

Papua New Guinea Tourism Demand Assessment Part II

Case Studies for Niche Market Success

June 2018

IN PARTNERSHIP WITH



Creating Markets, Creating Opportunities

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The International Finance Corporation's (IFC) work in Papua New Guinea is guided by the Papua New Guinea Partnership. Australia, New Zealand and IFC are working together through the partnership to promote sustainable economic development, reduce poverty and stimulate private sector investment in Papua New Guinea.

The Papua New Guinea Tourism Demand Assessment was commissioned by IFC and TPA. The study was conducted by the international market research firm Euromonitor International, using a mixed methodology of primary and secondary research sources.

IFC's work in Papua New Guinea is guided by the Papua New Guinea Partnership. Australia, New Zealand, and IFC are working together through the partnership to promote sustainable economic development, reduce poverty and stimulate private sector investment in Papua New Guinea.



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Glossary

Birdwatching: Observing or photographing birds in their natural habitat

Cultural tourism: Visiting a destination for an indigenous cultural experience

Dark tourism: Visiting a destination associated with tragedy, destruction or disaster such as war, genocide or natural disasters

Dive tourism: Scuba diving in fresh or salt water; includes only active divers with advanced certifications

Hard adventure tourism: Participating in nature-based activities that are high risk in nature, such as caving, climbing (mountain, rock, or ice), trekking, paragliding and bungee jumping

Historical tourism: Visiting sites, relics, monuments, memorials or services related to WWI or WWII

Inbound tour operator: A destination country service provider that arranges itineraries, transport, accommodation, and tourism products for international tourists, and markets them to outbound tour operators; located within Papua New Guinea in this study

Niche market: High-value tourists motivated to travel for specific, unique experiences

Outbound tour operator: Outbound country service provider that markets and sells trips to tourists; located in outbound markets

Soft adventure tourism: Participating in activities that are low risk, such as hiking, fishing, surfing, snorkelling, and kayaking; excludes trekking, bird watching and diving for the purposes of this study

1 Objectives

The *Demand Assessment for Tourism in Papua New Guinea* study will assist the Government of Papua New Guinea (PNG) in strategic tourism development, targeting air arrivals from important global niche markets. International Finance Corporation (IFC), the largest private sector development firm and a member of the World Bank Group, and the Tourism Promotion Authority of Papua New Guinea (TPA) will use the results of this study to determine tourism investment planning, marketing strategies, and destination development opportunities. This *Comparison Destination Report* is a part of the study and aims to:

- Identify destinations that have overcome similar challenges to those that PNG faces;
- Analyze the key factors that enabled these destinations to succeed; and
- Identify best practices from these destinations which PNG can adopt.

1.1 Comparison Destination Methodology

Comparison destinations were selected, based on their success with birdwatching, diving, cultural tourism, historical tourism and soft adventure tourism. Other criteria considered included marketing efforts, transportation infrastructure, similarity of product offerings, challenges faced by the comparison destination, and learning potential for PNG. A shortlist of destinations was identified and agreed upon by IFC, TPA and Euromonitor. The destinations selected were Ecuador for birdwatching, Sulawesi for diving, Namibia for cultural tourism, Okinawa for historical tourism, and Rwanda for soft adventure tourism.

Costs in this report are estimated and are based on research conducted in 2017. Unless otherwise stated, dollar amounts are in USD.

1.2 Comparison Destinations

Destinations for comparison were chosen, in consultation with IFC and TPA, to reflect the best learning potential for each of the market segments. They are as follows:

- 1. Cultural tourism – Namibia:** Namibia was selected in order to study how government and industry marketed the destination internationally, developed a tourism system that could benefit local communities, and obtained sufficient government support.
- 2. Birdwatching – Ecuador:** Ecuador was chosen because of its ability to develop sustainably, create efficient transportation, build knowledge about the destination, train specialized guides, and utilize specialized accommodation to attract birdwatchers.
- 3. Soft adventure tourism – Rwanda:** Rwanda was selected because it was able to transform international perceptions, build a portfolio of tourism products, develop an inclusive conservation plan, and develop targeted infrastructure to support the tourism industry.
- 4. Historical tourism – Okinawa, Japan:** Okinawa was selected because it has strong historical tourism products and is now targeting international markets, having hitherto targeted only domestic markets.
- 5. Diving – Sulawesi, Indonesia:** Sulawesi was selected because it has a strong diving product and was able to overcome challenges of accessibility to the region, develop a system to ensure the sustainability of the marine environment, manage the marine protected areas, and involve local communities in the planning and development of tourism in the region.

Similarity of product offerings to those in PNG: The comparison destinations selected must have similar or more developed product offerings to those niche segments being studied for PNG – birdwatching, diving, cultural tourism, historical tourism, and soft adventure tourism.

Challenges faced by the comparison destination: Examining the challenges faced by the tourism industry in the comparison destinations allows PNG to learn from how the comparison destination overcame the challenges.

Potential lessons for PNG: The comparison destinations must have applicable lessons that PNG can learn from in order to develop birdwatching, diving, cultural tourism, historical tourism, and soft adventure tourism in PNG.

Tourism development story: The comparison destinations must have a clear and well-documented tourism development story that outlines the strategies, projects and actions that the government and private sector took to increase tourism.

Marketing efforts: Marketing efforts undertaken by the comparison destinations to promote the destination and to promote the niche segment activity were taken into account when selecting comparison destinations.

Transportation infrastructure: Development of transportation infrastructure in the destination to support tourism was taken into account when selecting comparison destinations.



Photo: John Y. Can

COMPARISON DESTINATION ANALYSIS

2.1 CULTURAL TOURISM NAMIBIA

2 COMPARISON DESTINATION ANALYSIS

2.1 Cultural Tourism – Analysis of the Cultural Tourism Segment in Namibia

2.1.1 Key Success Factors

- **Developing cultural tourist products along existing tourism routes to tap into established patterns of travel.** The most successful cultural tourism products in Namibia are located along popular, existing tourism routes, giving them access to a high volume of travellers.
- **Cultural tourism product development initiated where market control exists to drive demand.** Cultural tourism products in remote areas are successful when they are linked with a private sector partner that has market control and drives visitation. Products developed in remote areas without a private sector partner have failed.
- **A strong enabling environment created mechanisms for community based tourism and empowers rural communities.** The Government of Namibia has mainstreamed community benefit into its policies and strategies, creating a strong enabling environment for community-based tourism and community-based natural resource management.
- **Globally iconic and authentic cultures and effective marketing creates a cultural destination image.** Namibia has globally iconic and authentic cultural tourism products that Namibia Tourism Board leverages to create a strong and recognizable cultural destination image through effective and targeted marketing.

2.1.2 Overview

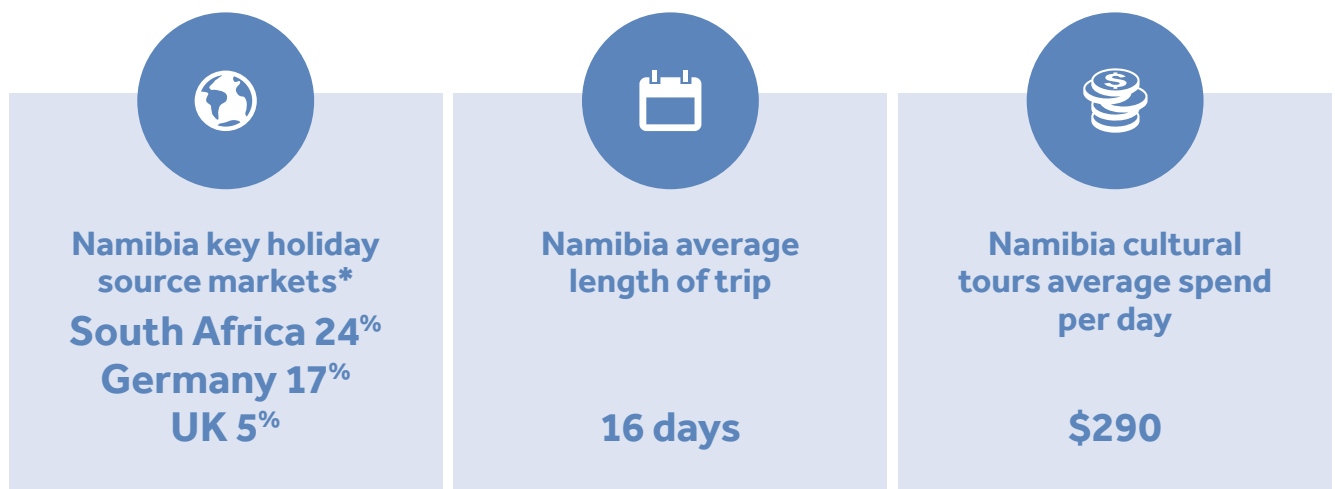
Namibia's pioneering community-based natural resource management (CBNRM) policy created a strong enabling environment for community based tourism, allowing communities to plan, own and benefit from tourism enterprises. Namibia's thriving wildlife populations, good infrastructure as a Sub Saharan African destination, and accessibility make it a popular destination for visitors seeking a safari experience. The CBNRM policy began as a measure to conserve the country's wildlife and ensure communities benefit from natural resources.¹ The goal of the policy is to vest economic user rights with resident communities through the establishment of demarcated and registered conservancies. The conservancy management entities are then able to establish tourism ventures, including cultural tourism products, under common property rights.

To diversify tourism products and attract new markets, the Ministry of Environment and Tourism (MET) and industry stakeholders developed cultural products along existing tourism routes and with strong linkages to the private sector. Through a holistic development program, MET and industry stakeholders developed a range of products, including cultural villages, cultural trails, cultural and interpretive centers, and craft production and sales areas. The most successful products were those developed along popular, existing routes to tap into accessible visitor volume flows and linked to a private sector partner that has market control. Product development was coupled with training of service providers and entrepreneurs to encourage high quality products, business management and customer service. It is important to note that many cultural products in Namibia, and elsewhere, have not succeeded because they were not located close to established tourism routes, did not have a private sector partner, and had inadequate business planning.

¹ The basis for community benefit from tourism stems from Namibia's 1990 Constitution, which mandates the protection of natural resources and their sustainable utilization for communities.

The success of cultural tourism in Namibia was also dependent on iconic cultural tourism assets and effective marketing. Namibia has globally iconic and authentic cultural tourism assets, with a focus on the Himba, San and Herero cultures. These assets supported the creation of a strong and recognizable cultural destination image. To support overall destination and specific cultural tourism marketing, the Namibia Tourism Board (NTB) conducted market research to identify target markets, then marketed routes and itineraries through traditional marketing channels at trade shows, familiarization trips (famils),² their award-winning website and targeted social media campaigns.

2.1.3 Arrivals, Length of Stay, and Spend



* Percentage of total holiday arrivals

Source: MET 2016c, MET 2013, Trade Interviews and compilation of inbound and outbound operators tour packages prices.

Key Markets

Namibia has experienced steady average annual growth of five percent for holiday arrivals over the past decade, with total holiday arrivals reaching 541,583 in 2016, representing 37 percent of total arrivals (MET 2016c). Key source markets for cultural tourism in Namibia are South Africa (24 percent of holiday arrivals in 2016), Germany (17 percent) and UK (5 percent).³ Namibia has specifically been targeting the USA market, reaping growth around 11 percent each year from 2014 to 2016. MET has also identified China as a market of interest, due to 25 percent growth in Chinese inbound arrivals from 2012 to 2016, albeit from a low base (MET 2016c).

The importance of the European market has been increasing with holiday arrivals from Europe growing by 24 percent from 2015 to 2016.⁴ Arrivals from Germany alone increased by 29 percent during the same period. Lodge operators with cultural activities note that an estimated two-thirds of their guests are German, demonstrating a market preference among Germans within the cultural tourism segment. There is a strong trend of repeat visitation within the German market, with tourists exploring new attractions in Namibia each trip. Operators also note that they have seen an increase in younger German tourists, often families traveling with children, who prefer tour packages. Other European markets have higher independent travel rates and tend to prefer self-drive tours.

