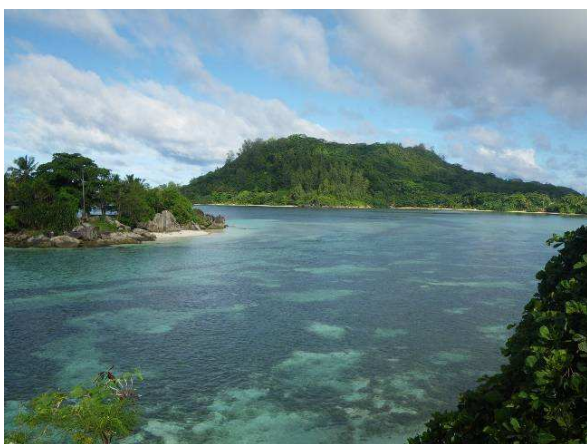


**World Bank**  
**Tourism Industry: Research and Analysis Phase II**

**Tourism Product Development**  
**Interventions and Best Practices in sub-Saharan Africa:**  
**Part 1: Synthesis**



**Report to the World Bank**

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## Table of Contents

1.	Executive summary .....	5
1.1.	Acknowledgements .....	9
2.	Introduction.....	10
3.	Method.....	11
3.1.	Market scan .....	11
3.2.	Evaluation framework .....	11
3.3.	Case studies.....	11
3.4.	Synthesis .....	13
4.	Who is doing what, where and how? .....	13
4.1.	Governments .....	13
4.2.	Multilateral agencies.....	13
4.3.	Bilateral agencies.....	14
4.4.	Private sector.....	15
4.5.	Non-governmental organisations .....	15
5.	Policy tools for sustainable tourism .....	17
6.	Combining commercial success with sustainability .....	18
6.1.	Economic .....	18
6.2.	Environmental .....	20
6.3.	Social and cultural .....	22
7.	Innovative and noteworthy issues.....	23
7.1.	Evolution in joint-venture partnership models.....	24
7.2.	Paradigm shifts in policy .....	25
7.3.	Evaluating and enhancing market linkages.....	25
7.4.	Shifting the brand with promotion and investment .....	25
7.5.	Adaptations in livelihood strategies .....	26
7.6.	Partnerships between agencies .....	26
7.7.	Close networks of professionals.....	26
8.	Successes and Constraints .....	26
9.	Synthesis.....	30
10.	References.....	33
11.	Annexes .....	35
11.1.	Annex 1: Terms of reference for tourism industry research and analysis phase II .....	35
11.2.	Annex 2: Market scan of who is doing what, where and how in tourism in sub-Saharan Africa .....	38
11.3.	Annex 3: Evaluation framework .....	48
11.4.	Annex 4: Supplementary guidance and tools.....	50
11.5.	Annex 5: Moving from a policy framework to implementation of Sustainable Tourism in South Africa.....	51

## Tables

Table 1: Overview of case studies .....	12
Table 2: Economic impacts of tourism from the case studies, in order of increasing scope .....	19
Table 3: Environmental impacts of tourism from the case studies.....	21
Table 4: Social and cultural impacts of tourism from the case studies.....	22
Table 5: Successes and constraints observe in the case studies .....	27
Table 6: Overcoming constraints in sustainable tourism development .....	29
Table 7: Scaling up .....	30
Table 8: Government agencies .....	38
Table 9: Multi-lateral actors .....	39
Table 10: Bi-lateral development agencies .....	40
Table 11: Private sector actors.....	42
Table 12: NGO actors .....	44

## Figures

Figure 1: Institutional arrangements at Rocktail Beach Camp, South Africa, by Wilderness Safaris ...	24
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## Boxes

Box 1: What is sustainable tourism?.....	10
Box 2: What is value chain analysis?.....	16
Box 3: What is a conservancy?.....	18

## Acronyms

AfD	Agence Française de Développement
ASL	Africa Safari Lodges foundation
ASSET	Association of Small Scale Enterprises in Tourism
AWF	African Wildlife Foundation
BEST-AC	Business Environment Strengthening for Tanzania – Advocacy Component
CBNRM	Community-based Natural Resource Management
CBT	Community-based tourism
CCP	Tourism Cluster Competitiveness Program
COAST	Collaborative Actions for Sustainable Tourism
CSI	Corporate Social Investment
DED	German Development Service
DfID	Department for International Development (UK)
EIA	Environmental Impact Assessment
EMS	Environmental Management System
EMS	Environmental management system
FFI	Flora and Fauna International
FTTSA	Fair Trade in South Africa
GDP	Gross Domestic Product
GEF	Global Environment Facility
GNH	Gross National Happiness
GoS	Government of Seychelles
GSTA	Global Sustainable Tourism Alliance
GTZ	Gesellschaft für Technische Zusammenarbeit
IGCP	International Gorilla Conservation Program
IRDNC	Integrated Rural Development and Nature Conservation
ITC	International Trade Centre
IWPA	iSimangaliso Wetland Park Authority
KfW	Kreditanstalt für Wiederaufbau (KfW)
M&E	Monitoring and evaluation
MICE	Meetings, Incentives, Conferences, and Exhibitions
NA	Not available
NBT	Nature-based tourism
NGO	Non-governmental Organization
NNF	Namibian Nature Foundation
NORAD	Norwegian Agency for Development Cooperation
NP	National Park
ODI	Overseas Development Institute
PA	Protected Areas
SADC	Southern Africa Development Community
SBDC	Small Business Development Company
SIDS	Small Island Developing States
SMME	Small and Medium and Micro Enterprise
SNV	Netherlands Development Organisation
SSA	Sub Saharan Africa
STEP	Sustainable Tourism Eliminating Poverty (a UNWTO program)
TAPP	Tanzania Agriculture Productivity Program
TLPRP	Tourism-Led Poverty Reduction Program (an ITC program)
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Program
UNEP	United Nations Environment Program
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNIDO	United Nations Industrial Development Organisation
UNWTO	United Nations World Tourism Organisation – Sustainable tourism eliminating poverty
USAID	United States Agency for International Development
VCA	Value Chain Analysis
VSO-ZEST	Voluntary Services Overseas - Zanzibar Enterprise and Sustainable Tourism
WHS	World Heritage site
WTTC	World Travel and Tourism Council
WWF	World Wide Fund for Nature
ZATI	Zanzibar Association of Tourism Investors

## 1. Executive summary

The aim of this synthesis is to identify and describe the innovative and successful interventions that are making the most effective progress in terms of sustainable tourism in sub-Saharan Africa (SSA). This is a region where a diverse range of tourism destinations offer natural and cultural heritage attractions for leisure travellers, in addition to facilities for business and conference travellers. The report focuses on three main questions:

1. Who are the key actors/organizations involved in tourism development in the region?
2. What are the principle approaches and areas of focus?
3. What are the best practices in the region for tourism development, focusing in particular on nature-based and cultural heritage interventions?

The report presents the methods, models and mechanisms used to leverage tourism for poverty alleviation, employment generation and enterprise development in conjunction with the conservation of the environment and cultural heritage. This leads to a series of prioritized strategies and recommendations advisable to enable destinations in SSA to compete more effectively on a global basis. The report includes information on sustainable tourism in relation to:

- Who is doing what, where and how, including governments, donor agencies, non-governmental organisations (NGOs) and the private sector;
- Policy tools that are being employed;
- How success has been achieved for the triple bottom line of sustainable development, including the economic, environmental, social and cultural implications;
- Best practices in the region for nature-based, cultural, beach and business tourism within a series of case studies;
- Innovative and noteworthy processes, issues, and programs;
- Successes and constraints, and options to overcome problems in terms of the enabling environment, economy, environment and society; and
- Linkages to guidance and tools that can assist destinations in developing sustainable tourism economies.

The synthesis was compiled by reviewing a series of seven case studies, namely (1) luxury wildlife tourism and the private sector: Wilderness Safaris and &Beyond; (2) the wildlife conservancy program in Namibia; (3) hiking tourism on Mount Kilimanjaro, Tanzania; (4) beach tourism in the Seychelles; (5) cultural tourism in Zanzibar; (6) cultural tourism in the Pays Dogon of Mali; and (7) business tourism in Nairobi, Kenya. The full case studies can be found separately from this report (in Part 2). Some of the important findings include the following:

- The luxury safari tourism market can generate significant returns in destinations including local employment and training, capital investment, local procurement, biodiversity conservation, and corporate social responsibility. However, to attract investors of the caliber of &Beyond and Wilderness Safaris, destinations need to provide an enabling environment including stable land tenure, political stability, access, suitable infrastructure, a suitable natural destination, and medium- to long-term commitment.
- Providing stable land tenure, and devolving rights to people to manage wildlife on their land, has made it possible for communities to lease tourism concessions to the private sector in Namibia. This program has resulted in increased local employment, capital investment, income

for the state, and wildlife populations. The process requires a strong policy framework, appropriate technical advice, and is successful where there are low population densities, rich wildlife, and the poor viability of alternative land uses.

- Mountain climbing can generate considerable revenue for park authorities and to local people, due to the relatively long length of stay and the labour-intensive nature of hiking. This is particularly true in iconic tourism destinations like Mount Kilimanjaro. However, the working conditions for porters, guides and cooks accompanying hiking teams can be arduous if their rights are not protected. Also, the environmental impacts of large volumes of hikers in environmentally sensitive mountainous regions require adequate planning, infrastructure, and management.
- A strong policy framework, collaboration with a solid conservation non-governmental organization (NGO) network, and partnerships with the private sector can support the conservation of the environment in beach tourism destinations, such as in the Seychelles. Remote tourism destinations have to be particularly adaptive and dynamic in addressing problems that emerge, such as the global recession and negative publicity. Small Island Developing States (SIDS) face human resource constraints, which means that they sometimes need to use expatriate labour for both technical and menial tasks (e.g. construction). However, the small labour pool also means that local technical experts can create amicable atmosphere for collaboration and communication.
- Destinations with tourism based on rich cultural heritage, such as Zanzibar, face the challenge of how to make culture economically productive, while conserving it, and also dispersing negative impacts on society. Maximizing the local economic impacts of tourism can be constrained by limited local ownership of accommodation facilities, the availability of cheap imports, and the availability of training.
- The collaboration of agencies in destinations can be effective in providing synergistic financial, technical and local support, as seen in the Pays Dogon of Mali. However, the presence of high quality cultural assets is not enough to grow a sustainable tourism industry by itself: product and service development, human resource development, marketing and promotion, and market linkages area also vital. Localized instability and short tourism seasons also constrain visitation and investment.
- Surviving declines in tourism due to political unrest or instability can be accomplished through the diversification of tourism products, encouraging investment, high quality vocational training, and aggressive marketing and promotion. As shown in Nairobi, Kenya, concentrating on leisure tourism (or any one tourism segment) can be risky.

Some of the areas of innovation observed in SSA include paradigm shifts in policy on land tenure and natural resource use; concessions and joint-venture partnerships; evaluating and enhancing market linkages, shifting brands, with promotion and investment; adaptations in livelihood strategies for hosts; partnerships between agencies and establishing close networks of professionals. A series of recommendations are suggested that may assist destinations in overcoming constraints to sustainable tourism development. These include:

- Development of enabling policies, that are based on sound research and participatory development processes.
- Development of appropriate instruments and programs to implement and regulate those policies consistently (e.g. focussing on yield, rather than numbers of tourists)
- Simplifying and supporting the development and operation of business through suitable licensing and regulatory instruments.
- Vigorously tackling corruption and poor governance by providing transparent and equitable solutions.
- Providing trust, space and time for innovation by the private sector.

- Monitoring and evaluation of the impact of policy, and providing mechanisms for feedback and adaptation.
- Targeted capital infrastructure development to support tourism, related to demand, and enhancing the destination for residents simultaneously.
- Creating incentive and taxation instruments that support, rather than punish commercial success.
- Providing mechanisms to ensure living, or minimum wages, across the sector, in participation with the private sector.
- Promoting value for money in tourism products and destinations, coupled with high quality service and experiences.
- Establishing strong market linkages between the destination and source markets and encouraging investment in marketing and promotion.
- Promoting strong local value chains, so that local businesses can overcome barriers to engaging in tourism markets, and sell their goods and services to the tourism sector.
- Monitoring and evaluating the economic and financial returns to society and local people.
- Ensuring adequate planning, design and location for tourism development, which is cognisant of the impacts on the local environment and resource use.
- Avoiding negative environmental impacts where possible, and mitigating damage when it occurs.
- Providing access to information and technical assistance to support conservation, wise use of resources (e.g. energy and water), and reduce the negative impacts of waste.
- Vigorously protecting fragile ecosystems and endangered species.
- Providing access to vocational training for local people in hospitality and tourism (including guiding and craft development)
- Protecting the rights of workers to safe and healthy working conditions.
- Using tourism to conserve, rehabilitate and re-invigorate cultural heritage and traditions.
- Adopting participatory processes for planning and decision making with local people.
- Tackling and resolving conflicts as they arise, and try to find win-wins.
- Recognising that the people living in tourism destinations are an integral part of the asset.
- Ensuring that enhancements in destinations improve the well-being of residents, as well as tourists such as facilities for healthcare, education, transport and sanitation.

Approaches to build capacity in SSA to scale up the successes effectively in new destinations are suggested, and may include the following:

- Provide training programs for representatives of protected area authorities, tourism and environment decision makers in government;
- Provide access to technical and resource support to the private sector, NGOs and communities;
- Provide easy access to technical tools and training materials developed;
- Develop a series of trainers who can roll out the training materials in destinations; and
- Develop a network of experienced technical advisors who can provide support to agencies throughout the process.

The next phase in this process should ideally be to take each of the suggested intervention options and:

- Collate or adapt and develop suitable tools, processes and mechanisms to implement the intervention options, and the methods to scale up successes and improve capacity;
- Provide easy access to the tools (e.g. web-based), and training programs for technicians to learn how to use them;

- Engage with actors in destinations and discuss the findings of this report (including specific case studies, the synthesis, short policy briefs highlighting the key issues, and the powerpoint presentations);
- Identify specific destinations that need support, and what combinations issues and interventions are appropriate and desirable in each instance;
- Establish roles and responsibilities of different actors and stakeholders, both in the destination and from international technical support agencies;
- Develop destination-specific strategies and programs for implementation, workplans, technical expertise requirements and budgets;
- Source financing and appropriate human resources;
- Implement the program, and monitor and evaluate its progress; and
- Report on successes and constraints, and share the findings.

