MINISTRY OF TOURISM, ARTS AND CULTURE

2023 TOURISM REPORT:

STRONG RECOVERY

visitGhana

Culture·Warmth·Rhythm

FOREWORD

MR. AKWASI AGYEMAN
CEO, Ghana Tourism Authority

Dear valued stakeholders,

It is with great pleasure that we present to you the Ghana Tourism Report 2023, which showcases the remarkable recovery and growth within our tourism sector. This report stands as a testament to the resilience and hard work of our industry partners, whose dedication has been instrumental in revitalizing Ghana's tourism landscape post COVID -19.

I would like to extend my deepest gratitude to all stakeholders especially the Ghana Tourism Federation (GHATOF) and our various Trade Associations for their unwavering commitment and support. Your collaborative efforts have been pivotal in driving the positive trajectory of our tourism sector.

A special acknowledgment must be made to our Research Monitoring and Evaluation team headed by Spencer Doku for their tireless efforts in curating and coordinating this comprehensive report. Their meticulous work provides valuable insights that continues to serve as a foundation for policy direction and the bedrock for our future endeavours in Marketing and Product Development.

As we celebrate the significant strides chalked, let us remember that it is merely a beginning – a foundation that we must continue to build upon. Moving forward, we will continue to focus on our three Cs of Collaboration, Creativity, and Commitment. By embodying these values, we seek to propel Ghana's tourism industry to greater heights and ensure sustained success for years to come.

Thank you once again to all stakeholders for your dedication and support. Together, let us embark on this journey towards a brighter and more prosperous future for Ghana's tourism.

Warm regards,
Akwasi Agyeman
CEO - Ghana Tourism Authority

PREFACE

The Ghana Tourism Authority has a mandate to publish reports on the performance of the tourism and hospitality industry, and we have been consistent in doing so with the Tourism Report since 2019. The 2023 Tourism Report, titled "**STRONG RECOVERY**," offers data and perspectives for all stakeholders. The baseline year for the report is 2019, with subsequent years marked by the COVID-19 pandemic affecting the sector. Despite the challenges, government interventions and the dedication of stakeholders have shown the sector's resilience.

During the compilation of the report, the Research, Monitoring and Evaluation (RME) Department of the Authority worked closely with the Ghana Immigration Service (GIS) to gather secondary data on international arrivals. We conducted interviews with inbound tourists at the Kotoka International Airport (KIA) and carried out surveys at tourism establishments in Accra, Tema and Takoradi during the December in Ghana (DiGH) festivities in December. Additionally, domestic data was collected from managers of various tourist sites in the country. Despite some challenges with surveys on inbound tourism data collection this year, we relied on trends from previous years to estimate certain indicators.

The latest data from the UN Tourism Secretary General indicates that international tourism has nearly fully rebounded from the COVID-19 crisis. Africa has seen a recovery of 92% of pre-pandemic visitation numbers. Fortunately, Ghana is among the countries surpassing pre-pandemic arrivals and receipts, showcasing a strong recovery trend. This information is crucial for the local businesses and economy as we navigate through the World Bank and IMF Recovery programme.

The Department gratefully recognizes the ongoing support from the Chief Executive Officer, Mr. Akwasi Agyeman, who serves as the 'patron' of this report and consistently ensures that we deliver on this mandate since 2019. We are also thankful for the assistance provided by the Directorate at the Head Office and all regions.

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SPENCER DOKU
DIRECTOR: RESEARCH, MONITORING & EVALUATION

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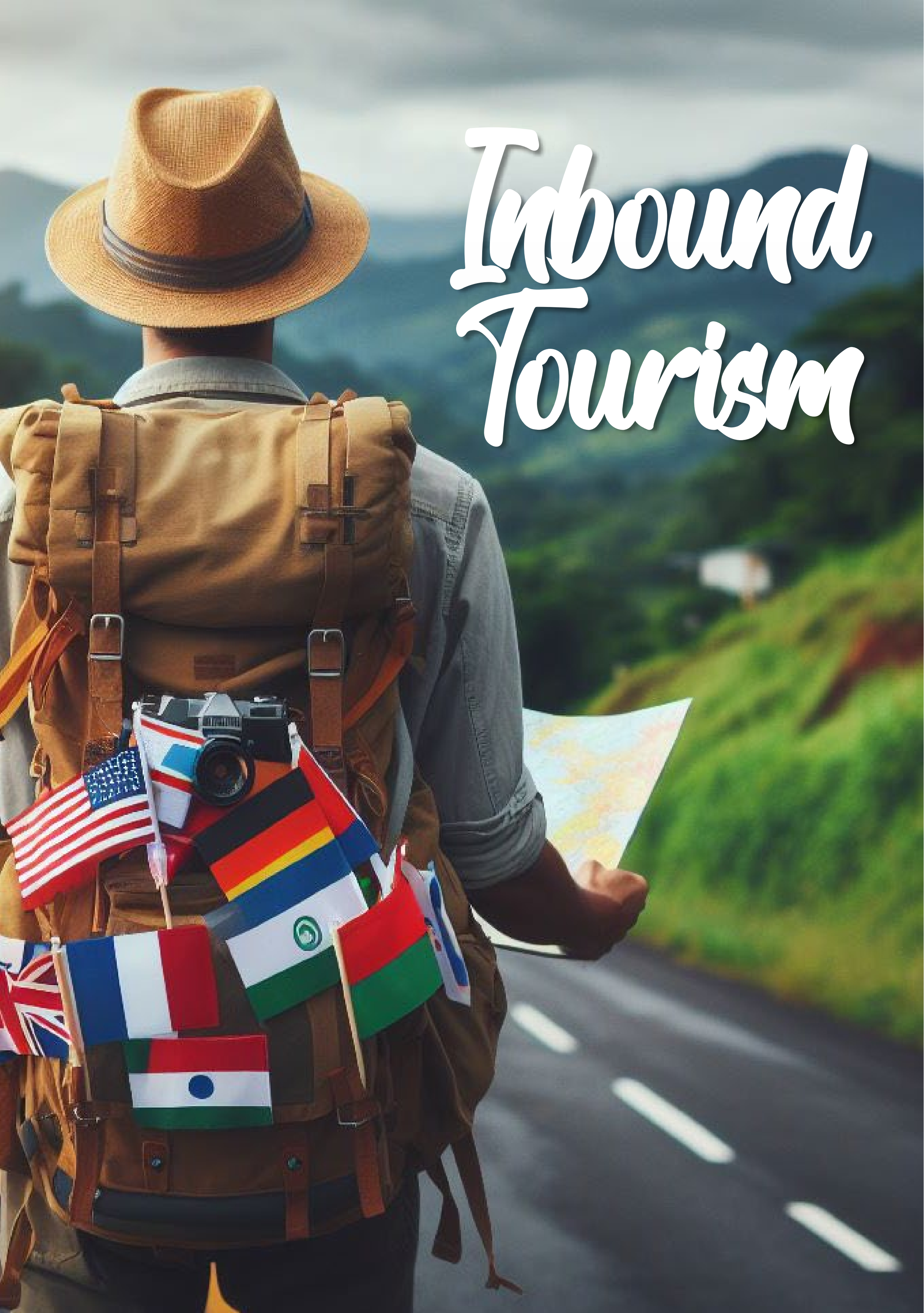
DEFINITION OF ABBREVIATIONS

GTA Ghana Tourism Authority
GIS Ghana Immigration Service
KIA Kotoka International Airport
RME Research, Monitoring & Evaluation
IATS International Air Travellers Survey
DiGH December In Ghana

Inbound Tourism



INTERNATIONAL ARRIVALS FROM 2019 TO 2023

In 2019, international arrivals stood at 1,130,307. The subsequent year saw a sharp decline of 69% due to the COVID-19 pandemic. However, there was a remarkable rebound in the 3rd and 4th quarters of 2021, leading to a 76% surge in total arrivals during that period. The positive trend continued with arrivals nearly doubling in 2022, marking a 47% growth. In 2023, arrivals reached 1,148,002, showing a 25% increase from the previous year and a 2% rise above pre-COVID figures, signaling a strong recovery.

The United States, Nigeria, and Britain stood out as the top contributors to international arrivals from 2019 to 2023, with their combined percentages ranging from 23.4% to 29.7%. While their contributions dipped slightly in 2023, they still remained significant. December emerged as the strongest month for international arrivals, with December 2023 alone accounting for 37% of all arrivals, with an increase of 9,023 arrivals compared to December 2019.

Overall, the data reflects a positive growth trajectory post-COVID, using 2019 as a benchmark. A comparative analysis of 2019 pre-COVID arrivals against 2023 figures showed marginal increases in all quarters except the first quarter, indicating a strong recovery in the tourism sector post-pandemic.

