Post COVID-19: Positioning Africa

Ecotourism for Gabon's diversification strategy

By Jeff Megayo  jmegayo@act-afrique.com
## Contents

I. Executive summary........................................................................................................................................... 3

II. Tourism as a strategic sector in economic development.................................................................................. 6

III. Background on ecotourism.......................................................................................................................... 7

    i. Strategic Plan for an Emerging Gabon ........................................................................................................... 7

    ii. Ecotourism within the context of nature-based tourism................................................................................ 7

IV. Shifting from oil to nature.................................................................................................................................. 10

    i. The current situation in Gabon: oil is king ........................................................................................................ 10

    ii. Ecotourism as an economic diversification initiative in Gabon.................................................................... 11

V. Developing ecotourism into an income-generating industry............................................................................. 15

    i. Evaluate the achievements and competitiveness of the industry ................................................................. 15

    ii. Conduct a needs assessment of the stakeholders......................................................................................... 17

    iii. Involve the local communities.................................................................................................................. 18

    iv. Establish an ecotourism public-private partnership framework.................................................................... 20

    v. Promote local tourism ................................................................................................................................... 21

    vi. Develop the infrastructure around ecotourism ............................................................................................ 22

    vii. Developing a qualified workforce ............................................................................................................... 24

    viii. Tourism master plan ................................................................................................................................... 25

VI. Conclusion.......................................................................................................................................................... 26

Annex: list of tables and figures .......................................................................................................................... 27
I. Executive summary

As the world enters the second quarter of this year, the uncertainty looms ahead. For most people today, the ongoing COVID-19 pandemic (the disease caused by SARS-CoV-2) is the most serious global crisis that they have experienced yet. In merely five months, over 265,000 people have already succumbed to the virus\(^1\). The daily human casualty that we are witnessing can be vertiginous at times as even the most advanced healthcare systems in the world struggle to contain the virus.

In spite of leaders and experts calling for people to remain optimistic (high recovery rate, mild symptoms for most, low death rate compared to past grave pandemics, etc.), the reality remains that COVID-19 has so far pushed the world into a corner. Beyond the dizzying death count, its impact is almost immeasurable. The damages are felt in two other major areas:

- Economic consequences
  The world economy is teetering on the brink of a recession. The novel coronavirus has affected almost all sectors of the global economy. Global supply chain networks have suffered major disruptions, primarily due to overheating in the consumer goods industry and this coinciding with the closing of land, maritime, and air borders in many countries.

  Unemployment is on the rise due to a downturn in global economy and lockdown measures. Facing a liquidity squeeze, many companies have opted to grant an indefinite

\(^1\) Official data compiled by the Johns Hopkins University as of 5/06/20. There is an ongoing debate between experts, suggesting the actual number of deaths caused by the COVID-19 virus is higher than reported
unpaid leave of absence to their employees. In the U.S. for example, in the week ending on April 4, 6.6 million new people filed claims for unemployment\(^2\). To put this into perspective, it was the biggest weekly jump in unemployment in the history of the U.S. labor market\(^3\). The same challenge is observed across the world, particularly in developed economies. In the European Union, it is reported that over four million people have lost their jobs. The difficult labor market has put millions of workers in a precarious position as the crisis deepens.

Financial markets are not unscathed from the headwinds of the pandemic. Since the outbreak, global stock markets have underperformed, giving rise to a significant volatility and forcing investors to pull money from the markets. In a research note released by Bank of America, $20.2 billion were pulled from stocks on March 13\(^{th}\), the largest daily outflow in history. The Dow Jones Industrial Average and London’s FTSE 100 saw their biggest quarterly drops since 1987, plunging 23% and 25% respectively.

- **Social impact**

Perhaps for most people, the most noticeable impact of the pandemic is the alteration in their way of life. Social norms have been upended as governments across the world ordered their citizens to remain confined in their homes. Closed schools, sports seasons suspended, cinemas are shut down. More intimately, hugs and gatherings are banned in some countries. Reports are also surfacing that people are beginning to suffer from anxiety and depression as confinement forces us into a lifestyle that we have never experienced.

Nonetheless, as the world scrambles to combat a common enemy in the pandemic, many countries are simultaneously positioning themselves for the inevitable post COVID-19 world. Western countries have begun enacting huge stimulus packages to boost support businesses. But these stimulus packages are merely the visible part of iceberg. In the midst of the pandemic and far outside the limelight, economists, financiers, and lawmakers are frantically working and modeling various scenarios to give a competitive edge to their countries once the pandemic becomes a thing of the past.

\(^2\) Based on a press release by the United States Department of Labor. “COVID-19 Impact”. April 9, 2020

\(^3\) The federal government began keeping unemployment claims record since 1967. Prior to the current pandemic, the highest weekly gain was the week of September 18, 1982 (680,000 people claimed unemployment).
In Africa, our governments are also busy assembling resources to fight the pandemic which is an immediate need. Needless to say, there remains a central question that is more long-term focused: **what is Africa doing to prepare itself economically and strategically for the post COVID-19 era?** It is likely that the pandemic may not cause a noticeable change in the global order of powers, however business will not be as usual. Countries will make highly strategic decisions to adapt to new economic and social development priorities.