In addition, it is suggested that value would be added by expanding this selection of case studies, using the same analysis framework, and a list of suggestions is provided. Once the additional case studies are undertaken, this synthesis should ideally be revisited and adapted accordingly.



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## 2. Introduction

Africa is a melting pot of innovation, success and failure in the use of tourism to reduce poverty, conserve nature, and preserve cultural heritage. There is a rich diversity of iconic destinations and experiences on the African continent, in addition to luxury safari lodges in wildlife-rich savannahs, coral-lined beaches, snow-topped mountains and unique architecture and culture. These riches are in stark contrast to the negative connotations of poverty, incidents of civil unrest and corruption that are often portrayed in the media. Sustainable tourism provides an optimistic and proactive view of how the travel industry can be harnessed to stimulate economic opportunities for nations and their people; can help to finance the conservation of natural areas and fragile habitats, while also strengthening societies and enriching their cultures (see Box 1).

### Box 1: What is sustainable tourism?<sup>1</sup>

Sustainable tourism development guidelines and management practices are applicable to **all forms of tourism in all types of destinations**, including mass tourism and the various niche tourism segments. Sustainability principles refer to the **environmental, economic and socio-cultural aspects** of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability. Thus, sustainable tourism should:

- 1) Make **optimal use of environmental resources** that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- 2) Respect the **socio-cultural authenticity of host communities**, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- 3) Ensure viable, **long-term economic operations**, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Sustainable tourism development requires the **informed participation of all relevant stakeholders**, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary.

Sustainable tourism should also maintain a **high level of tourist satisfaction** and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.

The aim of this synthesis is to identify and describe the innovative and successful interventions that are making the most effective progress in terms of sustainable tourism. The geographical focus of the analysis is sub-Saharan Africa, where a diverse range of tourism destinations offer natural and cultural heritage attractions for leisure travellers, in addition to facilities for business and conference travellers. The report focuses on three main questions:

1. Who are the key actors/organizations involved in tourism development in the region?
2. What are the principle approaches and areas of focus?
3. What are the best practices in the region for tourism development, focusing in particular on nature-based and cultural heritage interventions?

The synthesis draws on a market scan of who is doing what, where and how. Then the lessons learned from seven case studies are used to illustrate a selection of noteworthy approaches being used in the region.

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<sup>1</sup> WTO, 2004

The report presents the methods, models and mechanisms used to leverage tourism for poverty alleviation, employment generation and enterprise development in conjunction with the conservation of the environment and cultural heritage. This leads to a series of prioritized strategies and recommendations advisable to enable sub-Saharan Africa to compete more effectively on a global basis.

The terms of reference can be found in Annex 1.

### **3. Method**

#### ***3.1. Market scan***

Initially a scan was made of the different actors working on sustainable tourism in SSA (excluding World Bank group initiatives which are reviewed elsewhere<sup>2</sup>). These included the private sector, non-governmental organisations (NGOs), development agencies, governments, and multilaterals. A matrix was created which included information on what they were doing, where it was taking place, what was innovative, how it reflected sustainable development (i.e. the triple bottom line of economic, social and environmental sustainability), and whether it was working. To complement this, the information was re-structured to look at actors and destinations involved in nature-based tourism (wildlife and non-wildlife based), cultural tourism, beach tourism, and MICE (Meetings, Incentives, Conferences and Exhibitions). The scan was undertaken using internet-based information and the author's previous experience.

The results of the market scan can be found in Annex 2, and were used to select a series of case studies that were to be developed.

#### ***3.2. Evaluation framework***

An evaluation framework was devised, and two rounds of pilot case studies were developed in order to test the adequacy of the framework. This resulted in a change of approach from developing a greater number of short case studies focussing on actors, to a smaller number of more detailed cases focussing on tourism niches. The evaluation framework can be found in Annex 3.

#### ***3.3. Case studies***

The case studies were all compiled in line with the common evaluation framework, and explored the following five themes:

- **Relevance to policy:** The extent to which the activity aligned to local and national and regional development priorities and policies;
- **Effectiveness and impact:** The extent to which objectives have been achieved, and impacts observed;
- **Innovation and noteworthy issues:** The extent to which interventions are unique, noteworthy, exceptional and pioneering;
- **Sustainability:** The implications for the triple bottom line of sustainable development: (1) economic sustainability, including poverty reduction, job creation, business viability and benefits generated throughout society; (2) environmental sustainability, including biodiversity conservation, resource use and waste management; and (3) social and

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<sup>2</sup> Ebbe, 2010

cultural sustainability, incorporating the conservation of cultural heritage and net-benefits for resident populations; and

- **Successes and constraints:** Consideration of what has worked, what has not worked, what the implications are to competitiveness and investment, and what future interventions would be beneficial.

The case studies developed, and an overview of what each case describes, are outlined in Table 1. This sample of case studies were selected to draw upon the most exciting and pioneering activities in SSA, and to illustrate a diverse range of interventions by actors in different contexts.

**Table 1: Overview of case studies**

Theme	Location	What the case study describes
Wildlife-tourism led by private sector operators, &Beyond and Wilderness Safaris	Sub-Saharan Africa	Illustrates the types of beneficial impacts the private sector can have in destinations (on the economy, environment, and society). As illustrations, it draws on two particular lodges within each group for specific examples: Damaraland Camp in Namibia (Wilderness Safaris) and Phinda Resource Reserve in South Africa (&Beyond). The case also includes the basic enabling environment requirements that are required to attract and support such investors to help replicate these conditions.
The wildlife conservancy program	Namibia	Demonstrates an example of using land tenure and responsibility for wildlife as a mechanism for financial and economic growth. This program has provided a mechanism that has led to the sustainable use of wildlife resources, stable land tenure for rural Namibians, and improved livelihoods. It has also provided the basis for communities to develop tourism enterprises within conservancies: either through joint-ventures with the private sector, or as community-based tourism operations.
Hiking tourism on mountains	Mount Kilimanjaro, Tanzania	Concentrates on the pro-poor financial benefits distribution and environmental impacts of tourists in a tourist destination with climbing the mountain as an example, and provides lessons on how to enhance benefits to the local communities in similar mountain destinations. Destinations that wish to develop hiking tourism in mountainous regions in such a way that it conserves the natural environment, while providing viable livelihood opportunities for local people will find this case useful. It also raises issues of the 'shelf life' of iconic tourism destinations, and how branding and destination management adapt over time.
Beach tourism	Seychelles	Describes how government can provide a stable enabling environment for tourism investment on a network of islands. This has been done by formulating appropriate policies, by partnering with international agencies that bring targeted investment and technical assistance, and by providing space and dialogue with conservation NGOs.
Cultural tourism	Zanzibar	Describes a rich cultural destination which is struggling to balance the needs of its residents; the conservation of its heritage; and the economic, social and environmental impacts of rapidly growing tourism.
Cultural tourism	Pays Dogon, Mali	Illustrates why this destination has succeeded over other areas in the country, due to the collaboration of agencies, and interventions on product and service development, human resource development, marketing and promotion, and market linkages. Tourist numbers to the Pays Dogon have increased and tour operators are keen to promote the area.
Business and conference tourism	Nairobi, Kenya	Shows how a destination renowned for its leisure product, has adapted its marketing and promotion focus and has strengthened a different tourist segment (business tourism) in order to catalyse its recovery. The case will be useful to other destinations that are heavily focussed on a narrow range of tourism products and experiences that they wish to diversify. It also offers lessons to destinations on how to survive the ups and downs of the sector caused by political instability. In addition, the case shows the importance of high quality vocational training in the Meetings, Incentives, Conferences, and Exhibitions (MICE) sector, and also that international accessibility is paramount for regional travellers.

Case studies were drafted from a literature review, and internet-based research, coupled with information gathered from actors working in the relevant destinations. Draft cases were reviewed and validated first by the actors, and then by the World Bank. Additional questions and comments raised by World Bank representatives were shared with destination actors for further information.

The case studies are reviewed in the following sections of this report, and the full cases are presented in a separate companion document: *“Tourism Product Development Interventions and Best Practices in sub-Saharan Africa: Part 2: Case studies.”*

### **3.4. Synthesis**

The synthesis was undertaken by drawing key elements raised within the case studies and the market scan. In addition to collating the most interesting aspects of the themes explored within the case studies, it also summarises success factors recommends approaches to tourism development interventions that are likely to be most fruitful; and suggests those that may work well at scale. Where some factors are illustrated in destinations that fall outside the scope of the case studies, these are also drawn into the analysis.

## **4. Who is doing what, where and how?**

In SSA there are a diverse range of actors working on sustainable tourism. These include governments, multilateral agencies, bi-lateral agencies, the private sector and non-governmental organisations. The role of each type of actor in developing sustainable tourism, and some of the noteworthy achievements in SSA are outlined below.

### **4.1. Governments**

Governments have a key role to play in providing the enabling environment for tourism to thrive. This includes creating a stable political and economic climate, secure land tenure, safety for visitors, favourable conditions for investors, and ensuring a good reputation and ‘brand’ for their tourism destinations. These conditions are created through government led policies, plans and laws that guide and regulate the sector.

Noteworthy initiatives described within the case studies include Namibia’s conservancy program, which gives rural communities the rights to use wildlife on their lands; Zanzibar’s Strategy for Growth and Poverty Reduction, and the Seychelles Ecotourism Strategy. Other innovative approaches in SSA include the South African National Parks program for public-private-partnerships (PPPs) in national parks<sup>3</sup>, responsible tourism policies developed in South Africa<sup>4</sup> and the Gambia, and Botswana’s policy to promote high-value, low impact tourism.

### **4.2. Multilateral agencies**

Multilateral development agencies provide financial support and professional advice for economic and social development activities in developing countries<sup>5</sup>. A number of United Nations agencies are working in SSA on aspects of sustainable tourism. Three of the case studies (Zanzibar,

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<sup>3</sup> Varghese, 2008; Spenceley 2004

<sup>4</sup> See Spenceley, 2008a for an overview

<sup>5</sup> <http://web.worldbank.org/WBSITE/EXTERNAL/EXTABOUTUS/0,,contentMDK:20040612~menuPK:41694~pagePK:51123644~piPK:329829~theSitePK:29708,00.html>

Kilimanjaro, Mali) concern World Heritage Sites, which have been designated for cultural or environmental reasons under the United Nations Educational, Scientific and Cultural Organisation (UNESCO). Other UN relevant programs in SSA include:

- The United Nations World Tourism Organisation (UNWTO)'s Sustainable Tourism Eliminating Poverty (STEP) program, which has a variety of projects that aim to reduce poverty by developing tourism products, and building capacity in destinations. Currently there are 43 projects in more than 18 countries in SSA, including one of the case studies: Mali.
- The United Nations Industrial Development Organisation (UNIDO)'s Collaborative Actions for Sustainable Tourism Project (COAST), which aims to promote the conservation, management and monitoring of this coastal biodiversity in nine east and west African countries, including the Seychelles.
- The United Nations Conference on Trade and Development (UNCTAD)'s Tourism-Led Poverty Reduction Program (TLPRP), which focuses on value-chain interventions to expand opportunities for the poor and improve market linkages.
- The United Nations Development Program (UNDP)'s program of developing millennium villages, supporting conservancy development in Namibia, and mainstreaming biodiversity in industry in the Seychelles.

#### ***4.3. Bilateral agencies***

Bilateral agencies form agreements with governments on a country-by-country basis, in order to provide financial and technical development assistance. Some examples illustrated the set of case studies include:

- The United States Agency for International Development (USAID), which is supporting the Global Sustainable Tourism Alliance (GSTA) in the Pays Dogon in Mali, and a Tanzania Agriculture Productivity Program (TAPP). USAID also has tourism interventions in Rwanda, Mozambique, Kenya, and Tanzania.
- The German Development Service (DED) which is assisting with financial and technical resources to support cultural and ecotourism in Mali.
- The British Department for International Development (DfID)'s programs in Zanzibar, which includes the Tourism Cluster Competitiveness Program (CCP) and the Business Environment Strengthening for Tanzania – Advocacy Component (BEST-AC).

Other agencies working on tourism in Africa include the Agence Française de Développement (AFD) in the Quirimbas and Limpopo National Parks in Mozambique; Gesellschaft für Technische Zusammenarbeit (GtZ), which is working in Benin, South Africa and the Central African Republic on ecotourism, livelihood interventions and value chain linkages; Kreditanstalt für Wiederaufbau (KfW) which is financing protected area infrastructure and management and concessions processes in more than 12 countries in SSA; and the Norwegian Agency for Development Cooperation (NORAD) which is working on tourism infrastructure and Community-based Natural Resource Management (CBNRM) in Zambia, South Africa, Tanzania, Mozambique, Uganda and Malawi.

#### **4.4. Private sector**

The private sector's role and responsibilities in sustainable tourism cannot be underestimated. The business of tourism is simple concept of matching the supply with the demand in order to generate profit. Working within the enabling environment provided by governments, tourism enterprises hold the key to promoting and selling trips; transporting people from their homes to the destination; accommodating them; feeding them; providing shopping opportunities; and enabling them to visit attractions. The private sector has impacts on the local economy, through employment and procurement; on the natural environment from the way in which they develop infrastructure, conduct their tours and use resources; and on society and culture in which they operate and sometimes commercialise.