² Familiarization trips are trips organized by in country tourism stakeholders to bring outbound tour operators, media and trade to the country to experience the destinations and products.

³ Although visitors from Angola represent 16% of total holiday arrivals to Namibia in 2016, Angola is not considered a main source market for cultural tourism in Namibia. Due to the high cost of living in Angola, shopping and short stay city experiences are the typical focus of Angolan holiday visitors within the southern Africa region (South Africa Tourism 2021. 2012).

⁴ This has been paralleled by a 16 percent decrease in holiday arrivals from Africa.

Length of stay, demographic and spend

Travellers to Namibia stay longer than the global average, demonstrating the appeal of the destination, particularly for long haul visitors. The average length of stay for all visitors to Namibia, at 19 days in 2016 (MET 2016c), is longer than the average length of stay at the global level – eight days (Visa 2018). Key holiday source markets reflect this trend, with German visitors staying an average of 20 days, British 17 days and French 15 days (MET 2016c).

Targeted efforts to increase arrivals from younger markets in Europe and North America have been successful.

As most holiday tourists to Namibia are older, more experienced travellers, MET began targeting younger travellers from Europe and North America in 2011 (Solimar International 2012). Recent trends have shown significant increases in younger travellers from these source markets, with 30 to 39 year-olds increasing by 20 percent for Europe and 25 percent for North America from 2014 to 2016. However, still the largest share of visitors from core markets in Europe (46.6 percent) and North America (44 percent) are in the 50 years or above category. Even visitors from South Africa mostly fall within the 40 years and above category, with business travellers likely bringing the average age down (MET 2016c).

Although there is no current and detailed market spending information, the 2013 Tourist Exit Survey revealed that holiday visitors spend an average of \$132 per night and an average of \$992 on airfares (MET 2013). In trade interviews with lodges specializing in cultural activities, operators note that package holiday visitors spend approximately \$290 per person per day for an all-inclusive tour that includes guiding, meals, accommodation, local transportation, and visas.

2.1.4 Product Availability, Quality and Pricing

The cultural tourism products in Namibia include:

Immersive: Village visits	Lodges and tour packages offer a half- or full-day immersive visit to local villages in which communities like the Himbas, Sans, and Ju/'hoan people live: <ul style="list-style-type: none"> • Kunene River Lodge – A half-day visit to the Himbas village costs \$26 (NAD 330) per person • Nhoma Safari Camp – A full day with the Ju/'hoan Bushmen costs \$190 (NAD 2,400) per person • Kalahari – A two-day trip with the Sans tribe costs at least \$310 (NAD 3,850) per person
Demonstrative: Living museum visits	Living museums are demonstration villages that belong to the tribe conservancies who employ their own people to act and demonstrate their ancestors' way of life. <ul style="list-style-type: none"> • Damara Living Museum with the Damaras – Costs \$10 (NAD 140) per person • Mbunza Living Museum – A short program costs \$12 (NAD 150) per person and a full-day program costs \$22 (NAD 280) per person
Cultural festivals	Annual cultural festivals showcase Namibia's various cultures and traditions, and preserve the heritage of local communities. These festivals include: <ul style="list-style-type: none"> • /Ae//Gams Arts and Cultural Festival • San Kubis Festival • Lüderitz Crayfish Festival • Olufuko Cultural Festival
Twyfelfontein Heritage Site	Namibia's first UNESCO World Heritage Site was used by the historical hunter-gatherers and ethnic groups as a place of worship and a site for conducting shamanistic rituals. Approximately 2,500 rock carvings and rock paintings are preserved for tourists to view. <ul style="list-style-type: none"> • Entrance fee is \$5 (NAD 60) per person
Sheshe and Ngoma Craft Centers	Situated on the way to nature-related sites, the Sheshe and Ngoma Craft Centers sell various craft items made by locals. Unlike living museums, demonstrations are not the focus at these attractions.

Cultural tourism in Namibia is built on community-based tourism activities that provide financial, environmental and social benefits for local communities, along with authentic cultural experiences for tourists. Cultural tours focus on distinctive experiences, allowing tourists and local communities to engage with and discover each other's knowledge, skills and ways of life. Activities explore Namibia's 11 ethnic groups and include community-managed campsites, village visits, culinary experiences/traditional restaurants, festivals, demonstrations and exchanges of traditional skills on language, art, music and sport, and teachings about Namibia's history and religions.

Popular conservancy-based cultural products include the immersive village visits and living museums with a strong focus on the three iconic cultures of the Himba, San and Herero peoples. Village visits include opportunities for interaction and exchange with local peoples in their homes. Guides provide translation services and information about the customs. They are knowledgeable about the cultures of the local communities as well as the cultures of the tourists and so can navigate cultural sensitives. Village visits are typically seen by tourists as authentic experiences.

Living museums are hosted in traditional villages that are built for the purpose of tourism rather than habitation. They include demonstrations by local communities and guided tours. Although less authentic from a tourist perspective, the living museums have clear and transparent benefit-sharing methods and potentially less impact on the day-to-day lives of local communities.

Namibia has interesting heritage tourism products that appeal to cultural tourists as well. The townships of Windhoek and Swakopmund offer visitors a mixture of indigenous and European colonial attractions as well as introducing visitors to apartheid history. It also offers historical tourism products based on its German and South African colonial histories and other historical conflict experiences.

Popularity of product offerings

Product offerings in Namibia are popular because:

The cultures of the Himba, San and Herero people are iconic and globally recognized, creating a strong cultural destination image.

Successful cultural tourism products are located along existing tourism routes and easy to integrate into general tourism itineraries.

Community-based tours offer an immersive experience, allowing tourists to interact with the local communities and gain valuable insights into the culture.

Accommodation Options

Although Namibia has a range of accommodation options, 47 percent of holiday visitors stay in lodges and tented lodges, due to their proximity to tourism attractions and natural scenic environments. Lodges and tented lodges in Namibia experience high occupancy rates between 60 percent and 70 percent on average. Namibia accommodation establishments offer a variety of price ranges, styles, locations, and quality levels for different market segments, although most are small establishments. Visitors gave positive reviews on the quality of accommodation and the high service level of staff, mentioning that accommodations were simple, but "exceeded their expectations."⁵ Tourists also gave positive reviews for the locations of accommodation options, mentioning the beautiful landscapes, night skies, and wildlife. As visitor arrivals have grown, there has been a shortage of accommodation, especially in peak season. The government is promoting tourism sector investment to address this challenge.

⁵ Based on reviews on Booking.com and Expert Africa

Cultural tourists prefer immersive community-based tourism and home-stay experiences. Younger cultural tourists seek authentic experiences and are willing to forgo traditional amenities in accommodation. However, older tourists prefer more comfortable accommodation and so are less interested in overnight immersive experiences. Maintenance of home-stay and community lodges is an issue that will eventually affect quality.

Restrictions on foreign ownership of land in Namibia promote local ownership, adding to the cultural and community-based tourism offer. However, the restrictions have limited foreign investment in accommodation in the country⁶ and create a lower return on investment for accommodation providers, due to the high costs associated with private land ownership.

2.1.5 Marketing

NTB has shifted focus in recent years to market cultural tourism in addition to the mainstream wildlife and nature tourism products. Targeted marketing campaigns are aimed at diversifying markets and helping tourism penetrate into more communities to spread the benefit of tourism.

To cater to cultural tourists who prefer to travel independently, NTB modified existing routes and itineraries to give them cultural themes and assist in trip research and planning. Global cultural tourists tend to be free, independent travellers (FIT) with a desire to research and plan their own trips and travel independently in a country. Around 50 percent of long haul market tourists self-booked their trips to Namibia (MET 2013). To assist these FITs, NTB created the Arid Eden and Omulunga Palm routes to showcase cultural tourism products along existing and popular tourism routes. The information in the routes provides interesting stories about the experiences and critical trip planning information. Additionally, NTB supports FITs who want to plan customized trips but still need support for booking and traveling by linking them directly with inbound tour operators. The cultural tourism routes, along with a wildlife-based route, were developed by NTB under a two-year Millennium Challenge Corporation project costing approximately \$1.1 million (Millennium Development Goals Fund 2017).

NTB implements market research and evaluates its marketing efforts to ensure a high return on investment for its limited marketing budget. Despite the importance of tourism to the country – it contributes 3.2 percent of GDP – NTB has a limited marketing budget. Their proposed 10-year marketing budget for 2016 to 2026 is USD 5.5 million – compared to a USD 4 million per year marketing budget for Tanzania (Eturbonews 2014). To make the best of its resources, NTB conducted market research to segment its main markets and create tourist profiles for more directed marketing. Additionally, in 2009, NTB implemented an evaluation of its marketing materials to determine the ones with the highest impact.

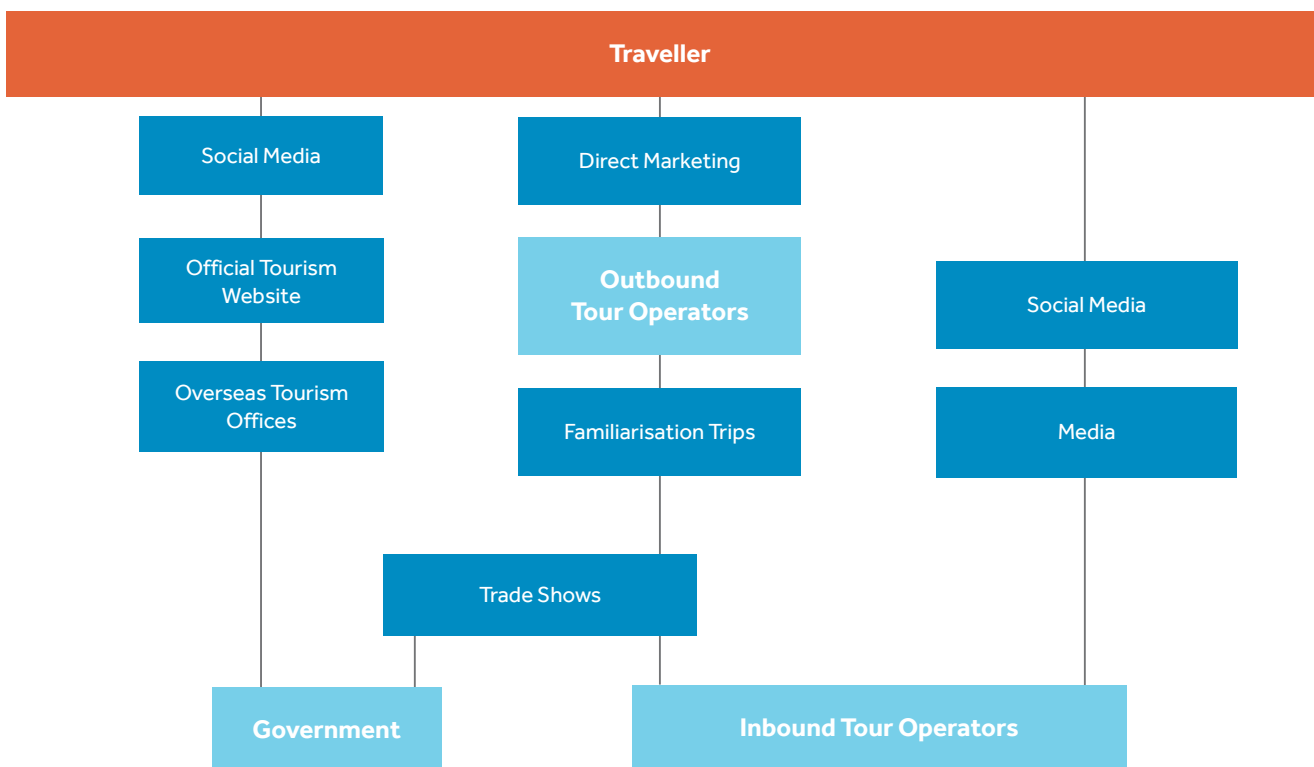
Knowing that over 60 percent of their holiday tourists plan trips to Namibia via internet research, NTB invested in lower cost online marketing through its award-winning website,⁷ strong social media presence and online advertising. The online marketing campaigns are also responsive to Namibia's high return visitor market that is more interested in up-to-date and detailed information. NTB launched a specific North America focused online marketing campaign in 2010 to address market penetration issues. Outbound tour operators were enthusiastic about the Namibia products but their clients were unaware of the destination and were therefore not requesting information about it. The campaign targeted travellers through social media, sponsored journalist trips for press coverage, local storytellers to reveal authentic narratives, and interactive quizzes and contests on the official tourism website. NTB also provided outbound tour operators' tools, such as syndicated Facebook applications, and incentives to better engage with and sell Namibia to their clients. The marketing campaign resulted in a 50 percent growth in holiday travellers from North America from 2010 to 2016 and a 68 percent growth in the number of North American outbound tour operators offering packages to Namibia.