In this series **Post COVID-19: Positioning Africa**, the teams at ACT Afrique provide insights to decision makers on the shift in strategy that they should embrace regarding economic development on the continent in a context where the pandemic is behind us. In this brief, ACT analyzes the Republic of Gabon’s ecotourism industry and provides some recommendations based on the government’s ambition to diversify away from the oil and gas sector.

Eight years after the release of its **Plan Stratégique Gabon Emergent** (the Strategic Plan for an Emerging Gabon) and five years prior to the maturity date of Vision 2025, it is important to evaluate the progress that has been achieved in the flagship programs of the strategic plan and propose a way forward. The focus here will be the ecotourism sector which represents an untapped potential for Gabon as it seeks to diversify its economy. This brief proposes a few steps that the government of Gabon and other stakeholders can take to consolidate the considerable efforts that have been made in order to realize economic gains.
II. Tourism as a strategic sector in economic development

Today, most high-level forums on economic development in Sub-Saharan Africa do not generally place tourism among the top priority sectors. Instead, debates often focus on sectors which include manufacturing, agribusiness, technology, and financial services. While there is strong evidence—notably from developed economies and learned experiences in Africa—to suggest the importance of the aforementioned sectors, it is worthwhile to acknowledge that forums and high-level discussions seldom capture the context of each country and the timeframe of its economic development.

Furthermore, a country’s economic development strategy strongly hinges on the contextualization of its strengths and weaknesses. Hence, some economic sectors may be strategic in some countries but not in others. Nonetheless, upon a closer analysis of data and trends, tourism is a strategic sector for most African countries. Tourism contributes 8.5% to Africa’s economy and employs 24 million jobs. In fact, tourism is growing faster in Sub-Saharan Africa than anywhere else in the world.

Tourism then, may be a priority sector for a country depending on its range of resources and the ability of the government and other stakeholders (public and private) to execute the action plans that they mutually elaborate. Tourism is a bona fide export service activity.

Suffice it to say that on a global scale, tourism is an important sector and contributes significantly to a country’s national output. In 2018, total international tourist receipts amounted to $1.7 trillion USD, a 4% increase from prior year. This represents 29% of the world’s export services. Table 1 below shows the weight of tourism in the economy of some of the most developed countries in the world. In China and Mexico for example, travel and tourism contributed to 11% and 17.2% of the country’s GDP respectively. Overall, travel and tourism is an $8.8 trillion USD sector that employs 319 million people.

---

4 This amount excludes revenues generated from domestic tourism. Total travel & tourism receipts is the sum of transport to destinations and expenditures made by the visitor abroad.
### TABLE 1 – Travel & tourism (T&T) contributes significantly to the GDP of the world’s most developed economies

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>RANK</th>
<th>CONTRIBUTION TO GDP (BILLIONS USD)</th>
<th>T&amp;T % OF COUNTRY GDP</th>
<th>T&amp;T GDP GROWTH % YOY</th>
<th>DOMESTIC SPENDING: % OF TOTAL</th>
<th>INTERNATIONAL SPENDING: % OF TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>1</td>
<td>1,595</td>
<td>7.8</td>
<td>2.2</td>
<td>81.2</td>
<td>18.8</td>
</tr>
<tr>
<td>CHINA</td>
<td>2</td>
<td>1,509</td>
<td>11.0</td>
<td>7.3</td>
<td>85.8</td>
<td>14.2</td>
</tr>
<tr>
<td>JAPAN</td>
<td>3</td>
<td>368</td>
<td>7.4</td>
<td>3.6</td>
<td>82.5</td>
<td>17.5</td>
</tr>
<tr>
<td>GERMANY</td>
<td>4</td>
<td>345</td>
<td>8.6</td>
<td>1.2</td>
<td>85.2</td>
<td>14.8</td>
</tr>
<tr>
<td>UK</td>
<td>5</td>
<td>311</td>
<td>11.0</td>
<td>1.0</td>
<td>84.4</td>
<td>15.6</td>
</tr>
<tr>
<td>ITALY</td>
<td>6</td>
<td>275</td>
<td>13.2</td>
<td>3.2</td>
<td>76.2</td>
<td>23.8</td>
</tr>
<tr>
<td>FRANCE</td>
<td>7</td>
<td>266</td>
<td>9.5</td>
<td>4.1</td>
<td>65.7</td>
<td>34.3</td>
</tr>
<tr>
<td>INDIA</td>
<td>8</td>
<td>247</td>
<td>9.2</td>
<td>6.7</td>
<td>87.2</td>
<td>12.8</td>
</tr>
<tr>
<td>SPAIN</td>
<td>9</td>
<td>211</td>
<td>14.6</td>
<td>2.4</td>
<td>44.8</td>
<td>55.2</td>
</tr>
<tr>
<td>MEXICO</td>
<td>10</td>
<td>209</td>
<td>17.2</td>
<td>2.4</td>
<td>85.2</td>
<td>14.8</td>
</tr>
</tbody>
</table>


### III. Background on ecotourism

#### i. Strategic Plan for an Emerging Gabon

As part of its Vision 2025 development plan, the government of Gabon elaborated a strategic roadmap which covered the years 2011-2016. This roadmap feeds into other initiatives of stakeholders with the objective to lift Gabon to an emerging market status by the year 2025. The Vision 2025 is organized into three main pillars from which emanate all the priority projects of the government. They are Industrial Gabon, Green Gabon, and Gabon of Services.