Two luxury safari tourism operators are the focus of one of the case studies in this collection: &Beyond and Wilderness Safaris. Both companies have an extensive network of lodges, with an impressive track record of active conservation, sensitive accommodation development, and ensuring local economic benefits to communities. There are also many other notable companies working on the continent that have taken a proactive approach towards sustainable development. These include Great Plains Conservation, which uses a similar approach to Wilderness Safaris, while also using carbon offset programs to finance conservation. The Banyayn tree is a luxury hotel group working in Africa, Asia and South America, and supports linkages with communities and conservation NGOs (including in the Seychelles). Other excellent companies include Masakutu in The Gambia; Singita in South Africa, Tanzania and Zimbabwe; the Mantis collection in South Africa, Rwanda, Zambia and Mozambique, Nkwichi Lodge and Guludo Beach Lodge in Mozambique; and also enterprises that have been certified as sustainable by programs such as Heritage, Fair Trade in Tourism South Africa, and the EcoRating Program in Kenya. Companies taking a destination-level approach include African Parks, which combines conservation with business expertise, to turn protected areas into commercially viable destinations through tourism and payments for ecosystem services.

Collectively, private sector associations also play a role in sustainable tourism. For example, the Zanzibar Association of Tourism Investors (ZATI) has been working with a number of NGOs on tourism research and assisting local farmers to supply their produce to the tourism sector.

#### **4.5. Non-governmental organisations**

The NGO and not-for-profit sector has mixed success in tourism. In the best situations, they access funds, they provide high quality technical expertise on nature conservation, deliver capacity building and training for local people, and link local entrepreneurs with the private sector. In the worst instances, they finance tourism infrastructure development for communities that does not match demand, or they expect local communities to manage sophisticated tourism businesses and share the benefits equitably (for example, numerous community-based tourism enterprises in SSA<sup>6</sup>), or raise unrealistic expectations of what tourism can deliver. NGOs working on sustainable tourism in SSA include international agencies (e.g. The African Wildlife Foundation (AWF); Netherlands Development Organisation, SNV; World Wide Fund for Nature [WWF]; and Voluntary Services Overseas [VSO]) and smaller, locally grown institutions within destinations.

Some of the NGO activities explored in the case studies include the Marine Conservation Society of Seychelles, Nature Seychelles, and the Island Conservation Society. These organisations are working with tourism enterprises in specific Seychelles destinations to promote biodiversity conservation, with the support of their technical expertise. With a greater focus on poverty

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<sup>6</sup> See for example Spenceley, 2008b; Dixey, 2008; Ashley et al, 2008

reduction, SNV, is working in Zanzibar, Mali and Kilimanjaro using a value chain analysis approach to improve the linkages between small businesses and tourism markets (see Box 2). Meanwhile the Integrated Rural Development and Nature Conservation (IRDNC) and Namibian Nature Foundation (NNF) are supporting communities on improving livelihoods and wildlife conservation within the conservancy program in Namibia. In some destinations NGOs form partnerships to collaborate on areas of common interest, such as in Zanzibar where VSO and SNV are working together on supporting market linkages in tourism, and are doing so with the private sector association, ZATI.

### Box 2: What is value chain analysis?

**Value Chains Analysis** describes the interrelationships between a range of functional activities, service providers, customers, supporting institutions and supply chains. They allow representation of financial returns from a sequence of reproductive processes along the supply chains. **Pro-Poor Value Chains** concentrate specifically on mapping the participation of the poor<sup>7</sup>.

**Supply chains** are systems of organizations, people, technology, activities, information and resources involved in moving a product or service from a supplier to a consumer<sup>8</sup>.

In addition to the NGOs that are described within the case studies, there are also other notable initiatives in SSA including:

- The African Safaris Lodges (ASL) foundation, which manages an innovative programme creating long-term partnerships between safari lodge operations and the people of the surrounding communities, in order to generating wealth and improve well-being<sup>9</sup>.
- The International Gorilla Conservation Program (IGCP), which is a consortium of three international NGOs, AWF, CARE and Flora and Fauna International (FFI).<sup>10</sup> The IGCP is supporting Mountain Gorilla conservation in the Virunga Massif between Rwanda, the Democratic Republic of Congo, and Uganda. In addition to brokering joint-venture partnerships between communities and the private sector to develop tourism lodges, they have also supported participatory sustainable tourism planning in the region.
- Fair Trade in South Africa (FTTSA)<sup>11</sup> and Ecotourism Kenya<sup>12</sup>, which operate certification programs, designed to independently validate private sector claims of sustainability, and provide them with an approved logo that they can use in their promotions.
- The Association of Small Scale Enterprises in Tourism (ASSET), which is membership organisation that brings together, advocates for, and promotes a large number of small enterprises that are active in the tourism industry in The Gambia<sup>13</sup>.
- Technoserve, which has been providing support to ecotourism ventures with business planning, financial and management skills, and also piloting ways to promote locally owned tourism enterprises to create destination circuits<sup>14</sup>.

<sup>7</sup> Rylance et al, 2009

<sup>8</sup> Nagurney, 2006

<sup>9</sup> [www.asl-foundation.org](http://www.asl-foundation.org)

<sup>10</sup> [www.igcp.org](http://www.igcp.org)

<sup>11</sup> [www.fairtourismsa.org.za](http://www.fairtourismsa.org.za)

<sup>12</sup> [www.ecotourismkenya.org](http://www.ecotourismkenya.org)

<sup>13</sup> [www.asset-gambia.com](http://www.asset-gambia.com)

<sup>14</sup> [www.technoserve.org](http://www.technoserve.org)



- The Ford Foundation, which has been supporting NGOs including the ASL, Technoserve and SNV in focussed initiatives in southern Africa<sup>15</sup>.

All of the case study destinations reviewed have a diverse range of different actors involved in tourism development. More information on the agencies summarised here and their interventions can be found in a series of tables drawn from the market scan, in Annex 2.

## 5. Policy tools for sustainable tourism

The importance of sound policy and regulation frameworks that create stability cannot be understated for sustainable tourism development.

Two innovative and successful private sector operators in SSA are reviewed in the case studies: &Beyond and Wilderness Safaris. They reveal how important the enabling environment is to attract and support the most responsible and commercially successful tourism investors. The elements that need to be in place in the country include:

- Political and economic stability;
- Rational economic policies, especially relating to security of tenure;
- An established or developing tourism industry, for economies of scale;
- Easy access (e.g. international flights, roads etc);
- Suitable attractions (e.g. wildlife, culture);
- Availability and reasonable cost of suitable and attractive sites for development;
- Availability of communities to work with; and
- Capacity to have a positive impact on the long term sustainability of biodiversity conservation.

Some policies can be counter-productive when growing sustainable tourism. For example, there is a tendency for strategies to focus on increasing the volume of tourists that come to a country or destination, mistakenly assuming that this will translate into more income and more jobs. This has been the case in Zanzibar, the Seychelles, and also in Mauritius,<sup>16</sup> where ambitious targets have been set for increased arrivals. However, this approach often fails to take into consideration the infrastructure and human resources requirements needed to capitalise on greater volume. A more effective approach is to increase the amount of money each tourist spends in the destination, by making it easier for them to stay longer, and to purchase more local goods and services. This should be coupled with trying to use tourism to improve the well being of people living in tourism destinations.

Having appropriate policies and plans alone is not enough. It is not unusual for countries in SSA to have excellent strategies, policies, masterplans and well crafted legislation. Sometimes these have even been developed by external technical expert consultants, and sometimes these consultants have adopted a participatory approach to their development. However, if they are not implemented, or are not enforced and regulated, they can simply become expensive glossy documents that gather dust on shelves. For example, tourism masterplans can be problematic. These may include be zones for particular types of land use in certain areas, which are adopted and approved by government. However, when investors come they are permitted to develop in ways and in locations that contravenes the plan<sup>17</sup>. Examples illustrated within the case studies include the implementation

<sup>15</sup> [www.fordfoundation.org](http://www.fordfoundation.org)

<sup>16</sup> Spenceley and Bashain, 2010

<sup>17</sup> For example, Inhambane in Mozambique

of Environmental Impact Assessment (EIA) regulations. Sometimes EIAs have simply been cut-and-pasted from assessments written for other developments; they are not reviewed with a critical eye; activities recommended to mitigate environmental impacts are not monitored or enforced during development. One example where there has been a fourteen-year drive towards pushing sustainable tourism from a policy level, is in South Africa where ‘responsible tourism’ has been promoted. However, so far little tangible change has been observed within the mainstream private sector: Only around 140 tourism enterprises in the country have been independently certified as operating sustainably, and only a minority of tourism enterprises are aware of sustainable tourism practices (see Annex 5 for more information and a research summary).

To illustrate with a successful example of a policy intervention, the conservancy program in Namibia demonstrates how important stable land tenure is (see Box 3). Fundamental questions such as “Who owns it?”, “Who can use the resources on it?”, “How does investment take place on it?”, and “How it is transferred to others?” create a complex array of factors that can affect the stability of a nation, and can influence the affluence of its people. The Namibian conservancy program provides an example of how land tenure and responsibility for wildlife has been used as a mechanism for financial and economic growth. The program has provided a mechanism that has led to the sustainable use of wildlife resources, stable land tenure for rural Namibians, and improved livelihoods. It has also provided the basis for communities to develop tourism enterprises within conservancies: either through joint-ventures with the private sector, or as community-based tourism operations. Government provided the policy and legislative framework that has allowed the conservancy system to prosper to the extent that conservancies now cover nearly 17% of the country<sup>18</sup>.

**Box 3: What is a conservancy?**

A conservancy is an area of land where people acquire the rights and responsibilities for the consumptive and non-consumptive use and management of wildlife and natural resources, on behalf of the community<sup>19</sup>.

Broadly speaking, to create conditions for sustainable tourism investment, governments need to create suitable conditions for the private sector to develop and operate tourism; they need to conserve the environment and culture; and also provide the setting in which tourism can improve the livelihoods of local communities. A series of tools and guidance that is available for government authorities can be found in Annex 4.

## **6. Combining commercial success with sustainability**

This section explores the implications of the interventions for sustainable development. This asks what the implications are for the triple bottom line of economic, environmental and social sustainability.

### **6.1. Economic**

One of the ‘truisms’ of tourism is that it can be used as a tool to reduce poverty in destinations. Current thinking on this issue indicates that this can be true, but that aside from direct employment, there is limited indirect benefit (e.g. from procurement of goods and services) unless there is an active program to strengthen value chain linkages for the poor or to create ‘inclusive businesses’.

<sup>18</sup> Republic of Namibia, 2010

<sup>19</sup> Ashley and Jones, 2001

The case study evaluations of the economic impacts largely considered the impacts on poverty, job creation, commercial viability, procurement of goods and services in the local economy, and whether there was ‘shared growth’, or benefits that flow through the economy as a whole.

A comparison of some of the economic impacts of the case studies is outlined in Table 2. Although the case studies vary between focussing on individual tourism companies (&Beyond and Wilderness Safari), tourism niches in destinations (e.g. Meetings, Incentives, Conferences and Exhibition {MICE} tourism in Nairobi), tourism destinations (Pays Dogon, Namibian conservancies, Kilimanjaro), and countries (Seychelles, Zanzibar), and although there are some data gaps, some interesting comparisons can be made. For example:

- **Number of tourists and their expenditure:** The number of tourists visiting the Seychelles and business travellers in Nairobi is similar, but the average expenditure is much higher in the Seychelles (US\$230 vs. \$128 per day).
- **Length of stay and spend per day:** Encouraging tourists to stay longer, and spend more money locally each day, generates more income in destinations. For example, an average expenditure US\$2,303 per trip (or \$230 per day) in the Seychelles for a 10 day trip, generates three times the revenue of 7 day business trip to Nairobi, at \$762 per trip (or \$108 per day).
- **Investment value:** Collectively two private sector companies (&Beyond and Wilderness) have invested almost as much money in their tourism enterprises, as has been invested in all 59 conservancies in Namibia (US\$16.5 million vs. \$19 million). This is an impressive achievement from two private operators, and provides support for the importance of a positive business enabling environment where the private sector can excel.
- **Number of jobs:** Although Mount Kilimanjaro has roughly half the number of tourists as Pays Dogon, and almost 70% of the average trip spend, this destination generates 52 times the number of jobs. However, these are seasonal, informal jobs, and salary levels are low.

**Table 2: Economic impacts of tourism from the case studies, in order of increasing scope<sup>20</sup>**

Case study	Scope	Contribution to Gross Domestic Product (GDP) / number of tourists	No. jobs	Number of poor people benefiting	Average tourist spend in destination (US\$), per day and per trip	Local ownership of tourism businesses	Investment value (US\$)
&Beyond and Wilderness Safaris	Two private sector companies with 110 lodges in 9 SSA countries	NA	5700	5000	Rack rates per night varies, depending on the camp from \$200 to \$1500	Mixture of locally owned, joint-ventures and privately owned. Support to local small enterprises to supply lodges	Estimated value of \$16.5 million <sup>21</sup>
Business and conference tourism, Nairobi, Kenya	Niche within a destination	\$227.5 million / 180,600 business travellers in 2009	NA	NA	\$900 per week (\$128 per day)	A mixture. Local and international hotel chains involved	Investment in hotel infrastructure and refurbishment Value not known.

<sup>20</sup> All data is drawn from the case studies, unless indicated otherwise

<sup>21</sup> Assumes an average of US\$1.5 million per lodge, and 110 lodges using the investment data from Rocktail Beach Camp in South Africa

Contd.

Case study	Scope	Contrib'n to Gross Domestic Product (GDP) / number of tourists	No. of jobs	Number of poor people benefiting	Average tourist spend in destination (US\$), per day and per trip	Local ownership of tourism businesses	Investment value (US\$)
Cultural tourism, Zanzibar	Niche within a destination	NA / \$136 million in 2007	10,000	+ 10,000	\$762 per trip (\$108 per day)	Between 15% quality hotels, to 70% of budget hotels	NA
Hiking tourism, Mount Kilimanjaro	Destination	NA / 35,000 climbers in 2008	10,900 (irreg.)	+10,900	\$1376 per trip (\$275 per day)	Camping accommod'n 'owned' by parks authority	NA
Cultural tourism, Pays Dogon, Mali	Destination	\$2.1 million / 63,000 tourists in 2007	210	+ 210	\$1540 per trip (\$385 per day)	100% locally owned 'communes' and independent hotels	Limited direct investment. Value not known.
The wildlife conservancy program, Namibia	59 conservancies destinations across a country	NA	539	Members of conservancies = 223,920 <sup>22</sup>	NA	Locally owned & joint-ventures	\$19 million
Beach tourism, Seychelles	Country	25.6% / 160,000 tourists in 2008	8,800-12,400	Not known, but only 2% of population (1800) living under \$2 per day	\$2,303 per trip (\$230 per day)	90%	\$375 m in 2008 for construction (but only 5-15% retained)
NA: Information Not Available							

Annex 4 contains information about some reports and tools that can be used for further information on enhancing the economic and financial impacts of tourism in destinations.