6 Based on a trade interview with the government

7 Best Website at the Travel Mole African Web Awards, 2011 and Best Tourism Board 2011 at INDABA, Africa's largest tourism fair.

Namibia also benefits from high private sector participation in destination marketing. The private sector and NTB have a unified marketing presence with strong support for brand Namibia. This unified branding presence has a high impact on the international market place, avoiding conflicting or diffuse multiple messaging. The private sector also participates in traditional marketing channels such as tradeshow and familiarization trips with NTB. NTB coordinates and plans annual familiarization trips, while inbound tour operators and lodges cover the costs of on-ground transport, tours and accommodation.

Figure 1 Marketing distribution channels for Namibia’s cultural tourism market



Government

- **Social media:** Travelers are increasingly using online sources to learn about travel destinations before making their travel decisions. For this reason, NTB is committed to improving its online advertising capabilities.
 - A “Namibia Endless Horizons” Facebook and Instagram account was created to raise awareness of Namibia as a tourist destination.
 - The NTB tourism page has a specialized Facebook application, allowing tour operators to showcase their own Namibia itineraries.
 - Namibia Tourism Twitter accounts were created, including accounts tailored to individual markets such as “Namibia Tourism UK” and “Namibia Tourism South Africa.”

- **Official tourism website:** NTB has a comprehensive online website that provides international visitors with tourist information on community-based tourism and allows visitors to locate tour guides.
 - The website is interactive, using campaigns, such as the “#ShareMyNamibia” competition, to encourage website visitation.
 - NTB specifically markets culture through cultural routes and online brochures highlighting cultural experiences.
 - The government has also created an interactive online quiz, which can create a personalized travel plan for individuals.
 - Online journalists are invited to visit and write articles on the blog of the official Namibian tourism website. NTB’s online journalist program engages the support of professional writers to create buzz and share their experiences in Namibia.
- **Familiarization trips:** Outbound operators fully experience the product offerings and services that Namibia has to offer before deciding whether to add Namibia to their tour offerings. Generally, outbound tour operators fund their own expenses and familiarization activities at the destination. However, depending on the situation, inbound tour operators may offer complementary or reduced-price accommodation and tours, with the understanding that they are building business leads and that the outbound operator may bring customers in future.
- **Trade shows:** The government takes part in trade shows to raise awareness about Namibia’s tourism offerings globally. A recent event was the Namibia Tourism Expo, held by NTB in Windhoek in May 2017. NTB also hosted the Adventure Travel and Trade Association Adventure Travel World Summit in 2013, attended by over 700 industry professionals.
- **Overseas tourism offices:** NTB’s worldwide offices handle promotion in their respective source markets – South Africa, Germany, the UK, and China. NTB-Frankfurt participates in events such as the IMAX show, bringing 450 tour operators to the country each year.⁸ Promotions such as “Win a Trip to Namibia” campaigns are also conducted with brands.

Private sector

- **Social media:** Social media is the primary channel for inbound operators to promote cultural tourism in Namibia. Inbound operators engage with the international community via Facebook and YouTube. TripAdvisor allows past visitors to rate and share their experiences at the villages online.
- **Trade shows:** Tour operators participate in trade shows to network with outbound operators and trade from international markets. Recent participation includes:
 - The China Outbound Travel and Tourism Market held in Beijing in March 2017;
 - The Namibia Tourism Expo held in Windhoek, Namibia, in May 2017; and
 - The ITB Asia travel trade show held in Singapore in October 2017.
- **Media:** Tour operators offer an option of filming documentaries during village visits. It is an avenue for Namibia to showcase the authentic bush experience through the media. Filmmakers pay a filming permit of NAD 500 to the Namibia Film Commission before filming and publishing their videos, either through television outlets or on YouTube.

⁸ Based on trade interviews

2.1.6 Tourism Development

Product development and training support

By leveraging a mixture of tourism and culture expertise and Namibia's CBNRM policy, the Ministry of Environment and Tourism (MET) supports the creation of cultural products with varying degrees of impact on local communities. In line with tourism policy recommendations by the World Bank Group in 2012, MET set up the community-based tourism sub-division in order to develop and promote community-based tourism and spread its benefits. The sub-division leverages the CBNRM policy to support communities in developing a variety of tourism enterprises through conservancies. The conservancy management entities identify, develop and own their tourism ventures, including cultural products, meaning that the conservancies share the costs as well as the benefits of these ventures. The sub-division also monitors community-based tourism enterprises and joint ventures in order to learn from them and measure their success. The variety of tourism products developed allows communities to select the type of experience they prefer. Recently, demand for home-stays has increased and NTB is currently working with partners to train local communities on this.

The private sector leveraged the new product development to stimulate demand and encourage longer stays at lodges. The targeted effort moved cultural tourism products from an ad hoc offer to a demand-driven experience. Inbound tour operators are more regularly working directly with free, independent travellers to create customized and responsive itineraries.

Challenges

Improvements in professionalism and product quality are still needed for cultural tourism. Despite the coordinated and supportive approach to cultural tourism development, training is still required to enhance the products, improve customer service and ensure that businesses are being sustainably managed. Additionally, as demand increases for cultural tourism, MET and communities will need to be careful about the impacts on culture and the potential degradation of the cultural experience. Remote cultural products that are dependent on one private sector partner for market access are also vulnerable to cultural commodification if cultural tourism is not well managed. As visits to rural areas increase, water and waste management plans will be required.

Community based cultural tourism development remains difficult and many cultural tourism initiatives in Namibia have failed. Community based tourism is challenging and requires strong management, community engagement and education, and mitigation of potential negative impacts of tourism in order to work. The success of community based cultural tourism in Namibia is dependent on accessibility from existing routes, linkages with the private sector to provide a flow of visitors, and strong business planning. Initiatives in Namibia such as the Okakarara Community Cultural and Tourism Centre, Kowarib Cultural Village, Warmbad Museum, and others have not succeeded due to these reasons.

2.1.7 Transportation Efficiency

Getting to Namibia

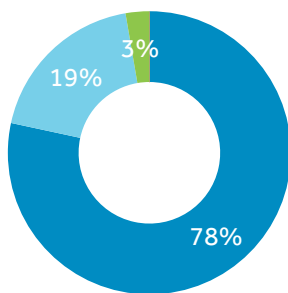
Accessibility to key foreign markets has improved, with Air Namibia recently obtaining rights to fly to the USA and any EU member state. The introduction of new air routes by Qatar Airways in September 2016, Ethiopian Airlines in October 2016 and KLM in November 2016 strengthened links to European markets. Given the prominence of regional markets, 53 percent of holiday visitors arrive in Namibia by land. However, 90 percent of the important long-haul markets of Germany, France and Italy arrive by air (MET 2016c).

Getting around Namibia

Air and land transport are the main modes of transportation in Namibia, but air transport is becoming more popular and convenient due to the increasing number of airports in the country, with 32 airports to date. Self-driving is a popular option as it forms part of the experience for tourists but limits the number of regions visited per trip. To provide affordable air travel as an alternative to self-driving, the government identified regional airport upgrades and the launch of an additional regional airline as investment projects in their *National Tourism Investment Profile and Strategy 2016–2026* (MET 2016b).

2.1.8 Customer Satisfaction

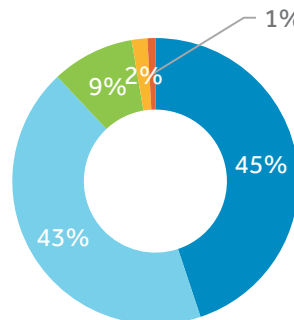
Nhoma Camp: Review Ratings*



■ Excellent ■ Very good ■ Average ■ Poor ■ Terrible

*Out of 37 reviews on Expert Africa, as of December 4, 2017

Damara Living Museum: Review Ratings*



■ Excellent ■ Very good ■ Average ■ Poor ■ Terrible

*Out of 225 reviews on TripAdvisor, as of December 4, 2017

Visitors to Nhoma Camp left positive comments about the hospitality, knowledge, and professionalism of the guides,⁹ with 29 out of 37 reviews on Expert Africa praising the visits as “authentic,” “unforgettable,” and “unique.” Visitors’ feedback for areas of improvement focused on accommodation quality, eight reviewers commenting that facilities could be improved.

Overall, 87% of visitors to the Damara Living Museum reported a positive experience, with most noting that the professional environment allowed them to learn about culture without pressure to purchase souvenirs. Positive reviews focused on the professionalism and knowledge of the guides, the friendliness of the demonstrators, and the opportunities for interaction. Only six reviewers felt negatively about the experience: they felt it was a demonstration created for tourists rather than a real representation of normal day-to-day life. Aligning expectations about the purpose of the living museum is important, so that tourists are aware that the living museum provides an opportunity to conserve cultures, learn about traditions, and provide an income for the Damara people.

9 Based on reviews on TripAdvisor and Expert Africa

2.1.9 Analysis of Success Factors

Namibia's cultural tourism has been successful because of:

- Developing cultural tourist products along existing tourism routes to tap into established patterns of travel;
- Cultural tourism product development initiated where market control exists by the private sector to drive demand to cultural products;
- A strong enabling environment that created mechanisms for community based tourism and empowers rural communities; and
- Globally iconic and authentic cultures and targeted marketing creates a cultural destination image.

Developing cultural tourist products along existing tourism routes to tap into established patterns of travel

The most successful cultural tourism products in Namibia are located along popular, existing tourism routes, giving them access to a high volume of travellers. Developing cultural tourism products in or near popular destinations, allows cultural attractions to benefit from volume and link with accommodations in the area. NTB encouraged visitation by modifying popular, existing tourism routes to give them a cultural theme, showcase cultural products and give tourists the information needed to plan trips independently. NTB's routes help cultural tourists understand options and make decisions. The information is also used by inbound tour operators that work with cultural tourists to create custom itineraries for unique experiences.

Cultural tourism product development initiated where market control exists to drive demand

Cultural tourism products in remote areas are successful when they are linked with a private sector partner that has market control and drives visitation. Products developed in remote areas without a private sector partner have failed. Remote cultural tourism attractions, such as Nhoma Safari Camp, benefit from strong private sector partnerships. In these cases, the private sector partner has market control to drive visitors to the site and is often involved in the management of the cultural experience to ensure a good visitor experience. For long term sustainability and to avoid cultural commodification, this requires a private sector partner committed to community benefit.

A strong enabling environment created mechanisms for community based tourism and empowers rural communities

The Government of Namibia has mainstreamed community benefit into its policies and strategies, creating a strong enabling environment for community-based tourism and community-based natural resource management. The mechanisms created by government policy established a framework for community based tourism in demarcated and registered conservancies where communities have economic user-rights of natural resources and wildlife. This model was tested and honed to grow wildlife and nature-based tourism in the 1990s. The government then leveraged the same model for cultural tourism development to diversify products, attract new markets and spread tourism into new communities of Namibia.