The strategic plan highlights various programs which cover a wide array of areas including the economy, education, administration, and healthcare. Key focus points in the strategic document include the reform and modernization of the administration; investment in agriculture and fisheries; increased investment in the oil and gas and mining sectors; development of an industrialization strategy; and the elaboration of the tourism operational plan— the focus of this insight.

#### ii. Ecotourism within the context of nature-based tourism

First, due to the multiple definitions that it is attributed in various studies and research papers, it is important to define ecotourism. Indeed, it is much easier to explain the concept behind ecotourism than to give it a definition. This is because the definition of ecotourism has evolved over time in line with its rising popularity and based on who defines it.
Ecotourism is part of a broader type of tourism called nature-based tourism which in turn consists of ecotourism and wildlife tourism.

In a report produced by the World Travel and Tourism Council (WTTC), it defines wildlife tourism as a type of tourism whereby “wildlife watching experiences and/or interactions are an important motivator”. An important element of wildlife tourism is that animals are observed or interacted with in their natural habitat. Based on this definition then, wildlife tourism excludes settings such as zoos or hunting and fishing excursions.

Ecotourism on the other hand, encompasses wildlife tourism, but also interactions with the flora and the surrounding inhabitants. Other organizations and people may attribute a different definition to tourism. To some, trophy hunting is considered wildlife tourism and hence, ecotourism. Nonetheless, given the strong advocacy of the Gabonese Government for environmental conservation, the WTTC’s definition of ecotourism is more appropriate in this context.

Even within the context of a more or less specific definition by the WTTC, it is still tricky to gage the target market of ecotourism. Some may view ecotourism as a niche market while others do not. The simplest way to understand ecotourism is to view it as a continuum. On one end of the spectrum, ecotourism is a mass-market tourism scheme with the environment and its ecosystem being the central theme. On the other end of the continuum, ecotourism is a niche market whereby the offerings and experiences are unique and potentially more expensive.

**FIGURE 1 – Ecotourism is mainly nature-based tourism with a significant wildlife tourism content and some adventure tourism**

SOURCE: World Travel & Tourism Council
Although there is not an authoritative definition of ecotourism, experts agree on the following core elements inherent in the industry:

1. **The focus is natural areas.** People engage in ecotourism specifically to visit natural destinations with the goal of observing and interacting with the biota.

2. **Conservation of the environment.** As much as possible, ecotourism should not disrupt the natural state of the environment and tourists should be sensitized on the importance of the conservation of the environment.

3. **Economic benefits for local communities.** The revenues derived from ecotourism activities should benefit local communities who reside around the tourist attractions.

**What then is the contribution of ecotourism within the broader tourism sector?** Ecotourism remains a small component of tourism, however it is the fastest-growing sub-sector in the sector. Although more recent authoritative data on the global ecotourism market is unavailable, reliable proxy data allow us to assess the potential of the market. In its report titled *The Economic Impact of Global Wildlife Tourism*, the WTTC highlighted that in 2018, wildlife tourism represented a $343.6 billion market and sustained 21.8 million jobs globally. Recall that wildlife tourism is a subset of ecotourism, therefore these figures do not account for other segments of ecotourism, which together would greatly amplify the value of the industry.

In Africa, the importance of ecotourism is even more pronounced, reasonably due to the abundance and diversity of wildlife. According to the UNWTO, 80% of annual sales of trips to Africa were geared toward wildlife. Consequently, countries such as South Africa, Kenya, and Tanzania have significantly invested in nature-based tourism to drive their economies forward. In Kenya for example, estimates indicate that wildlife tourism accounts for about 70% of tourism earnings and more than 10% of total formal sector employment\(^5\).

Ecotourism is also the fastest growing sub-sector of the tourism sector, with global annual growth rate between 10-15\(^6\), far surpassing the global GDP growth rate of about 3 %. The importance of tourism and (therefore ecotourism) to Gabon’s economy is therefore evident—

---

\(^5\) *The Economic Impact of Global Wildlife Tourism*. August 2019. World Travel & Tourism Council

\(^6\) According to the *Journal of Tourism and Gastronomy Studies* 5/1 (2017) 20-31
it is potentially a significant source of revenues and sustainable economic growth for the country.

IV. Shifting from oil to nature

i. The current situation in Gabon: oil is king

To appreciate ecotourism as a growth sector in Gabon, it is imperative to provide a brief overview of its oil and gas sector which has shaped almost all aspects of the country for nearly six decades.

Gabon is abundantly rich in natural resources. The country is among the top exporters of crude oil, manganese, and timber. In the oil and gas industry, Gabon has proved particularly valuable and has consistently attracted global investors. From a nascent commercial oil sector in the 1960s, the country quickly became one of the most important oil producers in Africa, reaching a peak production of 370,000 barrels per day by 1997.

Evidently, the oil sector transformed the economic landscape of Gabon. As the global demand for oil grew, the country’s export revenues also grew considerably, and Gabon became an upper-middle-income country. The influx of foreign investors and international meetings in the country also increased its presence and influence in world affairs.

FIGURE 2 – Gabon’s economic identity is intricately linked to the oil and gas sector

1928 First geological studies conducted in Gabon.

1960s Following major oil discoveries in late 50s, commercial production begins.