INTERNATIONAL ARRIVALS 2019-2023

Table 1.0

PERCENTAGE CHANGE(%)2019-2023						
Quarter	MONTH	2019	2020	2021	2022	2023
1st Quarter	JANUARY	89,725	89,762	36,838	56,285	87,081
	FEBRUARY	77,575	79,532	26,899	50,397	74,636
	MARCH	89,157	43,494	35,213	64,014	86,412
	SUB TOTAL	256,457	212,788	98,950	170,696	248,129
	% CHANGE		-17%	-53%	73%	45%
2nd Quarter	**APRIL**	**86,491**	**89**	**37,019**	**67,022**	**84,210**
	MAY	84,544	775	43,376	71,660	87,374
	JUNE	90,669	3,719	51,510	77,907	92,434
	SUB TOTAL	261,704	4,583	131,905	216,589	264,018
	% CHANGE		-98%	28%	64%	22%
3rd Quarter	**JULY**	**104,593**	**6,633**	**63,713**	**91,859**	**106,652**
	AUGUST	106,099	5,709	61,380	86,469	104,332
	SEPTEMBER	94,582	20,260	55,216	79,434	95,381
	SUB TOTAL	305,274	32,602	180,309	257,762	306,365
	% CHANGE		-89%	453%	43%	19%
4th Quarter	**OCTOBER**	**95,261**	**29,354**	**61,379**	**81,654**	**99,872**
	NOVEMBER	95,173	32,136	66,015	82,977	104,157
	DECEMBER	116,438	43,645	84,965	105,214	125,461
	SUB TOTAL	306,872	105,135	212,359	269,845	329490
	% CHANGE		-66%	102%	27%	22%
GRAND TOTAL		**1,130,307**	**355,108**	**623,523**	**914,892**	**1,148,002**
	% CHANGE		-69%	76%	47%	25%

Source: GIS

2023 INTERNATIONAL ARRIVALS BY POINT OF ENTRY (POE)

Figure 1.0

AFLAO BORDER – 67,148.00 (5.85%)

ELUBO BORDER – 43,467.00 (3.78%)

PAGA BORDER – 19,811.00 (1.73%)

KOTOKA INTERNATIONAL AIRPORT (KIA) – 1,017,576.00 (88.64%)

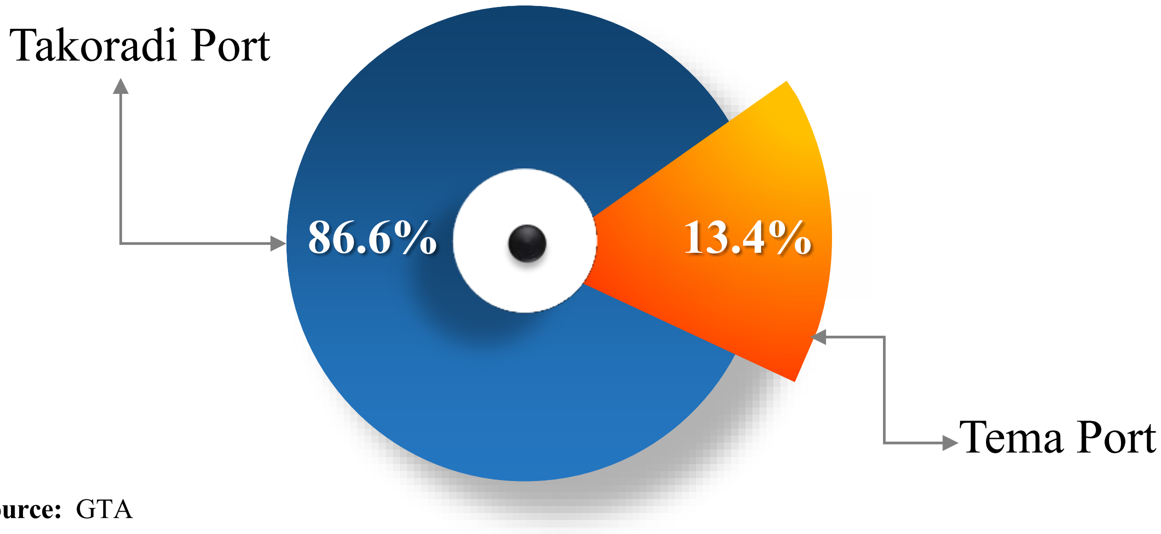
Source: GIS

GRAND TOTAL - 1,148,002.00

CRUISE TOURISM IN GHANA

Cruise tourism in Ghana is driven by recreation, entertainment, and sightseeing. Ghana's post-COVID success story includes its rising status as a cruise tourism destination. In 2023, cruise ships docked at the ports of Takoradi and Tema, welcoming a total of 9,152 visitors. The majority, 86.6%, arrived via Takoradi port, while 13.4% came through Tema port. These tourists were served by renowned tour operators like Sunseekers Tours, Blast Tours, Kaya Tours, and Carmens, exploring various attractions in the Western and Central Regions.

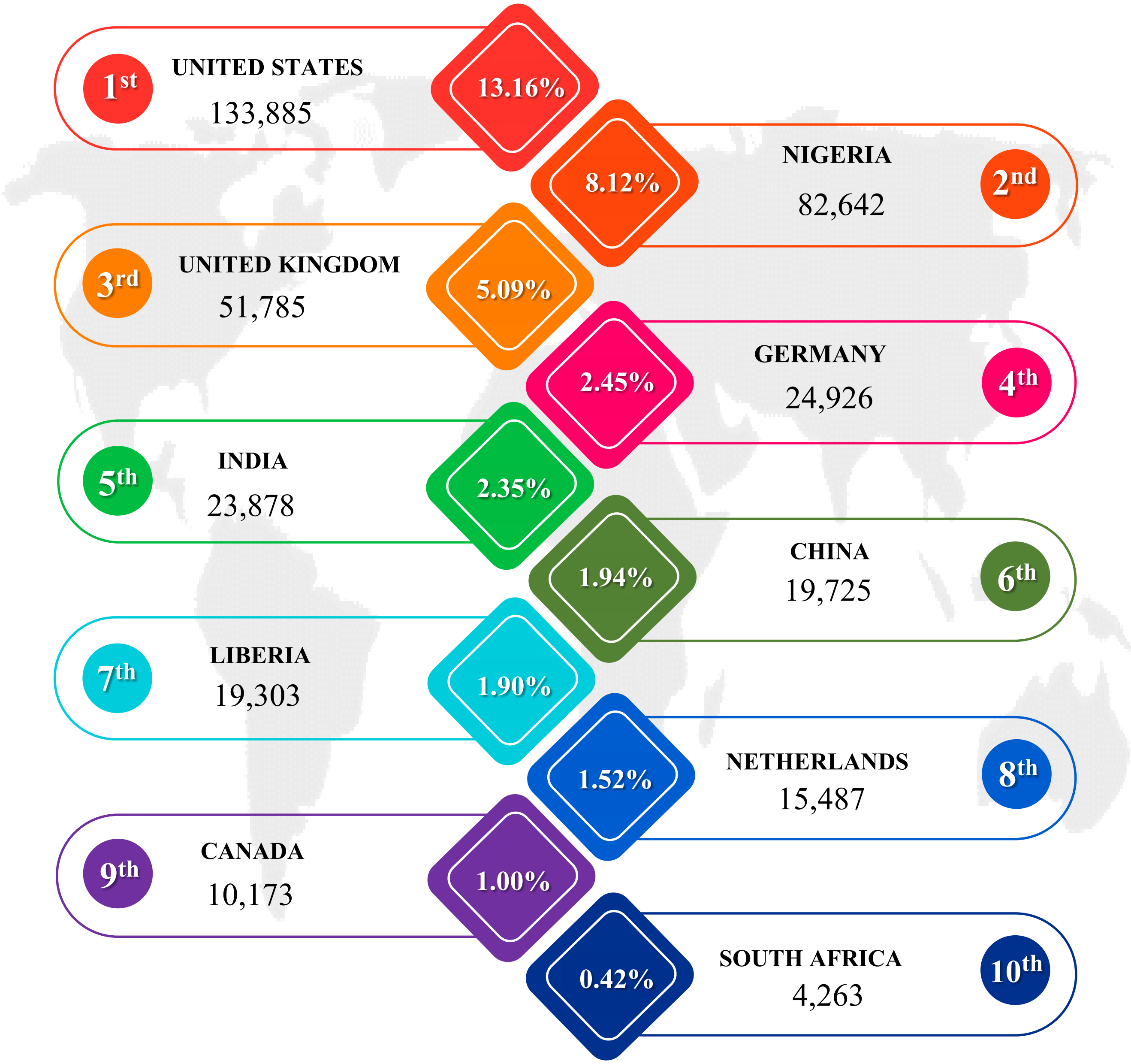
Figure 2.0



Source: GTA

TOP TEN HIGHEST ARRIVAL COUNTRIES (2023) IN GHANA

Figure 3.0



Source: GTA & GIS

TOP 3 ARRIVAL COUNTRIES (2019-2023)

Figure 4.0

			Percentage of Arrivals
2019	USA	118,009	25.6%
	NIGERIA	102,339	
	UK	69,954	
2020	USA	39,028	26.18%
	NIGERIA	33,394	
	UK	20,538	
2021	USA	92,139	29.14%
	NIGERIA	59,193	
	UK	34,073	
2022	USA	118,369	26.14%
	NIGERIA	72,786	
	UK	47,962	
2023	USA	133,885	23.4%
	NIGERIA	82,642	
	UK	51,785	

Source: GTA & GIS

TOP 10 ARRIVAL COUNTRIES (2019-2023) PERIOD

Table 2.0

COUNTRIES	2023		2022		2021		2020		2019	
	TOTAL	RANK	TOTAL	RANK	TOTAL	RANK	TOTAL	RANK	TOTAL	RANK
United States	133,885	1st	118,369	1ST	92,139	1ST	39,028	1ST	118,009	1ST
Nigeria	82,642	2nd	72,786	2ND	59,193	2ND	33,394	2ND	102,339	2ND
United Kingdom	51,785	3rd	47,962	3RD	34,073	3RD	20,538	3RD	69,954	3RD
Germany	24,926	4th	22,159	5TH	14,785	4TH	8,103	4TH	25,022	5TH
India	23,878	5th	22,261	4TH	***	***	***	***	***	***
China	19,725	6th	***	***	8,088	8TH	6,129	6TH	26,387	4TH
Liberia	19,303	7th	16,149	6TH	***	***	***	***	***	***
Netherlands	15,487	8th	14,541	7TH	11,923	5TH	6,028	7TH	18,135	7TH
Canada	10,173	9th	13,051	9TH	8,475	6TH	5,522	8TH	15,371	8TH
South Africa	4,263	10th	12,674	10TH	7,591	9TH	5,283	9TH	21,619	6TH
Cote D'Ivoire	***	***	14,284	8TH	8,413	7TH	6,210	5TH	10,167	10TH
France	***	***	***	***	7,048	10TH	5,219	10TH	14,203	9TH