Globally iconic and authentic cultures and effective marketing creates a cultural destination image

Namibia has globally iconic and authentic cultural tourism products that NTB leverages to create a strong and recognizable cultural destination image through effective and targeted marketing. The Himba, San and Herero peoples have iconic and photogenic cultures, providing NTB with the marketing assets to create impactful destination marketing campaigns to drive cultural tourism. This is bolstered by NTB's approach to efficient marketing to ensure a high return on investment for its limited marketing budget. To achieve the most with its resources, NTB conducted market segmentation research and evaluated its marketing materials. Knowing that over 60 percent of their holiday tourists plan trips to Namibia via internet research, NTB invested in lower-cost online marketing through their award-winning website, strong social media presence and online advertising. The campaign targeted travellers and outbound tour operators, with specific campaigns and tools to generate interest within the market and equip outbound tour operators with tools to sell Destination Namibia.



Photo: Ian D. Keating

COMPARISON DESTINATION ANALYSIS

2.2 BIRDWATCHING ECUADOR

2.2 Birdwatching – Analysis of the Birdwatching Segment in Ecuador

2.2.1 Key success factors

- **A sustainable tourism plan.** Protecting biodiversity and building reliable infrastructure to provide access to birdwatching hotspots is essential to Ecuador's birdwatching tourism.
- **Improved transportation infrastructure.** The development of road infrastructure connecting regions reduced travel time, allowing birdwatchers to see more species during their trips.
- **A clear delineation of marketing efforts.** The government and private sector worked together on a clearly defined marketing strategy. The government manages country-level promotion and the private sector specifically markets birdwatching.
- **Specially trained birdwatching guides.** Guide quality in Ecuador is high due to the government's efforts in training and improving the knowledge of local guides.
- **Diversity of accommodation to cater to various segments.** A wide variety of accommodation concepts exists near birdwatching sites with price options catering to all preferences and budgets for birdwatching tourists.

2.2.2 Overview

Tourism is one of Ecuador's key focus areas for economic development, and the industry has seen increased interest as a result of eco-tourism. Ecuador's tourism sector brought in \$1.6 billion in international tourism receipts in 2015, compared with \$488 million in 2005, and visitor numbers rose from 860,000 to 1.5 million (UNWTO 2018).

Birdwatching has seen increased interest as a result of intensive and targeted government initiatives. Birdwatching started as a secondary product to eco-tourism, but has gained traction as a specialized activity since 1998. Government initiatives implemented through the *Alianza Ecuatoriana para el Turismo Sostenible* (AETS) program by the Global Sustainable Tourism Alliance (GSTA) put tourism management systems in place to mitigate environmental impacts of tourism through Limits of Acceptable Change programs. The government also took a targeted approach to increase tourism in mainland Ecuador to diversify away from the highly popular Galapagos Islands destination. Through the AETS program, the government enhanced product quality with training of existing guides and improving transport infrastructure. This has led international visitors to spend more time on the mainland and participate in activities such as birdwatching.

Numerous birdwatching spots and developed infrastructure on the mainland allow birdwatchers to comfortably see a large number of bird species. Birdwatching tours and services are most developed in the Mindo, Antisana Reserve, Pacto, El Coca, Sumaco, Napo, and Galeras areas. Infrastructure developed and supported by NGOs in these locations includes observation towers, well-maintained walking trails, bird drinking-troughs, and birdwatching guides. The most important birdwatching hotspots in Ecuador are located in the northwestern part of the Andean highlands, the Amazon region, and the cloud forests in the Pichincha, Napo, Orellana, and Carchi provinces.

2.2.3 Arrivals, Length of Stay, and Spend



Source: Trade interviews with Ecuadorian tour operators and compilation of inbound and outbound operator tour package trip lengths and prices.

Key source markets

Birdwatchers made 15,000 trips¹⁰ to Ecuador in 2016. This represents one percent of Ecuador's 1.5 million holiday arrivals, compared to the global average of 0.5 percent. By comparison, PNG had 460 birdwatching trips in 2016, representing of 1.2 percent holiday air arrivals to the country.

The majority of birdwatchers come from the USA. Approximately 65 percent of birdwatchers staying at specialty lodges came from the USA in 2016. Birdwatchers typically travel as a couple or as members of nature-related associations. The next largest visitor sources are Germany, the Netherlands, and the United Kingdom. Smaller numbers of visitors come from China, India, Japan, and Australia (Trade Interviews 2018).

Length of stay and demographic

Ecuador attracts serious birders, with "specialists or twitchers" making up 30 percent of all birdwatching visitors to the country. "Enthusiasts" and "casual birders" make up 40 percent and 30 percent, respectively.¹¹

Specialists, or twitchers, take longer trips of up to three weeks and travel to multiple sites. Most specialists/twitchers are aged 50 years or older.¹² Enthusiasts and casual birdwatchers spend two to five days birdwatching at popular and accessible locations, combined with non-birdwatching activities. Overall this results in an average length of about 11 days a birdwatching trip. Generally, birdwatching trips are package tours that include guiding, transportation, food, and accommodation in a single price.

Average spend per trip

The average spend on a birdwatching trip in Ecuador is \$311 per day. This includes airport transfers, guides, drivers, lodging, meals, and entry fees. Some tourists are willing to pay \$400 to \$550 per person per night for luxury accommodation. Specialists/twitchers tend to spend the most on guide services alone, especially for complicated itineraries, which may cost \$120 for about 10 hours of guide service. In PNG, birdwatching trips are almost double, with per day spend at \$579. This is due to higher accommodation costs and flights to travel between birdwatching sites.

¹⁰ Based on Euromonitor's research estimates

¹¹ Based on trade interviews with tour operators

¹² Based on trade interviews with tour operators

2.2.4 Product Availability, Quality, and Pricing

Birdwatching locations in Ecuador by region include:

Galapagos	<ul style="list-style-type: none"> Santiago Island, Bartolome Island, Floreana Island, Baltra Island, Santa Cruz Island, Isabela Island
Coast	<ul style="list-style-type: none"> Tandayapa Hummingbird Sanctuary, Paz de las Aves Reserve, Milpe Bird Sanctuary, San Jorge de Estero Hondo Bird Reserve, Silanche Reserve
Andes	<ul style="list-style-type: none"> Quito Bird Reserve, Antisana Andean Condor Reserve, Jerusalem Inter-Andean Dry Forest Reserve, Yanacocha Reserve
Amazon Slope	<ul style="list-style-type: none"> San Jorge de Cosanga Cloud Forest Reserve, San Jorge de Sumaco Bajo Bird Sanctuary, Cayambe Coca Ecological Reserve, Limoncocha National Biological Reserve

Birdwatching activities include:

- Observation activities
- Night hikes
- Bird calling practice
- Identifying routes and practices of a specific species
- Pre- and post-birdwatching discussions

Birdwatching tours in Ecuador have features added to the tours that make them more engaging. Guides lead discussions before the trip to identify bird locations, calls, songs, behaviors, and other characteristics to increase the chance of sightings. Post-trip discussions take place online after the conclusion of birdwatching trips. Birdwatchers post trip reports on specialized forums such as eBird and Aves De Quito to share what they saw.

Popularity of product offerings

Birdwatching in Ecuador is popular because:	Distances between birding hotspots in Ecuador are short and hotspots are accessible. This appeals to birders, as they can spot many birds in a short time.
	Tour operators offer customizable birdwatching tours. Visitors have the flexibility to decide their itinerary.
	Guides are knowledgeable about birds and Ecuador's ecology. They are able to share extra knowledge with visitors, such as identifying microclimates, waterfalls, plants, and other animal species.
	Ecuador has at least 1,600 bird species (Freile 2018) and birdwatchers are able to see a variety of birds.
	Accommodation facilities are nature-themed, nature-friendly, and include services such as Internet access, trip planning, personal guides, and friendly staff with a high level of customer service.

Structure of tour operators

Birdwatching tour operators offer extensive packages from 14 to 21 days, covering multiple regions at a variety of budget levels. This is made possible as a result of government investment in road and highway infrastructure that reduces travel time between regions.

Some birdwatchers prefer to work with inbound operators to create customized tours. Although there are strong outbound operators like Victor Emanuel Nature Tours, Field Guides, Birdquest Tours and Rockjumper Birding Tours, some birdwatchers prefer to develop customized itineraries directly with inbound tour operators because they want to see specific species. The inbound operators work directly with the birdwatchers on the details of the itinerary, which makes the planning process more efficient. Targeted marketing is focused on birdwatching groups, clubs, and associations to build these connections.

Tour packages offered by inbound operators are more personalized than outbound operator tours. Inbound tour operators are able to offer customized and flexible package tours due to their knowledge about weather conditions, prices, the availability of complementary services, and local circumstances. Outbound tour operators offer more standard packages and customization is dependent on interest, reaching a minimum threshold for the number of participants. Group travelers have several options; they can book a customized package tour with an inbound tour operator, a standardized package tour with an outbound operator, or arrange their own personalized trip itineraries working with individual ground service providers.

Accommodation options

There are 746 accommodation facilities in birdwatching regions, including community-based stays, lodges, cottages, and eco-tourism accommodation providers in a wide range of budgets. Occupancy rates range from 65 percent to 70 percent (Larco 2015), which is higher than occupancy rates for hotels in urban areas of Ecuador. For this report, the 746 accommodation facilities consisted of (MINTUR 2016):

- 13 luxury options;
- 186 providers with four-star ratings;
- 517 providers with two- and three-star ratings; and
- 30 facilities with one-star or no star ratings.

Birdwatching-specific, luxury accommodation is available and offers nature-friendly environments and activities targeted toward birdwatchers. This type of accommodation costs between \$400 and \$550 per person per night. Transport between birdwatching sites and accommodation costs between \$20 and \$120 per person per day, depending on group size, distance and route (vehicles typically cost \$200 per car and driver per day).¹³ Occupancy rates for luxury accommodation range from 70 percent to 75 percent, higher than average occupancy rates.¹⁴

Mid-range and budget accommodation in cloud forest areas such as Mindo, El Chaco, and the Amazon region emphasize birdwatching and other adventure activities such as hiking. These accommodation providers diversify their reach by targeting visitors with a variety of nature-based interests. Mid-range lodges cost \$90 to \$150 per person per night, and budget lodges range from \$30 to \$80 per night.¹⁵ These lodges attract birdwatchers who do not prioritize accommodation, given the availability of minimum standards of comfort and convenience.

¹³ Based on compilation of average inbound tour operator and accommodation providers' published prices

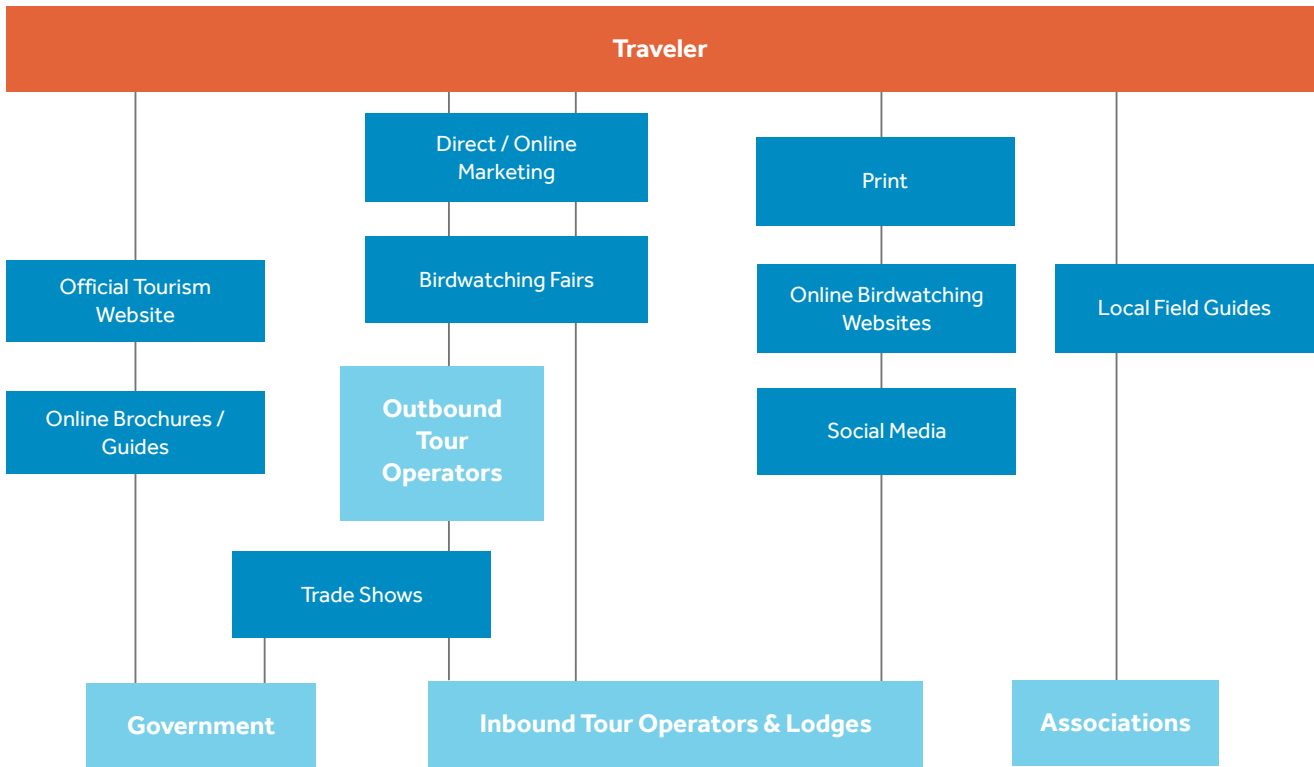
¹⁴ Based on trade interviews with accommodation providers