1975 Gabon becomes a full member of OPEC. It later left the organization in 1995 and finally rejoined in 2016.

1997 Oil production reaches a peak of 370,000 bpd.

2018 Oil output continues its descent to reach 193,400 bpd.

2019 The government promulgates a new hydrocarbons code to attract investors and revitalize the industry.

SOURCE: U.S. Energy Information Administration; Total Gabon: “Our activities in Gabon”; OPEC: “Gabon facts and figures”
Today however, although oil still represents a significant part of Gabon’s export revenues, there has been a noticeable decline in output. Many of the onshore oilfields have matured, compelling the government to further attract investors’ appetite to its deep offshore oil reserves.

Another and more long-term strategy that the government has adopted is the diversification of the country’s economy. Oil being a finite resource, the Gabonese government has been pursuing ways to become less reliant on the commodity. This desire is clearly inscribed in its Vision 2025 where sectors such as agriculture, healthcare, and forestry are an increased priority.

### ii. Ecotourism as an economic diversification initiative in Gabon

Among many other reasons, the early success of Gabon in the oil and gas sector was partly due to the abundance of the resource in the country. Another immense natural resource of Gabon is its biodiversity. Gabon is located within the Congo Basin, the world’s second largest tropical rainforest after the Amazon. Data indicate that nearly 90% of the country is still forested with a relatively low deforestation rate. This makes Gabon the third most forested country in the world, just behind Suriname and the Federated States of Micronesia.

#### TABLE 2 – Gabon ranks high among the most forested countries in the world

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Country</th>
<th>Forest Area (% of land area)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Suriname</td>
<td>98.3</td>
</tr>
<tr>
<td>2</td>
<td>Federated States of Micronesia</td>
<td>91.9</td>
</tr>
<tr>
<td>3</td>
<td>Gabon</td>
<td>90.0</td>
</tr>
<tr>
<td>4</td>
<td>Seychelles</td>
<td>88.4</td>
</tr>
<tr>
<td>5</td>
<td>Palau</td>
<td>87.6</td>
</tr>
<tr>
<td>6</td>
<td>American Samoa</td>
<td>87.5</td>
</tr>
<tr>
<td>7</td>
<td>Guyana</td>
<td>83.9</td>
</tr>
<tr>
<td>8</td>
<td>Lao PDR</td>
<td>82.1</td>
</tr>
<tr>
<td>9</td>
<td>Solomon Islands</td>
<td>77.9</td>
</tr>
<tr>
<td>10</td>
<td>Papua New Guinea</td>
<td>74.1</td>
</tr>
</tbody>
</table>

SOURCE: World Bank data

The tropical forests, mangroves, wetlands, and savannas as well as the species that dwell in them represent a unique ecosystem that is exceptional. Numerous studies demonstrate

---

7 Deforestation rate estimated at 0.12% per year (Association Technique Internationale des Bois Tropicaux)
8 According to 2016 World Bank Data
that Gabon has the highest biodiversity of the central terrains in the Congo basin. The country has an estimated 10,000 species of plants of which 20% are endemic; over 700 bird species; nearly 200 mammal species; 100 amphibian species; and over 160 reptile species. Although a significant portion of Gabon’s forest elephants has been killed (more than 25,000 killed between 2004-2014⁹), the country still has the largest surviving population in the world.

**FIGURE 3 – The country is greatly endowed in wildlife: highest biodiversity in the Congo basin**

- **Species of mammals**: Gabon is home to an estimated 50-60% of the world’s forest elephants.
- **Amphibian species**: Studies indicate that the amphibian population has not been fully inventoried.
- **Reptile species**: 4 reptile species are endemic to Gabon.
- **Species of plants**: Frequently, new species are discovered as either new to Gabon or new to science.

**SOURCE**: World Wildlife Fund. WWF in Gabon; reptile-database.org; Oiseaux.net; Mongabay

Along with its rainforests, Gabon shares over 885 kilometers with the Atlantic Ocean. Its seas are filled with marine life which include unique and endangered species of whales, sharks, rays, and turtles. The topography of Gabon is likewise covered with bodies of water which form complex channels of rivers, lagoons, and waterfalls. The Ogooue River, for example, is the principal river in the country, spanning 1,127 km and covering 90% of Gabon’s territory.

Beyond the magnificent biota of Gabon though, there is a more important asset which is integral to Gabon being a potential destination for ecotourism. It is the group of people who live in the surrounding areas of the rainforests, the shorelines and the other bodies of water in the country. Gabon has over 40 different ethnic groups and over 50 practiced rites\textsuperscript{10}. The surrounding ethnicities have been inhabiting the areas for thousands of years and are physically and spiritually connected to their ecosystem. They also constitute an invaluable reserve of culture and heritage that can be tapped into as Gabon positions itself as a premier ecotourism destination.

If Gabon invests in ecotourism as much as it has done in the oil sector, it could potentially achieve greater and more sustainable success in the long run. There are encouraging signs that the government is heading into the right direction. For nearly two decades now, the Gabonese government has been aggressive and relatively successful in its fight to protect its biodiversity. This has earned the country accolades and recognition on the global stage. In 2019 for example, Norway rewarded Gabon with 150 million USD over 10 years to reduce its greenhouse gas emissions from deforestation and degradation. It is the first country to obtain such funds in Africa via the Central African Rainforest Initiative (CAFI).