Source: GTA & GIS

INTERNATIONAL ARRIVALS AND RECIEPT 2019-2023

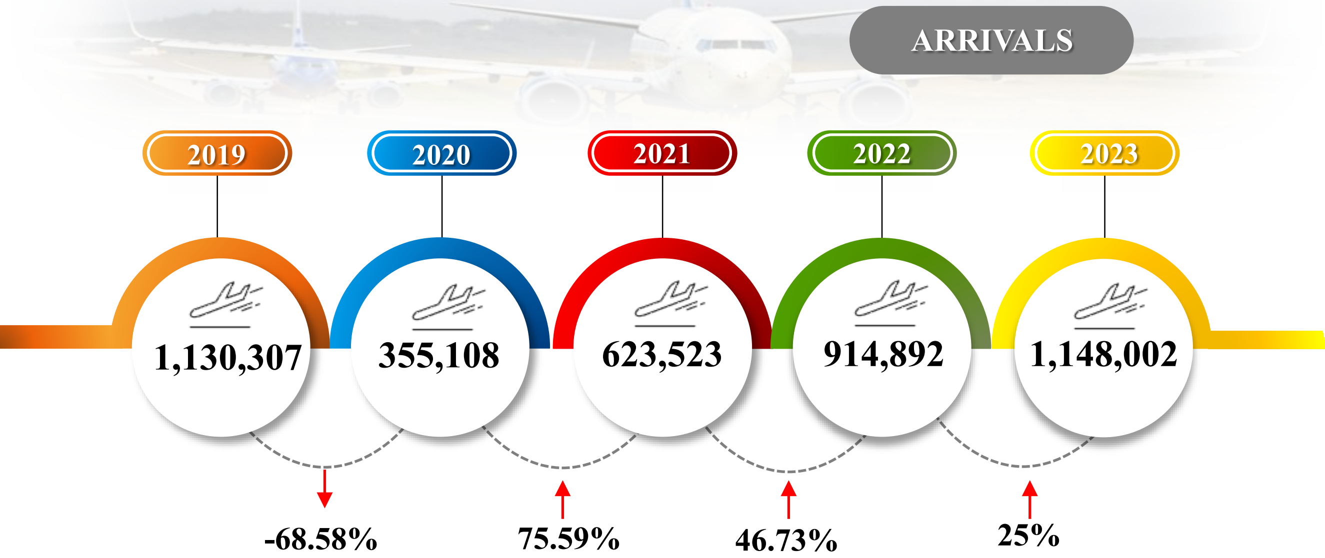
In 2019, the tourism sector saw an average tourist expenditure of $2,931, generating $3.3 billion in revenue. However, the onset of the pandemic in 2020 led to a substantial drop in average tourist spending by 62.81%, only amounting to $1,298. Consequently, the sector's total revenue plummeted to a record low of $387 million, marking an 88% decrease.

By 2022, there were positive indicators of recovery with an increase in both average tourist expenditure to $2,743 and sector receipt to $2.7 billion.

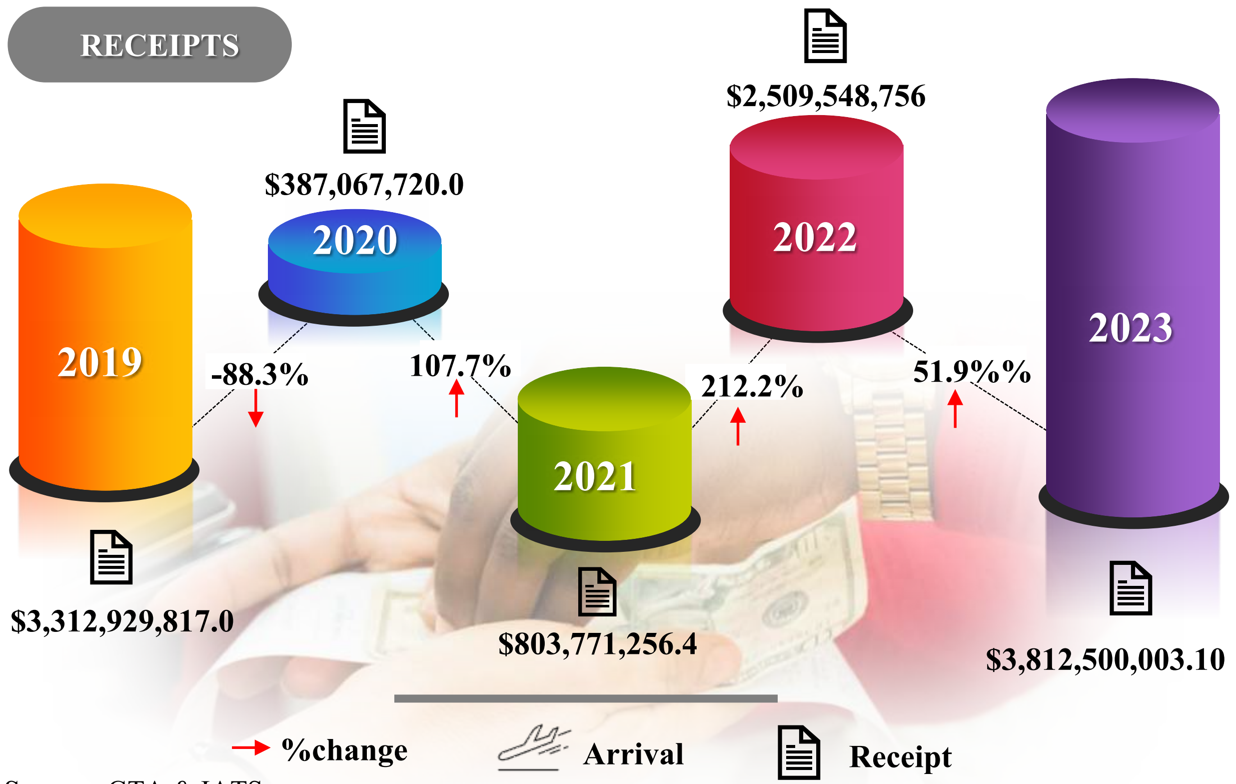
Despite this progress, these figures remained below the pre-pandemic levels. Surveys spanning from 2019 to 2022 forecasted that in 2023, the average tourist expenditure would rise to $3,746.65, translating to a projected sector revenue of $3.8 billion, a significant 51.9% increase from the previous year. Additionally, the average length of stay is estimated to be 13 days. These optimistic projections for 2023 signify a continued recovery and growth trajectory in tourist expenditure and revenue, reflecting a promising outlook for the sector's resurgence

INTERNATIONAL ARRIVALS AND RECEIPT 2019-2023

Figure 5.0



Source: GIS



Source: GTA & IATS

ACCOMODATION SECTOR AND RECOVERY STORY

The accommodation sector reigns as the primary beneficiary among all tourism enterprises. In Ghana, tourists' expenditure on accommodation fluctuated from 2019 to 2022, ranging between 31% to 54%, peaking in 2020. Notably, the upmarket hotels (3-5 stars) witnessed significant strides in average occupancy over the period.

The 5-star hotels exclusively situated in Accra saw their lowest occupancy at 31% in 2020, which soared to 65% in 2022, reaching a peak of 71% in 2023. Meanwhile, the four-star hotels experienced a low of 38% occupancy in 2020, with a moderate rise to 50% in 2023, falling short of the pre-COVID level of 59%.

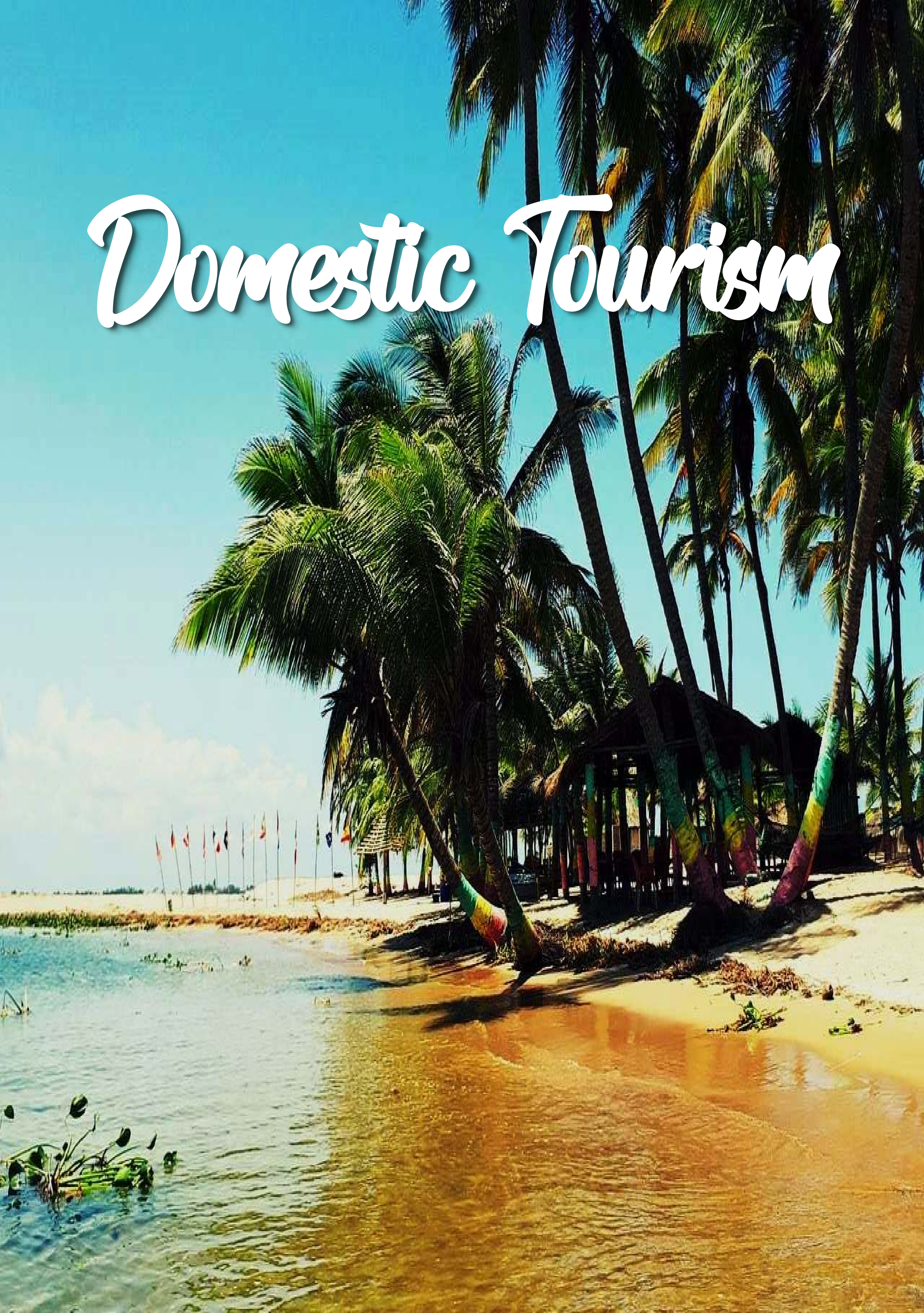
Similarly, a remarkable recovery was observed among the three-star hotels, with average occupancy climbing from 18% in 2021 to a restored level of 55% in 2023. These occupancy trends signify a promising resurgence in the accommodation sector, painting a picture of progress and revitalization in the post-COVID hospitality landscape.