¹⁵ Based on compilation of average accommodation providers' published prices

2.2.5 Marketing

The government and private sector work together with clearly defined marketing roles to raise awareness of birdwatching in Ecuador. The Ministry of Tourism supports broad destination marketing internationally, including online campaigns such as “All You Need is Ecuador”. The private sector markets birdwatching-specific tours and locations. Marketing channels used by the private sector include online, print, trade shows, and fairs.

Figure 2 Marketing distribution channels for Ecuador’s birdwatching market



Government

- **Online official government website:** The Ministry of Tourism created a specific page (Ecuador Travel 2018) on Ecuador’s tourism website to promote birdwatching.
- **Online brochures:** The Quito Tourism Board, a regional government tourism agency, produces an online tourist guide in English that includes birdwatching activities in the surrounding areas.
- **Familiarisation Trips:** Destination marketing and familiarization trips have resulted in important media coverage such as:
 - Prestigious international photographer websites. Nature photographers, such as Adrian Hopkins, Dušan Brinkhuizen, and Glen Bartley, increase awareness of birdwatching in Ecuador through their photographs of birds online. These pictures are usually taken while on familiarization or press trips, sponsored by tourism boards and associations.
- **Trade shows:** The Ministry of Tourism and the Quito Tourism Board actively participate in international trade shows to promote birdwatching and Ecuador’s other tourism offerings.

Recent participation includes:

- The World Travel Market held in London in November 2017, at which representatives from the Ministry of Tourism, the Quito Tourism Board, and the private sector, connected with outbound tour operators, travel professionals, airlines, online service providers, travel publishers, and agencies from other countries;
- Collaboration of the government and tour operators to take part in trade shows that promote birdwatching and eco-tourism offerings, targeting trade members rather than consumers; and
- Direct marketing connected to trade shows resulting in partnerships with outbound tour operators such as Wings Birding Tours.
- **Social Media:** Ecuador uses Facebook, Twitter, Instagram and YouTube to reach out to consumers directly. Only one official account is used for these, rather than an account for each source market.

Private sector

- **Online websites:** Online media is a key marketing channel for private sector operators. Online channels include:
 - Individual business websites, including online booking tools, bird lists and destination birding information; and
 - Mindo, an Ecuador-based operator booking site, where inbound tour operators and lodges can sell their products.
- **Print:** Birdwatching in Ecuador is promoted through specialized and international magazines as an editorial feature or through product advertising organized by private tour operators. Examples include:
 - Bird Life, Birding World, the American Birding Association magazine, and research bureau print materials;
 - Travel guide magazine publishers, such as National Geographic, Travel & Leisure, Conde Nast, Lonely Planet, Semana, Caretas, and Viagem e Turismo.
 - Local field guide books, such as The Birds of Ecuador by Ridgely and Greenfield, written and published as a private initiative, brought Ecuador into international focus as a birding destination. The informative nature of the books serves as a tool to raise awareness of the destination.
- **Birdwatching fairs:** Participating in international birdwatching fairs allows operators to raise awareness about birdwatching in Ecuador. These fairs are targeted at consumers, unlike tradeshow that are targeted at outbound tour operators.

Recent participation:

- The 2017 annual British Birdwatching Fair, Birdfair. The event connects tour operators directly with birdwatchers. Private sector participants include lodge operators, reserve administrators, and birdwatching tour operators. It is also possible to receive funding internationally through the Birdfair fundraising campaign. In 1997, Mindo Forest received about \$80,250 (£60,000) as part of the Birdfair conservation project that year (Birdfair 2016).
- Local fairs in Quito and Pichincha attract local and international visitors looking for eco-tourism activities. For example, the annual Birdwatching, Cultural, and Craft Fair of the Northwest of Pichincha Network promotes birdwatching in Pichincha.

- **Social media:** Online forums allow operators to get feedback from birdwatchers. Tour and lodge operators use the platform to address reviewers' concerns directly. The main social media sites used to market birdwatching include:
 - Specialized birdwatching sites like eBird and *Aves De Quito*. These are online databases that provide information about the number of bird species, sighting rates, and distances to the locations. They also allow birdwatchers to submit and share their trip reports online.
 - Birdwatchers leave feedback and share their experiences on TripAdvisor. Potential visitors are able to use the information to plan their trips.
 - Exclusive birding clubs, such as Hudson-Mohawk Bird Club, Marylebone Birdwatching Society, and the Carmarthenshire Bird Club, have members-only forums, in which members share feedback and tips on birdwatching in Ecuador, raising awareness among private groups of birdwatchers.
- **Associations:** Associations supporting birdwatching in Ecuador include the Birdwatching Tourism Association of Northwestern Pichincha, the Eco-tourism Association of Inbound Operators, National Guides Association, Mindo Cloud Forest Foundation, and Tangaré. The associations promote birdwatching through online channels, provide guide training programs, and potentially network international tour operators with domestic tour operators.

2.2.6 Tourism Development

Promoting sustainable tourism

A tourism program office was established to manage sustainable tourist development, enable community-based enterprises, build visitor infrastructure, and coordinate marketing strategies with the Ministry of Environment and the Ministry of Tourism. The program office was developed through collaboration between USAID, and the Global Sustainable Tourism Alliance (GSTA). Improvements in the management of protected areas helped protect key species, such as the Andean condor, and natural habitats against environmental threats.

Key achievements include:

- A tourism concession management system to mitigate the impact of tour operations in the Galapagos Islands;
- Infrastructure upgrades, mostly funded by USAID as part of the AETS program, include the construction of trails, signage, bridges, and observation decks that improve the quality and accessibility of birdwatching; and
- Raising the capacity of birdwatching guides by training and qualifying 39 new guides with a two-week intensive program; and training 24 existing guides with international bird-watching expert William Perez.

Management of land issues

Privately owned land designated as a conservation area can become the source of conflicts when private landowners disagree with government environmental policies dictating what can be done on the land. Common types of land ownership conflicts that arise over private land designated as a conservation area include:

- A lack of coordination between the National Institute for Agrarian Development (INDA) and the Environmental Authority on demarcation of their jurisdiction;
- Ancestral communal properties lacking clearly registered titles;
- Illegal individual occupations; and
- Conflicting claims between de facto occupants and absentee legal owners (USAID 2011).

Assistance is provided to the government and local communities to improve property rights conditions through projects supported by the donor community. Conservation groups and non-governmental organizations also work with local community organizations to support both environmental protection and rights to ancestral lands. Initiatives include environmental education, community development, securing land rights, training park rangers, and developing eco-tourism.

Tour and guide development

Through a National Tourism Training Program, the government assessed local tourism skills and training institutes and developed a plan to improve tourism services and skills, training offerings and entrepreneurial skills. Under the program, the Ministry of Tourism defined national qualifications for tourism competences, developed train-the-trainer modes to spread training into rural areas, and conducted specialized guide training. This was paired with training on business management and operations for tourism enterprises, destination management training, hospitality and food safety training, and quality management for luxury tourist activities. The program resulted in the development of 13 specialist tourist guide profiles that outlined the qualifications for guides according to products and regions, and three tourist training manuals (MINTUR 2017b). Guide training is focused on improving guiding skills, attitudes, language skills, customer service, and background location knowledge. Training is offered virtually through a platform or in person.

Route development

Foundations, reserves, lodge operators, guides, locals, and birdwatching specialists collaborate to plan routes, relying on their combined knowledge of bird sightings and hot spots. Birdwatchers are specific about the types of birds they want to see and they have limited time, so having pre-planned routes saves time. The routes created are region-specific and help define the comparative advantage of each birding destination – the cloud forests and the Amazon region have unique characteristics that attract different bird species. More technical route development is supported by specialized organizations and government bodies, such as the Ministry of Tourism and the Quito Tourism Board. These rely on scientific activities, including market study and mapping. Other routes may be created naturally, with the protected areas serving as a reference for route boundaries.

Accommodation development

Specialty accommodation caters to the needs of birdwatchers. Lodges are built specifically to meet the needs of birdwatchers, with features such as rooms with wide windows, nature-friendly decorations, and small birdwatching lookouts within the lodge compounds.

Accommodation is further specialized into segments catering to different types of birdwatchers. There are luxury lodges that target high-income, casual, and enthusiast birdwatchers who prioritize comfort in their accommodation. They offer features combining the concepts of luxury, eco-tourism, and birdwatching. Luxury lodges, such as Mashpi Lodge (20 rooms, 3 suites), start at \$1098 per night.¹⁶ There are also lodges with eco-friendly designs and architecture, such as the Sacha Lodge (26 rooms, \$350 per night)¹⁷ in the Amazon region and Casa Divina (\$175 per night)¹⁸ in Mindo, which attract environmentally conscious birdwatching tourists. Growth in the birdwatching segment has led to subsequent investments in other specialty accommodation across the country, such as in Pichincha Province.

¹⁶ Accommodation details and rates retrieved from <https://www.mashpilodge.com>

¹⁷ Accommodation details and rates retrieved from http://www.amazonadventure.net/amazon_lodges/first_class_sacha_lodge.html

¹⁸ Accommodation details and rates retrieved from <http://www.mindocasadivina.com>

2.2.7 Transportation Efficiency

Getting to Ecuador

Mariscal Sucre International Airport, the main port of entry to Ecuador, serves 11 international airlines and three domestic airlines. The airport opened in Quito in 2013, replacing the old airport and expanding capacity. Capacity was increased by 50 percent of total passenger volume to 7.5 million in 2015. Improvements include a 10,500-square meter terminal extension, two additional boarding bridges, 870 more seats in lounges, and new retail outlets completed in 2015 (Heredia 2015).

Getting around Ecuador

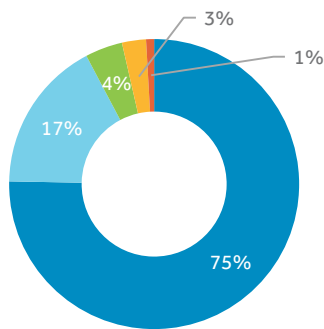
Birdwatching tours include transportation for the entire duration of the tour. Specialized bus companies work with tour operators to take visitors deep into hotspot areas in special vehicles, including large buses, vans, 4x4 jeeps, pickups, and vehicles with big windows, bird sounds, videos, and narration equipment. Some hotspots in the Amazon region require river transport, which is coordinated by tour operators or lodges.

Private transport services for independent tourists are available, but they are less successful than those who work with tour and lodge operators, as most birdwatching tourists join tour packages.