## 6.2. Environmental

Tourism is inextricably linked to the environment, in terms of the attractions it offers to tourists, the quality of experience that can be provided, and the industry's impact from the use of resources to sustain it. It is imperative that the tourism industry, governments, NGOs and other stakeholders collaborate on conservation management.

The case studies considered environmental issues including planning (e.g. EIAs), environmental management systems (e.g. use of water, waste disposal, energy use), and also biodiversity conservation. Table 3 provides a comparison of the environmental impacts highlighted in the case studies. The cases clearly show that the nature-based tourism activities have the most positive impacts on biodiversity conservation (&Beyond and Wilderness Safaris; Namibian conservancies), with tremendous successes in relation to the conservation of large tracts of natural habitats, and the protection of endangered species. Tourism in sensitive environments also has the potential to be the most damaging to the environment (e.g. Mount Kilimanjaro, coastal areas of the Seychelles and Zanzibar), and needs to be managed with appropriate planning and infrastructure. All of the tourism initiatives have issues relating to adequate environmental management: primarily

<sup>22</sup> NASCO, 2008

concerning waste disposal (e.g. sewage, waste water, and solid waste) and natural resource use (e.g. firewood). There is some application of environmental management systems and renewable energy, but not consistently throughout the cases (e.g. Seychelles, &Beyond and Wilderness Safaris, Nairobi hotels).

**Table 3: Environmental impacts of tourism from the case studies<sup>23</sup>**

Case study	Relevance to the environment	Planning	Environmental Management Systems	Biodiversity conservation
&Beyond and Wilderness Safaris	Nature-based tourism companies, focussing on pristine wildlife destinations	The companies follow the environmental planning guidance required in destinations where they develop (e.g. EIAs). Lodges are generally designed to have a low negative impact on the environment.	Both companies have, or are implementing, audit and indicator tools at their lodges, that measure energy, water, and waste.	Collectively the companies influence the conservation of 3.4 million hectares in Africa. Environmental education is provided for local children at lodges. They have rehabilitated land, increased populations of endangered species, and conducted research.
The wildlife conservancy program, Namibia	Wildlife conservation and expanding protected areas	NA	NA. On a conservancy-by-conservancy basis	The program has extended the conservation area to 19% of the country. Wildlife populations have generally increased under local custodianship (e.g. elephant, black rhino)
Hiking tourism, Mount Kilimanjaro	Environmental management of hiking in fragile mountain ecosystem	An environmental management plan is in place for Kilimanjaro, which specifies how the environmental impact of tourism is to be managed.	Waste disposal (solid and sewage) is problematic on the mountain. Infrastructure improvements are planned. Firewood collection has been a problem in the past	Trail erosion is problematic on the mountain, due to the high number of visitors and sensitive ecology.
Beach tourism, Seychelles	Coastal management of reefs and beaches	EIAs take place, and there is public consultation. However, recommendations are not always followed, given the pressure to invite investment.	Sewage from coastal tourism enterprises can damage marine ecosystems, which are damaging to young corals. Many hotels have solar water heaters. A feasibility study is being done for a national sustainable tourism certification process.	The Seychelles is rich in biodiversity, including 250 indigenous plant species. Damage to coral reefs from leisure activities has occurred. NGOs and private sector are collaborating to remove alien species from islands. Mangrove areas have been destroyed in some areas for tourism.
Cultural tourism, Zanzibar	Exploitation of marine life for craft, and EMS in hotels	There is a National Environmental Action plan and an Integration Coastal Zone Management Plan	Problems include poor treatment and disposal facilities for solid waste, sewage and waste water; depletion of minerals for construction.	Issues include unnecessary removal of trees and vegetation on construction sites; and pressure on marine resources to supply fish to hotels and restaurants.

<sup>23</sup> All data is drawn from the case studies, unless indicated otherwise

*Contd.*

Case study	Relevance to the environment	Planning	Environmental Management Systems	Biodiversity conservation
Cultural tourism, Pays Dogon, Mali	Environmental management systems (EMS) in villages	NA	In a desert environment, -natural resources such as wood and water are scarce. There are issues of poor sanitation and waste disposal in the villages	There are initiatives to collect and plant euphorbia cuttings to stabilise sand dunes, and also to develop tree nurseries.
Business and conference tourism, Nairobi, Kenya	EMS within hotels	NA	None of the MICE hotels are accredited under the EcoRating program, but at least 3 of 8 hotels have implemented low-energy technologies.	One hotel has attempted to increase the biodiversity value of its hotel, but this is difficult when located within a city.
NA: Information Not Available				

Annex 4 contains information regarding reports that can be used for further information on enhancing the environmental impacts of tourism in destinations.

### **6.3. Social and cultural**

Tourism provides an opportunity for exchange and learning between cultures. Visitors can have opportunities to learn more about the societies and values of the people interact with. Revenues can be used to preserve historical sites and the tourism activity itself can revitalise local interest in history and traditional practices such as cuisine and entertainment.

The comparison of the social and cultural impacts of the case studies is interesting in its diversity (see An innovative destination which has spearheaded the importance of society and culture in tourism is the Kingdom of Bhutan, on the edge of the Himalayas. This nation has become famous for its promotion of ‘Gross National Happiness’, or GHN, which it deems more important than GDP. The concept was introduced in 1972 and is built on four pillars: (1) equitable economic development, (2) environmental preservation, (3) cultural resilience and (4) good governance. The underlying idea is that happy people in destinations create relaxed and pleasant destinations for people to live, and for the tourists who visit them. Therefore, destinations and tourism companies that strive to enrich their societies and culture, can also demonstrate sound business practices.

Table 4). The two cultural tourism destinations (Mali and Zanzibar) have both benefited from the restoration and rehabilitation of historical sites. Traditional cuisine has been a focus in both the Seychelles and Zanzibar. The private sector (Wilderness Safaris, & Beyond) have taken their corporate social responsibility seriously. They have invested their own resources, and those channelled from donations, towards benefits for communities including healthcare and educational infrastructure. On a more critical note, the difficulty of climbing Mount Kilimanjaro has created harsh working conditions for the porters and guides, and as a result associations have been developed locally to protect their rights. The conservancy program has enabled rural community members to have stable land tenure, and empowered them to negotiate commercial agreements with the private sector to operate tourism. This is probably the most ‘transforming’ initiative for a rural society among the cases.

An innovative destination which has spearheaded the importance of society and culture in tourism is the Kingdom of Bhutan, on the edge of the Himalayas. This nation has become famous for its promotion of ‘Gross National Happiness’, or GHN, which it deems more important than GDP. The concept was introduced in 1972 and is built on four pillars: (1) equitable economic development, (2) environmental preservation, (3) cultural resilience and (4) good governance.<sup>24</sup> The underlying idea is that happy people in destinations create relaxed and pleasant destinations for people to live, and for the tourists who visit them. Therefore, destinations and tourism companies that strive to enrich their societies and culture, can also demonstrate sound business practices.

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<sup>24</sup> Braun, 2009

**Table 4: Social and cultural impacts of tourism from the case studies<sup>25</sup>**

Case study	Relevance to society and culture	Impacts on culture and society	Non-economic benefits to local people	Involvement of local stakeholders
Cultural tourism, Pays Dogon, Mali	Historical and unique architecture in villages, and interpretation by local guides is the key tourism product	Local people are positive about tourism in their communities. Raised awareness of the importance of cultural heritage conservation. Rehabilitation of ancient monuments	Training has been provided in a wide range of areas, including guiding and interactions between hosts and guests	Involvement of different local stakeholders, including municipalities, but sometimes conflict due to a lack of communication and coordination.
Cultural tourism, Zanzibar	Multi racial and multi cultural community of many faiths and origins. Historical architecture, slave-trading port, and spice tours	Rehabilitation of cultural sites (e.g. museums, gardens) Some negative impacts including increases in substance abuse and crime (although other factors may also contribute to these)	Traditional food sold at evening markets in Stone Town.	Events that attract visitors and local people, including film and music festivals.
&Beyond and Wilderness Safaris	Promotion of facilities and opportunities for education and health in local communities	Impacts on cultures and society vary with the destination. Some commercialisation of culture (e.g. village tours), but sensitively managed and monitored.	Infrastructure development (classrooms, clinics). Educational bursaries and training. Environmental education lessons Skills development	Involvement in deciding what local benefits are needed in the community. Educational bursaries from &Beyond are followed by a period where the beneficiary passes on knowledge to their community.
Beach tourism, Seychelles	Creole culture, which reaches tourists through food and dance	Local people demonstrate great pride in their Creole culture	Sales of local food (including fish, spices, juices) and craft.	Local market bazaars have become an integral part of the local and tourist calendar.
The wildlife conservancy program, Namibia	Devolution of responsibility for wildlife management to people, creating empowerment and responsibility	Stable land tenure, and responsibility for management of natural resources.	Training, cultural dances for visitors and tourism enterprises.	Participation and buy-in from local people is a pre-requisite to forming a conservancy. Negotiated contracts with the private sector for joint-ventures.
Hiking tourism, Mount Kilimanjaro	Recognition and reinforcement of the iconic status of the mountain.	High school enrolment rates, life expectancy and adult literacy rates.	Limited involvement of women in guiding or as porters, due to difficult working conditions	Development of porters and guides associations to protect and safeguard them.

Annex 4 contains links to tools that can be used for further information on enhancing the social and cultural impacts of tourism in destinations.

## 7. Innovative and noteworthy issues

One important aspect of this review was to analyse the pioneering, exceptional and noteworthy initiatives taking place in SSA. This collection of case studies has provided a rich palette of innovation, which may inspire others to scale-up or replicate them.

<sup>25</sup> All data is drawn from the case studies, unless indicated otherwise. Note that the MICE study in Nairobi did not address social and cultural issues and is not included here.

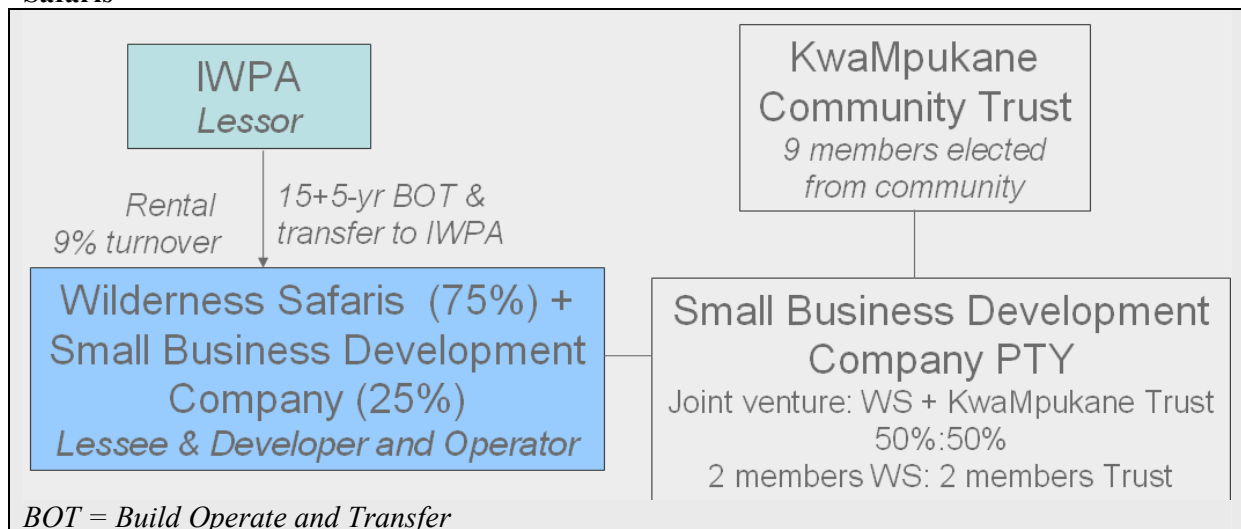


### 7.1. Evolution in joint-venture partnership models

With the vision of creating successful tourism business that local people can benefit from, there has been a trend away from community-based tourism towards joint-venture partnerships in SSA. This trend has recognised that partnerships where communities bring resources (e.g. land, natural attractions), and the private sector brings business acumen and networks (e.g. existing client bases, linkages with tour operators, business planning and promotion experience), can create ‘win-wins for the parties. &Beyond and Wilderness Safaris have both taken the joint-venture model a step further, to evolve the joint-venture model:

- Rocktail Bay Lodge is a tripartite joint-venture between the private sector (Wilderness Safaris), the conservation authority (KwaZulu Natal Wildlife) and a local community (Mqobela). However, from a local benefit perspective, initially few jobs were realised and there was consistent mismanagement of dividends that were distributed to a community trust formed within the Mqobela community.<sup>26</sup> In a second phase of development, therefore, the institutional model was adapted. At Rocktail Beach Lodge, the iSimangaliso Wetland Park Authority (IWPA) leases the land to a joint-venture between Wilderness Safaris and a Small Business Development Company (SBDC). The SBDC is another joint-venture, this time between WS and the KwaMpukane Community Trust. The evolution of the community company (the Small Business Development Company PTY) allowed Wilderness Safaris to participate as a joint-partner, and to provide technical expertise in business and financial management (see Figure 1).