OCCUPANCY RATE UP MARKET HOTELS (2019-2023)

Figure 6.0

	★ 5 STAR	★ 4 STAR	★ 3 STAR
2019	66%	59%	55%
2020	31%	38%	31%
2021	50%	42%	18%
2022	65%	45%	50%
2023	71%	50%	55%

Source: GTA


Domestic Tourism

INTRODUCTION

Ghana boasts a diverse array of nature reserves, parks, and gardens, with the significance of domestic tourism highlighted during the pandemic when international borders were closed.

In a strategic move towards recovering from the impacts of COVID-19, the Ghana Tourism Authority (GTA) and the Ministry of Tourism, Arts, and Culture (MoTAC) rolled out initiatives such as "See Ghana, Wear Ghana, Feel Ghana" to ignite the curiosity of Ghanaians in exploring their own country through attractions, music, dance, and fashion. Supported by the Ghana Tourism Development Project (GTDP) funded by the World Bank, projects were launched to enhance capacity, develop products, and upgrade sites and facilities. One notable success story is the transformation of the Kwame Nkrumah Memorial Park, resulting in a remarkable surge in visitor numbers in 2023.

HIGHLIGHTS ON VISITOR ARRIVALS (DOMESTIC TOURISM) 2019 -2023

In 2019, Ghana registered 669,311 domestic visitors. However, this number plummeted by 69% in 2020 due to the pandemic's disruptive effects on travel and tourism. The tide turned in 2022 with a total of 945,405 visitation at attraction sites, marking a 49% year-on-year growth and signaling a recovery from the previous year's dive.

By 2023, domestic visitor arrivals surpassed pre-COVID figures by a striking 110%, underscoring a robust rebound in domestic tourism. Residents accounted for the majority at 1,161,474 visits, making up 83% of the total, while non-residents contributed 17%. This trend underscores the resilience and relevance of domestic tourism in the post-pandemic era, reflecting the enduring allure of exploring one's own backyard.

TOTAL VISITATION OF ATTRACTION SITE FROM (2019-2023)

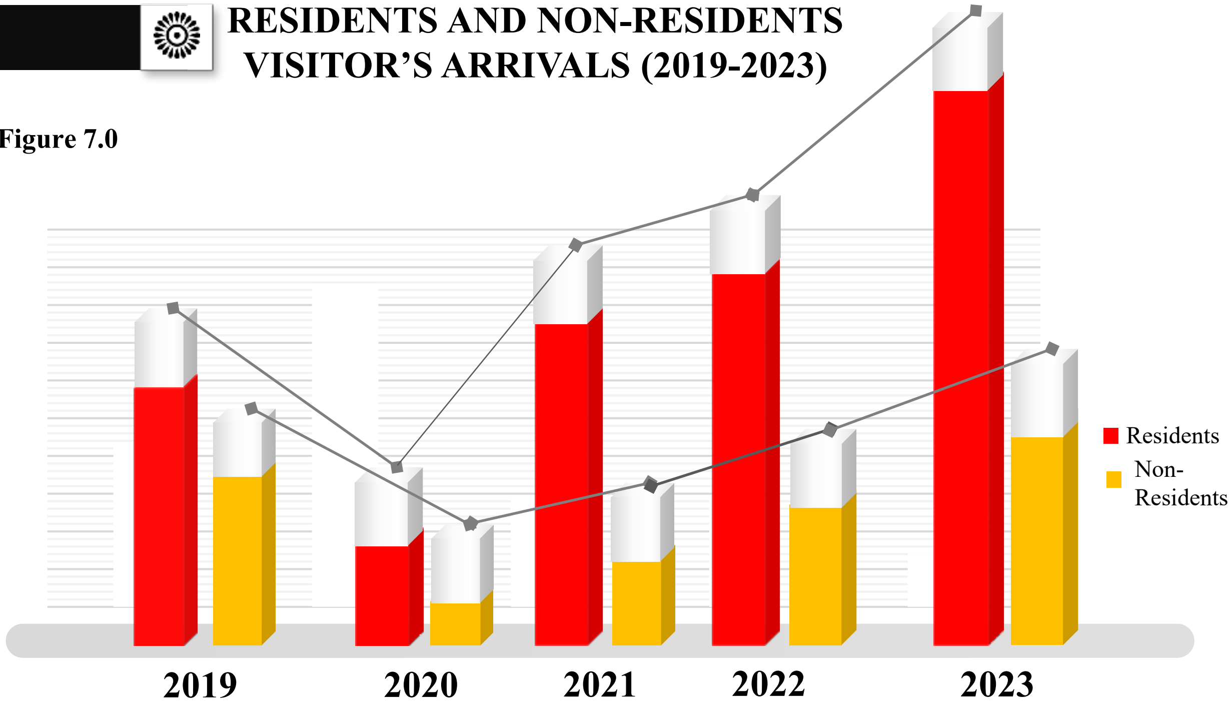
Table 3.0

YEAR	RESIDENTS	%	NON-RESIDENTS	%	TOTAL VISITATION	GROWTH RATE
2019	464,162	69%	205,149	31%	669,311	
2020	173,988	83%	36,594	17%	210,582	-69%
2021	516,990	88%	71,956	12%	588,946	180%
2022	795,991	84%	149,414	16%	945,405	61%
2023	1,161,474	83%	246,235	17%	1,407,709	49%

Source: GTA

RESIDENTS AND NON-RESIDENTS VISITOR'S ARRIVALS (2019-2023)

Figure 7.0



	2019	2020	2021	2022	2023
Residents	464,162	173,988	516,990	795,991	1,161,474
Non-Residents	205,149	36,594	71,956	149,414	246,235

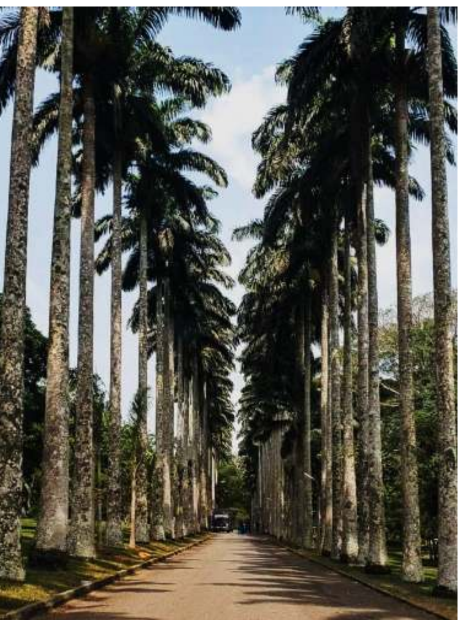
Source: GTA

TOP 10 MOST VISITED ATTRACTION SITES IN GHANA 2019-2023

In 2023, the Kwame Nkrumah Memorial Park emerged as the premier tourist destination, drawing a substantial 208,577 visitors, representing 15% of the total arrivals. Following extensive renovations and reopening in July 2023, the KNMP surpassed Aburi Gardens, the 2022 frontrunner, which slipped to the fifth spot among the country's ten most frequented sites. Additionally, the Manhyia Palace Museum, having undergone upgrades, saw a striking resurgence in 2023, reclaiming a spot in the top 10 after last appearing in 2019.