The development of inter-region and rural roads has reduced travel time and cost, and made transporting birdwatching tourists more efficient. Land transportation is now the primary mode of transportation used by tour operators. The AETS project improved town and provincial roads and made inter-regional connectivity and travel to hotspots easier and more comfortable for visitors. Through a separate project in 2013, the Inter-American Development Bank provided Ecuador with a \$60 million loan to improve its rural road network in 23 provinces and rehabilitate 143 kilometers of roads (IDB 2013).

2.2.8 Customer Satisfaction

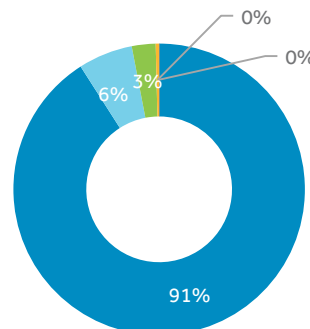
San Jorge Eco-Lodge and Reserve: Review Ratings*



■ Excellent ■ Very good ■ Average ■ Poor ■ Terrible

*Out of 336 reviews on TripAdvisor, as of December 4, 2017

Mashpi Lodge: Review Ratings*



■ Excellent ■ Very good ■ Average ■ Poor ■ Terrible

*Out of 265 reviews on TripAdvisor, as of December 4, 2017

The sighting of hundreds of bird species on a multiple-week birding trip to Ecuador common, as recorded in birding reports, leaving birders amazed at the diversity of bird species in the country. Reviews about the guiding services are also positive, often touching on the hospitality and warmth of their guides. However, travelers have mentioned some areas needing improvement: the roads leading up to lodges, service levels at accommodation facilities, and prices.

2.2.9 Analysis of Success Factors

The success of the birdwatching segment in Ecuador is attributable to:

- A sustainable tourism plan;
- Improved transportation infrastructure;
- A clear delineation of marketing efforts between public and private sectors;
- Specially trained guides; and
- Diversity of accommodation to cater to various segments.

Sustainable tourism plan

A sustainable tourism plan that protects biodiversity and builds reliable infrastructure to provide access to birdwatching hotspots is essential to Ecuador's birdwatching tourism (USAID 2009). The plan has led to the sustainability of the biodiverse natural environment that forms the basis of Ecuador's birdwatching offerings, and has also provided land access to the locations.

Improved transportation infrastructure

Improvements to transportation infrastructure led to a reduction in travel time, allowing tour operators to plan more extensive and longer itineraries for birdwatching tourists.

Clear delineation of marketing efforts

A clear delineation between marketing efforts made by the government and those conducted by the private sector has made Ecuador's tourism marketing effective and successful overall. The government promotes Ecuador on a national level, while the private sector markets to birdwatching tourists specifically.

Specially trained guides

Guide quality in Ecuador is high due to the government's efforts in training and improving the knowledge of local guides. The Ministry of Tourism set national qualifications for guides and developed guide training manuals to set standards and ensure quality. Also, training programs covered basic tools and guiding techniques, customer service, biology, natural resources, and law, to name a few modules. As a result, the local guides for birdwatching are specialized. They are able to share specific information with tourists pertaining to bird behavior and practices, microclimates, plants, and other animal species.

Diversity of accommodation to cater to various segments

A wide variety of accommodation concepts exists with price options catering to all preferences and budgets for birdwatching tourists. These accommodation options are located in close proximity to birdwatching sites, allowing birdwatching tourists to focus on activities rather than travel time.



Photo: Scott Chacon

COMPARISON DESTINATION ANALYSIS

2.3 ADVENTURE TOURISM RWANDA

2.3 Adventure Tourism – Analysis of the Adventure Tourism Segment in Rwanda

2.3.1 Key Takeaways

- **Success of iconic product followed by diversification of adventure tourism offerings.** Rwanda developed a strong market presence in the early stage of tourism development through focusing on a single, iconic tourism experience – gorilla trekking.
- **Inclusive conservation efforts linked to tourism.** Both the government and local communities are involved in park management, gorilla protection, and combating animal poaching.
- **Intensive marketing efforts by the government to create a strong brand image.** The government launched an intensive public relations campaign to shift the image of the country and leveraged its iconic species to create a strong brand image.
- **Government commitment to infrastructure improvement,** such as the expansion of RwandAir, the revamp of Kigali International Airport, and investing in the construction of the multinational “Kivu Belt” roads.

2.3.2 Overview

Rwanda is now perceived as one of the safest countries in the region due to strong government and marketing efforts to change unfavorable international perceptions caused by the conflicts and genocide of the 1990s.¹⁹

The success of Rwanda’s tourism shows that a post-conflict country can change global perceptions with strong leadership and marketing direction, coupled with iconic tourism products. According to 2016 statistics released by the Rwanda Development Board (RDB), tourism spend revenues increased considerably from \$131 million in 2006 to \$404 million²⁰ in 2016, with year-on-year growth peaking at 26 percent in 2011.

The government recognized the need to grow the soft adventure tourism²¹ segment and go beyond a single product offering – gorilla trekking. It diversified its product offerings and developed other soft and hard adventure activities, such as trekking, biking the Congo Nile Trail, and hiking in Nyungwe Forest National Park, which features a 150 meter-high canopy walk. These new products and targeted marketing have increased visitation to national parks beyond Volcanoes National Park. Akagera National Park visitation grew by 126 percent and Nyungwe National Park visitation grew by 184 percent from 2008 to 2016. While much of the initial growth was driven by domestic tourism, the new products in these parks can contribute to sustainable long-term growth by encouraging international visitors to stay longer and travel throughout the country.

19 The Rwandan Civil War, which began in 1990, led to the genocide of the Tutsis in 1994 and subsequently the First and Second Congo Wars in 2003.

20 The total tourism revenue for 2016 is estimated.

21 Soft adventure tourism is a segment that encompasses low- to moderate-risk outdoor activities, such as hiking, kayaking, and fishing

Developing a tourism strategy

With support from the United Nations World Tourism Organization (UNWTO), a 10-year Tourism Master Plan was drafted in 2009 that recognized the need to diversify beyond gorilla tourism and improve infrastructure and facilities used by tourists. The government has allocated \$1.5 million (RWF 1.3 billion) to upgrade existing products and develop new ones by 2020. Guidance from UNWTO was possible because existing local associations were already taking initiatives to develop tourism. The Rwanda Tourism and Travel Association (RTTA) was established in 2000 to represent the interests of member tour agencies and operators. Furthermore, in 2001, public- and private-sector stakeholders jointly established the Tourism Working Group to develop the National Tourism Strategy and Policy (MINICOM 2009).

Rwanda is also focusing on promoting the country as a premier business tourism destination in order to diversify tourism offerings. Through a World Bank-funded tourism project, Governance for Competitiveness, the Rwanda Convention Bureau was established in 2014 to promote Rwanda as a business events destination (World Bank 2016).

Involving the private sector

Under the Tourism Working Group, the private sector consults with the government on tourism policy developments. The Joint Action Development Forum, a multi-stakeholder platform, was established in 2007 to facilitate public- and private-sector engagement in service provision and development planning. In the past, the private sector lacked capacity and funding. To support dialogues, the government has invited private sector players to participate in discussions regarding the national tourism strategy since 1999.

Importance of conservation

The Rwanda Development Board (RDB), in charge of investment and tourism promotion, has initiated a revenue-sharing scheme to direct five percent of tourism revenues from park fees to local community projects, such as environmental protection, poacher prevention, education, and basic infrastructure. This is to ensure that the locals have a stake in tourism development and treat the parks as their own. Past studies have also indicated that the community is increasingly aware of the benefits of tourism and the need to protect the environment to sustain soft adventure tourism.

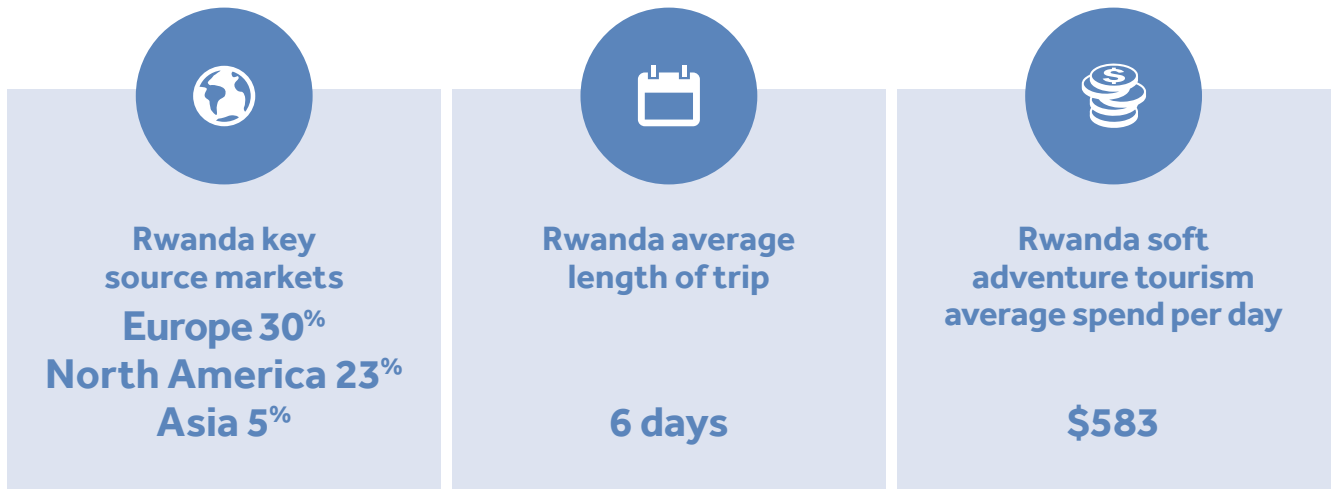
Benefits from gorilla tourism

Soft adventure tourism has brought economic benefits to the community. Based on a World Development Report conducted in 2011:

- Volcanoes National Park provided employment to at least 180 people working as guides, trackers, and anti-poaching teams in 2009.
- About 800 people from the local community are involved in park management.
- Other indirect benefits are the number of school and water tank construction projects, training, and other income-generating activities.

Park management has tackled the issue of poachers by educating former poachers about tourism opportunities and forming conservation teams made up of former poachers. In the past, animal poaching posed a serious threat to the conservation of the park and the sustainability of this tourism offering. The ex-poachers now actively participate in park conservation efforts, collaborating with government rangers to patrol the parks.

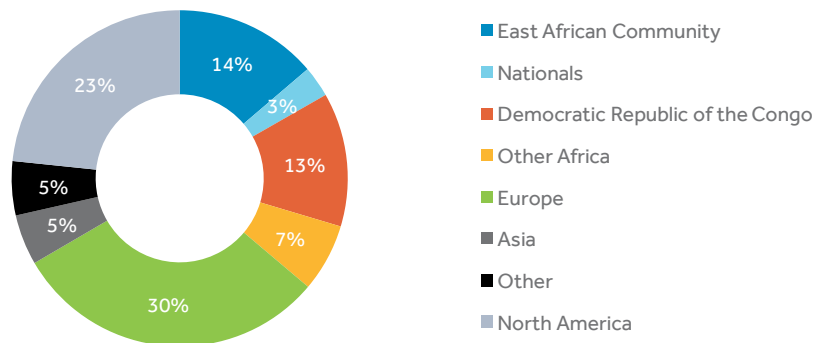
2.3.3 Arrivals, Length of Stay, and Spend



Source: NISR 2017 and compilation of inbound and outbound operator tour package trip lengths and prices.

Key source markets

Tourist Arrivals to Rwanda for Holiday and Relaxation Purposes 2016



Source: NISR 2017

In 2016, Rwanda received 1.3 million visitors, of whom about 10 percent were holiday-makers.²² There were 36,509 holiday arrivals by air and 59,348 by land in the same year (NISR 2017). Long haul visitors to Rwanda make up 64 percent of all holiday arrivals. The top three long haul markets for holiday arrivals include Europe at 30 percent, North American at 23 percent and Asia at 5 percent. Given the high number of holiday land arrivals (62 percent), there is likely a trend for holiday visitors to enter Rwanda from neighboring countries as part of a multi-country itinerary. The inclusion of Rwanda in the East Africa Tourist Visa allows foreigners to travel between Kenya, Rwanda, and Uganda on a single visa (UNWTO 2015).

