



Tourism in the Congo Basin Rainforests

How to accelerate tourism and make it regionally sustainable



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Client

German Facilitation to the Congo Basin Forest Partnership

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EXECUTIVE SUMMARY

This study was performed with the intent of understanding the challenges to developing ecotourism in the Congo Basin, and of identifying actions and recommendations to overcome these challenges. A background study of the existing literature, research articles, reports and national strategies (where available) was performed to ascertain the political strategies and academic understanding of ecotourism in the region. Interviews were conducted with tourism experts deeply familiar with the region. Interviewed experts included ecotourism development experts, international marketing experts, ecotourism operators and entrepreneurs from the region. Each interview participant also completed a survey about their perceptions of potential obstacles and enabling conditions. The interviews and surveys were designed to draw on the first-hand experiences of on-ground experts and to access their thoughts, reflections and their understanding of ecotourism in the region.

Tourism as a development tool in Africa is recognized by the African Union (AU) and noted in the African Agenda 2063 and the 2004 AU-New Partnership for Africa's Development (NEPAD) Tourism Action Plan. AU Ministerial Working Groups have recognized the importance of improving state-business relationships through public-private partnerships (PPPs), improving local and regional air access (Open Skies for Africa), and improving visa access (African Common Passport) (AU 2016). However, very little has been done towards these ends and tourism development in the Congo Basin has not been a priority to date. As such, the necessary enabling conditions have not been put in place.

There are three prerequisites for tourism development: quality attractions, good accommodation, and easy access. The central African rainforest countries have incredible attractions, but very little accommodation and very limited to no access. However, over that last decade, there have been several private investors that have taken tentative steps toward pioneering professional ecotourism in Gabon, Republic of Congo, and Central African Republic. It is important to recognize that these private businesses are key for sustainable economic development, creating the nascent hospitality industry and marketing tourism products to compete with other destinations in the world.

The results of the study indicate that to promote ecotourism development, national governments in the region need strong policy frameworks, country-wide marketing strategies, and the alignment of government departments and their actions. The experts all agreed that easing visa requirements, improving access, and marketing the African rainforests are top priorities to accelerate investment and ecotourism development.

To generate the required political support, regional partners could convene a presidential summit to promote the benefits of tourism, and to highlight the prerequisites and the concrete steps for accelerating ecotourism development in their countries. Successful leaders could commit to removing hindrances to tourism development and supporting helpful legislation such as prioritizing favorable immigration policy, open sky policies, and fiscal incentives through the provision of tax relief to pioneer investors. A high-level regional group could be formed to initiate the required prerequisites and facilitate legislation that would remove key obstacles to ecotourism development.

It is clear that there are many challenges to jump starting tourism in the Congo Basin and the results of this study converge on several explanations for why ecotourism in the Congo Basin rainforest countries has not yet developed. Recommendations to resolve these issues include holding a presidential summit; easing access to visas; and removing barriers to private aviation, which, if implemented, will greatly improve the competitiveness of the region and accelerate the development of ecotourism as a viable economic sector.

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LIST OF ABBREVIATIONS

AGATOUR	<i>Agence Gabonaise de Développement et de Promotion du Tourisme et de l'Hôtellerie</i>
AU	<i>African Union</i>
AU-STCTIIIET	<i>The First Ordinary Session of the African Union Specialized Technical Committee on Transport, Intercontinental and Interregional Infrastructures, Energy and Tourism</i>
CAR	<i>Central African Republic</i>
CBFP	<i>Congo Basin Forest Partnership</i>
CREST	<i>Center for Responsible Travel</i>
DRC	<i>Democratic Republic of Congo</i>
EG	<i>Equatorial Guinea</i>
GDP	<i>Gross Domestic Product</i>
ITB	<i>ITB Berlin (Internationale Tourismus-Börse Berlin)</i>
NEPAD	<i>New Partnership for Africa's Development</i>
NGO	<i>Non-Governmental Organization</i>
PPP	<i>Public-Private Partnership</i>
ROC	<i>Republic of Congo</i>
SADC	<i>Southern African Development Community</i>
TCITH	<i>Chartered Institute of Tourism and Hospitality</i>
UNCTAD	<i>United Nations Conference on Trade and Development</i>
UNECA	<i>United Nations Economic Commission for Africa</i>
UNDP	<i>United Nations Development Programme</i>
UNWTO	<i>United Nations World Tourism Organization</i>
WCS	<i>Wildlife Conservation Society</i>
WTO	<i>World Trade Organization</i>
WTTC	<i>World Travel & Tourism Council</i>
WWF	<i>World Wide Fund for Nature</i>

1 INTRODUCTION

Tourism in Africa is often a key topic when discussing the continent's economic development and its future potential. In many African countries, tourism revenue is an important source of income and helps create jobs, promote entrepreneurship and develop local economies. Well-established African destinations attract tourists from around the world and have helped transform many national economies. However, tourism on the continent is not consistent across regions. Whereas some countries (i.e., Kenya and Tanzania in the east, Morocco and Tunisia in the north, and South Africa and Zimbabwe in the south) have well-established and economically successful tourism economies, many others have limited tourism development despite considerable potential.

Situated in the heart of the Congo Basin is the second largest tropical rainforest in the world. Beneath the forest canopy, an unparalleled level of biodiversity creates a colorful collage in which some of the planet's rarest and most iconic species can be found, e.g., forest elephants, gorillas, chimpanzees, iconic monkeys, antelopes and numerous colorful and noisy rainforest birds. However, common images of tourism in Africa are often associated with the great migration across the Serengeti, or a sunset sinking behind a fever tree in Kruger or the Okavango delta. Few people associate tourism in Africa with the Central African rainforests. In this study, we will examine the reasons for this, and make recommendations for developing ecotourism in the Congo Basin ecosystems. Incorporating the perspectives of ecotourism business owners and investors, the study explores how ecotourism might be supported as an economic contributor in the Congo Basin.

1.1 Background

The Congo Basin Forest Partnership

The Congo Basin Forest Partnership (CBFP) is a multi-stakeholder partnership comprising 10 Central African countries: Burundi, Cameroon, Central African Republic, Chad, Democratic Republic of Congo, Equatorial Guinea, Gabon, Republic of Congo, Rwanda, and Sao Tomé and Príncipe. It also includes a wide variety of institutional actors, including regional political partnerships, international and local NGOs, private sector actors and research and training institutions. The CBFP's primary focus is on conservation and sustainable use of forests in Central Africa. It aims to reduce deforestation and protect biodiversity to combat climate change, promote good governance, and advance the well-being of local communities. To meet its objectives, the CBFP employs partnerships with public, private and civil society actors to develop and promote shared visions and actions for the protection and sustainable management of Congo Basin forests.

The CBFP is led on a voluntary basis by one of its members who acts as a facilitator, promoting dialog and cooperation and organizing exchange within the diverse partnership. The current facilitation, led by the Federal Republic of Germany, has requested a series of studies on topics important to the partners' environmental policies, including an evaluation of ecotourism in the region. The Congo Basin's large, charismatic megafauna and vast areas of untouched, spectacular wilderness offer incredible attractions for tourists. Despite this, ecotourism is a negligible activity in the Congo Basin countries and remains underdeveloped, or even neglected. This report will describe the current state of tourism in the Congo Basin, characterize the challenges faced by the sector, and identify opportunities for growth.

Overview of the Congo Basin

The Congo Basin comprises a diverse river network, tropical rainforests, flooded forests, swamps and savannahs and is extremely rich in biological diversity. This region hosts the second largest intact forest in the world and spans across six countries that are amongst the poorest on earth, namely Cameroon, Central African Republic (CAR), Democratic Republic of the Congo (DRC), the Republic of the Congo (ROC), Equatorial Guinea (EG) and Gabon. It is home to over 400 species of mammals, 1,000 bird species, 10,000 tropical plants (of which 30% are endemic to the region) and 700 species of fish (WWF n.d.).

In addition to the rainforests, the Congo Basin coastline comprises over 2,500 kilometers of pristine beaches, lagoons and coastal forests. This coastline represents an important leatherback and green sea turtle breeding site and contains tidal lagoons and estuaries populated by West African manatees, crocodiles and hippopotamus. Visitors to this region can observe elephants and buffalo emerging from forests to relax in the surf, humpback whales and the world's largest recorded group of rare Atlantic humpback dolphins. North of Gabon lies the Cameroonian coastline which forms part of the Gulf of Guinea seascape (WCS n.d.).

The Congo Basin hosts Africa's central rainforest and, depending on where the boundaries are set, it spans around 2 million square kilometers. The Congo Basin gets its name from the Congo River, which in turn is named after the Kongo Kingdom, a people who lived in Central Africa near the mouth of the large river that the Portuguese discovered as they were exploring Africa's coast in the 1480s.

Technically, the Congo Basin is the hydrographic basin, or drainage, of the Congo River. Its head waters are in the south-east, and it contains a vast network of streams and rivers draining much of Central Africa. However, due to geographic factors, the coastal rainforests of Central Africa are drained into the Atlantic by other rivers, notably the Ogooué River in Gabon, and the Sanaga River in Cameroon.



Figure 1: Map of the Congo River drainage basin

Source: Spencer et al. 2016

However, the forests of Gabon, mainland Equatorial Guinea, and southern Cameroon do form part of the Congo Basin rainforest block and the animals that live in the drainage of the Congo River are also found in the drainages of the Ogooué and Sanaga rivers. The island of Bioko, part of Equatorial Guinea, is a small, forested island just 32 kilometers off the coast of Cameroon, covered by the Congo Basin rainforest plant species and home to many of the Congo Basin’s animals. During the last ice age, when much of the world’s water was locked into massive glaciers that covered much of the northern hemisphere, sea levels dropped by up to two hundred meters, and Bioko was part of the mainland. As the climate warmed and the glaciers melted, sea levels rose and the island and its wildlife were cut off from the mainland, sometime between 18,000 and 10,000 years ago.