**Figure 1: Institutional arrangements at Rocktail Beach Camp, South Africa, by Wilderness Safaris<sup>27</sup>**



- &Beyond has also established a different form of innovative partnership at Phinda, which has created a win-win situation from the land-claims process in South Africa. Previously a privately owned, developed and operated venture, Phinda became a joint-venture with local communities in 2007, following a land claim. &Beyond did not oppose the claim, and was paid approximately US\$34.5 million by the South African government for the return of 12,000 hectares to the communities. Now &Beyond pays rental fees for areas of land they lease from the communities, and also have traversing agreements to operate their game

<sup>26</sup> Pers. Com. Poultney, cited in Spenceley 2008d; Poultney and Spenceley, 2001

<sup>27</sup> Pers. Com. Poultney, cited in Spenceley 2008d; Poultney and Spenceley, 2001

drives<sup>28</sup>. The rental income is being used for projects including electrification and education<sup>29</sup>. So & Beyond ‘wins’ because they have freed up considerable capital to use for other purposes, and the community ‘wins’ because they reclaimed their land title and now generate substantial income from the tourism partnership.

## **7.2. Paradigm shifts in policy**

The pioneering elements of the conservancy in Namibia are firstly, that the government realised that *the main threat to wild habitats and resources is not overuse, but actually the conversion of land for agriculture and livestock*<sup>30</sup>. This implies that biodiversity conservation depends on giving landowners the right incentives for sustainable land use. When residents living with the resources have a vested interest in ensuring that they can continue to benefit from them, sustainable land use is most likely to succeed<sup>31</sup>. The success of the conservancy program in Namibia demonstrates how a combination of economic incentives and proprietorship creates suitable conditions for sustainable wildlife use<sup>32</sup>. Government approved legislation that made it possible for communities living in communal lands to acquire common property rights to manage and use their wildlife resources. The change in the law made it possible for communities to register conservancies, in which they could take on the rights to manage and use wildlife resources with the assistance of NGOs and government<sup>33</sup>. In Namibia the government formally owns conservancy land but communities have rights of occupation<sup>34</sup>. Similar approaches have been tried in other SSA countries (e.g. CAMPFIRE in Zimbabwe; ADMADE in Zambia), but Namibia has arguably been the most successful to date.

## **7.3. Evaluating and enhancing market linkages**

Value chain analyses (VCA) in Kilimanjaro, Mali, and Zanzibar have allowed agencies to better understand how the poor benefit from tourism, and where the market blockages lie. Using the rich data that comes from the studies, agencies such as SNV and VSO have been able to target their interventions towards enhancing opportunities for entrepreneurs and small businesses to supply the tourism industry. The noteworthy element, therefore, is recognising that not everyone can run a hotel, or be a tour guide. However, there are other opportunities for business in tourism, including through providing food and drink, transport and other services that support the industry.

## **7.4. Shifting the brand with promotion and investment**

Kenya is traditionally a tourism destination famed for its wildlife safaris and white sandy beaches. Kenya conjures iconic images such as the annual wildebeest migration through savannahs of the Massai Mara. The coral-reef lined beaches around Mombassa coupled with enigmatic wildlife provide the perfect ‘bush – beach’ holiday destination. However, outbreaks of violence that followed the December 2007 elections led to a dramatic drop in visitors in 2008<sup>35</sup>. Tourist arrivals dipped by 40% to 1.2 million, bed occupancies declined by an average 65%, and subsequently earnings declined by 19.4% in 2008<sup>36</sup>. However, Kenya has engineered a dramatic turnaround, through an aggressive marketing campaign coupled with investments in the conference and business

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<sup>28</sup> Pers Coms Pretorius and Campbell, cited in Spenceley 2008c

<sup>29</sup> & Beyond, undated

<sup>30</sup> SASUSG, 1996

<sup>31</sup> Jones and Murphree, 2004

<sup>32</sup> Jones and Weaver, 2009

<sup>33</sup> Barnes, 2008

<sup>34</sup> Ashley and Jones, 2001

<sup>35</sup> Ongong'a Achieng, Kenya Tourist Board, cited by USAToday, 2008

<sup>36</sup> MariAnne Ndegwa, Kenya Tourism Board, cited by Lumiti, 2009; Ministry of Tourism 2010

stock<sup>37</sup> by local and international investors. As a result, conference tourism became the fastest growing segment of the industry in Kenya by 2009, with a higher financial impact than leisure tourists<sup>38</sup>. In 2009 the bed occupancy in Nairobi's high class hotels actually surpassed its 2008 levels, despite dropping by 31% between 2007 and 2008<sup>39</sup>. This marketing and promotion had similarly helped to recover the number of visitors to protected areas, so that by 2009 they had returned to their 2006 levels.<sup>40</sup>

### ***7.5. Adaptations in livelihood strategies***

West African countries have begun to shift from focusing on a dependence on agrarian livelihoods and mining, towards industries like technology and tourism. Mali illustrates this type of shift, and has experienced an influx of international organisations focussed on tourism development<sup>41</sup>. Tourism is perceived as a mechanism to reduce poverty and to aid the economic and social growth of countries<sup>42</sup>. The Pays Dogon is noteworthy because focus by NGOs and development agencies on this cultural destination has led to a growth in tourism and linkages with food security<sup>43</sup>. This includes mapping food security plans in combination with tourism.

### ***7.6. Partnerships between agencies***

Partnerships and collaboration between development agencies in destinations has been increasingly observed in SSA. Encouragingly, in destinations like Mali and Zanzibar, NGOs are collaborating and establishing partnerships in order to maximise their impacts on the ground<sup>44</sup>. This is particularly the case when undertaking research and in value-chain interventions. In the Seychelles, NGOs have been partnering with the private sector to provide technical assistance on conservation management. This enhances the attractiveness and value of the tourism product for the private sector, while enhancing biodiversity.

### ***7.7. Close networks of professionals***

One of the interesting aspects of the Seychelles, which probably contributes towards the effectiveness of the sustainable tourism programs, comes from a close network of committed individuals working within the different agencies. Perhaps in part due to the small population, and the limited number of skilled professionals in the tourism and conservation sector, there is adequate communication and collaboration between them and it is relatively easy to arrange meetings when required. There is also an interesting 'rotation' of the professionals between institutions over time, including between government, NGOs and donor projects. This has also led to strong cross-linkages, and understanding particularly within the conservation sector.

## **8. Successes and Constraints**

A comparison of the success and constraints observed within the case studies is provided in Table 5. This demonstrates that for each of the cases, no matter how successful, there are difficulties and constraints that need to be overcome. Tourism interventions are not always easy or fast.

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<sup>37</sup> Mwalya, 2009

<sup>38</sup> Mwalya, 2009

<sup>39</sup> Ministry of Tourism, 2010

<sup>40</sup> Ministry of Tourism, 2010

<sup>41</sup> Solimar International, undated

<sup>42</sup> Solimar International, undated

<sup>43</sup> SNV, 2010

<sup>44</sup> Solimar International, Undated

**Table 5: Successes and constraints observe in the case studies**

Case study	Successes	Constraints
&Beyond and Wilderness Safaris	<ul style="list-style-type: none"> <li>The luxury safari tourism market can generate significant returns in destinations including local employment and training, capital investment, local procurement, biodiversity conservation, and corporate social responsibility.</li> <li>Large portfolios of high quality lodges, in varied natural destinations allow for cross marketing, for clients to take return visits within the group. They also provide some 'cushioning' to market shocks such as the global financial crisis.</li> </ul>	<ul style="list-style-type: none"> <li>To attract investors of this caliber, destinations need to provide an enabling environment including stable land tenure, political stability, access, suitable infrastructure, a suitable natural destination, and medium- to long-term commitment.</li> </ul>
The wildlife conservancy program, Namibia	<ul style="list-style-type: none"> <li>Sustainable use of wildlife by farmers is achieved by giving them the rights to manage wildlife in communal area conservancies.</li> <li>Conservancies have provided stable land tenure for communities.</li> <li>The conservancy framework has made it possible for communities to lease tourism concessions to the private sector. These have resulted in increased local employment, capital investment, income for the state, and wildlife populations.</li> <li>Donor investment in the conservancy process has enhanced community returns.</li> </ul>	<ul style="list-style-type: none"> <li>The process requires a strong policy framework devolving the rights to use wildlife.</li> <li>The processes are complex, and therefore governments need to obtain technical advice with this approach.</li> <li>The process works well in Namibia because of low population densities and rich wildlife, and the poor viability of alternative land uses.</li> </ul>
Hiking tourism, Mount Kilimanjaro	<ul style="list-style-type: none"> <li>The high demand for climbing on Mount Kilimanjaro, relates to its iconic status as the highest mountain in Africa and the low level of technical expertise and equipment needed to reach the summit.</li> <li>Mountain hiking can generate considerable revenue for park authorities (due to the relatively long length of stay) and to local people.</li> <li>On Mount Kilimanjaro 35,000 climbers per year support irregular, seasonal employment for a massive 10,900 people, as guides, porters and cooks.</li> <li>Associations and NGOs supporting the rights of porters and guides, coupled with codes of conduct and regulations can improve working conditions.</li> </ul>	<ul style="list-style-type: none"> <li>The environmental impacts of large volumes of hikers in environmentally sensitive mountainous regions require adequate planning, infrastructure, and management.</li> <li>Working conditions for porters are arduous, with difficult working conditions, and they frequently climb in inadequate clothes due to the high relative cost of suitable shoes and warm clothing.</li> <li>Diversification of tourism activities for hikers, and non-hikers, is important in maintaining and increasing length of stay and tourist expenditure.</li> <li>Enforcement (not just the presence) of protected area regulations is vital.</li> </ul>
Beach tourism, Seychelles	<ul style="list-style-type: none"> <li>Tourism is one of the three main economic sectors in the Seychelles, along with fishing and financial services. Tourism accounts for more than 90% of all export earnings, and is responsible for 56% of all jobs.</li> <li>A strong policy framework, collaboration with a solid conservation NGO network, and partnerships with the private sector can support the conservation of the environment in beach destinations.</li> <li>A network of local technical experts can create amicable atmosphere for collaboration and communication.</li> </ul>	<ul style="list-style-type: none"> <li>Small Island Developing States (SIDS) face human resource constraints, which means that they sometimes need to use expatriate labour for both technical and menial tasks (e.g. construction).</li> <li>Remote tourism destinations have to be particularly adaptive and dynamic in addressing problems that emerge, such as the global recession and negative publicity.</li> <li>To maintain their environmental integrity, developing countries must rigorously enforce their legislation, and avoid undermining them to attract investment.</li> </ul>

*Contd.*

Case study	Successes	Constraints
Cultural tourism, Zanzibar	<ul style="list-style-type: none"> <li>A range of international and local stakeholders contribute towards cultural tourism on the island, including government, private sector, NGOs and UN agencies, and coordination and collaboration is important.</li> </ul>	<ul style="list-style-type: none"> <li>Destinations with tourism based on strong cultural heritage face the challenge of how to make culture economically productive, while conserving it, and also dispersing negative impacts on society.</li> <li>Maximizing the local economic impacts of tourism is constrained by limited local ownership of accommodation facilities, the availability of cheap imports, and the limited availability of training.</li> </ul>
Cultural tourism, Pays Dogon, Mali	<ul style="list-style-type: none"> <li>The collaboration of agencies in destinations can be effective in providing synergistic financial, technical and local support.</li> </ul>	<ul style="list-style-type: none"> <li>The presence of high quality cultural assets is not enough to grow a sustainable tourism industry by itself: product and service development, human resource development, marketing and promotion, and market linkages area also vital.</li> <li>Localised instability and insecurity, and short tourism-seasons can impact on visitation levels and investment.</li> </ul>
Business and conference tourism, Nairobi, Kenya	<ul style="list-style-type: none"> <li>Kenya has managed to ride out a dramatic decline in tourism due to political unrest, and too diversify its tourism offering and encourage investment in the process.</li> <li>Aggressive marketing and promotion of MICE tourism, coupled with investment in conference facilities and accommodation, have demonstrated dramatic improvements in revenue and tourist arrivals.</li> <li>High quality vocational training for hotel employees, and a high caliber of hospitality, is a critical factor in MICE competitiveness.</li> <li>A key advantage for Kenya is its international flight access. Nairobi is served by many international airlines, and is the biggest hub in East Africa.</li> </ul>	<ul style="list-style-type: none"> <li>Concentrating on leisure tourism (or any one segment) only can be risky for destinations, particularly following periods of political turmoil or instability.</li> <li>High levels of taxes, levies and government fees, corruption and overly bureaucratic processes and procedures can undermine private sector investment in the tourism sector.</li> <li>The MICE tourism sector needs to be supported by adequate access, conference facilities, communication (phone and email), and consistent electricity supply. Therefore basic services and infrastructure need to be adequate.</li> </ul>

To summarise, the many **successes** have included:

- **Enabling environment:** The development of sound policies relating to sustainable tourism development; providing stable land tenure for communities and the private sector; enabling residents to benefit from the resources on their land.
- **Economic:** Capital investment; increased yield per tourist; job creation; market linkages; business opportunities for small, medium and micro enterprises (SMMES); diversification of markets.
- **Environmental:** Revenue and technical assistance for biodiversity conservation; partnerships between different actors (e.g. private sector, government, NGOs, communities).
- **Social and cultural:** Empowerment and responsibility for community members; educational and health improvements; social infrastructure development; training and capacity building; partnerships and collaboration between development actors.

Some of the main **constraints** to success and competitiveness have been:

- **Enabling environment:** Limited implementation of effective policies; corruption; bureaucratic processes and high costs of doing business; the need for adequate supporting infrastructure (e.g. transport, education, communication, public health, electricity). Some

tourism opportunities, such as joint-ventures and conservancies, are complex and take time to negotiate.

- **Economic:** High costs of taxes, levies and government fees; sufficient economies of scale to develop viable market linkages; ‘many’ jobs may not necessarily mean ‘many good quality and well-paid jobs’, with decent working conditions.
- **Environmental:** Adequate planning, coupled with conservation management and environmental management systems (e.g. waste, energy, resource use) difficult to achieve. Fragile ecosystems (e.g. mountains, coastal zones) and endangered species require attention.
- **Social and cultural:** The presence of rich culture alone is not enough to guarantee a sustainable tourism industry. It is challenging to avoid and mitigate negative social and cultural impacts of tourism. Vocational training in hospitality and other supportive skills are vital and are challenging to provide in emerging destinations with limited human resources and infrastructure. Defending and protecting informal workers rights is not easy.

In addressing these constraints, and trying to maximise the successes from tourism, a number of approaches can be used. Some of these are outlined in Table 6.