22 Total tourist arrivals to Rwanda, excluding those in transit and returning residents; see Transportation Infrastructure section

Length of stay and spend

National park visits increased from 43,083 visitors in 2008 to 88,184 in 2016, generating \$17.8 million in park revenues. While domestic tourism has recently grown, international arrivals still comprised 70 percent of all park visitors in 2016 (RDB 2016). The average length of stay across all national parks is five days, including domestic and international visitors. However, the average length of stay for high-end international soft adventure tourists is closer to 3.5 days.²³ The average spend on a soft adventure tour package is \$583 per person per day, which includes accommodation, airport transfers, 4x4 tour vehicles, park fees, guides, and meals.²⁴

2.3.4 Product Availability, Quality, and Pricing

Soft adventure activities in Rwanda include:		
Gorilla trekking	<ul style="list-style-type: none"> Gorilla trekking is Rwanda's main tourist attraction. Tourists pay an entrance fee and buy a gorilla trekking permit to enter Volcanoes National Park before climbing to the gorillas' habitat with the help of guides. A visitor's permit costs about \$1,500 per person. 	Tours and conservation formalized by the Africa Wildlife Foundation, World Wildlife Fund and Fuana and Flora International in 1979. The Rwanda Development Board (RDB) provides guide training with the support of the Dian Fossey Gorilla Fund.
Dian Fossey and Bisoke Crater Lake Hikes	<ul style="list-style-type: none"> Dian Fossey was a famous scientist and gorilla advocate. Visitors can hike to her grave with staff from the Dian Fossey Gorilla Fund at Volcanoes National Park, and learn about current research and gorilla protection practices. The Bisoke Crater Lake hike, the most popular day hike at Volcanoes National Park, takes visitors to the lake at the summit of Mount Bisoke. Cost is \$75 per person. 	Visits to Dian Fossey's Grave were set up by the Dian Fossey Gorilla Fund
Golden Monkey tracking	<ul style="list-style-type: none"> Golden monkeys represent an endangered species that is unique to the Virunga Mountains in Volcanoes National Park. The hike to see them is less difficult than the hike to see the gorillas. Cost is \$100 per person. 	Established by the Volcanoes National Park and RDB. RDB provides guide training with support of the Dian Fossey Gorilla Fund.
Buhanga Eco Park	<ul style="list-style-type: none"> The Buhanga Eco-Park is a forest near Volcanoes National Park, where Rwandan kings performed rituals. A trail walk through the forest allows visitors to experience the past. The entrance fee is \$40 per person. 	RDB upgraded the site targeted in its National Tourism Master Plan. It also provides guide training with the support of the Dian Fossey Gorilla Fund.
Congo Nile Trail	<ul style="list-style-type: none"> Launched in 2011 as a new tourism product, the Congo Nile Trail is a 226-kilometer trail that allows tourists to trek or cycle along the shores of Lake Kivu and both the Nile and Congo Rivers and into the Nyungwe Rainforest. The route can be completed in 10 days on foot and five days by bicycle. Tourists can opt to complete sections of the trail. 	Trail delineation and development by RDB, funded by USAID.
150 meter-high Canopy Walk	<ul style="list-style-type: none"> Nyungwe Forest National Park is the largest protected mountain forest in Africa, and visitors can traverse the 90-meter canopy walk for a rainforest experience. Cost is \$60 per person. 	Opened by the public Nyungwe Park Management. Funded by USAID.

²³ Based on trade interviews with tour operators

²⁴ Based on compilation of inbound and outbound operator tour package trip lengths and prices.

Popularity of product offerings

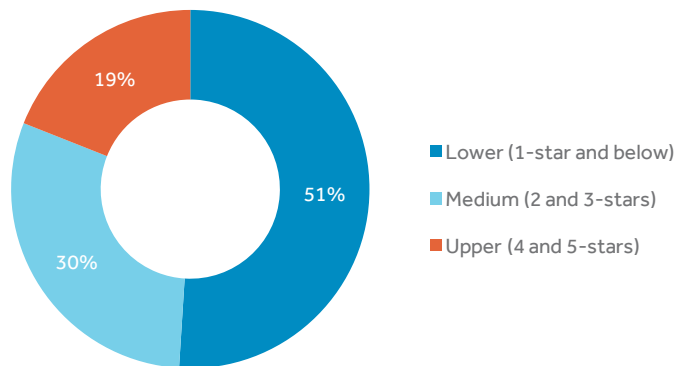
Product offerings in Rwanda are popular because:	Rwanda offers an up-close experience with gorillas that is unique and thrilling for tourists.
	Service quality and hospitality from guides and porters meet expectations. The guides and porters are attentive and experienced, taking care to brief tourists and ensure their safety.
	It is convenient for tourists to engage in two adventure tourism activities at the same place, e.g. gorilla trekking and golden monkey trekking at Volcanoes National Park. Hikes can also be done there.

Pricing

In May 2017, RDB decided to raise the gorilla permit price from \$750 to \$1,500 to ensure the sustainability of conservation initiatives and funding to local communities. RDB also caps the number of permits at 96 per day to ensure that gorilla habitats are not affected by too many visitors. At the time of the report, it is difficult to say how the price increase will affect Rwanda’s tourism industry. During the first half of 2017, gorilla trekking bookings increased by 22 percent compared to the same period in the prior year (Mugisha 2017). The government expects that it will take some time for tourists and tour operators to adjust to the new pricing strategy. Prices typically include guides, porter services, national park entrance fees, and gorilla trekking permit fees.

Accommodation options

Distribution of Room Categories 2016



Source: Rwanda Development Board, 2016

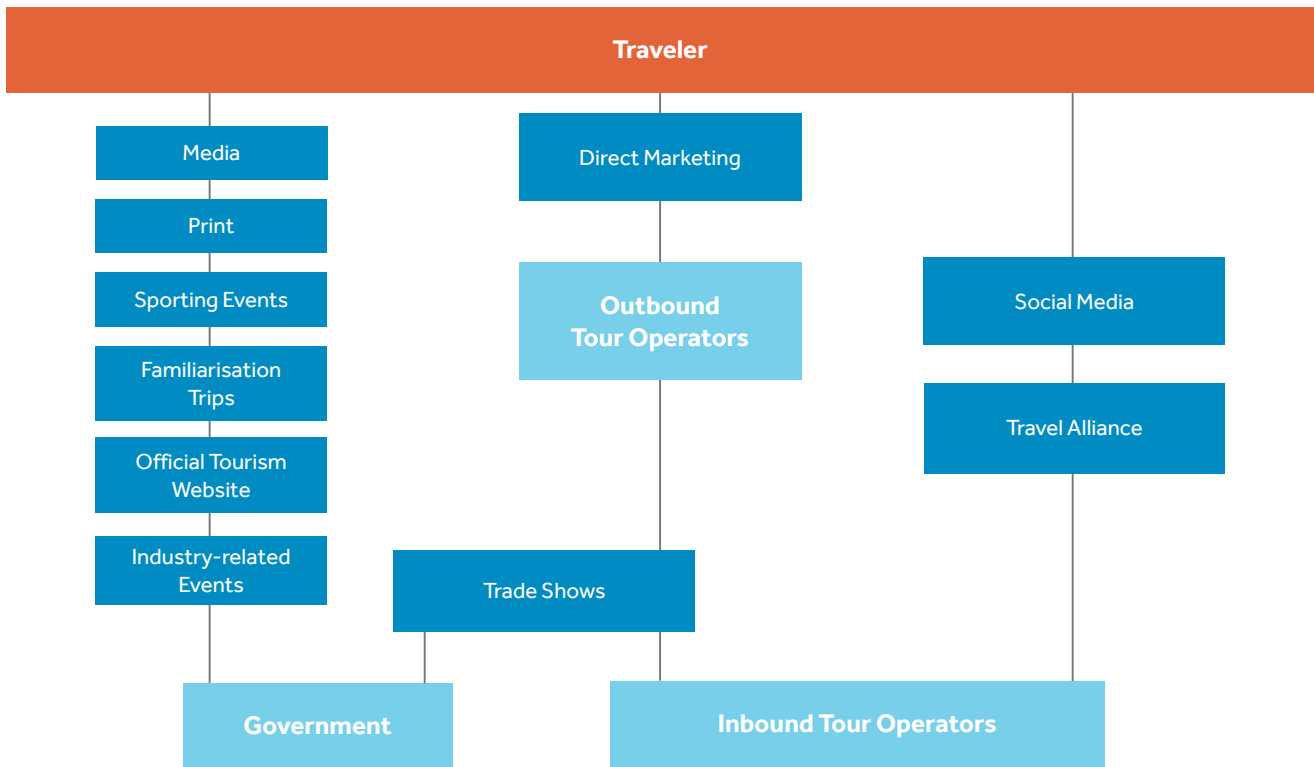
Hotel accommodation is categorized as upper, medium, and lower, with more than 50 percent of accommodation designated as lower, i.e. one-star and below. There has been significant investment in accommodation with government statistics showing an increase from 623 rooms in 2003 to 9,900 rooms in 2016. However, most of this investment is in Kigali targeting the meetings, incentives, conference and events (MICE) market. At least 1,000 new three-star hotel rooms are expected to open in Kigali over the next few years (World Bank 2016). Industry professionals have noted that accommodation is an impediment to growth for national parks beyond Volcanoes National Park (The East African 2018).

2.3.5 Marketing

Under the 2009 Rwanda Tourism Policy and Master Plan, \$1.4 million (RWF 1.1 billion) was allocated to rebrand Rwanda and organize promotional campaigns with the private sector. RDB hired marketing agencies in the USA and UK to implement promotional campaigns that created positive marketing messages to attract international visitors. The campaigns also leverage print media, with travel guides like *Lonely Planet* giving positive coverage. During trade shows promoting the destination to outbound operators, Rwanda received awards, such as the World Tourism Award at the World Travel Market and Most Promising New Destination Award at the Outbound Travel Mart in 2017. Familiarization trips and public events, such as a gorilla-naming ceremony, further solidified Rwanda as an interesting destination in the view of outbound operators and international tourists.

Inbound operators have joined the Rwanda Tourism and Travel Association to gain exposure at trade shows. Interviews with inbound operators indicate that key marketing channels for the private sector include trade shows and social media.

Figure 3 Marketing distribution channels for Rwanda’s soft adventure market



Government

- **Media:** The most important marketing channel to change the international perception of Rwanda is the media. Media outlets featuring Rwanda’s tourism offerings include CNN, Aljazeera, the Discovery Channel, and Reuters.
- **Print:** Publications have large reader bases and targeted readership, making them effective channels for the government to promote Rwanda’s soft adventure tourism offerings. Prominent press outlets, such as CNN, National Geographic Traveler, Time Magazine, and Fodor’s, have featured Rwanda favorably on lists such as “Best Trips of 2014” and “11 Places to Go in 2014” (RDB 2014) and more recently in the New York Times “52 Places to Go in 2018”. Rwanda was also featured in articles in the UK newspaper, The Telegraph.