Humans have inhabited the forests of the Congo Basin for 50,000 years and currently over 75 million people are heavily dependent on the forest for their livelihoods and subsistence (food, fresh water, shelter, raw materials, medicine). Among its 150 different ethnic groups, the indigenous Ba'Aka, BaKa, BaMbuti, Efe – also referred to as “Autochthon”, or more derogatively as “Pygmies” – are well-known and visible representatives of an ancient hunter-gatherer lifestyle. They possess a vast knowledge of the forest and its animals and medicinal plants.

The protection and sustainable use of natural resources is threatened by logging, oil palm plantations, agriculture, population growth and new road development. The construction of new roads has not only facilitated access to the interior of the forest, but has also resulted in the relocation of many communities to be closer to these roads. Local communities are often made up of subsistence farmers and hunters surviving in these remote areas, and their agricultural practices result in substantial deforestation and degradation of Congo Basin forests.

As noted above, Congo Basin countries include Equatorial Guinea, Gabon, Cameroon, CAR, ROC and DRC. These six countries are partially covered by forests, are members of the CBFP and are the focus of this study.

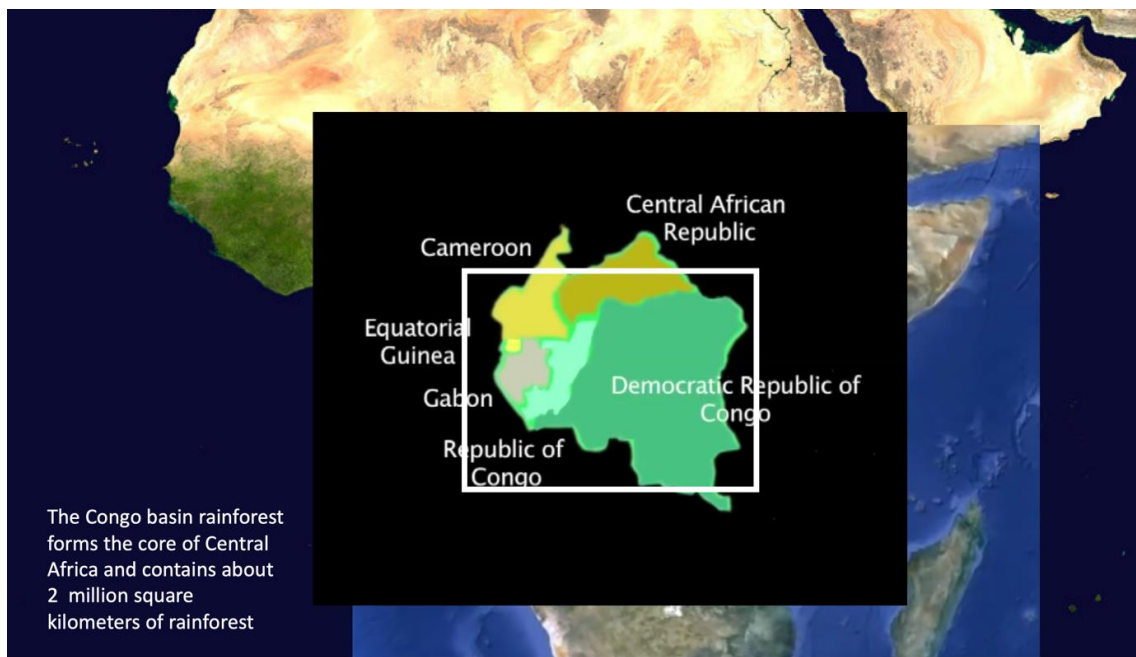


Figure 2: Map showing the outlines of the six rainforest countries in the study

What is ecotourism?

The Center for Responsible Travel (CREST) currently defines ecotourism as, “Responsible travel to natural areas that conserves the environment, socially and economically sustains the well-being of local people, and creates knowledge and understanding through interpretation and education of all involved (including staff, travelers, and community residents)” (TCITH n.d.) (changed from ITHSA).

The term ecotourism was first used by Hector Ceballos-Lascurian to describe tourism travel to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring and enjoying the scenery and its wild plants and animals, as well as any existing cultural attraction (Cheia 2013). Ecotourism became the formalization of the new trend of adventure and nature travel that was taking place in the 1980s (Fennel and Weaver 2008).

According to The International Ecotourism Society there are several principles that are important to the definition of ecotourism. Among them are minimizing tourists’ impact, building environmental and cultural awareness, respecting local culture and providing direct financial benefits for conservation and the empowerment of local people (TCITH n.d.). It is for this reason that ecotourism is an attractive economic sector that CBFP countries wish to develop.

According to the United Nations World Tourism Organization (UNWTO), tourism is a service industry, comprising various tangible and intangible components. It describes intangible components as “rest and relaxation, culture, escape, adventure and new and different experiences” (UNCTAD 2017). It is incumbent on governments to provide the tangible components, while business can focus on providing the intangible aspects. Tourism has been referred to as an invisible export industry with no tangible product (UNCTAD 2017).

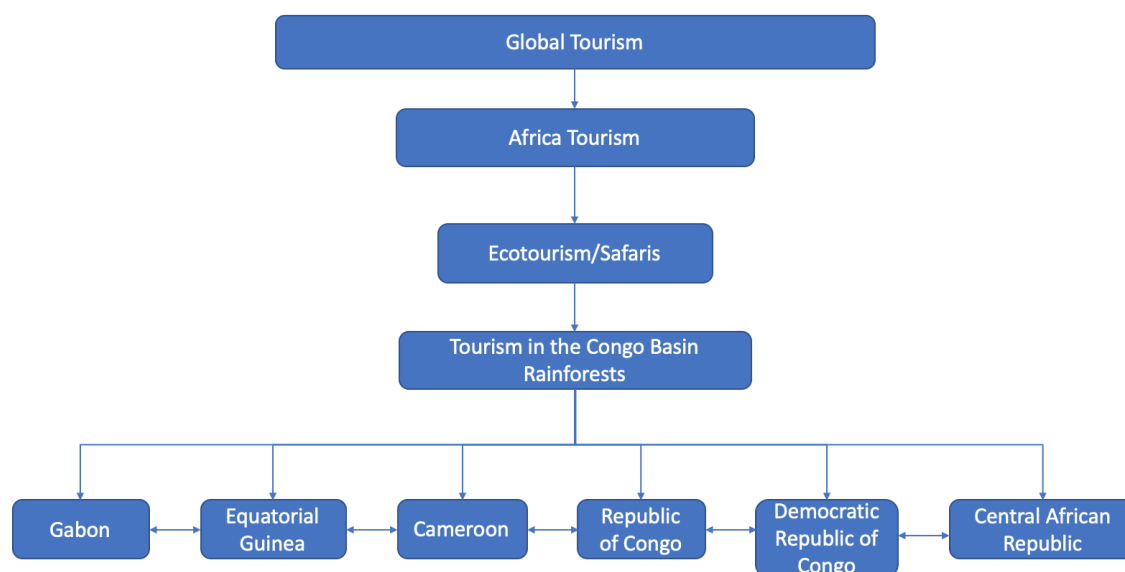


Figure 3: Tourism Hierarchy

Tourism as an economic driver

Tourism is one of the fastest growing economic sectors in the world. Over the past five years, one in four of all new jobs created globally has been in the travel and tourism industry (WTTC 2020a). The most recent global statistics from the UNWTO show upward growth trends in global tourism, with a tenth consecutive year of increases in the number of travelers and revenue generated. Global tourism continued to expand and diversify to become one of the largest and fastest-growing economic sectors in the world (UNWTO 2021).

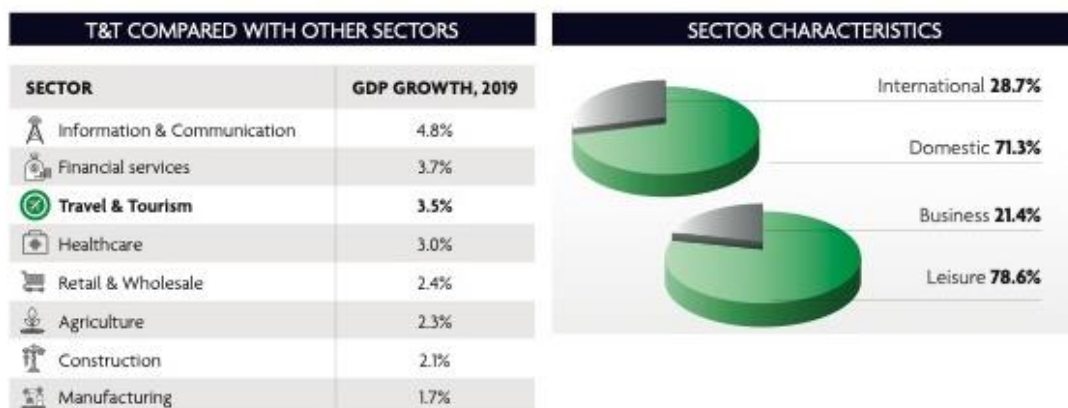


THE IMPORTANCE OF TRAVEL & TOURISM IN 2019*

TRAVEL & TOURISM IN 2019



TRAVEL & TOURISM GROWTH TO 2030



THE AUTHORITY ON WORLD TRAVEL & TOURISM

Figure 4: Importance of Travel and Tourism in 2019 (WTTC 2019)

The tourism sector can be a remarkable engine of economic growth. In 2019, prior to the coronavirus pandemic, international tourism receipts (defined by the WTO as expenditures of international inbound visitors including payments to national carriers and goods and services received in the destination country) grew by 2.5% globally and contributed 10.4% to global GDP (\$8.9 trillion dollars), making it the third largest sector after IT/communications (4.8%) and financial services (3.7%). Some countries derive as much as 48% of their GDP from tourism (UNTWO 2021, WTTC 2020a, WTTC 2020b).

Tourism’s value to a country’s GDP is derived by adding the economic activity of the hotels, restaurants and transportation. However, other economic subsectors can be important for economic growth. Demand from lodges, camps and hotels for goods and services from local enterprises can support the development of business opportunities. For example, this could include retail, agriculture, communication, laundry, transport and construction services (e.g., of lodges, camps and campsites). Expenditure on these “non-tourist” activities is often significant but tends to be hidden from national tourism statistics (UNCTAD 2017).