Gabon’s first major breakthrough into environmental conservation occurred in 2002. During the United Nations Sustainable Development Summit in Johannesburg that year, former president Omar Bongo Ondimba announced the creation of 13 national parks in Gabon to protect some of the most important wildlife within the Congo basin. Today a reality, the national parks of Gabon cover three million hectares (over 11,000 square miles), representing 11% of the land mass of the country. This is about the size of the Kingdom of Belgium.

The other major step occurred in 2017 when the current president of Gabon, Ali Bongo Ondimba, announced the decision to create the largest network of marine parks in Africa. The 18,000 square miles area (46,000 square kilometers) is made up of nine marine parks and 11 aquatic reserves. This preserved area will protect 27% of Gabon’s territorial waters which include many protected species of whales and dolphins.

\textsuperscript{10} As reported by the office of the Gabonese Presidency
FIGURE 4 – The 13 national parks of Gabon

FIGURE 5 – The national and marine parks ensure that the country achieves the two-pronged objectives of preserving its biota and developing sustainable nature-based tourism

SOURCE: The Gabonese National Agency for National Parks
V. Developing ecotourism into an income-generating industry

Subsequent to the Gabonese government’s development of its Vision 2025 strategy, it is now imperative for stakeholders to reevaluate the role that tourism, particularly ecotourism, plays in the economic development of the country. Overall, the scope of the recommendations revolves around evaluating the current state of affairs in the sector, elaborating a comprehensive framework, and devising a monitoring and evaluation plan.

Given that ecotourism is an export industry (goods and services are exchanged), therefore subject to market forces, it is important for the government and other stakeholders to provide active and coordinated effort to make the industry competitive. The following are a few high-level recommendations that the Gabonese authorities and other stakeholders should consider as the country tries to position itself as a premier tourism destination.

i. Evaluate the achievements and competitiveness of the industry

It is appropriate to recall that tourism is highlighted as a flagship sectorial project within the country’s strategic development plan. There are a number of programs that the government elaborated to turn Gabon into a regional pole of excellence in tourism. These programs are included in the *National Ecotourism Action Plan* of the strategic roadmap. They include: the establishment of a graduate school in tourism, a tourism railway (Rainforest Express), and cultural art centers.

Eight years since the elaboration of the strategic roadmap and five years prior to the maturity date of Vision 2015, an evaluation is essential, particularly pertaining to the tourism context, as it provides an objective assessment of the design, implementation, and results of the roadmap.

As part of this evaluation process, a comparison could be made between the achievements in the sector against the stated objectives within the roadmap. This step involves quantitative and qualitative assessment on the ecotourism sector. In light of the purpose of the evaluation, the focus should be on the achievements related only to ecotourism in order
to (i) limit the scope to fit the goal of the evaluation; (ii) reduce the resources allocated to the evaluation; and (iii) obtain specific results that can inform decision makers.

There is a plethora of indicators that could help to measure the competitiveness of the Gabonese ecotourism sector against national and international established benchmarks. The OECD Tourism Committee has established a framework of eleven core indicators that the government can consider in reviewing the achievements in the tourism sector\textsuperscript{11}. These indicators are organized around four categories which are:

- measuring the tourism performance and impacts;
- monitoring the ability of a destination to deliver quality and competitive tourism services;
- monitoring the attractiveness of a destination; and
- describing policy responses and economic opportunities.

During the evaluation process, only the measurement framework would be relevant to stakeholders. This framework comprises eleven indicators that are illustrated in Table 3.

\begin{table}[h]
\centering
\caption{Indicators that could prove useful in the tourism evaluation process}
\begin{tabular}{|l|p{12cm}|}
\hline
Tourism competitiveness indicators & Measurements of the indicators \\
\hline
Tourism Direct Gross Domestic Product & Direct impacts, domestic and inbound tourism consumption. It is the most important statistic in tourism competitiveness. \\
\hline
Inbound tourism revenues per visitor by source market & The economic activity of visitors, identifying the percentage growth or decline year-on-year in inbound tourism revenues per visitor by source market. \\
\hline
Overnights in all types of accommodation & Tourism flows in accommodation, capturing the percentage growth or decline year-on-year in overnights in all types of accommodation. \\
\hline
Exports of tourism services & Exports of tourism services and relative performance compared with other sectors, capturing growth or decline year-on-year in value and in percentage. It reflects performance in terms of brand, value awareness and international appeal. \\
\hline
Labor productivity in tourism services & The level and evolution of productivity of those employed in tourism and the productive potential of the tourism economy. \\
\hline
Purchasing Power Parity (PPP) and tourism prices & Tourism price level differences across countries expressed as indices with a basis chosen by country or country group. \\
\hline
Country entry visa requirements & Entry visa requirements including methods of visa issuance and of the number of visas issued per year and share of inbound tourism arrivals. \\
\hline
Natural resources and biodiversity & Country’s stock of natural assets, in terms of the number of recognized natural heritage sites and preserved areas. These
\hline
\end{tabular}
\end{table}

<table>
<thead>
<tr>
<th>Cultural and creative resources</th>
<th>Number of recognized cultural and creative attractions in various forms.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor satisfaction</td>
<td>Demand side attractiveness value, using a comparable measure of visitor satisfaction rating and intention for repeat visits.</td>
</tr>
<tr>
<td>National Tourism Action Plan</td>
<td>A competitiveness indicator that recognizes the existence and quality of implementation, effectiveness and evaluation of a National Tourism Action Plan.</td>
</tr>
</tbody>
</table>

Central in the evaluation is an assessment of the activities of various state agencies that operate in the tourism ecosystem. A notable one is the Gabonese Agency for the Development and Promotion of Tourism and Hospitality (Agence Gabonaise de Développement et de la Promotion du Tourisme et de l’Hôtellerie, AGATOUR\(^\text{12}\)). Born out of the ashes of former Gabon Tour in 2014, it is the primary organ that oversees investments in the sector through promotion and partnerships with private and public entities. Since its creation, AGATOUR launched many activities and has signed multiple public-private partnership MoUs with notable private international operators. A review of the activities of AGATOUR and other agencies and the results that emerged from them would prove useful in improving the ecotourism industry in Gabon.