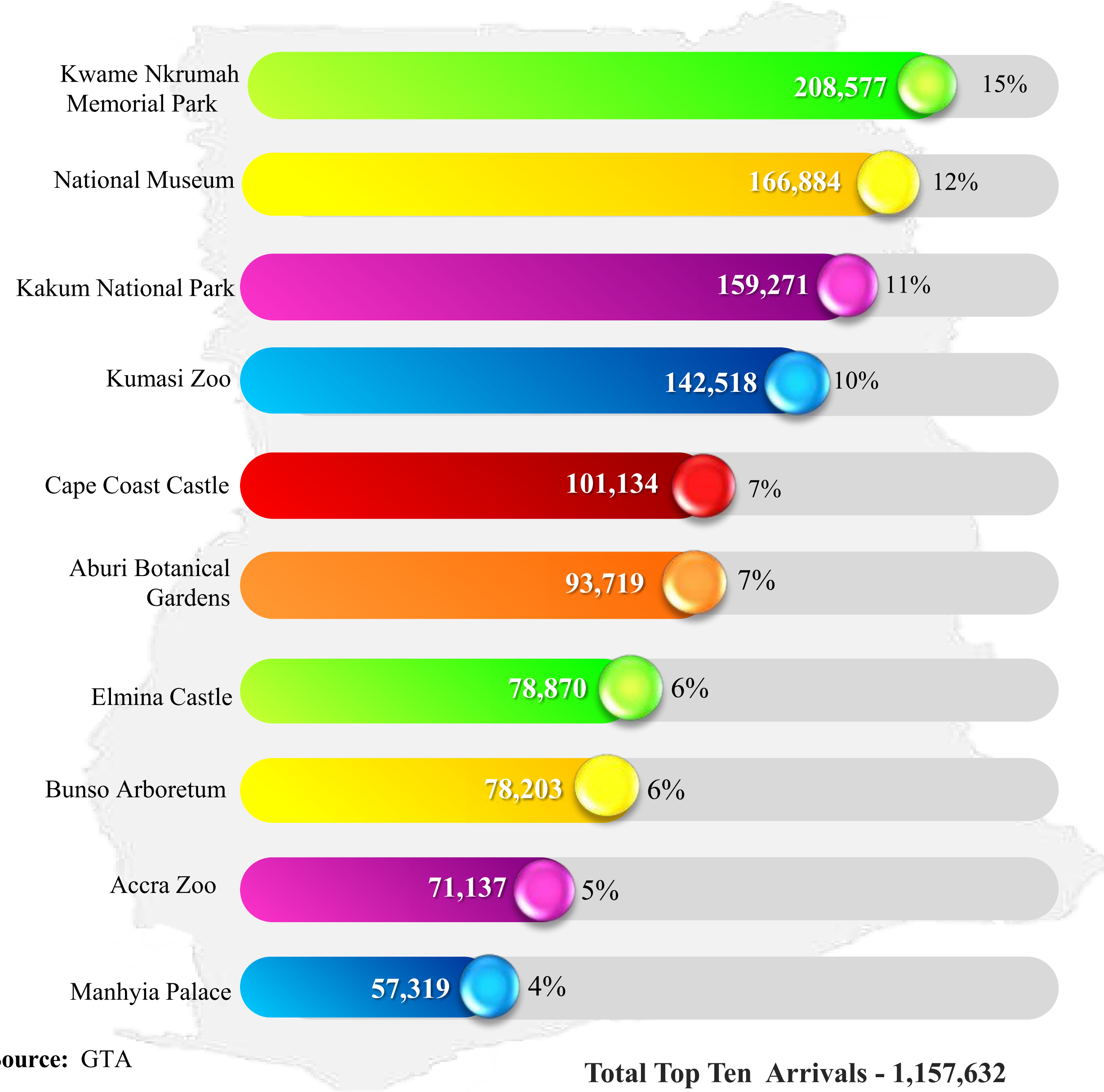
These shifts underscore the dynamic transformation within Ghana's tourism landscape, where rejuvenated historic landmarks and culturally rich sites have succeeded in luring in more visitors. The ten most visited sites collectively captured between 78.80% to 93.72% of total arrivals during the period, maintaining a consistent share of 82% between 2019 and 2023. Notably, the top ten destinations accounted for 82% of overall domestic arrivals, with residents making up 68% of this visitation and non-residents comprising 14%.

This data encapsulates a compelling narrative of growth and evolution in Ghana's tourism sector, where strategic enhancements and the preservation of cultural heritage have not only sustained visitor interest but also played a pivotal role in driving tourism success.



TOP TEN MOST VISITED SITES IN GHANA 2023

Figure 8.0



Source: GTA

Total Top Ten Arrivals - 1,157,632

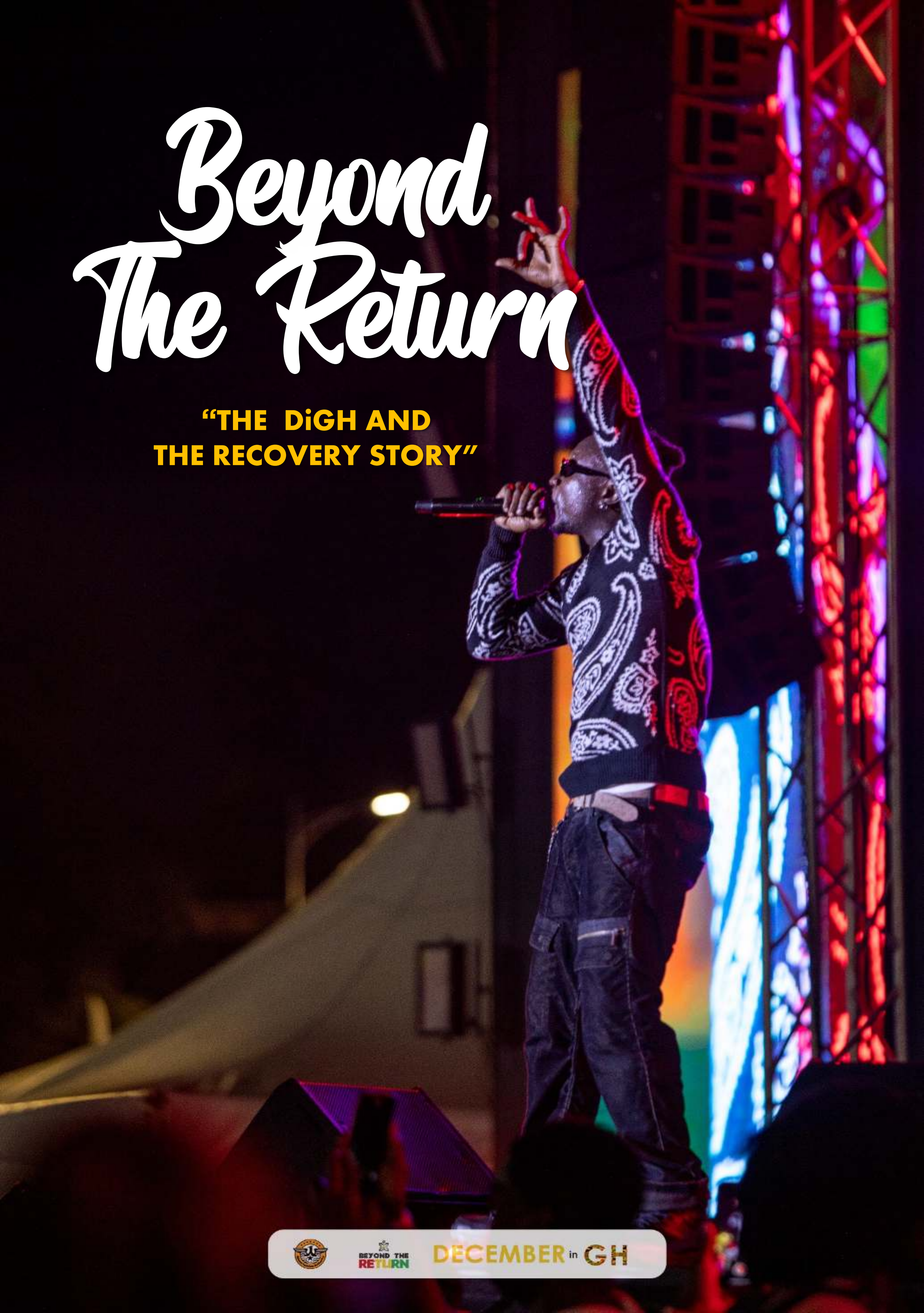
TOP TEN MOST VISITED SITES (2019-2023)

Table 4.0

ATTRACTIONS/ SITES	2023	RANK	2022	RANK	2021	RANK	2020	RANK	2019	RANK
Kwame Nkrumah Memorial	208,577	1ST	***	***	28,361	10TH	34,678	3RD	98,678	2ND
National Museum	166,884	2ND	***	***	***	***	***	***	***	***
Kakum National Park	159,271	3RD	136,256	2ND	86,035	1ST	54,514	1ST	126,190	1ST
Kumasi Zoo	142,518	4TH	114,684	3RD	69,208	2ND	***	***	51,930	6TH
Cape Coast Castle	101,134	5TH	86,692	4TH	47,931	4TH	37,631	2ND	88,124	3RD
Aburi Gardens	93,719	6TH	186,109	1ST	42,706	5TH	***	***	***	***
Elmina Castle	78,870	7TH	72,691	5TH	36,302	6TH	23,193	4TH	69,544	4TH
Bunso Arboretum	78,203	8TH	40,895	8TH	30,152	9TH	***	***	***	***
Accra Zoo	71,137	9TH	45,825	7TH	32,764	8TH	***	***	***	***
Manhyia Palace Museum	57,319	10TH	***	***	***	***	***	***	60,423	5TH
Shai Hills Reserve	***	***	48,116	6TH	***	***	16,351	5TH	***	***
Prempeh II Jubilee Museum	***	***	21,139	9TH	***	***	***	***	***	***
Kintampo Waterfalls	***	***	18,231	10TH	***	***	10,848	6TH	18,420	7TH
Wli Falls	***	***	***	***	***	***	6,061	8TH	***	***
Mole National Park	***	***	***	***	***	***	***	***	13,796	9TH
Komfo Anokye Sword	***	***	***	***	***	***	***	***	10,526	10TH
Lake Bosomtwi	***	***	***	***	***	***	***	***	17,088	8TH
Nzulezo	***	***	***	***	***	***	7,688	7TH	***	***
Boabeng-Fiema Monkey Sanctuary	***	***	***	***	***	***	3,793	9TH	***	***
Zenga Crocodile Pond	***	***	***	***	***	***	2,564	10TH	***	***
Larabanga Mosque	***	***	***	***	55,395	3RD	***	***	***	***
Mognori	***	***	***	***	35,243	7TH	***	***	***	***
Total	**1,157,632**		**770,638**		**464,097**		**197,321**		**554,719**	

Source: GTA

***Indicates that these attractions were not part of the top ten in the particular year under review


Beyond
The Return
"THE DiGH AND
THE RECOVERY STORY"
BEYOND THE RETURN
DECEMBER in GH

INTRODUCTION

In 2019, Ghana commemorated a successful Year of Return program, marking the 400th year since the abolition of the Slave Trade. A pivotal event in this celebration was December in GH (DiGH), an initiative by the Ghana Tourism Authority (GTA) that has evolved into a significant cultural and tourism highlight on the nation's calendar. Drawing global visitors keen on experiencing Ghana's rich heritage, arts, and entertainment scene, DiGH has been a focal point in showcasing the country's vibrant cultural tapestry. The Beyond the Return Secretariat played a crucial role in organizing events not only in Accra but also in various towns across the country.

To evaluate the impact and contributions of the DiGH events, surveys were conducted targeting participants returning from these events at Kotoka International Airport Terminal 3, as well as upscale hotels, food and beverage establishments, and nightlife venues in Accra and Takoradi. This report aims to synthesize and compare participants' feedback, experiences, and impressions of the DiGH events since its inception.