Additional “out-of-pocket” expenditures associated with tourism can also contribute to livelihoods. In fact, studies suggest that significant amounts of spending in restaurants, shopping and handicrafts as well as local transport and excursions reaches economically disenfranchised parts of African societies, particularly when supplies for those pursuits are sourced locally (UNCTAD 2017 and ODI 2006). More directly, the tourism sector is labor intensive and results in more employment than other sectors, outside of agriculture. Tourism establishments provide work to unskilled workers, such as drivers and other staff at accommodation facilities. In turn, this can increase incomes in local communities and enhance employee skills and productivity. The agricultural supply chain for the tourist sector is particularly important as it often sustains more poor households than jobs in hotels and restaurants (UNCTAD 2017).

Remote and rural areas present a major target for the ecotourism market because they contain the most ecotourism resources. They also provide the “authentic” experiences and products that tourists value. Not surprisingly, these areas often lack substantial employment and business opportunities, and skilled workforces. Ecotourism brings a formal market directly to these rural areas and promotes rural economic development by providing income generating and training opportunities to the communities living in the area (UNCTAD 2017).

Local communities can also benefit from the demand for new infrastructure needed to access ecotourism sites and accommodation. These benefits include employment opportunities, transport infrastructure improvements and demand for local construction materials. Environmentally friendly practices can help negate the negative impacts sometimes associated with tourism and can include using recycled materials, adopting renewable sources of energy, disposing of waste responsibly and developing infrastructure in an environmentally sensitive manner. Additionally, tourism revenues can provide an incentive to support the conservation of ecotourism resources, resulting in environmental sustainability through the preservation of biodiversity (UNCTAD 2017).

Tourism in Africa

From a continental perspective, Africa places a high value on tourism’s importance for social economic development and structural transformation. The AU/NEPAD Tourism Action plan (2004) recognizes tourism as one of the sectors with the greatest potential to contribute to the economic regeneration of the continent, particularly through the diversification of African economies and generation of foreign exchange earnings (AU Agenda 2063, the AU/NEPAD Tourism Action Plan). Regionally, the Southern African Development Community (SADC) and the Common Market for Eastern and Southern Africa have emphasized the importance of tourism in their “Southern African Development Community, Tourism Programme 2020-2030”, as do the Intergovernmental Authority on Development member countries (Djibouti, Eritrea, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda) in their “Sustainable Tourism Master Plan for the Inter-Governmental Authority on Development (IGAD) Region: 2013-2023” (SADC 2019, UNECA 2013). However, neither the Economic Community of West African States nor the Central African Economic and Monetary Community regions have declared similar goals.

Tourism is critical to Africa's growth and can help countries reduce poverty and meet their sustainable development goals. Ecotourism is a dynamic sub-sector of tourism that is usually associated with remote destinations and environmental protection, and ecotourism has the potential to contribute to sustainable development and environmental sustainability. Many African countries have a competitive advantage in ecotourism due to the diversity of natural landscapes and wildlife found across the continent. If properly exploited, this advantage can promote economic diversification, job creation, enterprise development, infrastructure improvement and environmental protection. In addition to economic and productive benefits, tourism can also encourage inclusion by providing vulnerable groups, such as the poor, women and youth, opportunities for employment (UNCTAD 2017).

Statistics for Africa in 2019 illustrate solid growth in the tourism sector: total contribution of US\$ 168.5 bn to GDP, 2.2% total growth, and 24.6 million jobs (WTTC 2020a). This contrasts with the Asia-Pacific region, where the sector grew at a rate of 5.5%, accounted for 182 million jobs and contributed US\$ 3.0 TN to GDP. In the Americas, the sector had a total growth of 2.2% similar to Africa, but accounted for nearly double the number of jobs at 45.3 million and contributed US\$ 2.5TN to GDP. The continental and the European markets are the most important source markets for Africa overall (UNWTO 2017). Africa represents 5% of the world's international tourist arrivals while Europe dominates with 51% of arrivals, thus showing that African tourism has ample room for growth (UNWTO 2021). However, future growth in this sector cannot be predicted due to the Covid-19 pandemic, with all global destinations having imposed travel restrictions after January 2020 (Spencely 2021).

Regional differences

Although tourism is a major contributor to economic development across Africa, it is not evenly distributed across countries or regions (UNCTAD 2017). Across the continent, North Africa has dominated the tourism sector, while tourist arrivals in sub-Saharan Africa have, on average, remained flat (UNWTO 2021). The importance of tourism across sub-regions varies widely. Sub-Saharan Africa saw a 2.1% growth in tourism in 2019, with incredible variation between countries and sub-regions (WTTC 2020a). The sub-Saharan African economies where travel and tourism contributed the most to GDP that year were South Africa (US\$24.6 billion) and Nigeria (US\$18.1 billion). Countries where the government has prioritized tourism have experienced real and tangible impacts both in terms of community development and conservation. Albeit in different political contexts, two examples of this are in Rwanda and Kenya, where government prioritization enabled private sector investment in tourism-related projects. They experienced a growth in travel and tourism contributions to GDP by a remarkable 10.9% and 4.9%, respectively (WTTC 2020a).

Tourism in the Congo Basin

Central African countries in the Congo Basin, where tourism has not been a priority, show great untapped potential for natural tourism that can be better exploited with more development and investment. The tourism market is emerging in this region, and between 2011 and 2014, tourism in Cameroon, CAR, DRC, Gabon, and ROC directly contributed between 1.7% to 9.9% of GDP (UNCTAD 2017). There is no data for Equatorial Guinea. Perhaps not surprisingly, ROC and Gabon are among both the least tourism-dependent economies and among the top 20 African oil-exporting economies (UNCTAD 2017).

According to the UNCTAD (2017), national tourism development plans exist for each of the six Congo Basin countries studied in this report. These fall into three groups: group 1 with plans providing objectives for the tourism sector (Cameroon, ROC); group 2 with plans providing objectives and/or some planned policies aimed at achieving those objectives (DRC, Gabon); and group 3 with plans providing objectives and/or policies, and detailed implementation plans (EG, CAR). The creation of national tourism development plans illustrates intent to further grow the tourism sectors and ecotourism activities in these countries.

2 METHODS

This study was conducted using several distinct methods. A desk review of existing information including national strategies (where available) was performed to ascertain the political strategies and academic understanding of ecotourism in the region. Global tourism and trade statistics were also reviewed to provide context. In addition to the desk review, primary data was generated by familiarity visits¹ to all six of the Congo Basin rainforest countries, visits that included existing or developing tourism projects and sites considered to hold strong potential for ecotourism development. Additionally, interviews (video and audio) were conducted with tourism experts deeply familiar with the region. There were 18 individuals who participated in the study, including individuals from all six of the countries and from four different continents.

The experts interviewed for this study represent four distinct sub-groups within the industry. The first group was represented by four interviewees who are ecotourism development experts. Each expert has at least one successful ecotourism business in Africa with multiple lodges, and possesses business, operations and development experience in multiple African countries. All four of these expert businessmen have investigated the possibility of developing ecotourism businesses in the rainforest region of the Congo Basin, and all of them have visited several of the countries in this study. These business developers are currently operating lodges or facilities in the region, ranging from privately operated lodges, internationally recognized brands, community-based tourism projects, and corporate clients with many existing ecotourism facilities who have investigated developing tourism in the region.

The second group represented is the international tourism sales and marketing experts. Four individuals were interviewed who have a broad base of international clients from around the world. They have been selling African ecotourism packages to the medium to high end general public on four continents (North America, Australia, Europe and Africa). These agents each have a minimum of 20 years' experience in marketing and selling African ecotourism products to international clients and all have visited tourism products in at least two of the countries in this study.

The third group is represented by interview participants who own and/or operate tourism businesses in the rainforests of Central Africa. These eight individuals all live and work full time in the region and operate lodges that receive international clients. They all operate separate facilities including community-based ecotourism lodges, adventure tourism facilities, hotels, and safari ecotourism lodges, in all six of the countries of this study.

The fourth group of interviewees represent various agencies that are technical partners with the governments of the region, and/or that work in protected area management and the promotion of ecotourism as a means of developing and financing protected areas. They all live in the region and represent international NGOs, or collaborate with national universities, and bilateral international donors.

¹ The authors have spent the last 12 years living and working in the Congo Basin region, including the last six years working directly in ecotourism development.

The in-depth, semi-structured interviews and discussion techniques were designed to access the personal data and first-hand experiences of the participants and to generate an understanding of the stakeholders' context and motivations linked to the study objective. In particular, the opportunity for the researcher to access the interviewed participants' thoughts, reflections, experiences and understanding of tourism was a major motivation. The interviews lasted for between 30 and 120 minutes and were digitally recorded.

The main focus of the interviews was to determine the expert participants' opinion of which prerequisites would need to be in place for ecotourism to evolve in the forest ecosystems of the Congo Basin. All participants were informed that their identities would remain anonymous and were provided with an explanation of the expected outcome of the study. The interviews proceeded with specific questions designed to determine the participants' views as to the necessary preconditions for further development of ecotourism in Congo Basin forests, the obstacles to this, and the practical options to foster ecotourism in the region. Twenty-eight (28) questions were elaborated to elicit responses from the participants about a range of topics including, but not limited to, priority policy actions, practical options for actions, most important preconditions, obstacles, security and safety threats, necessary infrastructural developments, and community development.

Not all questions were asked of all participants, but the semi-structured nature of the interview allowed for a comprehensive understanding of the participants' viewpoints and recommendations. Each interview was then reviewed, and the main points noted for consolidation into this study. In addition to soliciting information and opinions regarding preconditions and obstacles, as well as solutions to each, a line of questioning about communities and community involvement was pursued. Specifically, responses were elicited regarding what each participant thought about how communities and the local population could be appropriately integrated (early, continuously and meaningfully) in the decision-making, management and benefit sharing of ecotourism.