The tourism performance and impact measurements constitute a comprehensive tool that could aid ecotourism stakeholders in Gabon to assess the competitiveness of industry. It is to be noted, however, that some of the indicators may be difficult to obtain within the context of Gabon or in Sub-Saharan Africa in general. Indicators such as labor productivity and inbound tourism direct GDP are more readily obtainable in relatively mature and sophisticated tourism markets. Nevertheless, the evaluation phase would help stakeholders to identify the gaps within the industry and make subsequent improvements.

**ii. Conduct a needs assessment of the stakeholders**

Another action that could be undertaken is a needs assessment of all key players. A needs assessment is an inclusive exercise that could reveal the needs of the stakeholders vis-à-vis the intended objectives of the tourism strategic roadmap. The central question that the needs assessment would answer is: **what is the role of each stakeholder and what do they need in order to meet the tourism objectives stated in the strategic roadmap?**

\(^{12}\) AGATOUR is governed by decree number 0314/PR/MIMT of September 25\(^{\text{th}}\), 2014
The needs assessment is a critical phase that helps to determine activities such as the development of action plans, elaboration of technical assistance, and resource allocation. Needs assessments are designed based on various factors of the program, however the following activities are inherent in any needs assessment:

- identifying the stakeholders. A mapping exercise could be undertaken to identify the various stakeholders and the relationship between them;
- understanding the role each stakeholder plays towards achieving the stated objectives for the industry; and
- engaging with each stakeholder to understand their needs and assess the resources available to them.

**FIGURE 6 – The fundamental steps of a needs assessment**

The needs assessment phase is important because it gives an idea to authorities regarding how to allocate resources within the industry and how much leverage should be given to each stakeholder.

### iii. Involve the local communities

It is challenging to achieve sustainability in ecotourism without local community participation. Local communities play a significant role in preserving the environment and developing the economic activities related to it.

There is often a conflict between residents and the State with regard to areas surrounding the tourism activities. The State accuses residents of poaching animals in the wilderness and residents in turn blame government authorities for seizing their lands which is often
their only source of livelihoods. Locals can play a role in the entire value chain of the industry, particularly in the monitoring and evaluation aspect, under the condition that a dependable relationship exists with government authorities.

The relationship between these two stakeholders does not have to be challenging. Authorities can involve local communities in the industry activities at two levels: during the decision-making (planning) process and via participation in income-generating activities (post planning).

- **Planning process**: given that residents live within or near the areas slated for ecotourism, local people should be empowered to participate conjointly with other stakeholders. One way to achieve this is to create tourism bodies at the most basic local level. An in-depth survey could be conducted to determine the best way to approach this. This may even be in the form of consultation groups or the creation of committees. Here, an established mechanism in the mining sector could be leveraged for tourism. Indeed, in Gabon the mining code has a provision regarding the creation of tri-party committees (State, private sector operator and local communities) vis-à-vis ESG activities. Given that this scheme has been effective in the mining sector, it could be adapted in the tourism sector.

- **Post planning**: from the many opportunities that ecotourism presents, job creation is likely the most important to local dwellers. Unlike oil and gas or other capital-intensive industries, tourism attracts a high proportion of jobs, something that is of interest to local communities. In order to achieve this however, it is important to provide capacity building to locals in various segments including entrepreneurship, customer service, and foreign languages.

Generally, locals have a good understanding of their surroundings and its history, however since ecotourism is foremost a business, they should be trained on how to transform their knowledge into revenue-generating activities. For example, tour guides could learn or improve their foreign language skills in order to better communicate with foreign tourists. Young community members could also be trained in creating crafts to better showcase their cultural values and earn money. Locals could also acquire training in tourism-oriented businesses including restauration, guesthouses, and many more.
By actively involving local communities whenever this is feasible and making them feel that they have a voice in the tourism development process, the government breaks down barriers and increases the trust with them. In turn, locals are motivated to help the government to achieve its vision in the sector. Furthermore, it is an opportunity for the government to contribute toward poverty reduction—an essential indicator in economic development. The commitment of local communities is also important in combatting population pressure, eco-exploitation, and the destruction of the ecosystem.

iv. Establish an ecotourism public-private partnership framework

Gabon is in the advanced stages of finalizing a tourism code which will be the legal framework for the sector. While this is an important step, it is important to ensure that the principles of a successful PPP partnership are observed, to create a mutually beneficial outcome for all parties.