HIGHLIGHTS OF DiGH PARTICIPANTS SURVEY AT KIA (2020-2023)

Profile of Participants

Over the study period, a total of 961 participants were interviewed, with 40.8% men and 59.2% women. The majority of attendees were millennials (aged 18-39), with their share increasing from 71.10% in 2021 to 76.48% in 2023. The event attracted a growing number of first-time visitors, rising from 40% in 2022 to 47% in 2023. The percentage of those traveling alone decreased from 36% to 34%, while those traveling with friends decreased from 36% to 26% compared to the previous year.

Generating markets of DiGH participants and Life in Ghana

December 2023 saw the highest total arrivals at 125,461, 7.7% more than the pre-pandemic arrivals in December 2019. The US nationals constituted the largest group at 39%, followed by Ghanaians residing abroad at 33%, with the UK (16%), Nigeria and Germany (6% each), and South Africa (4%) also represented.

Accommodation and Expenditure During DiGH

There was a slight decline (3-5%) in the participants staying in hotels. Those opting for Air BnB accommodations saw a significant jump from 11.5% in 2021 to 27% in 2023. The average length of stay increased by three nights to 17, with male participants averaging 17.38 days and females 16.71 days. Average expenditure on accommodation accounted for the highest spending at $476.57 (34.61%), slightly exceeding last year's 33.34%. Entertainment spending was $267.50 (19.43%), followed by food and beverage at $204.66 (14.87%), shopping at $188.26 (13.67%), gifts at $83.46 (6.4%), transport at $118.58 (8.6%), and other expenses at $37.70 (2.7%). The average daily expenditure per participant surged from $606.79 to $1,376.73 (126%) from the previous year.

Cost Of Destination Ghana During DiGH and Satisfaction Levels From Some Services

This comprehensive analysis sheds light on the dynamic aspects of the DiGH events and their impact, offering crucial insights into participant demographics, spending patterns, visitor markets, and satisfaction levels, painting a vivid picture of the evolving tourism landscape in Ghana.

Participant perceptions on the cost of the destination varied, with 44.62% finding it expensive, 34.49% considering it normal, and 20.88% deeming it not expensive. Further exploration into the cost of destinations among the top arrival countries revealed insightful findings.

Figure 9.0

	Very Expensive	Expensive	Normal	Less Expensive	Not Expensive
American	6.32%	29.47%	37.89%	17.89%	8.42%
British	4.44%	42.22%	24.44%	20.00%	8.89%
Ghanaian	18.18%	54.55%	15.15%	3.03%	9.09%
Nigerian	5.56%	22.22%	50.00%	16.67%	5.56%
	7.85%	**36.13%**	**31.94%**	**15.71%**	**18.38%**

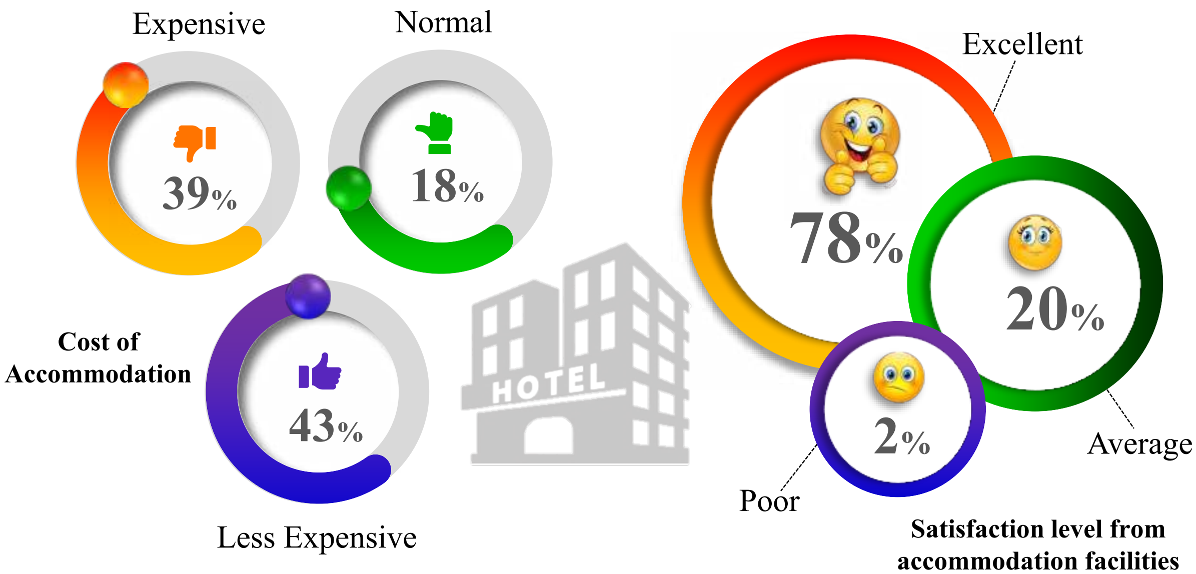
Source: IATS & GTA

The Visa acquisition process was streamlined with the introduction of visa on arrival. However, 43.99% perceived it as costly, while 21.61% believed it to be affordable and 34.4% considered it average.

The following diagrams illustrate the cost and satisfaction levels of participants across key areas such as accommodation, food and beverage, and events.

COST OF ACCOMMODATION AND SATISFACTION

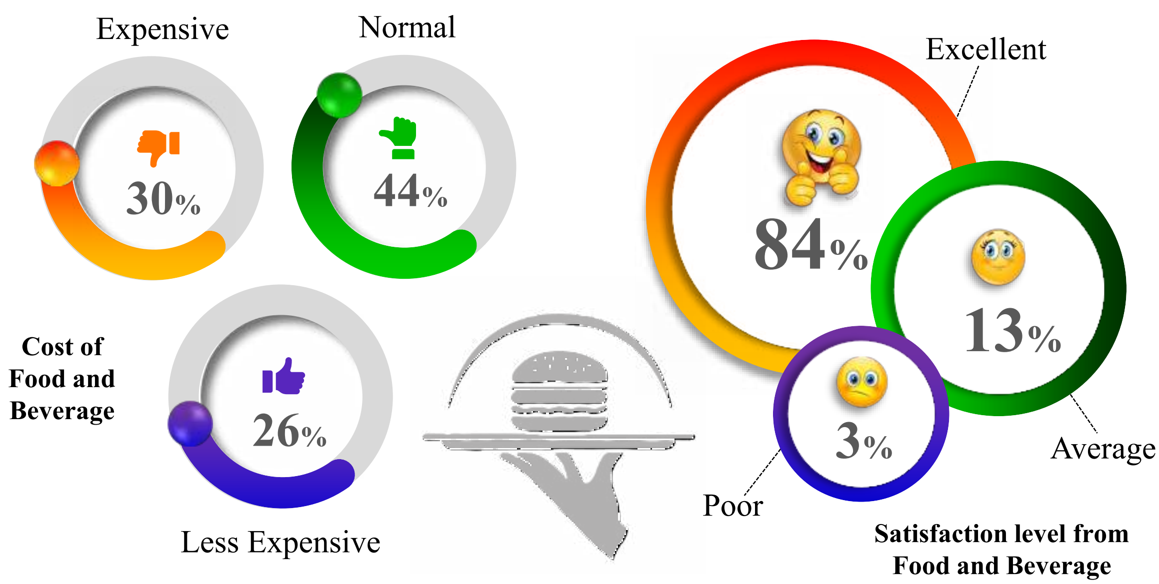
Figure 10.0



Source: IATS & GTA

COST OF FOOD AND BEVERAGE AND SATISFACTION LEVELS

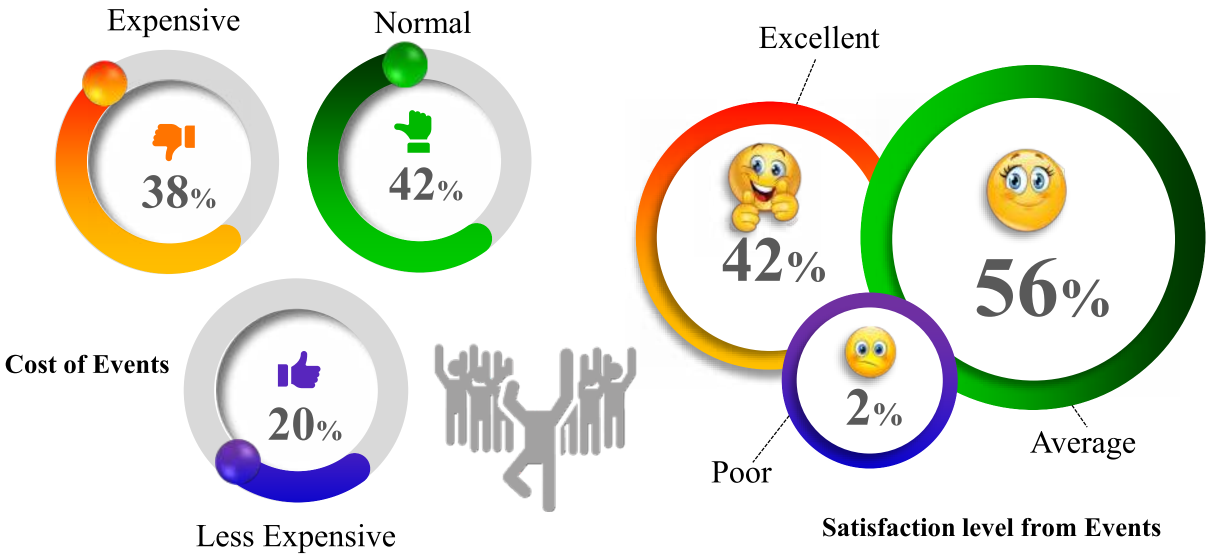
Figure 11.0



Source: IATS & GTA

COST OF EVENTS AND SATISFACTION

Figure 12.0



Source: IATS & GTA

In conclusion from the participants 92% were generally satisfied with December in Gh. activities while an overwhelming 97% endorsed the programme and will like to come again.