**Table 6: Overcoming constraints in sustainable tourism development**

Issue	Options to overcome constraints
Enabling environment	<ul style="list-style-type: none"> <li>• Development of enabling policies, that are based on sound research and participatory development processes.</li> <li>• Development of appropriate instruments and programs to implement and regulate those policies consistently (e.g. focussing on yield, rather than numbers of tourists)</li> <li>• Simplifying and supporting the development and operation of business through suitable licensing and regulatory instruments.</li> <li>• Vigorously tackling corruption &amp; poor governance by providing transparent, equitable solutions.</li> <li>• Providing trust, space and time for innovation by the private sector.</li> <li>• Monitoring and evaluation of the impact of policy, with mechanisms for feedback &amp; adaptation.</li> <li>• Targeted capital infrastructure development to support tourism, related to demand, and enhancing the destination for residents simultaneously.</li> </ul>
Economic	<ul style="list-style-type: none"> <li>• Creating incentive and taxation instruments that support, rather than punish commercial success.</li> <li>• Provide mechanisms to ensure living, or minimum wages, across the sector, in participation with the private sector.</li> <li>• Promote value for money in tourism products and destinations, coupled with quality service and experiences.</li> <li>• Invest in marketing and promotion.</li> <li>• Establish strong market linkages between the destination and source markets.</li> <li>• Promote strong local value chains, so that local businesses can overcome barriers to engaging in tourism markets, and sell their goods and services to the tourism sector.</li> <li>• Monitor and evaluate the economic and financial returns to society and local people.</li> </ul>
Environmental	<ul style="list-style-type: none"> <li>• Ensure adequate planning, design and location for tourism development, which is cognisant of the impacts on the local environment and resource use.</li> <li>• Avoid negative environmental impacts where possible, and mitigate damage when it occurs.</li> <li>• Provide access to information and technical assistance to support conservation, wise use of resources (e.g. energy and water), and reduce the negative impacts of waste.</li> <li>• Vigorously protect fragile ecosystems and endangered species.</li> </ul>
Social and cultural	<ul style="list-style-type: none"> <li>• Provide access to vocational training for local people in hospitality and tourism (including guiding and craft development)</li> <li>• Protect the rights of workers to safe and healthy working conditions.</li> <li>• Use tourism to conserve, rehabilitate and re-invigorate cultural heritage and traditions.</li> <li>• Adopt participatory processes for planning and decision making with local people.</li> <li>• Tackle and resolve conflicts as they arise, and try to find win-wins.</li> <li>• Recognise that the people living in tourism destinations are an integral part of the asset.</li> <li>• Ensure that enhancements in destinations improve the well-being of residents, as well as tourists (e.g. healthcare, education, sanitation, infrastructure).</li> </ul>

## 9. Synthesis

This paper has analysed the lessons learned from the development of wildlife tourism, cultural tourism, beach tourism and business tourism, to establish:

- Who is doing what, where and how through a market scan;
- Policy tools that are being applied to support sustainable tourism in SSA;
- How success has been achieved for the triple bottom line of sustainable development, including the economic, environmental, social and cultural impacts;
- Best practices in the region for nature-based, cultural, beach and business tourism throughout the seven case studies;
- Innovative and noteworthy processes, issues, and programs in SSA;
- Successes and constraints, and options to overcome problems in terms of the enabling environment, economy, environment and society; and
- Linkages to guidance and tools that can assist destinations in developing sustainable tourism economies.

Of the innovative and pioneering successes reviewed here, how can they be expanded and scaled-up to other destinations? What tools are needed to enable destinations to replicate them? Some suggestions that relate to the most noteworthy elements of the case studies are outlined in Table 7. These should be debated and explored.

**Table 7: Scaling up**

Innovation	How can it be scaled up?
Paradigm shifts in policy on land tenure and natural resource use	<ul style="list-style-type: none"> <li>• Share data on the benefits of secure land tenure and devolving rights to wildlife use.</li> <li>• Evaluate the land-tenure implications and options for expanding the approach to countries with different land-tenure systems.</li> <li>• Develop a ‘How to . . .’ guides, with the tools required to prepare, plan and implement conservancies (including when to, and when not to use them).</li> </ul>
Concessions and joint-venture partnerships	<ul style="list-style-type: none"> <li>• Develop concessions tool templates, models, guidelines and training materials, supported by case study examples.</li> <li>• Develop funding mechanisms to channel donor fund towards concession and joint-venture processes to promote poverty reduction, investment and conservation.</li> </ul>
Evaluating and enhancing market linkages	<ul style="list-style-type: none"> <li>• Share information on the value of value chain analysis (VCA), in terms of the information it generates, and of how to design interventions that improve market linkages in local economies.</li> <li>• Support interventions that have used VCAs in their feasibility and preparatory phases, in combination with environmental and social elements.</li> </ul>
Shifting brands, with promotion and investment	<ul style="list-style-type: none"> <li>• Demonstrate the costs and benefits relating to promotion and branding for destinations, particularly during programs to re-position them.</li> <li>• Provide guidance on what works, and what does not, and the most effective channels to use.</li> <li>• Help destinations to understand what infrastructure and human resource improvements need to go hand in hand with the promotion.</li> </ul>
Adaptations in livelihood strategies for hosts	<ul style="list-style-type: none"> <li>• Develop a suite of tools to assist decision makers in what combination of livelihood activities and industries can work in destinations, based on their context and resources.</li> <li>• Raise awareness that tourism is best used as one of a diverse range of livelihood options for rural people, and should not be promoted as a replacement.</li> <li>• Also raise awareness that tourism does not work everywhere, nor for everyone. There are basic conditions and requirements for tourism to succeed, and that it should be market-led.</li> <li>• Provide support to technical agencies and NGOs who are assisting stakeholders in destinations on enhancing livelihood options.</li> </ul>



*Contd.*

Innovation	How can it be scaled up?
Partnerships between agencies	<ul style="list-style-type: none"> <li>• Encourage strong communication and collaboration between agencies through meetings to share information, plan interventions together, and implement them.</li> <li>• Provide resources preferentially to consortiums of agencies, particularly where international and local agencies work together.</li> <li>• Avoid supporting overlapping or contradictory programs.</li> <li>• Provide sample partnership agreement documents that can be used.</li> <li>• Share best practice examples of multi-stakeholder platforms, including how they are developed, maintained and how they can have more impact than individual agencies.</li> </ul>
Close networks of professionals	<ul style="list-style-type: none"> <li>• Support dialogue and collaboration of different agencies and individuals in destinations, and highlight areas of common understanding and vision.</li> <li>• Encourage linkages between local and international professionals, to promote learning and networking (e.g. through learning networks and think-tanks).</li> <li>• Provide tools that facilitate networks (e.g. meetings, workshops, webinars etc.)</li> </ul>

**Approaches to build capacity** in SSA to scale up these successes effectively in new destination, may include the following:

- Provide training programs for representatives of protected area authorities, tourism and environment decision makers in government;
- Provide access to technical and resource support to the private sector, NGOs and communities;
- Provide easy access to technical tools and training materials developed;
- Develop a series of trainers who can roll out the training materials in destinations; and
- Develop a network of experienced technical advisors who can provide support to agencies throughout the process (e.g. NGOs, consultants).

The **next phase** in this process should ideally be to take each of the **suggested intervention options** and:

- Collate or adapt and develop suitable tools, processes and mechanisms to implement the intervention options (in Table 6), and the methods to scale up successes and improve capacity (in Table 7);
- Provide easy access to the tools (e.g. web-based), and training programs for technicians to learn how to use them;
- Engage with actors in destinations and discuss the findings of this report (including specific case studies, the synthesis, short policy briefs highlighting the key issues, and the powerpoint);
- Identify specific destinations that need support, and what combinations issues and interventions are appropriate and desirable in each instance;
- Establish roles and responsibilities of different actors and stakeholders, both in the destination and from international technical support agencies;
- Develop destination-specific strategies and programs for implementation, workplans, technical expertise requirements and budgets;
- Source financing and appropriate human resources;
- Implement the program, and monitor and evaluate its progress; and
- Report on successes and constraints, and share the findings.

Additional research recommended would be to **expand the selection of case studies**, using the same analysis framework, to include the following:



- Community-based tourism: a review across SSA;<sup>45</sup>
- Gorilla tourism in Rwanda, based on an existing World Bank case study;<sup>46</sup>
- Compare and contrast the Namibian conservancy program, with equivalent programs in Zimbabwe and Botswana;
- Mechanisms for success in tourism public private partnerships in protected areas, including programs from Namibia, Botswana, Mozambique and South Africa;
- Independent sustainable tourism enterprises, to contrast with the large groups of &Beyond and Wilderness Safaris, (e.g. Nkwichi and Guludo lodges in Mozambique);
- Tourism certification, standards, awards and guidelines;
- Major hotel chains and sustainability: including Serena and Marriott hotels; and
- Detailed evaluations of specific donor programs (e.g. UNWTO-STEP; SNV and pro-poor tourism; the ITC's TLPRP).

Once the additional case studies are undertaken, this synthesis should be revisited and adapted accordingly.

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<sup>45</sup> Using existing materials, such as Spenceley, 2008; Dixey 2008 and others

<sup>46</sup> Nielsen and Spenceley, 2009

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## 11. Annexes

### 11.1. Annex 1: Terms of reference for tourism industry research and analysis phase II

#### Review of Nature-based and Cultural-Heritage

#### Tourism Interventions and Best Practices in SSA

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##### I. Overview

Building upon a successful first phase of research, the purpose of Phase II is to delve more deeply into key competitiveness issues informed by the specifics of Phase I findings. Critical to this advanced analysis is the clear delineation of tourism products, consumer/visitor segments and source markets in order to thoroughly understand supply and demand opportunities in the context of current trends. Findings will address crucial aspects of the industry's 1) performance; 2) potential; 3) constraints; and 4) strategies these will be utilized in developing strategic recommendations for SSA's tourism sector to achieve an elevated level global competitiveness.

##### II. Competitive Africa: Background and Utilization of Research

In FY2010/11, AFTFP is critically addressing the challenge of Africa's trade competitiveness through a comprehensive flagship report, *Competitive Africa: How to Double Africa's Market Share in 15 Years*, including rigorous industry level analyses. The objective of this report is to provide new insights into the practical ways by which African policy makers can improve the competitiveness of their country and regions. In particular, the report will focus on the following three questions:

- What are the main constraints to competitiveness?
- What are the political economy issues associated with removing constraints and how can these be addressed?
- How can capacity be built to champion an effective competitiveness strategy?

The report will build on the extensive body of competitiveness research which has been conducted at both the aggregate and micro/industry level through offering "how to" strategies at the policy, industry and national levels. It will integrate empirical research with targeted quantitative analysis and case studies (illustrating from both successes and "interesting" failures) from Africa and illustrative examples from outside of Africa. Specifically, the report will advance current thinking on competitiveness through detailed analysis of several sectors including tourism, light manufacturing, agribusiness and ICT.

##### III. Industry Focus: Tourism and Sub Saharan Africa

The tourism sector comprises diverse services dependent upon man-made and natural resources. It is a cross-cutting economic activity relying on many sectors linkages such as transport, agriculture and infrastructure among others. Research on this sector, while focused on tourism specific indicators and activity, also requires careful consideration of interrelated development activities linked to tourism. A step towards such a review for countries across SSA was taken with Phase I. That research addressed key questions regarding the sector's challenges to competitiveness.

Highlights from Phase I research include:

##### **Sub-Saharan Africa Tourism Performance:**

- SSA tourism has been growing faster than the world average and is expected to continue to grow
- Tourist arrivals to SSA grew from 6.7 million in 1990 to 29.7 million in 2008
- SSA tourist receipts reached US\$21.8 billion in 2008
- Direct tourism employment is estimated at 3.4 million (2008)
- Most countries in SSA are heavily reliant on one or two source markets

- While *nature based tourism* is important to all regions, *safari tourism* is important to Southern Africa and East Africa; *resort tourism* is a key product for East and West Africa; *cultural heritage tourism* has most potential in Sahel countries; and *business tourism* is growing in West and Central Africa

#### **Sub-Saharan Africa Tourism Economics:**

- SSA tourism has shown greater resilience to the world economic crisis than other regions
- Average contribution of tourism to SSA GDP is 5.9%
- In East Africa, tourism contributes an average 8.9% to GDP. The Seychelles (50%) and Mauritius (25%) rely most on tourism
- In Southern Africa, tourism contributes just 3.9% to GDP. Namibia relies most on tourism (8%)
- In West Africa, tourism contributes 5.6% to GDP. Cape Verde and The Gambia rely most on tourism
- In Central Africa, tourism contributes just 1% to GDP

Phase I research identified Sub-Saharan Africa’s main constraints and suggested crucial tourism sector enablers to be leveraged for increased competitiveness. It was concluded that to move forward, key issues to be addressed are: i) Air access needs to be viable; ii) Political support for tourism needs to be proactive; iii) Standard accommodation needs to be in place; iv) Business security adequate, v) Availability of debt financing certain; and vi) Unrestricted movement of labor established.

Leveraging Phase I findings, Phase II research will further scrutinize paths to competitiveness through consideration of performance, potential, constraints, benchmark of innovative and successful nature-based tourism and cultural heritage tourism initiatives across SSA.

#### **IV. Phase II Research: SSA Tourism Development Interventions**

##### **Sector Study Approach**

The purpose of the research described in this TOR is to review successful and innovative tourism development activities across Africa in order to highlight the most effective practices/programs. The research will answer the following questions:

- Who are the key actors/organizations involved in tourism development in the region?
- What are the principle approaches and areas of focus?
- What are the best practices in the region for tourism development, with particular focus on nature-based and cultural heritage tourism interventions?
- What models and experiences from other regions (such as Asia) are applicable to SSA?