Although ecotourism presents a substantial long-term growth opportunity for Gabon, it is essential for the government to capture this growth and manage it to provide wealth for the Gabonese people. But, given that resources are limited, even for the wealthiest governments, this process must inevitably involve multiple stakeholders. One of those stakeholders is the private sector. It plays a predominant role in ensuring the economic viability of the tourism activities. The Gabonese government could invite private entities into the sector, especially for the more sophisticated and big-ticket investments.

Nonetheless, this partnership must be structured. Indeed, any program or project that has a long-term aim should have a framework. Given that with this approach, the government would be collaborating with the private sector, a public-private partnership framework is therefore in order. An established ecotourism PPP framework could allow the government to take the lead in the development of tourism resources based on the its development priorities as well as its social and environmental guidelines. In turn, the private sector can play a support role by harnessing financial resources, creativity, and competence to manage commercial activities in the sector. There are some considerations when establishing the PPP framework. The figure below illustrates the main principles for a successful PPP.
The 10 principles above illustrate the steps that the Gabonese tourism agencies can take if a PPP framework is designed for the ecotourism industry. As can be observed, a few of the principles indicate that the working relationship between the government authorities and ecotourism operators must produce a mutually beneficial result for all parties. This would be the only way to create a consistent flow of investment and revenues for the country.

In establishing the PPP framework, authorities should also consider tax, fiscal, and other incentives to encourage inflow of private investments. This segment of the PPP framework is important in ensuring that private operators are compensated for the risks they take, but also that the government obtains a guarantee of future payoff through the incentives.

v. Promote local tourism

It goes without saying that most countries in Africa still promote ecotourism as a niche sector with the primary target market being Europeans, North Americans, and Asians. This perspective is not any different in Gabon. In its strategic development plan, the Gabonese government explains that despite the many advantages that the country has to be an
ecotourism destination, “the fact remains that ecotourism will remain a niche offer, insufficient on its own to make tourism in Gabon, a true pillar of growth”\textsuperscript{13}.

The government’s position is understandable given that ecotourism constitutes a much lesser share of tourism in most countries. Nevertheless, it remains the fastest growing segment of the travel and tourism industry. Therefore, ecotourism should indeed be viewed as the catalyst to make tourism a pillar of growth in Gabon.

A great way to achieve this is to increasingly promote the sector to the Gabonese population. After all, domestic tourism spending generally exceeds external arrivals and spending. Thus, it is a market that should not be neglected. Promotions could be provided to locals and incentives (transportation, accommodation, etc.) should be put in place to motivate them to discover the biodiversity of their country. It is well-known that many of the most magnificent ecotourism destinations in Gabon are difficult to access. As a result, the Gabonese population (most residing in Libreville) are not incentivized to visit those tourist attractions.

The Gabonese can benefit from reduced or free tariffs to many tourist attractions including museums, cultural centers, and parks. Countries such as Ghana have implemented this strategy, and this has encouraged more Ghanaians to discover their country. It is also a standard practice in many countries that have a developed tourism sector or are embarked on a strategy to boost their tourism sector. After all, the best promoters of a country remain its people. It is also an opportunity for the Gabonese government to educate its youthful population on the rich biodiversity and cultural heritage of the country.

vi. Develop the infrastructure around ecotourism

It is well documented that in all economies, without adequate infrastructures in place, the potential of the tourism industry is limited. Tourism infrastructure development is at the core of any tourism strategic plan. The Tourism & Transport Forum (TTF) categorizes the infrastructure network of tourism into two core groups: demand drivers and supporting visitor infrastructure. The demand drivers essentially are the reason why tourists visit a country. They include iconic/historical sites, national parks, museums, and convention

\textsuperscript{13} From page 112 of the Plan Stratégique Gabon Emergent
centers. Demand drivers are important because in addition to attracting tourists to the country, they increase tourist spending.

The supporting infrastructures are seldom the reason why tourists may decide to visit a country; however, they influence the tourism experience and, often, are a prerequisite to tourist arrivals. The supporting infrastructures consist of the road, railroad and airport networks that connect international and domestic travelers to the tourist attractions within a country (the demand drivers). Furthermore, a key component of this infrastructure group is hotel accommodations.

**FIGURE 8 – Demand and support infrastructure are complementary and are both important**

In the case of Gabon, the objective of the government should be to make the country more affordable and accessible for international visitors as well as domestic tourists. A great starting point is the renovation of the Léon-Mba International Airport, the primary entry point into Gabon for international tourists. GSEZ Airport, a subsidiary of Gabon Special Economic Zone, has already begun renovation work on the airport. Upon completion, in addition to helping the tourism industry, the airport could be a value-addition because it could position Gabon as the transit hub in the central African region.

Additional work could also be done on the railways and road networks that run to the primary tourist sides in the country. All else being equal, easily accessible destinations are
more worthwhile destinations to visitors than hidden gems that most people cannot access except for intrepid adventurers.

Finally, the government should focus on improving its environmental infrastructure. It appears this is the area where the government of Gabon has made the most improvements. In 2002, the country created a network of 13 national parks which are managed by the Agence Nationale des Parcs Nationaux (ANPN).

The missing piece though, is the valorization of the national parks and other environmental infrastructure. Given the size of the national parks (11% of Gabon land mass), it is important for the government to derive some revenues from their management. The objective here is to turn these treasures into tourist attractions. Without this approach, it would be challenging for the government to sustainably manage the large reserves of land.

vii. Developing a qualified workforce

The quality of the workforce is a competitive factor of tourism in any country. Workers are at the forefront in receiving tourists who visit a country and the satisfaction of these tourists is largely based on how well they are received by the industry’s workers. In reality, the government’s ambition to build a tourism school of excellence should be part of a much broader vision to have a qualified workforce in the industry.