In addition to the semi-structured interview, each participant was asked to fill out a Priority Ranking Survey that listed a wide range of prerequisites and potential obstacles, ranking these in terms of their importance as solutions or as problems that needed to be addressed (Annex 1). This non-exhaustive list was derived from the range of obstacles and prerequisites found in the literature by means of the desktop review. The priority ranking survey results were tabulated, and rankings were listed from highest to lowest priority or importance (Annex 2).

3 RESULTS

The results of this study are significant in that there is a high degree of unanimity in the findings: primarily that governments must do far more than they are currently doing, and that there are three specific things that can be done to significantly increase the likelihood that ecotourism will rapidly develop in the region. The findings successfully answered the guiding question of this report, namely “Which tangible courses of action could be undertaken to foster ecotourism?” Most interesting is that both the literature review and the interviewed participants all indicated that governments are the primary enablers of tourism development in the region. The literature indicates that strong policy frameworks, country-wide marketing strategies, and the alignment of government departments and their actions are needed to remove the many obstacles to ecotourism development. The AU also recognizes this and has published numerous reports from The First Ordinary Session of the African Union Specialized Technical Committee on Transport, Intercontinental and Interregional Infrastructures, Energy and Tourism (AU-STCTIIIET 2016 a-d). It is not surprising then that the interviewees also unanimously indicated that the governments must make important changes to enable growth in ecotourism in the region.

While the literature suggested a general need for serious high-level political support, the interviewed participants all indicated specific tractable solutions that would help accelerate ecotourism development in the rainforest countries, namely simplifying entry visas, opening access, and better marketing. These solutions are based on interviewees’ firsthand experience and understanding of the obstacles and barriers. They are not mutually exclusive but rather interrelated.

The broad level government support needed was a common theme amongst those interviewees who belonged to the developer/investor category who had familiarity with successful and unsuccessful ecotourism business development in other regions of Africa. All three categories of interviewees indicated the specific need to make obtaining visas easier, and to increase access.

3.1 Literature Review

From the literature review, it is clear that the extent to which governments prioritize the sector has an important impact on countries’ competitiveness in the world tourism market (Calderwood et al. 2020). The 2019 Travel and Tourism Competitiveness Index report indicates that the least competitive 25% of countries consists mostly of low to lower-middle income economies, among them 26 sub-Saharan African countries. Lower levels of economic development translate into particularly poor competitive conditions for travel and tourism (<http://reports.weforum.org/ttcr>). The World Travel & Tourism Council (WTTC) Travel & Tourism Global Economic Impact Report showed that the African countries that had the most growth in tourism revenues and percentage contribution of tourism to GDP were those whose governments prioritized the sector, by improving security, creating PPPs, and improving local and regional connectivity (WTTC 2020a).

Moving to the six studies countries more specifically, research into the tourism sector of Cameroon also indicates that the lack of tourism growth and development was primarily due to an absence of tourism development and management policies, conflicts of interest between stakeholders and government policies, and non-implementation of park management plans (Kimbu & Tichaawa 2018, Kimbu 2010, Forie et al. 2021 and Harilal et al. 2019).

In DRC, there was an historical absence of any type of event devoted to the promotion of tourism, leading the government to hold its first edition of the International Tourism Fair in December 2020. The aim of this first forum was to sensitize political decision makers, the public, and economic operators about the importance of tourism in DRC's socio-economic development (Bunkulu Zola 2020).

In ROC, a National Policy Framework for Tourism Development was elaborated in 2015 with the support of technical partners (UNDP and UNWTO) but there have not been any major advances towards its implementation. The document draws attention to support needed from the highest levels to enable tourism to contribute to the country's economic growth. This framework states that tourism in ROC can only take place when the government improves its institutional, legislative and regulatory frameworks (Poliwa 2015).

Gabon is often cited as one of the few countries in the region where there has been political support for the development of ecotourism. However, while there have been strides made in this sector, it is far from being actualized on the ground with many regulatory hurdles remaining as obstacles to tourism development (Kimbu 2010b).

In CAR, recent political instability has resulted in several regime changes, precluding the elaboration of any coherent policy towards opening the country up to tourism. However, despite a lack of strong high-level political support, local officials and lodge operators, especially in the remote southwest rainforest part of the country, have managed to implement high quality tourist products.

Equatorial Guinea has a comprehensive Tourism Master Plan (El Plan Director de Turismo de Guinea Ecuatorial) that establishes policies, strategies, and objectives for ensuring tourism is developed and contributes to social development. However, this five-year plan was developed in 2012 and expired well before its goals were met.

3.2 Interview Results

Three main prerequisites for tourism development were consistently identified by all 19 interviewees. All three prerequisites – namely easing visa requirements, improving access, and marketing the African rainforests – can be implemented by government. These three key issues were the most important prerequisites across all the groups represented, with interviewees consistently giving highest priority to the visa issue and access. All the interviewees flagged improvements in marketing, but specifics varied within and between groups.

3.3 Ecotourism Development Experts

The four African ecotourism business developers ranked high-level government support for the development of ecotourism in their countries as a top prerequisite. While two of them cited specific examples where strong support from the government had accelerated tourism development (i.e., in Australia, Botswana, Kenya, and Rwanda), they had varying views as to how much the government needed to do. They did all agree that all governments in the region needed to ease the process of obtaining an entry visa. The ease of obtaining an entry visa was the highest ranked prerequisite but was often (three out of four individuals) listed in the context of easing access more generally.

Ease of access, both into the country (international flights and immigration processes) and within country to the tourism products, was the second most important prerequisite. Again, citing international competition for tourists' time and money, the business investors all spoke about the need to understand and cater to the needs of international tourists, who do not want to waste time or money getting to their destination. They want a seamless travel experience, from the time they book their ticket, through when they pass through immigration, followed by a quick transfer to the ecotourism experience, and back out again.

All four of the interviewees indicated that the target market for making ecotourism successful in the region was the medium to high-end client. Due to the high costs of getting to the region and of doing business there, the primary target of the well-traveled, high-end market needs to be individuals with enough income and a strong desire for the product. This includes middle- to high-income international travelers who have already traveled to Africa at least once, and who have the financial means and available time needed to reach the destination.

It was often stated that tourists want more than a single destination. This is because of the costs associated with getting to central Africa, with clients wanting to spend more time in an area and have a variety of experiences.

In terms of how to benefit communities, the participants favored several existing models that are currently being employed for bringing financial benefits, including a per person per night fee that is paid to the communities, and/or a percentage of revenue paid to the communities. However, it was noted that when there are no revenues or if revenues are down, the communities suffer. It may be more sustainable to provide communities with a percentage of concession fees, which are paid regardless of occupancy or revenue. To bring communities into the decision-making process, the interviewees in this group suggested that community representatives sit on protected area governing boards (i.e., Foundation Boards set up in PPPs) or participate in tourism management committees.

Finally, there was consensus that effective marketing of the destination is vital. Specifically, all interviewees in this group agreed that marketing a destination or region rather than a specific country had advantages, and that collaborating (while remaining competitive) has potential to increase overall revenue. However, they indicated that it was important to focus efforts on existing products, and not to market something that does not already exist.

3.4 Marketing and Sales Experts

Similar to the ecotourism development experts, the marketing and sales interviewees all highlighted the importance of political will and government intervention and they prioritized ease of access, especially to visas, and intra-country and intra-regional travel. They all agreed that government must remove obstacles to entry, specifically simplifying visa processes and authorizations. They also felt strongly that increasing options for intra-regional travel is one of the most important conditions for development of tourism in the region. They all cited the need for less expensive and safe in-country air-travel options to allow tourists easy access to the products.

All marketing expert interviewees felt that involving the communities was extremely important, not only to make sure that their well-being was improved through tourism but also that the communities themselves play a role in product development and even participate in the products themselves. They felt that communities could not only benefit from the direct employment tourism creates, but also from the opportunities to own microbusinesses supplying goods to the industry (food and artisanal products). They also supported a fee structure where a percentage of tourism revenue goes to the communities directly. Differing from the ecotourism development experts, the marketing experts all indicated that increasing fees to tourists that would go to the communities is not a barrier to sales. This was based on the assumption that ecotourists support community development.

Not surprisingly, the marketing and sales experts had clear suggestions on how to improve marketing. These all included creating a regional destination rather than marketing a single country or product. Similar to the business investors, they did not feel it necessary to sell the destination in absence of the individual products, but rather emphasized the importance of linking the existing products, and any new ones, into a destination that sets it apart from the other African regions. They all felt it important to remove or avoid any marketing that would link with negative press connected to the word “Congo” and associated with eastern DRC, Ebola or political instability.

The marketing experts were all keenly aware of the high costs of undertaking tourism in the Congo Basin rainforest region and, as such, all focused on clients from the upper middle classes of developed countries. They also felt it important to focus on clients who had already been to Africa.

Additionally, the marketing experts all felt that it was important for governments to provide financial incentives (tax holidays, reduced import duties etc.) for pioneer products, and that the marketing and sales of products be focused on international agents rather than on single individuals. Moreover, they stated that agents should be incentivized financially through commissions.

3.5 Product Operators

Interestingly, of the four categories of participants, the product operators put the most emphasis on the role of government, even indicating that governments are often perceived as the biggest stumbling block for successful ecotourism business development. These interviewees indicated that there are many barriers to investing, with little to no guarantee that the investments will be safe. They also stated that there are too many government offices or departments involved, all of which are trying to obtain as much money from the business as possible. Despite placing a high emphasis on lack of government support as one of the major obstacles to tourism development in the region, similar to the other groups, they prioritized easing of visas and access as two main areas that, if improved, would greatly help their own businesses and would increase tourism development in the region. All seven of the operators put easing visa processes at the top of the list of priority actions that could accelerate growth in the industry. Also like the other groups, the second most important factor they identified was access—international but more importantly also within country. Whereas they all indicated the need for better air service, road development was cited by five of the seven as an important prerequisite for tourism development.

Each of the operators placed a strong emphasis on marketing and the need for governments to improve the image of their countries. They all agreed that there were advantages to being included in a regional marketing program as long as it highlighted their products. They all also felt that a catchy regional label could propel regional tourism while emphasizing the unique wildlife in the region (i.e., gorillas, chimpanzees, forest elephants, tropical forest birds).