This work will result in the creation of a map of actors/organizations (ie, NGOs, bilaterals and multilaterals, donors, etc). Drawing upon this map of the “development marketplace”, illustrative cases of best and innovative practices will be highlighted and categorized. Approximately 15 case studies will distill key development strategies and techniques which foster sustainable interventions. For example, initiatives to be analyzed will include those funded by major bilateral and multilateral donors as well as initiatives funded by national and international NGO’s and private sector partners. The research will analyze projects in terms of methods, models and mechanisms used to leverage tourism for poverty alleviation, job generation and enterprise development in conjunction with environmental and cultural heritage preservation. The research will review the costs of intervention compared to return to communities, key players, and sustainability of interventions. Analysis of the marketplace map and case studies findings will be synthesized into prioritized strategies and recommendations advisable for enabling SSA tourism to compete more effectively on a global basis.

The research will explore four major criteria of successful and innovative tourism development projects:

- (i) Relevance – the extent to which the activity is suited to local and national and regional development priorities.

- (ii) Effectiveness – the extent to which project objectives have been achieved or how likely it is to be achieved.
- (iii) Innovation – the extent to which interventions are unique, important to beneficiaries and marketable.
- (iv) Sustainability – the likely ability of an intervention to continue to deliver benefits for an extended period of time after completion. Projects need to be environmentally as well as financially and socially sustainable.

The consultant will present a strategic review of innovative tourism development initiatives in SSA to highlight concept, design, model, implementation and impacts of key interventions, the implementation of the project in terms of quality, efficiency and effectiveness of activities carried out as well as the likely sustainability of project results. The review should take into account the extent to which the implementation of the project has been inclusive of relevant stakeholders and the degree to which it has been able to foster collaboration between different partners. The evaluation should also consider if the project has had significant unexpected effects, whether of beneficial or detrimental character.

Based on the results obtained from the review of projects and resulting donor map the consultant will carry out case studies of projects highlighting success indicators leading to shared growth, poverty reduction, job generation (formal and informal) and sustainability. Case studies should focus on more than one type of tourism and include examples of successful operations, particularly in nature-based tourism, heritage tourism, and creative industries. Case studies will focus on SSA with examples from other regions, such as North Africa and Asia, included as appropriate to demonstrate model interventions applicable to SSA.

### **Sector Study Outputs**

The proposed study will summarize activity and highlight the situation in Sub-Saharan Africa in terms of existing successful and innovative tourism development interventions, particularly in the areas of nature-based tourism and heritage tourism.

Specific outputs include, but are not limited to:

- Strategic analysis of existing best practices and innovative tourism operations in SSA.
- Synthesis and ranking of tourism interventions based on innovation, relevance, effectiveness, and sustainability.
- Profiling exercise to include approximately 15 case studies (2-3 pages) of successful and innovative SSA programs/interventions.
- Synthesize success factors and recommend new approaches to tourism development interventions that will lead to improved tourism project development as well as sustainability of tourism products developed in SSA.

**11.2. Annex 2: Market scan of who is doing what, where and how in tourism in sub-Saharan Africa**

**Table 8: Government agencies**

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
South African National Parks	Public-private partnerships (PPPs) in national parks: ecotourism concessions in national parks; retail concessions. Empowerment, finance and environmental requirements. PPP toolkit developed	South Africa	Groundbreaking PPPs with economic, social and environmental requirements.	<a href="http://www.sanparks.org">www.sanparks.org</a>
Namibia	PPPs in concession areas. Ecotourism. Livelihood benefits (hunting, craft, joint venture partnerships)	Namibia	Groundbreaking conservancy program, incorporating Community-Based Natural Resource Management (CBNRM) and joint ventures, hunting and other livelihood activities. Adequate Monitoring and Evaluation (M&E)	<a href="http://www.irdnc.org.na/">www.irdnc.org.na /</a> <a href="http://www.met.gov.na/programmes/cbnrm/cons_guide.htm">http://www.met.gov.na/programmes/cbnrm/cons_guide.htm</a>
Botswana (ecotourism)	High end ecotourism. Concessions to private sector. Destination stewardship (won World Travel and Tourism Council (WTTC) Tourism for Tomorrow award in 2010). Ecotourism manual for operators	Botswana	Pushing high-end ecotourism from concessions perspective. Finalist Tourism 4 Tomorrow awards 2010	<a href="http://www.botswanaturism.co.bw">www.botswanaturism.co.bw</a>
Madagascar	Concessions in protected areas	Madagascar	Concessions program linking with private sector	
The Gambia	Responsible tourism policy. Coastal tourism modifications to improve supply chain.	Gambia	Government leadership, in collaboration with international NGO technical support	

**Table 9: Multi-lateral actors**

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
Development Bank of Southern Africa	Support to development initiatives within South Africa and the Southern Africa Development Community (SADC) region, in the realization that infrastructure delivery has broader socio-economic and cross-border implications and impacts. Tourism: attractions, accommodation facilities and broader tourism infrastructural products such as airports and roads.	SADC countries (most tourism in South Africa)	PPPs, community partnerships, agritourism, Community-Based tourism (CBT)/Nature-based tourism (NBT)	www.dbsa.org
UNESCO (World Heritage Sites)	World Heritage Site (WHS) conservation: cultural and NBT. Funds allocated for WHS in danger	SSA: South Africa (8); Namibia (1); Mozambique (1); Tanzania (7), Botswana (1), Kenya (4), Malawi (2), Madagascar (3), DRC (5), Uganda (3), Zambia (1), Seychelles (2), Ethiopia (8), Zimbabwe (5), Benin (1), Burkina Faso (1), Cameroon (1), Cape Verde (1), Central African Republic (1), Cote d'Ivoire (3), Gabon (1), Gambia (2), Ghana (2), Mali (4), Mauritius (2), Niger (2), Nigeria (2), Senegal (5),	Protected status for WHS at global level.	www.unesco.org / whc.unesco.org/en/35/
UNIDO	COAST (Collaborative Actions for Sustainable Tourism Project): Promote the conservation, management and monitoring of this coastal biodiversity. The project will also aim at enhancing and diversifying sustainable local livelihoods through ecotourism as a means of alleviating poverty.	West and SSA: Mozambique, Kenya, Tanzania, Seychelles, Ghana, Gambia, Senegal, Cameroon, Nigeria	Integrated approach to coastal tourism management	www.unido.org
United Nations Conference on Trade and Development (UNCTAD)	Value chain analysis (VCA) approach to tourism development. Opportunity studies. Training modules. Interventions funded by others	Mozambique, Senegal, Rwanda	VCA approach: but not coastal/NBT. Cultural proposed in Syria	www.unctad.org



Contd.

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
United Nations Development Programme (UNDP)	Millenniums villages (also promoting tourism). Support to conservancy development and protected areas in Namibia. Work on mainstreaming biodiversity in industry including tourism in Seychelles. Mauritania work with artisans. Mauritius work on coastal tourism	Rwanda, Namibia, Seychelles, Mauritius. Mauritania	The Millennium villages	www.undp.org/africa
UNWTO – Sustainable Tourism Eliminating Poverty (STEP)	Pro-poor tourism. Variety of projects in countries aimed at reducing poverty. Coastal, NBT, CBT. Linkages with other agencies (e.g. SNV, Italian government)	Global. In SSA (Ethiopia (5); Kenya (4); Madagascar (5); Mozambique (1); Rwanda (2); South Africa (1); Southern Africa (1); Tanzania (3); Zambia (1), Burkina Faso (2), Benin (1), Niger (1), Cameroon (2), Ghana (3), Guinea (1), Mali (7), Senegal (2), SADC (1), West Africa (multi-destination marketing; cross border national parks - Benin, Gambia, Guinea, Guinea Bissau, Mali, Mauritania, Niger, Senegal and Sierra Leone (2))	Huge program of implementation projects in diverse countries focussed on poverty reduction. Reporting on '7 mechanisms' of poverty reduction.	www.unwto.org/step

**Table 10: Bi-lateral development agencies**

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
AfD	Development of Quirimbas national park (NP); Limpopo NP development	Mozambique		www.afd.fr/jahia/Jahia/lang/en/home
DFID	Assistance to farmers to sell better sized crabs to the hotel sector. With VSO	Tanzania (Zanzibar)	Value chain intervention	www.dfid.gov.uk
GtZ	PPPs and VC linkages in tourism (Mpumalanga, South Africa). Conservation of Pendjari biosphere reserve & livelihood activities, Benin. Protection of Nature Bayanga "Dzanga-Sangha", Central African Republic, and promotion of ecotourism	Benin, South Africa, Central African Republic	VCA approach (Mpumalanga)	www.gtz.de/en
JICA	Sustainable tourism conference in Uganda in 2009. Tourism Development Project through Strengthening Public-Private-Partnership in Ghana	Uganda, Ghana		www.jica.go.jp/english/

Contd.

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
KfW	KAZA: Development of park infrastructure, ecological corridors, wildlife management, the coordination of private initiatives of the local population with private investors in tourism, and in the medium term for demining and health programmes. South Africa: support Southern African Wildlife College. GLTFCA work on Limpopo NP (resettlement). Madagascar: concessions in national parks. Namibia: Etosha infrastructure & catering training. Tanzania: Game Management in the Selous Game Reserve	Zambia, Namibia, Zimbabwe, Botswana, Angola (KAZA), South Africa (SAWC), SA, Zim, Moz (GLTFCA), Namibia (Etosha), Madagascar (PPPs), Tanzania	Use of TFCA approach (not innovative) and work on job development. Resettlement in Moz	<a href="http://www.kfw.de">www.kfw.de</a>
NORAD	CBNRM and land use planning, infrastructure for tourism (Zambia), NRM (Tanzania)	Zambia (Kafue), South Africa, Tanzania, Mozambique (Niassa, Bazaruto), Uganda, Malawi	CBNRM approach, park development	<a href="http://www.norad.no/en">www.norad.no/en</a>
USAID	NBT, Coastal tourism, protected area conservation, PPPs, ecotourism, conservancies, infrastructure development	Global - but in SSA: Mozambique (Northern Arc, Gorongosa Park, Lake Niassa.), Rwanda (Nyungwe forest), Kenya, Tanzania. Namibia		<a href="http://www.usaid.gov">www.usaid.gov</a>

**Table 11: Private sector actors**

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
&Beyond	PPPs. Luxury nature-based tourism. Coastal tourism. Private PAs. Africa Foundation. Presentations at international conferences	27 lodges in SSA (Botswana, Kenya, Mozambique, Namibia, South Africa, Tanzania, Zimbabwe, Zambia) and 4 in India	Large network of lodges allows reduced risk for new lodges coming into network. Purchasing land and rehabilitating it for conservation. NGO linked to channel guest donations to local communities. Transfer of private sector to Joint Venture (e.g. Phinda)	<a href="http://www.andbeyond.com">www.andbeyond.com</a>
African Parks	Approach combines conservation practice with business expertise. Emphasise financial sustainability of the parks, principally through tourism, associated private enterprise and payments for eco-system services for economic development and poverty alleviation	5 destinations in SSA (Malawi, Zambia x 2, Democratic Republic of Congo (DRC), Rwanda)	Innovation on private park management: taking private sector concessions of protected areas, and running them as a business	<a href="http://www.africanparks-conservation.com">www.africanparks-conservation.com</a>
Banyan tree	Luxury nature-based tourism / coastal tourism. Environmental Management Systems (EMS). Linkages with local communities (CSI)	SSA (Seychelles), Asia (China, Thailand, Bahrain, Indonesia, Korea, United Arab Emirates (UAE), Maldives), South America (Mexico)	Finalist Tourism For Tomorrow Award 2010 (Global business)	<a href="http://www.banyantree.com">www.banyantree.com</a>
Gambia is Good	A pro-poor fruit and vegetable trading business. Work with Gambian farmers to bring the freshest, highest quality produce available, so they can feel confident that purchases contribute to local farmer incomes.	Gambia	Working with SMMEs in tourism and VCAs	<a href="http://gigorder.com">gigorder.com</a> / <a href="http://concernuniversal.org">http://concernuniversal.org</a>
Gorongosa	Rehabilitating Gorongosa, developing nature-based tourism infrastructure (mid-range), and tendering concessions (from budget to luxury), marketing. Working with local communities. Investing \$2m per year for 20 years	Gorongosa National Park, Mozambique. Developing different camps and concessions	Innovation on concessions program (hybrid of South African National Parks / Mozambique and other processes). Innovative for private sector to invest so much money in a park, and for government to allow this kind of concession	<a href="http://www.gorongosa.net">www.gorongosa.net</a>

Contd.