SURVEY ON 2023 DIGH UPMARKET HOTEL (ACCRA, TEMA AND TAKORADI)

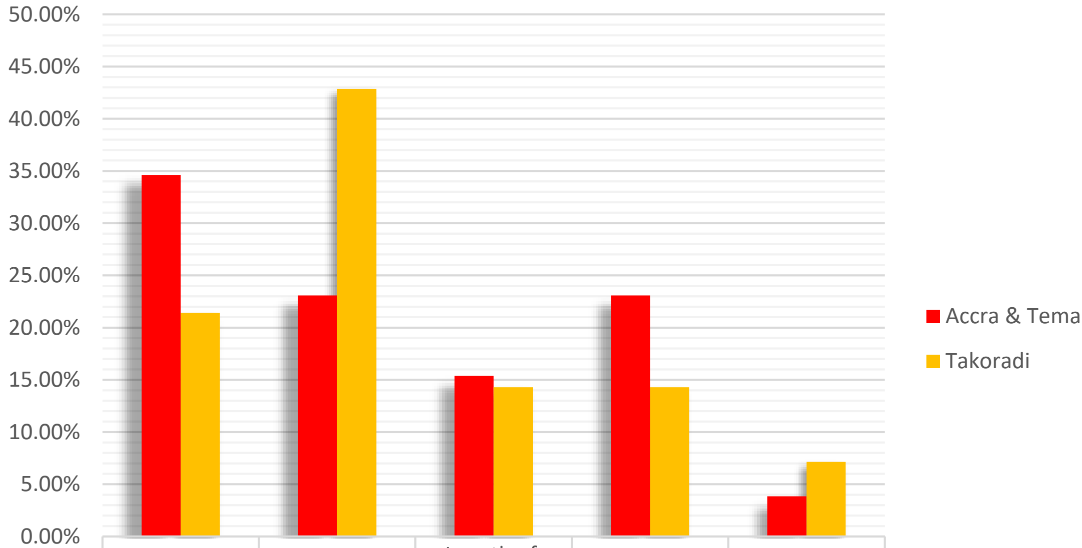
The 2023 DiGH Survey on Upmarket Hotels in Accra, Tema, and Takoradi aimed to assess patronage levels and the impact of DiGH on the luxury hotel sector in these regions. A total of 24 hotels, ranging from 5-Star to 3-Star were surveyed, with 14 hotels in Accra and Tema and 10 in Takoradi.

Analysis of hotel pricing during DiGH revealed that pricing strategies were primarily influenced by two key factors. In Accra and Tema, prices were driven by demand, accounting for 34.62% of the influence, whereas in Takoradi, pricing was more influenced by competitors, representing 42.86%. Other contributing factors had a minor impact, with values of 3.85% and 7.14% for Accra and Takoradi, respectively.

FACTORS AFFECTING HOTEL PRICING DiGH ACCRA, TEMA AND TAKORADI

The diagram below illustrates the various factors affecting hotel pricing during the DiGH period, shedding light on the dynamic pricing strategies adopted by hotels in response to market forces.

Figure 13.0



	Demand (%)	Competitor	Length of stay	Package (%)	Other
Accra & Tema	34.62%	23.08%	15.38%	23.08%	3.85%
Takoradi	21.43%	42.86%	14.29%	14.29%	7.14%

Source: IATS & GTA

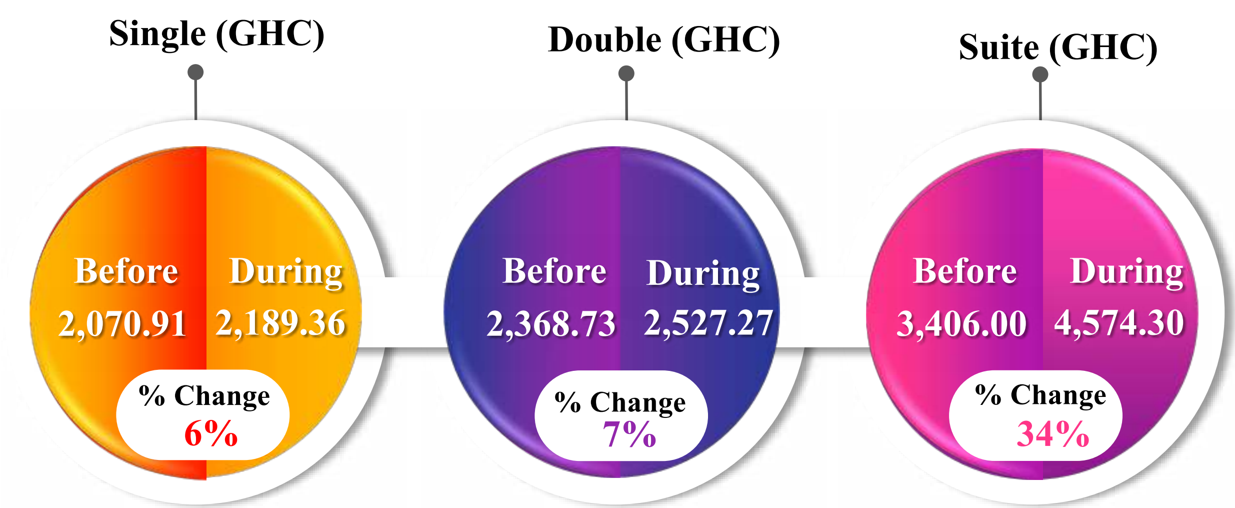
ROOM RATES (ACCRA, TEMA AND TAKORADI)

In the realm of room rates within the Accra, Tema, and Takoradi regions, notable fluctuations were observed. Single room rates in Accra and Tema saw a significant 6% increase, contrasting with a 5% decrease in Takoradi. The starkest contrast appeared in suite rates, which surged by a striking 34% in Accra but saw a 5% decline in Takoradi.

Similarly, double room rates witnessed a 7% increment in both Accra and Tema, as well as in Takoradi. However, the cumulative analysis reveals that the room rates in Accra and Tema experienced a more substantial overall increase compared to Takoradi. These observations underscore the dynamic pricing landscape within these regions and shed light on the diverse market forces at play influencing accommodation costs.

ROOM RATES BEFORE AND DURING DiGH ACCRA & TEMA

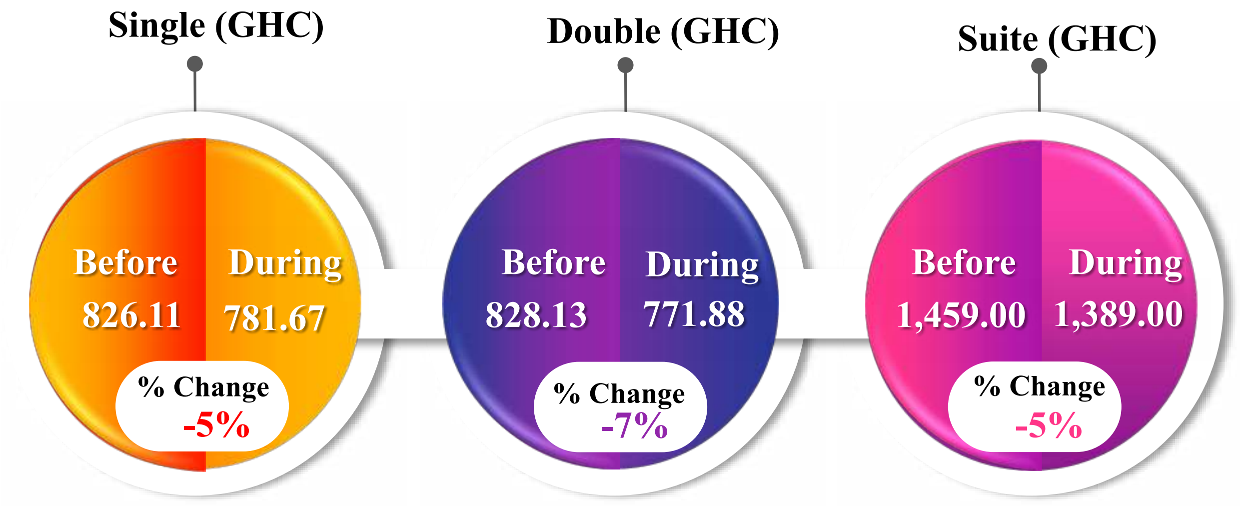
Figure 14.0



Source: IATS & GTA

ROOM RATES BEFORE AND DURING DiGH TAKORADI

Figure 15.0



Source: IATS & GTA

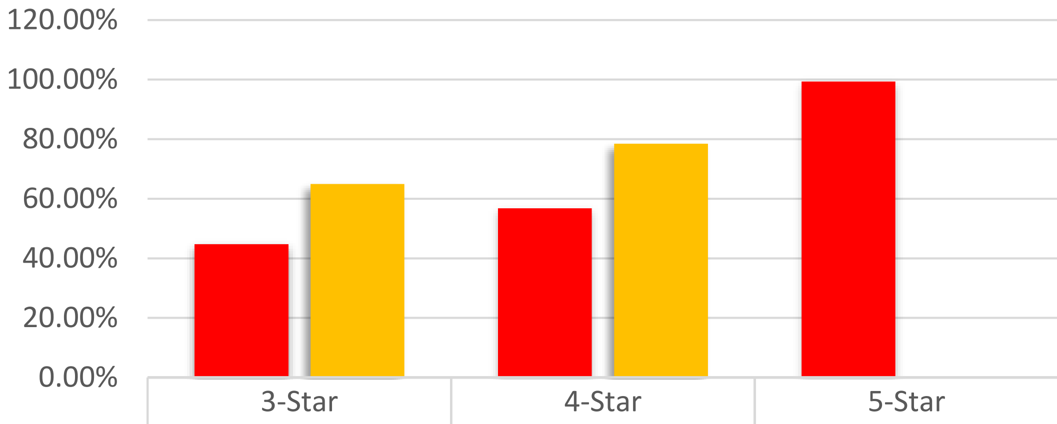
OCCUPANCY RATES AND LENGTH OF STAY DURING DiGH

The occupancy rates across different hotel tiers in Accra, Tema, and Takoradi revealed distinct patterns. Notably, all 5-star hotels in Accra achieved maximum occupancy, reaching an impressive 99.36%. In comparison, the 4 -3 star hotels in Accra and Tema had a moderate occupancy rate of 56.82% each. Takoradi demonstrated a robust performance with 78.46% of rooms in 4-star hotels occupied, surpassing the 56.82% occupancy in Accra and Tema.