None of the tourism operators would target backpacker clients and recognized that only those clients with a medium to high level of income could afford the travel to and costs of their products. They did, however, indicate that a strong local market was important. The first reason for this is that local markets could help keep the business going during off-seasons or in times of crisis (i.e., epidemics or political instability). The second reason was the respective governments' desire for their own people to be able to visit their national parks—a condition that would promote sustainability of these parks and ecotourism activities.

All the operators felt strongly about ensuring that communities benefited from tourism, not only through employment but also via some form of revenue sharing. However, if community engagement was not mandated, they felt that communities would not benefit from tourism development. Several of the operators were directly involved in community-based tourism products but felt that the rural communities would benefit from additional capacity building and training from tourism professionals.

3.6 Non-Governmental Technical Partners

This group of participants put the least emphasis on the amount of effort that government could be expected to invest in developing tourism in the region. One topic of consensus within this group was that governments must ensure that tourism products are protected and developed, either through strong national management or through PPPs (delegated management). They were very realistic about many of the government obstacles that needed to be removed but did not think it would be possible in the short to medium term for government action to take place.

All these interviewees also felt that easing visa access was the most important action that governments could take to accelerate tourism development. In-country access to tourism products was prioritized but improving road and air access was also seen as important.

All interviewees in this group felt strongly about the importance of community participation at the decision-making stage of tourism development. Each of them believed that community members should be part of national park management structures to ensure transparency in, and foster ownership of, tourism activities. Awareness and capacity building of local community members was also seen as important in order for the communities to have reasonable expectations about the sustainability of tourism activities and their expected contributions to communities. They also all felt that community involvement in community-based tourism projects was an additional way for community members to achieve financial benefits, as too was a revenue sharing scheme related to concession agreements and daily use fees.

None of this group felt that any effort should be put into attracting backpackers or low-end clients and instead were of the view that high-paying, low-impact tourism should be the focus. All interviewees in this group indicated that local clients were important as they were integral to gaining national support for tourism development.

This group had strong opinions about the negative publicity associated with eastern DRC and the negative influence of this on marketing. There was consensus within this group that there is a need to change the perception of the destination and that the word “Congo” had significant negative connotations. Collaborative marketing power and collectively contributing to a regional marketing solution was seen by all as having potentially great positive impacts. However, it was recognized that it would be difficult for individual governments to collaborate due to historical distrust and lack of regional leadership. They suggested creating a new image rather than attempting to change one that was deep-rooted and well established.

3.7 Priority Ranking Survey

The results of the priority ranking survey were similar to the interview results. The top ranking prerequisites for the evolution of tourism activities in the Congo Basin were “Increase ease of obtaining visas, either online or on arrival”, followed by “Improve the efficiency and safety in transport within the country”, and “liberalize air policies for travel within and between countries” (4.76, 4.76, and 4.71 respectively).

Table 1: Ranking Survey Results, Top Five Prerequisites

Rank	Prerequisites for Ecotourism Development	Total Score (out of 85)	Average score (out of 5)
1	Increase ease of obtaining visas, either online or on arrival	81	4.76
2	Improve the efficiency and safety of transport within country	81	4.76
3	Liberalize air policies for travel within and between countries	80	4.71
4	Provide financial incentives for pioneer developers (i.e., reduced taxes)	77	4.53
5	Reduce the obstacles of doing business in country	75	4.41

Of the 15 obstacles listed, the “global image of the Congo Basin” was ranked highest with an average score of 7.2, followed by “lack of tourism infrastructure” and “lack of transport infrastructure limiting access to attractions,” both scoring 7.1 out of 10.

Table 2: Ranking Survey Results, Top Five Obstacles

Rank	Obstacle/Challenge to Ecotourism Development	Total Score (out of 175)	Average score (out of 10)
1	Global image of the Congo Basin	126	7.20
2	Lack of transport infrastructure limiting access to attractions	125	7.14
3	Lack of tourism infrastructure, facilities and services	125	7.14
4	Bureaucracy and poor service delivery by local officials at the tourism interface	124	7.09
5	Inadequate airport facilities and extremely limited domestic routes	123	7.03

4 DISCUSSION AND RECOMMENDATIONS

4.1 Discussion

The results of this study are drawn from the literature and from interviews with tourism experts who have direct experience in the Congo Basin rainforest region. It is important to note that most of the literature predated the Covid-19 pandemic that has had an enormous impact on travel and tourism. The UNWTO reported that between January and May 2020, 100% of global destinations imposed travel restrictions, and 45% either totally or partially closed their borders to tourists (<https://www.unwto.org/news/covid-19-travel-restrictions>). At the time of this study, countries and tourism have slowly begun to reopen as vaccination programs have been undertaken on a global scale. However, many of the developing countries, especially those in Africa, will not be fully vaccinated well into 2022 or 2023 due to vaccine availability and vaccine hesitancy. Tourism and ecotourism will remain impacted by the pandemic and many facilities in Central Africa still remain closed.

As tourism reemerges from the global pandemic, several lasting effects can be expected. However, it is extremely difficult to predict the changes that will take place. We do not know when most countries will fully re-open and when international travel will return to pre-Covid-19 levels. During the onset of the pandemic, many people predicted a rapid return to normalcy and some ecotourism operators in Africa set tentative restart dates for early 2021. These reopening dates, however, were postponed as second and third waves of the pandemic caused many countries to reinstate travel restrictions and lockdown measures. Questions about how people will spend their leisure time in a post lockdown world remain unanswered, and whether or not they will risk traveling to countries that do not have world-class healthcare systems is also an unknown. It seems likely that tourism will reemerge strongly in a post pandemic world, and that ecotourism will remain an engine for inclusive growth and sustainable economic development for Africa. In this context, the Congo Basin rainforests have potential to become an ecotourism destination that contributes to the sustainable development of the Congo Basin countries.

According to the literature, there are **three prerequisites for tourism development** and these are often referred to as the “**three A’s**”: **attractions, accommodation, and access** (Dieke 2020). The Central African rainforest countries have incredible attractions, but very little accommodation and very limited to no access. Until recently, tourism development in the Congo Basin rainforest countries was largely implemented as a result of a need to create funding for conservation efforts to protect wildlife in many of the national parks.

Many of the early tourism development initiatives were undertaken with limited funding from conservation NGOs and used human resources from the conservation teams, adding to their daily management and research tasks. The levels of tourism development in the region varied greatly and the maintenance of facilities was often neglected due to lack of visitors, as well as lack of tourism development capacity and marketing. This created a double-edged sword, as facilities were not developed due to lack of markets, and markets could not be developed as adequate product was not available. This often resulted in inappropriate and nonprofessional hospitality experiences, and despite the establishment of some tourism facilities and a small number of lodges in proximity to several of the national parks the region, ecotourism development has generally failed to gain traction.

Ecotourism development has therefore been supported to a limited extent by a combination of the regional governments and conservation NGOs such as the African Parks Network, World Wide Fund for Nature and Wildlife Conservation Society. This has created a number of problems in the development of tourism, as it is a secondary initiative and not a strategic focus area of these organizations. In addition, it means that the development of tourism, a commercial practice, is being developed and managed by conservationists who lack the necessary experience and who would prefer to regulate tourist access in sensitive conservation areas. Although this is not the case for all of the products currently being offered, it is significant enough to have influenced public opinion on the quality of product.

It is clear that there are many challenges to jump starting tourism in the Congo Basin and the results of this study converge on several reasons for why ecotourism in the Congo Basin rainforest countries has not yet developed. The inability of governments to solve key issues, including political instability, security concerns, long travel times, red tape, health issues, high costs and missing infrastructure, makes it challenging to develop ecotourism in the region. All six of the Congo Basin rainforest countries rate very poorly in the World Bank’s ease of doing business ranking and it is therefore difficult to attract ecotourism developers.

Table 3: Ease of Doing Business Ranking of the Congo Basin Rainforest Countries

Ease of doing business	Ease of Doing Business Rank out of 190 Countries	Starting a Business	Protecting Minority Investors	Paying Taxes	Trading Across Borders
Cameroon	167	104	157	181	186
Gabon	169	96	170	182	170
Equatorial Guinea	178	183	162	179	175
ROC	180	179	162	185	183
DRC	183	54	176	180	187
CAR	184	180	162	187	164

Source: World Bank - Ease of doing business rankings (<https://www.doingbusiness.org/en/rankings>)

The literature often indicates the need for strong government policies and that governments need to empower their tourism departments (AU-STCTIIET 2016 a-d, Kimbu 2010, Kimbu 2020, UNWTO 2010). The tourism experts who work in the tourism sector in the region, whether developers, operators or marketing experts, also all indicate that governments must do much more in order for tourism to develop in the region. As an overarching goal for effective change that will be beneficial to all tourism stakeholders in the region, the governments of the CBFP countries should inscribe tourism as a key developmental item in their national development agenda. And as members of the AU, if the Congo Basin rainforest countries are serious about more rapidly developing tourism as part of their development strategies, they should more rapidly enact the recommendations of the African Union Summit “Agenda 2063,” the AU/NEPAD Tourism Action plan (2004) and the subsequent declarations and commitments. However, while all the tourism experts consulted in this study would support adherence to AU commitments, they also single out a few specific tractable actions that can greatly accelerate tourism development. These actions fall into two primary groups, easing of access, and marketing.

Ease of access

When discussing easing of access, it can be noted that ease of travel has been important throughout the history of tourism and the role of transportation in the development of tourism cannot be overlooked. International tourism became widespread after the end of the Second World War when aircraft and airfields/airports were converted to commercial purposes and air travel became safe and affordable to more people living in the industrialized world. This access along with increasing wealth after 1950 made it possible for people to spend their holidays visiting places in Europe and the Americas, while more wealthy and adventurous travelers could go on safari trips to Eastern and Southern Africa. Over time, travel and tourism became a leisure product and spurred economic growth and development in regions that had previously been isolated. As travel and tourism began to develop across continents and regions, countries that had easy access and ease of travel between regions quickly outpaced countries that did not. A destination must be easy to get to and easy to get around in, and the absence of a good and efficient transport network at the destination is one of the critical factors that negatively impacts on the experience of visitors and their general appreciation of a country as a tourist destination (Kimbu 2010).