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
Great Plains Conservation	Preventing environmental destruction through sound conservation & environmental sustainability through sensitive, low volume & low impact conservation-ecotourism.	Private lodges in Botswana, Tanzania, Kenya & Seychelles, India. Cultural heritage in Cape Town. Developments in Rwanda in progress	Builds on model started at Wilderness Safaris. Carbon offsetting program planned for Rwanda	<a href="http://www.greatplainconservation.com/intro.html">www.greatplainconservation.com/intro.html</a>
Mantis Collection	A group of five star boutique accommodation and game reserves. Nature based and city tourism enterprises. Philosophy of responsible and ecologically sensitive development, supporting the local environment through community development projects and conservation of resources.	35 enterprises in total. 22 lodges in SSA (South Africa, Rwanda, Zambia, Mozambique), Antarctica, Europe, South America,	Linkages with NGOs. Mixture of city and wildlife enterprises. Winner of various awards	<a href="http://www.mantiscollection.com">www.mantiscollection.com</a>
Maskakutu	Lodge on tidal estuary with innovatively designed floating platforms. Tree planting, digging wells for water, protecting forest. Employing local people. Using natural material. Encouraging local culture (dance, craft, song). Canoe trips on river. Guided bush walks.	The Gambia	Architectural design and construction to protect the natural environment.	<a href="http://www.makasutu.com">www.makasutu.com</a>
Sandele Bay Eco-Retreat	Development of lodge in conjunction with local community.	Gambia	Joint venture between community and private sector	<a href="http://www.sandele.com">www.sandele.com</a>
Singita	Luxury nature-based tourism. CSI. Trading 'fairly'	9 lodges in SSA (South Africa, Tanzania, Zimbabwe)	Finalist WTTC Tourism For Tomorrow Award 2010 (Conservation). Fair Trade in Tourism South Africa (FTTSA) accredited in SA	<a href="http://www.singita.com">www.singita.com</a>
Wilderness Safaris	Luxury nature-based tourism. Coastal tourism. PPPs. Developing indicators for sustainable tourism. CSI with Children in the Wild.	47 lodges in SSA (Botswana, Malawi, Namibia, South Africa, Seychelles, Zambia, Zimbabwe)	Groundbreaking work in Namibia on joint-ventures in conservancies. Strong relationships with NGOs (e.g. Save the Rhino) in destinations. Developing new indicators for sustainability	<a href="http://www.wilderness-safaris.com">www.wilderness-safaris.com</a>

**Table 12: NGO actors**

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
African Safari Lodges program	The African Safari Lodge (ASL) Foundation manages an innovative programme designed to galvanise transformation in deep rural areas of Southern Africa. The lasting partnerships created between safari lodge operations and the people of the surrounding communities are generating wealth and well-being	South Africa, Namibia, Botswana, Mozambique	Work on PPPs, training and support for communities engaging in joint ventures. Working also with the International Finance Corporation, NGOs (Technoserve) and funding including from Ford Foundation.	<a href="http://www.asl-foundation.org">www.asl-foundation.org</a>
African Wildlife Foundation	Involve, educate and equip local people to practice sustainable land management – and reap economic benefits. Lay foundations of scientific research to understand the landscape, the wildlife, the people and their complex interactions. Build intricate web of laws, policies and practices that bring stakeholders together (from government departments to villages to safari operators) so that lands are managed intelligently for the benefit of all.	West and SSA: Congo (DRC); Kazungula (Botswana, Namibia, Zambia, Zimbabwe); Kilimanjaro (Kenya and Tanzania); Limpopo (Mozambique, South Africa and Zimbabwe); Maasai Steppe (Tanzania); Regional Parc W (Benin, Burkina Faso, Niger); Samburu (Kenya); Virunga (DRC, Rwanda and Uganda); Zambezi (Mozambique, Zambia and Zimbabwe)	Using heartlands - transboundary areas as focus for conservation and development.	<a href="http://www.awf.org">www.awf.org</a>
Association of Small Scale Enterprises in Tourism (ASSET)	Membership organisation, which brings together, advocates for, and promotes a large number of small enterprises that were active in the tourism industry in The Gambia.	Gambia	Working with SMMEs in tourism	<a href="http://www.asset-gambia.com">www.asset-gambia.com</a>

Contd.

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
Conservation International	Kakum Canopy Walkway in Ghana - over-successful. South Africa work with Richtersveld community in their World Heritage Site. Finance for lodges in Mozambique and Madagascar	Global: biodiversity hotspots. Ghana. South Africa. Madagascar, Mozambique	Canopy walkway in Ghana was innovative - and helped develop a new tourism destination.	<a href="http://www.conservation.org">www.conservation.org</a>
Ecotourism Kenya	Ecotourism Kenya has four key programme areas: (1) Community Outreach (2) Awareness Creation & Information Sharing (3) Standards & Best Practices (4) Research & Consultancy. Responsible tourism certification. Includes for coastal, NBT and cultural tourism products. Community Outreach Program - integrating CBT into the mainstream.	Kenya	The oldest sustainable tourism program in Africa. Won Africa Investor award 2010 for SME development	<a href="http://www.ecotourismkenya.org">www.ecotourismkenya.org</a>
Fair Trade in Tourism South Africa	Responsible tourism certification for the private sector in South Africa. Includes for coastal, NBT and cultural tourism products. 41 accommodation and 25 activities certified	South Africa	First Fair Trade certification in the world for tourism	<a href="http://www.fairtourismsa.org.za">www.fairtourismsa.org.za</a>
Ford Foundation	Support to ASL and Technoserve. PPPs, CBT. Expanding opportunities for poor and low-income families worldwide to access public and private programs that encourage savings would enable families to build economic security over a lifetime. Finding innovative ways to improve the livelihoods of rural residents.	Mozambique, South Africa	Work on PPPs. Funding agency. Collaboration with ASL and Technoserve	<a href="http://www.fordfoundation.org">www.fordfoundation.org</a>
International Gorilla Conservation Program - IGCP (AWF, FFI, CARE)	Developed Sabinyo Lodge as luxury Joint Venture in Virunga Volcanoes. Another joint venture in progress (difficulties) in Uganda. Training for gorilla tourism	Rwanda, DRC, Uganda interface, in Virunga Volcanoes	Three major NGOs coming together to collaborate on one program for mountain gorilla conservation	<a href="http://www.igcp.org">www.igcp.org</a>

Contd.

Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
IUCN	Has World Commission on Protected Areas Tourism Specialist Group (being revitalised now). Has CBT lodges in Africa (e.g. Mozambique). Volunteer network provides technical advice - cultural and ecotourism. Business and biodiversity program	Global. Office for East and Southern Africa in Nairobi	Use of volunteer network of professionals.	www.iucn.org
Namibia Community Based Tourism Assistance Trust (NACOBTA)	Supports communities in their efforts to develop and operate tourism enterprises profitably as well as sustainably. Membership organisation. Technical support provided	Namibia. 62 member organisations	Tried to do CBT, but limited market understanding. Works better than UCOTA	www.nacobta.com.na
Peace Parks Foundation	Jointly manage natural resources across political boundaries – Transfrontier Conservation Areas (TFCAs)	10 TFCAs in SSA: Ai Ais Richtersveld, Kgalagadi, Greater Mapungubwe, Maloti Drakensberg, Great Limpopo, Lubombo, Malawi/Zambia, KAZA, Lower Zambezi, Liuwa Plains	Addressing TFCAs. Various methods for developing tourism, organising communities. CBT, NBT	www.peaceparks.org
SNV	Pro-poor tourism. Capacity building for local tourism stakeholders. Implementation of UNWTO-STEP projects. M&E of impacts on poverty. Network of advisors. Publications	85 advisors in West, Central, East and Southern Africa; Asia; Latin America; the Balkans	Having technical advisors in destinations building local capacity in sustainable tourism.	www.snvworld.org/en/ourwork/Pages/tourism.aspx
Technoserve	Gives eco-lodge ventures with help on business plans, financing and management skills. Piloting ways to promote locally owned tourism businesses and regional linkages among travel-related companies to create a destination travel circuit. Investigating clients in the Sodwana and Madikwe (South Africa). Helped Swazi Trails (a leading local tour company) and World Hotel Link to establish a web site for B&Bs	Mozambique, South Africa, Swaziland	Business approach to development	www.technoserve.org
Uganda Community Tourism Association (UCOTA)	Aim to spearhead sustainable community based tourism through capacity building, marketing, networking, advocacy and enterprise development in collaboration with stakeholders aiming at increasing community benefits, promoting quality standards, ownership and conservation of natural and cultural resources for better livelihoods.	Uganda. 50 member groups representing 1200 people	Tries to do CBT, but limited market understanding.	www.ucota.org

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Actor	What are they doing?	Where are they doing it?	What is innovative?	Website
WWF (World Wide Fund for Nature)	Conservation and development. Biodiversity focussed but broad programs. WWF's mission is to stop the degradation of our planet's natural environment, and build a future in which humans live in harmony with nature.	Global. Office for East and Southern Africa in Nairobi. Namibia (LIFE, Human wildlife conflict), South Africa (Rhinos, Turtles), SSA (CBNRM), Zambia (Kafue), Uganda (Rwenzoris), Albertine Rift region. Mozambique (Quirimbas)	LIFE program collaborated on conservancies in Namibia (decent results in joint ventures, CBNRM, M&E). Rhino expansion program in South Africa also going well, and partnerships with the private sector.	<a href="http://www.panda.org/earpo">www.panda.org/earpo</a>



### **11.3. Annex 3: Evaluation framework**

#### **1. Overview of the concept**

Design, Model, Planning and development, Implementation

#### **Box 1: Key issues in this case study**

#### **2. Motivation of the actor**

Who is the actor? What type of actor are they? (e.g. UN, NGO etc). What are they doing? (what is the area of focus?) How are they doing it? (what is the approach) How much money/resources/time has been invested? Why are they doing it?

#### **3. Relevance to policy**

Is the activity suited to national development priorities? How is the activity aligned with the actor's strategies?

#### **4. Effectiveness and impact**

Does the project support: private sector growth, competitiveness, job creation, job productivity

#### **5. Innovation and noteworthy issues**

What is noteworthy / exceptional / innovative / pioneering?

#### **6. Sustainability**

##### **a) Economic**

Poverty reduction, Job creation (formal and informal). Business viability / financial sustainability / is it marketable. Is the intervention likely to deliver benefits for an extended period of time after completion?

Shared growth: Does it create growth that creates benefits throughout society, including the poor, including those living in more remote rural areas, including women and youth?

##### **b) Environmental**

Environmental conservation / sustainability. Biodiversity conservation; protected areas; planning and construction; water use; waste disposal; energy use (e.g. renewables); carbon. Environmental Impact Assessment and Environmental Management Systems. Interviews and desk study

##### **c) Social and cultural**

Cultural preservation / social sustainability. How are relevant stakeholders involved? Collaboration with different partners fostered? How do local people benefit?

## 7. Successes and Constraints

What has worked? What has not worked? What were the factors that led to the success/difficulties? What are the tradeoffs? What has made a difference? Has it leveraged foreign direct investment? What are the main constraints to competitiveness? What are the issues associated with removing constraints? (including political economy) How can these be addressed?

How can capacity be built to champion an effective competitiveness strategy?

Given the investment (time, resources, funds) and the benefits - is it effective as an intervention?

### Some useful weblinks

Institution	Website

## 8. Acronyms

## 9. Acknowledgements

## 10. References

## 11.4. Annex 4: Supplementary guidance and tools

### For government and policy makers on sustainable tourism in destinations

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- *Guide for Local Authorities on the Development of Sustainable Tourism*. Author: UN World Tourism Organisation (1998). Publisher: UNWTO, Madrid: Spain
- *Indicators of Sustainable Development for Tourism Destinations: A guidebook*, Author: UN World Tourism Organisation (2004). Publisher: World Tourism Organisation. Madrid: Spain
- *Sustainable tourism in protected areas: Guidelines for planning and management*, Authors: Eagles, P. F. J, McCool, S. F., and Haynes, C. D. (2002). Publisher: IUCN WCPA World Commission on Protected Areas, Best Practice Area Guidelines Series No. 8
- *The Green Host effect: an integrated approach to sustainable tourism and resort development*. Authors: Sweeting, J. E. N., Bruner, A. G., and Rosenfeld, A. B. (1999). Publisher: Conservation International

### On enhancing the economic and financial impact of tourism

- *Tourism and poverty alleviation: practical steps for destinations*. Authors: Denman, R. and Denman, J. (2009). Publishers: SNV & UNWTO
- *Tourism and poverty reduction: Pathways to prosperity*, Authors: Mitchell, J. and Ashley, C. (2010). Publisher: Earthscan, Tourism, Environment and Development Series
- Pro-poor value chain analysis tools from the Export Led Poverty Reduction program of the International Trade Centre. See [www.intracen.org/poverty-reduction](http://www.intracen.org/poverty-reduction)
- A series of “How to . . . ?” briefing tools from the Overseas Development Initiative, available at [www.odi.org.uk](http://www.odi.org.uk):
  - Brief 1: Boosting procurement from local businesses
  - Brief 2: Stimulating local cultural and heritage products
  - Brief 3: Building local partnerships
  - Brief 4: Setting corporate priorities and managing internal change

### On enhancing the environmental impacts of tourism

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### **11.5. Annex 5: Moving from a policy framework to implementation of Sustainable Tourism in South Africa**

A summarised timeline of key activities and events that have illustrated the development of responsible tourism in South Africa.

1996	South Africa releases its White Paper on Tourism Development and Promotion, which launches the concept of responsible tourism, that promotes responsibility to the environment through its sustainable use; responsibility to involve local communities in the tourism industry; responsibility for the safety and security of visitors and responsible government, employees, employers, unions and local communities
2002	Following an extensive participatory process, the government releases national Responsible Tourism Guidelines, and a Responsible Tourism Manual <sup>47</sup> .
2002	The World Summit on Sustainable Development parallel event takes place, as the 1st international Conference on Responsible Tourism in Destinations held in Cape Town. The Cape Town Declaration on Responsible Tourism is released <sup>48</sup> .
2002	The Federated Hospitality Association of South Africa releases its Imvelo Awards for responsible tourism in the private sector. This becomes an annual event.
2002/3	Responsible Tourism Planning Framework is produced for Gauteng on behalf of Gauteng Tourism Authority and the Development Bank of Southern Africa
2004 – 2005	Development and implementation of national Training Programme in Responsible Tourism Planning for Provincial and Municipal Officials for the Development Bank of Southern Africa and the Tourism Education and Training Authority (THETA)
2005	Tourism Black Economic Empowerment Charter released
2007	Series of provincial workshops (Western Cape, KZN, Gauteng and Limpopo) for the tourism sector “Responsible Tourism and Market Advantage”
2008	Research among 244 tour operators in the Western Cape think that responsible tourism is important, but are not implementing it <sup>49</sup>
2008	The private sector operator &Beyond (then CCAfrica) organises a ‘Responsible luxury’ summit at Indaba (the largest regional tourism trade fair)
2009	Responsible tourism certification programs in South Africa have certified 142 tourism enterprises in the country <sup>50</sup> .
2008-9	South Africa develops National Minimum Standards for Responsible Tourism, in line with the 2002 guidelines and the Global Sustainable Tourism Council criteria. They are an effort to establish a common understanding of responsible tourism. An associated accreditation system will award a seal of accreditation to tourism certification agencies that are competent to offer sustainability certification schemes to tourism businesses. These standards are currently with the South African Bureau of Standards for revision, and will be rolled out in 2011.
2008-9	South African National Parks develops a Responsible Tourism strategy.
2010	Research demonstrates that the private sector in Gauteng is largely unaware of responsible tourism strategies, or of how to use them <sup>51</sup> .

<sup>47</sup> Spenceley, 2008b

<sup>48</sup> Spenceley, 2008b

<sup>49</sup> Frey and George, 2008

<sup>50</sup> Spenceley et al, 2009

<sup>51</sup> Hermann et al, 2010