Furthermore, the hotels in Takoradi outperformed those in Accra and Tema, with a higher occupancy rate of 64.96% for three-star hotels and 44.72% for four-star hotels. Interestingly, the data also highlighted that the average length of stay was longer at three-star hotels in both Accra and Takoradi compared to the higher-tier establishments, indicating potential preferences or trends among guests in these regions.

OCCUPANCY RATES DURING DiGH

Figure 16.0



	3-Star	4-Star average	5-Star
Accra & Tema	44.72%	56.82%	99.36%
Takoradi	64.96%	78.46%	

Accra & Tema   Takoradi

Source: IATS & GTA

EMPLOYMENT AND STAFF ENGAGEMENT AT UPMARKET HOTELS DURING DiGH

An in-depth analysis of employment figures at upmarket hotels during the DiGH period sheds light on personnel dynamics and organizational requirements. The average full-time staff strength in Accra hotels stood at 113, considerably higher than the 39 in Takoradi.

In terms of part-time staff, Accra and Tema employed an average of 59 individuals, whereas only 3 were recorded in Takoradi. Notably, during DiGH, additional staff were engaged to meet the demands, with 42 new members joining the workforce in Accra and Tema - equating to roughly 3 new staff per hotel.

Similarly, Takoradi hotels saw the engagement of 37 additional hands, averaging about 4 new staff per hotel. The surge in business during the DiGH events prompted the hiring of additional staff, underscoring the growth and operational requirements of these establishments.

2023 DECEMBER IN GHANA SURVEY& PERCEIVED IMPACT ON FOOD AND BEVERAGE

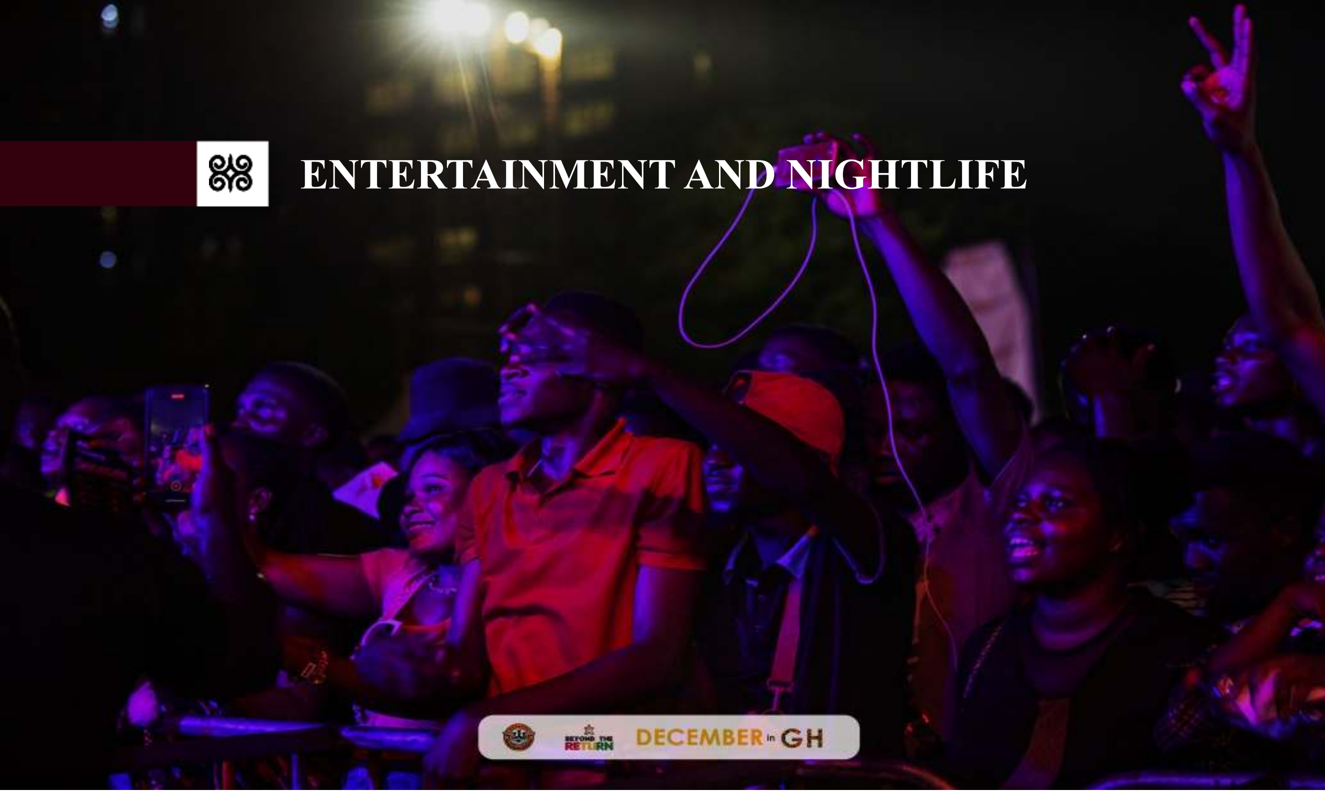
The vibrancy of the food, beverage, and entertainment sectors during the DiGH period is highlighted through a comprehensive survey conducted in Accra, Tema, and Takoradi. The sample of 12 establishments comprised three informal venues (2 chop bars and 1 drinking bar) and nine restaurants.

SALES REVENUE

Analysis of sales revenue revealed that the average cost of food items across all facilities was GHC 80, with prices ranging from GHC 15 to GHC 200. Meanwhile, the average cost of drink items was recorded at GHC 33, varying between GHC 4 and GHC 80. Prior to the DiGH period, the establishments averaged daily sales of GHC 7,489.61, reflecting a substantial increase to GHC 14,027.14 during the DiGH events marking an 87.28% rise attributed to the heightened activities.

Remarkably, online ordering services were not utilized by 66.67% of managers, while 33.33% offered this convenience. Furthermore, delivery services were only provided by 58% of the surveyed establishments.

ENTERTAINMENT AND NIGHTLIFE



Insights into the perceived impact of DiGH on food and beverage establishments revealed varying responses among the respondents. While 16.67% strongly agreed that the December in Ghana events influenced their services, 41.67% agreed to some extent. Moreover, 25.00% expressed uncertainty, with 8.33% in disagreement and an equal percentage strongly disagreeing. Notably, a significant majority (83%) acknowledged that DiGH contributed to increased awareness and recognition of their facilities, with no respondents expressing disagreement with this notion and 16.67% remaining uncertain.

Fact Sheet

"THE RECOVERY FIGURES"

LICENSED TOURISM ENTERPRISES (2019-2022)

Table 5.0

YEAR	ACCOMMODATION	F, B & ENT.	TRAVEL TRADE	TOTAL
2019	4,131	599	557	5,287
2020	3,538	538	479	4,555
2021	4,151	520	408	5,079
2022	4, 190	670	516	5,376
2023	4,613	647	526	5,786

Source: GTA

F, B & E – FOOD, BEVERAGE & ENTERTAINMENT

REGIONAL BREAKDOWN OF NUMBER OF LICENSED TOURISM ENTERPRISES (2023)

Table 6.0

REGION	ACCOMMODATION	FOOD AND BEVERAGE	TRAVEL TRADE	ENTERTAINMENT	CONFERENCES AND EVENTS	TOTAL
AHAFO REGION	60	4	1	0	0	65
ASHANTI REGION	682	51	55	3	0	791
BONO EAST REGION	128	2	0	0	0	130
BONO REGION	243	9	14	0	0	266
CENTRAL REGION	373	9	10	0	0	392
EASTERN REGION	570	29	4	2	3	608
GREATER ACCRA REGION	845	345	306	38	15	1549
NORTH EAST REGION	22	1	0	0	0	23
NORTHERN REGION	125	21	12	0	0	158
OTI REGION	37	0	0	0	0	37
SAVANAH REGION	44	0	3	0	0	47
TEMA REGION	426	83	63	6	3	581
UPPER EAST REGION	133	4	5	0	2	144
UPPER WEST REGION	75	5	6	0	0	86
VOLTA REGION	380	10	12	0	0	402
WESTERN NORTH REGION	71	2	0	0	1	74
WESTERN REGION	399	72	35	3	0	509
TOTAL	**4613**	**647**	**526**	**52**	**24**	**5862**

Source: GTA

F, B & E – FOOD, BEVERAGE & ENTERTAINMENT
TRAVEL TRADE – CAR RENTAL, TRAVEL & TOUR & TOURS ONLY

OCCUPANCY RATE 2019-2023

Table 7.0

HOTEL RATING	2019	2020	2021	2022	2023
5-STAR HOTEL	66%	31%	50%	65%	71%
4-STAR HOTEL	59%	38%	42%	45%	50%
3-STAR HOTEL	55%	31%	18%	36%	55%
2-STAR HOTEL	40%	8%	33%	40%	33%
1-STAR HOTEL	-	13%	22%	21%	33%
GUESTHOUSE	-	30%	26%	29%	32%
BUDGET HOTEL	-	16%	22%	18%	22%

Source: GTA

AVERAGE LENGTH OF STAY AND EXPENDITURE (2019-2023)

Table 8.0

Year	Average Expenditure ($)	Average Length of Stay
2019	2,931.00	10
2020	1,090.00	12
2021	1,289.08	14
2022	2,743.19	14
2023	*3,746.65	*13

Source: IATS (2019 -2022)
* Estimated

SALAGA SLAVE WELLS & BATH
IN THE SAVANNAH REGION

SALAGA SLAVE MARKET
IN THE SAVANNAH REGION

ONGOING PROJECTS

TANO BOASE SACRED GROVE
IN THE BONO EAST REGION

PIKORO SLAVE CAMP
IN THE UPPER EAST REGION

DENKYIRA KYEKYEWERE ECO PARK
IN THE CENTRAL REGION

GEESE PARK
IN THE GREATER ACCRA REGION

NATIONALISM PARK
IN THE GREATER ACCRA REGION

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