Air connectivity is crucial for tourism development, not only in Africa but for any tourist destination. In 2015, more than half (54%) of all overnight visitors worldwide reached their destination by air (UNCTAD, 2017). Air service to and within Africa is limited, with relatively few airlines dominating the market. In Africa, air connectivity is particularly relevant, as large distances and poor road transportation increase tourism's dependence on air transportation. In relation to the aviation industry in Africa, the large size of the continent coupled with the sheer distances between key African cities makes air transport undoubtedly a crucial means of transport for the continent. Further, the poor overland infrastructure in the continent underpins the importance of airline connections (AU-STCTIIET 2016d). Air service to and within Africa is expensive and airfares cost more than double than those for comparable distances in the domestic United States market, or are about 50% higher than what a counterpart in Latin America would pay (UNCTAD 2017).

Access is the most important feature that must be arranged, and there are three primary types of access of relevance here. First is the international access into the region. Each of the six countries has at least one reasonably well-developed international airport, some of which are new and state of the art. Each also has several non-stop international flights arriving from Europe, which is a good start. The second component of access relates to the accessibility of the product once the tourist has arrived in the country. "Time is money," and few people want to wait days or even hours to arrive at their final destination after arriving in the host country.

Tourism is extremely competitive and competes primarily for people's time and, to a slightly lesser extent, their money. It is an activity that is heavily influenced by economic conditions in the main tourist generating regions, which are primarily the United States and Europe. Today, many international tourists are considered to be "cash rich and time poor" (Dieke 2020). Travel time strongly influences a person's decision of where to travel. As such, direct access to a destination by road or air is important. In the Congo Basin rainforest countries, there are many top-quality natural attractions that remain inaccessible because of a lack of transportation infrastructure, making it difficult and time consuming to get to the final destination once the tourist has arrived in country. High quality wildlife attractions in the rainforest are unable to attract

sufficient numbers of tourists if they cannot be easily accessed, and value for people's time will eventually determine which countries and destinations will be most successful.

Along with the challenges of establishing reasonable international and local access, there are difficulties in obtaining entry visas. This third component of access has been flagged as among the most significant obstacles to tourism that needs to be overcome. As articulated in Aspiration II of the AU's "Agenda 2063", Africa aspires to be a "continent with seamless borders" with "free movement of people, capital, goods and services." To realize this vision, greater visa openness is a key prerequisite, resulting in the removal of time, cost and process obstacles to moving freely across the Continent. Either an electronic or "e-visa", or the possibility of obtaining a visa on entry for travelers from the primary tourism consumer countries (see background section) are required. The process of obtaining visas is time-consuming and expensive. This makes a destination far less attractive and competitive for tourists and investors alike (UNCTAD 2017). No one wants to go through a lengthy and costly process of obtaining a visa and the need to do so discourages people from traveling to the country. Relaxing visa requirements would thus allow visitors to save time and money. Moreover, countries where tourism is successful are those that have made visas easy to access, either by allowing tourists to obtain a visa on entry (i.e., Kenya, South Africa) or with an electronic visa (e-visa) that can be easily obtained via the internet.

Marketing

None of the countries other than Gabon (AGATOUR) has made any concerted effort to market itself as a destination for ecotourism. Within some of the countries, individual products have made considerable effort to promote themselves to the international market (i.e., Congo Conservation Company, Gabon Wildlife Camps & Safaris, Sangha Lodge), but in general there is no Congo Basin or Rainforest Destination marketing taking place. Marketing is expensive and difficult, requiring time, creativity and financial support to ensure that the messages are heard and seen in appropriate places. Trade shows are one forum where marketing takes place, and these also require considerable time and effort to be successful. If each product, company or country were to promote themselves individually, there would be a varying and potentially limited degree of success as they would all compete with each other and not all would have the same resources available. Each individual marketing team would still need to overcome negative images associated with parts of the rainforests in the Congo Basin.

Despite being a dynamic and growing sector, tourism is an extraordinarily competitive industry with a high number of destinations and variety of experiences to choose from on display around the world at the large trade and consumer shows. (i.e., World Travel Market, ITB Berlin, We Are Africa (Travel Marketplace) and the African Tourism Indaba). Competition exists between countries and regions, as well as within countries and their regions. In this context, simply having a high-quality product is not sufficient to drive tourism development.

Based on an understanding of the tourism value chain, there is a need to 'get into the minds' of the key constituencies: the trade, the consumers, the communities and the influencers (e.g., traditional and social media). It is vital to identify and focus on the critically important parts of the value chain and to communicate effectively.

The AU member states have highlighted the importance of destination marketing and have agreed to make Africa the preferred destination for tourism and to create an African brand of tourism. In so doing, they have not only recognized the importance of maximizing economy of scale for regional integration and shared development costs (especially in infrastructure and marketing), but have also agreed to create teams to develop key milestones and better coordinate tourism development (NEPAD-TAP 2017).

To get people to invest their time and money in a destination, the reasons for going there need to be compelling enough to overcome the competition from every other country in the world. Travelers need to feel safe at all times, and political stability, healthcare access, transportation efficiency and safety, and in-country experiences must all be seamless and perceived as better than the alternatives. Unfortunately, a lack of geopolitical knowledge among most western travelers means that almost all central African countries and products are lumped into a single basket that is dominated by the profuse negative press and media attention that is focused on the western side of the Virunga Mountains, otherwise known as eastern DRC. Whether it is recurring Ebola outbreaks, LRA rebels, or warlords and related killings, the media prefers to sensationalize events in this region and associate them with a “heart of darkness” imagery. Sadly, most western people who are exposed to these media images do not have sufficient knowledge of the African continent, and the vast rainforest region of the Congo Basin becomes associated with all of the negative images portrayed in the media. There is an incredible amount of work that needs to be done to overcome the negative brand perception that “Congo” is politically dangerous, a place associated with sickness and where one risks being attacked by an armed group. To overcome the negative perceptions of the Congo Basin, each country can take on the difficult task of trying to change its own image in a modern marketing context, or they can work together and join forces to create an entirely new destination image, disassociated from the current media-generated “heart of darkness.”

There is a strong need to avoid any negative associations with instability, security issues, or health risks. The global sensation-seeking media is constantly keeping the region’s negative aspects at the top of the news hour. Whether reporting on refugees, diseases like Ebola, or conflict and security issues in a geographically small part of Africa, they always make a point of mentioning “Congo” or eastern DRC, thus eliciting associated negative perceptions. Separating or isolating the media spotlighted area from the rest of the Congo Basin is a particularly difficult challenge to address because most potential tourists and even many travel agents do not realize that there are two Congos or that the Congo Basin is a vast area encompassing six different and largely safe and peaceful countries.

One of the biggest hurdles to accelerating ecotourism development in the region will be to successfully market it as a single destination rather than each country going it alone. This will require significant political collaboration but will be considerably less expensive because of pooled resources for a single product. It will also have the advantage of pre-emptively distancing the region from any potential negative issues that may arise, by associating the products with a new positive “rainforest” image rather than the historical negative images that currently pervade the media and marketing space. All of the countries in question are young democracies and in the early stages of economic development, which comes with its own inherent security, health and infrastructure risks. If one area or country were to generate negative media attention, but the region itself were marketed effectively, it should still be robust enough to withstand the negative

impact. For instance, an Ebola outbreak could occur in any of the rainforest countries and would have serious repercussions for the tourism industry, but if such an event were to occur in one country or part of a country, the negative impact could be diluted and the established, well-branded tourism circuits within the region would be far less negatively impacted. A hypothetical example would be another Ebola outbreak in northeastern DRC that attracts considerable negative press but has less of an effect on the “bonobos of the rainforest” than on “DRC’s bonobos”. If a single regional African rainforest destination can be marketed effectively, it will facilitate two main catalysts: it will create the impression of a destination that is stable as well as unique, and it will inspire each country to become part of a bigger whole, thereby fostering collaboration and distributing the costs and risks away from single governments and into a greater whole. The Congo Basin needs targeted public relations and reassurance campaigns under the supervision of marketing agencies to create a new uniquely attractive “rainforest destination.”

Destinations are generally defined as a combination of geographically close tourism products being consumed or sold under a single brand name. Destinations belong to a defined geographical region that is understood by its visitors as a unique entity, with a political and legislative framework for tourism marketing planning (Tatari 2006). A key contributor to successful tourism growth in both Botswana or Kenya for example has been the existence of “destination marketing” campaigns that are carried out in the major trade shows and in tourist generating markets (Blanke and Chiesa 2009).

Rather than each country putting together a detailed marketing strategy and then implementing it over time, it would be more efficient to work together on the development and implementation of a regional plan, with less cost and more exposure. The goal of the marketing strategy – in the form of advertising, sales promotion, personal selling and public relations – should be to provide knowledge about central Africa’s existing tourism products while ensuring that potential visitors build up a familiarity with the tourism package and ultimately a preference towards it. Because “nation branding” is a complex procedure involving many stages and various stakeholders from government through tour operators to local communities whose views must all be taken into consideration when developing the concept of national identity, it would be more efficient to unite efforts into a single regional brand rather than expending resources on many separate national or product brands.

A key question in developing tourism in the region is what the Congo Basin as a branded destination should be known as, and this question should be answered by professionals with input from existing products and national tourism departments in order to provide an inclusive platform for development of the currently largely unknown region as a whole. The experts consulted in this study all support branding of the Congo Basin, or Central African Rainforest in this context. Other rainforest tourism destinations are primary competitors for the Congo Basin rainforest. Central amongst these are the jungles of Costa Rica, the Amazon basin and various locations in Southeast Asia e.g., Borneo. They each offer a slightly different experience with unique, rare and endangered species. The Congo Basin has one significant advantage though, and that is the fact that it has the largest variety of large mammal species among any of the other rainforests. Moreover, the congregation of these unique species within the forest clearings or “baïs” may be significant. This advantage combined with the proximity of the Congo Basin to the largest part of the adventure market (namely Europe), should make it a significant player in the rainforest tourism industry.