Authorities could take certain steps to develop a qualified tourism workforce in Gabon. This includes developing a labor framework in the sector, setting the standards for training and recruitment, and elaborating the curricula. This preparation phase can be done in partnership with the government, industry associations or actors, and training providers. Key recommendations for the labor framework include:

- increase the participation of women and young people in the ecotourism workforce. This fulfills a social and economic need. The world now understands that the higher number of women actively involved in the workforce is a multiplier effect for the economy. Furthermore, young people can be trained to take up average paying jobs in the industry either part time to help them pay for school fees or to care for themselves and not be a burden for parents who may not have the means to do so;
• provide training for micro, small, and medium enterprises (MSMEs). Furthermore, apprenticeship and continuing education programs can be developed to reinforce the skills of workers who are already working in the sector.

viii. Tourism master plan

The cumulation of the prior recommendations is naturally a tourism master plan (TMP). Every country that has developed a prosperous tourism industry inevitably has a TPM. This highly strategic document is different from a tourism framework or code.

What is a tourism master plan?

It is a long-term, inclusive, and action-oriented vision for tourism in a country. Given that tourism is a fragmented sector, it is essential to develop a plan that includes all the stakeholders to realize its full economic potential. The TMP integrates inputs from private operators, government agencies, industry associations, civil society, academia, etc. It also provides guidance to topics that are relevant in tourism such as infrastructures, accommodation, entertainment and recreation, marketing, labor, immigration, etc.

The objectives of a tourism master plan

Although the TPM is not an enforceable regulation, it strives to create synergies within the functions of key stakeholders in order to improve visitor experience and make the tourism sector more competitive. Furthermore, by developing a TMP, a country achieves results and cost savings by eliminating redundancy of roles and allocating resources to the most suitable stakeholder.

FIGURE 9 – The development of a tourism master plan is an involved exercise
VI. Conclusion

The COVID-19 pandemic is perhaps the biggest challenge that the world has faced in a recent past. As the plight of the virus rages on, the leaders of this world continue to struggle to manage economies and communities. One observation is clear from our analysis at ACT Afrique: dealing with the current crisis should be the priority of all decision makers. As various epidemic models are indicating, if a concerted effort and multifaced approach is not established to combat the virus, millions of lives are at risk. In Africa, this could prove disheartening because in addition to the potential human casualties, there could be an economic unravelling for many countries that have provided so much effort during the past few years to develop.

Nevertheless, economic development is a continuous process and while tackling the ongoing crisis, leaders should also begin reflecting on the shift in economic growth path. In Africa, this shift in economic development paradigm is even more important because it is evident that the continent lacks the flexibility to combat the pandemic.

At ACT Afrique, we have been advising our partners to strengthen their response to the pandemic, but we have also been providing strategic and transaction advisory services to clients who are already positioning their organizations for the post COVID-19 situation. In the same perspective, country leaders should begin reflecting on the strategies that they could implement to ensure that their countries are more resilient against severe shocks.

In the Republic of Gabon, this reflection should inevitably focus on economic diversification. Oil, regardless of how well it is managed, remains a finite resource. Although the country has taken laudable measures in the past decade to diversify its economy, much remains to be done to attain this ambition. Among the other sectors that authorities are focusing on, ecotourism should be also be a priority. It is strategic segment of the country’s economy and could be a leverage to develop business tourism as well.

Due to its multimodal nature, a focus on developing ecotourism would also help to improve other areas of the economy such as infrastructure, services, and information technology. Finally, ecotourism is in harmony with the Gabonese government’s established resolve to combat climate change and protect wildlife.
Annex: list of tables and figures

| TABLE 1 | Travel & tourism (T&T) contributes significantly to the GDP of the world's most developed economies | 6 |
| FIGURE 1 | Ecotourism is mainly nature-based tourism with a significant wildlife tourism content and some adventure tourism | 7 |
| FIGURE 2 | Gabon’s economic identity is intricately linked to the oil and gas | 9 |
| TABLE 2 | Gabon ranks high among the most forested countries in the world | 10 |
| FIGURE 3 | The country is greatly endowed in wildlife: highest biodiversity in the Congo basin | 11 |
| FIGURE 4 | The 13 national parks of Gabon are located across the country | 13 |
| FIGURE 5 | The national and marine parks ensure that the country achieves the two | 13 |
| TABLE 3 | Indicators that could prove useful in the tourism evaluation process | 15 |
| FIGURE 6 | The fundamental steps of a needs assessment | 17 |
| FIGURE 7 | Ten key principles for a successful public-private partnership | 20 |
| FIGURE 8 | Demand and support infrastructure are complementary and are both important | 22 |
| FIGURE 9 | The development of a tourism master plan is an involved exercise | 24 |
ACT Afrique Group 2020. All rights reserved.

ACT Afrique partners with institutions, organizations, and leaders who are at the forefront in solving some of the most complex challenges that Africa faces. For more information, please write us at contact@act-afrique.com. Please visit act-afrique.com to find latest ACT Afrique content. Follow us on LinkedIn and Twitter.