Community involvement

The local communities living in and around protected areas in the Congo Basin are often overlooked or neglected, in part due to their isolation. However, the well-being and livelihoods of these communities are integral to protecting the forests in which they live. Community involvement in conservation and any development projects is a prerequisite for their success. However, gaining communities' meaningful contribution to decision-making, management and economic participation remains a challenge. Ecotourism development depends on wildlife and habitat that often overlaps or is contiguous with community use areas. Land ownership of community areas in the Congo Basin is often unclear although traditional use rights are usually recognized. It is therefore critical that the local population is integrated meaningfully into any and all ecotourism development.

There are several approaches to including communities in conservation and development projects in rural Africa. In Eastern Africa, communities in tourism areas are often allowed seasonal use of rangeland in communal protected areas as long as certain regulations are respected. In return for this, the communities are compensated by ecotourism operators, usually via a per person, per day fee that is paid to the community. This has two potential drawbacks, the first of which being that when there are few or no tourists, the communities do not receive any compensation. Secondly, direct payments to individually assigned members can cause conflict and rivalry within communities as well as with the tourism operators.

An alternative approach for compensating communities is to provide a fee to the community based on a percentage of the concession fee paid by the ecotourism operator. This ensures that even when there are few tourists, communities receive a consistent and reliable payment. The management capacity of the community to efficiently absorb these payments can still be challenging, and this will remain a problem if there is not a significant effort by protected area managers and ecotourism operators to engage with the corresponding communities.

To enable communities to not only receive benefits from tourism revenue, but also to participate in the decision-making processes related to the use of their land, it is important to include representative community members in protected area management teams. There are several examples of this in the Congo Basin, where PPPs have been established and protected area management is delegated to an entity that is overseen by a governing board. This governing board will have government representatives, conservation managers, and community members as part of this decisional body. The community members are chosen by the communities themselves and are required to make restitution to their communities after each decisional board meeting. Such efforts ensure that communities participate in the protected area management, and that ecotourism development decisions made by protected area managers are improved by local knowledge. At the same time, community members are informed of the management decisions that will directly impact their livelihoods and well-being. As they are directly affected, a grievance mechanism should always be available to local communities through which they can raise potential pitfalls and disenfranchisements they perceive – and which is thoroughly monitored and answered to by managing actors.

4.2 Recommendations

There are many international, continental and regional studies that discuss the key prerequisites for developing sustainable tourism (see for example the list of references of this study). Many of these factors are long-term goals that are difficult for developing countries to achieve. Among these are multi-layered institutional, infrastructural, and policy changes that are also required for macroeconomic development. While it is not necessary to have all of these in place to evolve tourism in the Congo Basin, there are a few key actions that must be undertaken to allow tourism to move from its fledgling state to a more fully developed state.

Broad government support

The obvious and probably the best understood prerequisite for countries to succeed in developing tourism is to have full and complete high-level government support. This can be described as a “flying goose formation” where tourism development is the lead government component of economic development in a country and any legislation or regulations that would negatively affect tourism would be either modified or removed to ensure that tourism development is not hindered. If a government makes a high-level commitment to developing tourism as its prime economic sector, everything becomes secondary to that priority, which in turn makes it easier to pursue. Tourism sector actors – whether it be private investors, lodge operators, or support staff in any peripheral businesses – would then feel supported by the government.

This has been and continues to be the best and most powerful tool for developing tourism and remains the recommendation with the highest priority. Having said that, despite generally broad acceptance of this recommendation, it is not, in reality, always put into practice. So, given the historical context and current development environment in the Congo Basin Rainforest countries, there are three subsidiary recommendations that can be made. These are not as politically or economically costly but would have an immediate effect on fostering sustainable ecotourism in the region.

Regional marketing strategy

Although the results of this study showed that visa easing measures and access improvement were the highest priorities identified by interviewees, there was also strong consensus on creating a team of high-level government representatives from each of the six countries who would work together to create an image of and market a “new rainforest destination.” This was expressed in various ways, but nearly all participants highlighted a need to improve the image of the Congo Basin through a concerted marketing campaign and indicated a preference for marketing a “destination” rather than individual countries or companies. All of the marketing professionals felt strongly that a regional destination marketing campaign would give tourism in the region a significant boost, and that this would in turn translate into more tourists and more private investment in the tourism sector. The ecotourism development experts had varying opinions on how this should be implemented but all agreed that it would require strong government leadership. To obtain the type and scope of national leadership needed to implement these recommendations, two courses of actions have been suggested.

High-level political attention and commitment

The first recommended course of action would be for the CBFP to convene a high-level summit to be held in the region. This facilitated summit could have the explicit purpose of educating the leaders about the benefits of tourism, the prerequisites needed to make it successful, and the concrete steps that they could take to accelerate ecotourism development in their region. Participants would comprise the CBFP facilitation, ecotourism development experts with experience in Africa and familiarity with the region, and tourism marketing experts who have experience with existing Congo Basin products. Additional facilitators could include government and business representatives from African countries where ecotourism plays a significant role in revenue generation and contributes strongly to GDP. The desired outcome of this summit would be for some or all of the national leaders to commit to establishing a high-level regional group representing the presidential authority, to work together on immediately initiating the necessary prerequisites and removing key obstacles to ecotourism development. Here, immediate priorities would be focusing on easing visa restrictions and opening regional access for private tourism flights or charter companies. This high-level group, or Tourism Action Group (TAG) would support and consult on the development of pro-ecotourism development policies in the range states. It could monitor activity quarterly and report back to governments, and regional partners.

As an alternative to this first recommendation, it is suggested that the Congo Basin presidential leadership be engaged through the African Union. The CBFP facilitator could approach the current leader of the AU, President Tshisekedi of DRC, who as one of the leaders of the Congo Basin countries, could convene a regional presidential summit for ecotourism development in the Congo Basin. Leadership through the AU could foster needed trust and reduce competition among the other Congo Basin leaders. The desired outcome of this summit would be the same as the other summit, that being to play a concrete role in developing ecotourism in the Congo Basin rainforest countries.

Ease of access

Another specific recommendation is that the governments of these countries make it easier to obtain entry visas. This can be done by allowing tourists to obtain a visa on entry, as is the case for many African countries where tourism is flourishing. Alternatively, countries could implement an electronic visa, whereby tourists could apply for their visas online and receive them when they arrive in the country. Finally, to really accelerate tourism development in the region, a “uni-visa” or regional tourist visa that would be valid in all six of the countries could be issued. This latter proposition is more challenging but would promote tourism as international perceptions of collaboration and willingness to open borders would likely foster a sense of welcoming security. It would also allow the region to be much more competitive as a single “uni-visa” would reduce much of the time and cost associated with the travel process.

Furthermore, a second recommendation would be that governments ease aviation restrictions in the region. This can be done by allowing specific tourism companies to operate small charter planes between regional capitals and remote tourist destinations and between remote sites across regional borders. By relaxing aviation and immigration policies related to regional private aviation, the governments would remove one of the most important obstacles to tourism development, making travel faster and more affordable and, in turn, increasing the

competitiveness of the region. Currently, there are very few safe and reliable aviation options in the countries.

Community involvement

Given the importance of integrating rural communities in decision-making, management and protection processes in the wildlands they inhabit, it is recommended that several steps are evaluated and integrated into the development of any ecotourism projects. Revenue sharing structures used in other parts of Africa should be reviewed and improved to ensure that communities benefit directly from the economic development of the region. These revenue sharing structures should include building developing communities' capacity to equitably manage the income among all entitled members. Additionally, communities must be included in the management decisions related to land use in ecotourism development. A way forward can be creating management structures in which elected community members serve as part of management authority decision-making bodies, such as those found in existing PPPs in the region. These actions need to be implemented and monitored to ensure that the intended benefits are delivered to communities, and periodic evaluations and adjustments must take place. Furthermore, all existing and new ecotourism projects must provide a grievance mechanism that is open and freely available to the local population affected by the initiative.

To facilitate the collective implementation of these recommendations, the TAG could play an important role. As a high-level regional body, the TAG would be able to work with national stakeholders in determining how best to include local communities in decision-making and revenue sharing processes. The TAG could investigate how to help build local capacity to participate in the ecotourism industry, and to equitably manage and distribute any revenue earned. Moreover, it would be able to liaise with governments to help develop and protect ecotourism initiatives in and around protected areas, facilitate donor commitments to develop and protect these products, and ensure that ecotourism pioneers in the region are supported by governments, donors and NGOs. The TAG would be well placed to advise and facilitate establishing a sustained public relations and marketing campaign for the Congo Basin to create and promote a regional destination.

4.3 Summary

Without a doubt, the quality of available conservation and cultural experiences in the Congo Basin is exceptional, and there is real potential for developing the Congo Basin as a major tourism destination. There is a significant opportunity for sustainable tourism development to serve as an enabler of conservation and socio-economic development in the Congo Basin region and the Congo Basin countries as a whole.

However, while the opportunities are great, the challenges are manifold, and addressing these will require leadership and support at all levels of government and from the various stakeholders. A clear strategy and actions with a consistent approach to implementation will be necessary prerequisites for progress.

Various stakeholders who have been involved in several of the projects relating to development of ecotourism in the region have raised a number of important points. These include:

- Ecotourism development is almost impossible without high-level political support.
- There is a need to create a positive image of the region.
- There is a critical need for investment and incentivizing the private sector to develop tourism facilities is crucial.
- National governments and the private sector both have a role to play but the private sector is hesitant to invest without assurance from governments that investments will be protected.
- Ecotourism development does not happen overnight and requires a consistent, systematic approach. Return on investment will take an extremely long time (at least twenty years).
- Pioneer investors such as the Congo Conservation Company in the Republic of Congo, Sanga Lodge in Central African Republic, Gabon Wildlife Camps and Safaris, and African Equatorial Safaris in Gabon, and other developers must be provided government support and incentives.
- Investment is needed in the parks by government and NGO partners to develop the “product” in order for tourism services to function properly.
- PPPs are crucial, and donors such as USAID should continue to provide matching grants to private sector and community organizations to encourage product development and private investment.
- Investing in the local people is important – skills development, provision of benefits, developing an understanding of the value of tourism to socio-economic development and engendering the required support for ecotourism development.
- Transparency with local communities is imperative as is early and meaningful community involvement and a functional benefit-sharing mechanism. Such actions will serve the long-term sustainability of ecotourism projects, increase ownership and local acceptance, and contribute to local livelihoods.
- Whereas ease of travel will entice, restrictions on time will put people off. Compelling reasons to travel to a destination together with a seamless experience (high quality) are important.
- Tourism must buy people’s time as every single minute counts.
- Viable and sustainable revenue sharing models between government, communities and operators are required.
- There are some good but minor examples of success in easing access in the region (i.e., TNS multi visa, Virunga Park DRC entry visa included in park entrance fees).

In conclusion, this report seeks to highlight opportunities, clarify actions, and ensure that clear roles and responsibilities are identified and assigned in order to successfully develop ecotourism in the Congo Basin. Ecotourism can play a significant role in the socio-economic development of the Congo Basin, but to foster and accelerate its development, the governments of the region must remove key obstacles and put in place certain enabling conditions. Significant progress has been made by a few pioneering private investors toward developing ecotourism in the region

and, with the help of governments, they can lead the way forward toward encouraging additional investors to help create the critical mass needed to make the Congo Basin a competitive destination. In the post-Covid-19 era, many African ecotourism destinations will be restarting their economies and if the Congo Basin can jump-start ecotourism with additional support from government and CBFP partners, it has the potential to become a competitive destination that will rival any other.

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ANNEX

A 1. Priority Ranking Survey

Name: _____

Country: _____

Date: _____

Introduction:

This survey is part of a study on eco-tourism in the Congo Basin rainforests

The purpose of the study is to provide the CBFP appropriate information to feed into the ongoing consultation process within the CBFP, which aims to produce a joint declaration by CBFP members outlining the region's challenges, its commitments and its demands to the international community with regard to the Rio Convention processes as well as upcoming Conferences of Parties (COP).

How would you rate the following obstacles/challenges (1 to 10) 1 = least important, 10 = most important

There are a number of obstacles to tourism development in the Congo Basin, which have been well documented:

_____ Security

_____ Political instability

_____ Health concerns (primarily malaria, typhoid fever, ebola, hepatitis A)

_____ Lack of tourism infrastructure, facilities and services (accommodation, catering establishments, ground handlers, operators etc)

_____ Incomplete or outdated tourism development plans

_____ Limited and weak institutional framework (local and regional tourism bodies)

_____ Global image of the Congo Basin

_____ Lack of transport infrastructure limiting access to attractions

_____ Despite established airlift between Europe and the capital cities of the 6 Congo Basin countries, airport facilities are inadequate and domestic routes are extremely limited

_____ Bureaucracy and poor service delivery by local officials at the tourism interface

_____ Threats to natural landscapes and assets (poaching, logging, human population spread)

- _____ Lack of political commitment to conservation of natural resources and promotion of tourism
- _____ The promise of short-term petroleum exports in certain countries limiting investment into other industries such as tourism
- _____ Subject matter and language training of guides and other tourism stakeholders
- _____ Sensitization and involvement of local communities

Please Rank by priority (1 = lowest, 5 = highest priority) of these conditions that governments can provide, in order to support tourism development.

- _____ Assuring the protection of the wildlife or protected area product (either through PPPs, delegated management agreements or other improved management structures)
- _____ Creating a strong collaboration between Management Authorities and Tourism authorities (i.e., Ministry of Forestry and Ministry of Tourism)
- _____ Ease of obtaining visas either online or on arrival
- _____ Reducing the obstacles of doing business in country
- _____ Resolving the lack of regional transportation (between countries)
- _____ Language issues (English vs French)
- _____ Lack of hospitality experience (hospitality industry training)
- _____ Reducing tourism fees (i.e., nightly tourism levies)
- _____ Reducing taxes on tourism investment (Import Taxes, Concession Fees)
- _____ Increase public safety against crime (the security of the destination to visitors)
- _____ Improving local educational systems
- _____ Reduce the number of “informal payments” or spontaneous fees
- _____ Reduce the number of government departments and statutory bodies responsible for different aspects of industry regulation
- _____ Creation of a single regional visa
- _____ Reduce restrictive zoning laws, preventing the exploitation of natural tourism assets
- _____ Increase political support from highest government levels
- _____ Improve the mechanisms to dialog between government and stakeholders
- _____ Improve the governments management of key tourism assets (including hotels, museums and national parks)
- _____ Reduce the cost of entry visas
- _____ Improve policies in other related industries (i.e., improve construction industry, reducing the cost of building hotels)

- _____ Improve labour market policies (ease of obtaining foreign work visas)
- _____ Improve public health infrastructure (access to medical care)
- _____ Reduce the prevalence of malaria
- _____ Improve the skills of government officials and employees with which tourists come in contact
- _____ Improve government workers (i.e., immigration officers) capacity to welcome visitors and market tourism services;
- _____ Improve physical infrastructure for access to key tourism assets
- _____ Fully elaborate national tourism development plans
- _____ Develop and finance national marketing strategy
- _____ Access to safe municipal drinking water
- _____ Participate in and fund a regional marketing strategy
- _____ Improve the efficiency and safety in transport within the country
- _____ liberalize air policies for travel within and between countries
- _____ Provide viable systems for community participation and ownership
- _____ Provide financial incentives for pioneer developers (i.e., reduced taxes)

A 2. Priority Ranking Survey Results

Rank	Question #	How would you rate the following obstacles/challenges (1 to 10)? 1 = least important, 10 = most important		Average Score
1	7	Global image of the Congo Basin	72,00%	7,20
2	8	Lack of transport infrastructure limiting access to attractions	71,43%	7,14
3	4	Lack of tourism infrastructure, facilities and services (accommodation, catering establishments, ground handlers, operators etc.)	71,43%	7,14
4	10	Bureaucracy and poor service delivery by local officials at the tourism interface	70,86%	7,09
5	9	Despite established airlift between Europe and the capital cities of the 6 Congo Basin countries, airport facilities are inadequate and domestic routes are extremely limited	70,29%	7,03
6	12	Lack of political commitment to conservation of natural resources and promotion of tourism	67,43%	6,74
7	1	Security	63,43%	6,34
8	2	Political instability	63,43%	6,34
9	15	Sensitization and involvement of local communities	62,86%	6,29
10	3	Health concerns (primarily malaria, typhoid fever, ebola, hepatitis A)	62,29%	6,23
11	11	Threats to natural landscapes and assets (poaching, logging, human population spread)	62,29%	6,23
12	6	Limited and weak institutional framework (local and regional tourism bodies)	58,86%	5,89
13	14	Subject matter and language training of guides and other tourism stakeholders	56,57%	5,66
14	13	The promise of short-term petroleum exports in certain countries limiting investment into other industries such as tourism	54,29%	5,43
15	5	Incomplete or outdated tourism development plans	53,71%	5,37
Rank	Question #	Please Rank by priority (1 = lowest, 5 = highest priority) of these conditions that governments can provide, in order to support tourism development.		Average Score
1	3	Ease of obtaining visas either online or on arrival	95,29%	4,76
2	31	Improve the efficiency and safety in transport within the country	95,29%	4,76
3	32	Liberalize air policies for travel within and between countries	94,12%	4,71
4	34	Provide financial incentives for pioneer developers (i.e., reduced taxes)	90,59%	4,53
5	4	Reducing the obstacles of doing business in country	88,24%	4,41
6	1	Assuring the protection of the wildlife or protected area product (either through PPPs, delegated management agreements or other improved management structures)	87,06%	4,35

7	2	Creating a strong collaboration between Management Authorities and Tourism authorities (i.e., Ministry of Forestry and Ministry of Tourism)	87,06%	4,35
8	12	Reduce the number of “informal payments” or spontaneous fees	84,71%	4,24
9	26	Improve physical infrastructure for access to key tourism assets	83,53%	4,18
10	5	Resolving the lack of regional transportation (between countries)	81,18%	4,06
11	16	Increase political support from highest government levels	81,18%	4,06
12	25	Improve government workers (i.e., immigration officers) capacity to welcome visitors and market tourism services;	80,00%	4,00
13	14	Creation of a single regional visa	80,00%	4,00
14	24	Improve the skills of government officials and employees with which tourists come in contact	80,00%	4,00
15	28	Develop and finance national marketing strategy	72,94%	3,65
16	33	Provide viable systems for community participation and ownership	77,65%	3,88
17	17	Improve the mechanisms to dialog between government and stakeholders	76,47%	3,82
18	18	Improve the governments management of key tourism assets (including hotels, museums and national parks)	76,47%	3,82
19	13	Reduce the number of government departments and statutory bodies responsible for different aspects of industry regulation	74,12%	3,71
20	22	Improve public health infrastructure (access to medical care)	71,76%	3,59
21	11	Improving local educational systems	70,59%	3,53
22	27	Fully elaborate national tourism development plans	70,59%	3,53
23	9	Reducing taxes on tourism investment (Import Taxes, Concession Fees)	69,41%	3,47
24	19	Reduce the cost of entry visas	64,71%	3,24
25	30	Participate in and fund a regional marketing strategy	64,71%	3,24
26	21	Improve labor market policies (ease of obtaining foreign work visas)	68,24%	3,41
27	10	Increase public safety against crime (the security of the destination to visitors)	65,88%	3,29
28	7	Lack of hospitality experience (hospitality industry training)	62,35%	3,12
29	15	Reduce restrictive zoning laws, preventing the exploitation of natural tourism assets	58,82%	2,94
30	20	Improve policies in other related industries (i.e., improve construction industry, reducing the cost of building hotels)	56,47%	2,82
31	6	Language issues (English vs French)	52,94%	2,65
32	23	Reduce the prevalence of malaria	55,29%	2,76
33	29	Access to safe municipal drinking water	52,94%	2,65
34	8	Reducing tourism fees (i.e., nightly tourism levies)	44,71%	2,24