- **Trade shows:** RDB attends trade shows and hosts international-level events to raise awareness of Rwanda as a tourism destination. Recent events include:
 - The World Travel Market held in London in November 2017, which was attended by RDB and 17 companies from Rwanda;
 - The ITB Asia Travel Trade Show held in Singapore in October 2017; and
 - The 41st Annual World Tourism Conference held in collaboration with the African Travel Association in Rwanda in August 2017.
- **Industry-related events:** Marketing efforts in the form of public events are held to generate international interest.
 - One such event is Kwita Izina, the annual infant gorilla-naming ceremony. The ceremony is often attended by government officials, international celebrities, and conservationists. The event has gained international attention due to its ceremonial nature and connection to conservation of an iconic species.
- **Sporting events:** The government is able to raise awareness of the country by hosting international sporting events. For example:
 - Tour du Rwanda, an annual cycling competition, sponsored by RDB. It is considered one of Africa's most prestigious stage races, attracting athletes from countries such as the USA, Canada, and Japan. This has placed Rwanda on a global stage and the competition continues to showcase the country's safety and hospitality.
- **Familiarization trips:** The RDB provides familiarization trips for international outbound tour operators and travel agents to visit Rwanda and experience the activities before promoting the country as a tourist destination to international tourists.
- **Official tourism website:** The RDB has an online website²⁵ – Remarkable Rwanda – that is regularly updated. It summarizes all tourist-oriented information in a single location for international visitors.
- **Social media:** The Rwandan government utilizes Facebook, Twitter, Flickr, and YouTube, but not Instagram. Posts are relatively frequent, with Facebook posts every other day and Twitter tweets two to three times a day. The Rwandan High Commission offices in source markets have their own Twitter accounts. For instance, the Rwandan High Commission in the USA has a twitter account @RwandaInUSA.

Private sector

- **Trade shows:** Inbound operators take part in international trade shows with the support of the RDB. Tour operators and RwandAir represented Rwanda at the Outbound Travel Mart held in India in February 2017.
- **Social media:** Operators rely on social media, such as Facebook, to reach the global community. YouTube is used by travel agencies to showcase promotional videos and offer insight into Rwanda's product offerings to the online community. TripAdvisor serves as an indirect marketing channel where Rwanda can be promoted positively or negatively, as content is created by tourists.
- **Travel alliance:** By joining the Rwanda Tourism and Travel Association (RTTA) network, inbound operators are able to attend RTTA seminars and lectures by tourism experts, take part in regional and international trade shows, and connect with a wider network of tourism professionals.

²⁵ <http://www.rwandatourism.com/>

2.3.6 Tourism Development

Working with Google Maps

Under the Rwanda Tourism MapUp initiative, RDB partnered with Google to map out the country’s tourist attractions and facilities in order to increase discoverability through search engines. The initiative allows tourists to better research their trips, understand the locations of attractions and the time needed to travel between attractions. Whether travelling independently or in a tour group, tourists increasingly carry out pre-trip research online to learn about the destination. Main attractions like the Congo Nile Trail and Nyungwe Forest, as well as services such as hotels and restaurants, are included.

Visa deregulation

Effective 1 January 2018, visitors from all countries will be eligible for a visa on arrival, simplifying tourists’ travel planning process and making Rwanda a more competitive destination. Furthermore, the implementation of single-entry tourist visas for East African Community (EAC) visitors in 2014 enables international visitors to tour multiple EAC countries without the need for a separate visa for each country (excluding Tanzania).

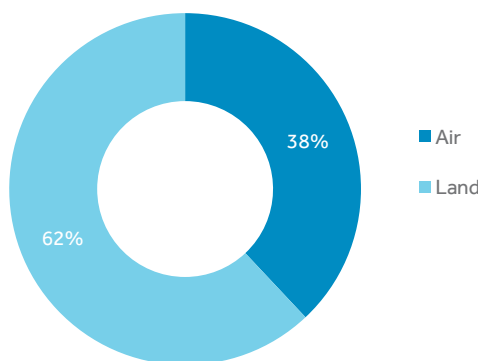
Improving security concerns

Travel advisories from international governments rate Rwanda as a relatively safe country with low crime levels, except for petty crime and violence at the border with the Democratic Republic of Congo. The Ministry of Defense has been active in holding sessions with panelists from national security practitioners, scholars, and analysts to discuss ways to address security issues.

2.3.7 Transportation Efficiency

Getting to Rwanda

Tourist Arrivals for Holiday and Relaxation Purposes by Transportation Mode 2016



Source: National Institute of Statistics of Rwanda (NISR), 2017

RwandAir, the national carrier, has expanded its fleet size, increased the frequency of its existing routes, launched new regional services, and signed new air service agreements with other airlines. It currently operates flights within Africa and the Middle East. Kigali International Airport was expanded to handle additional capacity. According to government statistics, 59,348 or 62 percent of total tourist arrivals for holiday and relaxation purposes, entered Rwanda by land, and 36,509 or 38 percent entered by air in 2016 (NISR 2017). The high proportion of visitors arriving by land is due to the number of tourists driving in from neighboring African countries. For international tourists arriving from outside of Africa, air is the primary mode of transportation.

Getting around Rwanda

The Ministry of Infrastructure has allocated about \$1 million (RWF 852 million) under the Rwanda Tourism Policy and Tourism Master Plan toward infrastructure development activities, such as:

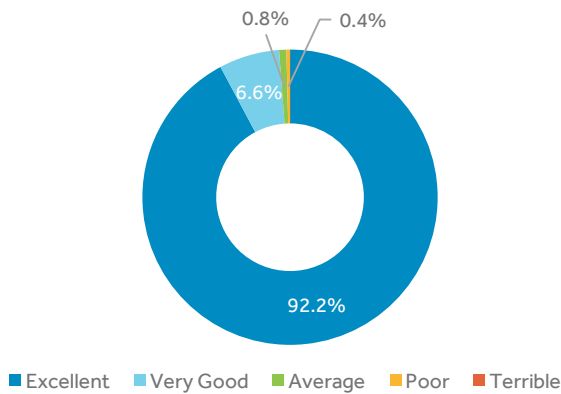
- Maintaining and upgrading access roads and air access facilities;
- Provision of roadside facilities and travelers’ rest areas to be developed with local communities;
- Improving signage on access roads and for tourist attractions; and
- Renovating existing airstrips to improve domestic air access.

There is little traffic congestion in the country, making road transportation an efficient option. A tour operator indicated that it can cost about \$90 or more per day to travel around the country by car. The options available are:

- **Taxi Moto:** This regulated motorcycle transportation company, the cheapest option, features drivers registered as official transportation providers. They can be identified by green vests and helmets with individual registration numbers.
- **Minibus:** Minibuses are the most common mode of transportation for longer distances and daily commutes. They are clearly marked with their destination and route.
- **Private vehicle rentals:** Special private vehicle rental, such as 4x4s, is a popular mode of travel to Nyungwe and Akagera National Parks, especially for those who self-drive.

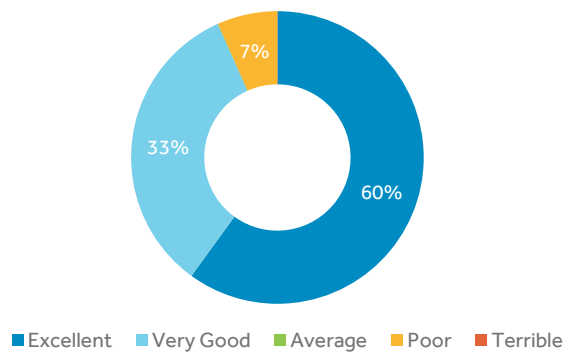
2.3.8 Customer Satisfaction

Volcanoes National Park: Review Ratings*



*Out of 1,012 reviews on TripAdvisor, as of December 4, 2017

Congo Nile Trail: Review Ratings*



*Out of 15 reviews on TripAdvisor, as of December 4, 2017

Reviews on TripAdvisor are predominantly positive with 92 percent (936 reviews), indicating that Volcanoes National Park was an excellent experience. Only four instances of negative feedback were received, coming from tourists who were unable to sight gorillas during their trip.

Challenges

The international private sector has been active in improving the quality of service skills in guiding and hotel operations, as demonstrated by the establishment of a French tourism school, *Vatel*, in Rwanda in 2016. Having skilled international professionals train Rwandan staff is expected to quickly improve the service quality up to the level of international standards.

2.3.9 Analysis of Success Factors

The key success factors that have increased the soft adventure tourism in Rwanda in are:

- Success of iconic product followed by diversification of adventure tourism offerings;
- Inclusive conservation efforts linked to tourism;
- Intensive marketing efforts by the government to create a strong brand image; and
- Government commitment to infrastructure improvement.

Success of iconic product followed by diversification of adventure tourism offerings

Rwanda developed a strong market presence in the early stage of tourism development through focusing on a single, iconic tourism experience – gorilla trekking. This gained international attention, which Rwanda leveraged for long-term tourism development. Recently, the government set out to diversify soft adventure tourism offerings through product development. This is an initial step in decreasing reliance on a single product, spreading the benefit of tourism throughout the country, and creating a more robust tourism industry.

Inclusive conservation efforts linked to tourism

Both the government and local communities are involved in park management, gorilla protection, and combating animal poaching. This approach has contributed to the sustainability of protected areas and has also addressed security issues. The Rwandan government also educates local residents and conveys the economic benefits that tourism can bring to them. This allows for soft adventure tourism activities to flourish in protected areas.

Intensive marketing efforts by the government to create a strong brand image

The government launched an intensive public relations campaign to shift the image of the country and leveraged its iconic species to create a strong brand image. RBD actively works with international media to promote its tourism offerings while portraying itself as one of the safest countries in the region. This approach ensures a broad coverage in international markets. Public relations campaigns are coupled with traditional tourism marketing include regular tradeshow participation, famils and industry events.

Government commitment to infrastructure improvement

The government is committed to infrastructure improvements, such as the expansion of RwandAir, the revamp of Kigali International Airport, and investing in the construction of the multinational “Kivu Belt” roads. It is important for Rwanda to help tourists save on cost and time by making soft adventure tourism activities readily accessible.



Photo: Nelo Hotsuma

COMPARISON DESTINATION ANALYSIS

2.4 HISTORICAL TOURISM OKINAWA, JAPAN

2.4 Historical Tourism – Analysis of the Historical Tourism Segment in Okinawa

2.4.1 Key Success Factors

- **Well-developed tourism infrastructure.** Strong destination management has allowed Okinawa to create high quality products, tourism infrastructure, transportation infrastructure, and easy access to historical sites.
- **Bundling of historical war sites with other attractions.** Bundling with other types of tourist attractions through packaged itineraries and a tour narrative in Okinawa has succeeded in attracting international visitor traffic to historical war sites.
- **Marketing to outbound tour operators specializing in military tours.** Overseas outbound operators specializing in military tours play an important role in raising awareness and attracting international visitors to Okinawa’s historical war sites.
- **High-quality guides creating a meaningful experience for visitors.** Good guides are key to providing tourists with a holistic perspective on the war and a meaningful, educational experience.

2.4.2 Overview

Okinawa has developed its tourism infrastructure and historical sites in order to have good quality products and services to offer anticipated tourists. Historically, the number of international tourists visiting historical war sites has been small. However, the development of tourism infrastructure and the high quality of the sites will ensure that site operators are well equipped to provide a world class tourism experience to international tourists, with features such as multilingual audio guides, multilingual signs, easy access to sites, and illustrative tour guides. This is a long-term approach for Okinawa that emphasizes quality of experience.

The historical tourism segment in Okinawa currently faces a political challenge. Japan’s role in the Second World War (WWII) and existing political tensions with China and South Korea have meant that historical tourism promotions are downplayed.

The two main war-related historical sites in Okinawa are the Peace Memorial Park and Museum and the Himeyuri Peace Memorial Museum. Both sites were built to remember the Battle of Okinawa, a major battle in the Pacific War during WWII. In memory of those who fought in the war, memorials and war museums were created. The memorials, museums, and battle sites form the basis for WWII tourism in Okinawa. In 2002, the Japanese government initiated the Okinawa Promotion Plan to identify potential historical sites in southern areas of Japan in order to promote the importance of peace (Nguyen 2012).

Decline in the total number of visitors at historical war sites

The total number of domestic and regional historical visitors has declined, due to ageing WWII survivors. In 2016, the total number of visitors at a key historical museum was 373,502, a decrease of 17 percent from 481,018 in 2000 (Ryukyu Shimpo 2017). Generally, the majority of visitors to Okinawa’s historical sites are domestic, with international tourists making up only four percent of total annual visitors (Trade Interview 2018). According to an interview conducted with the key historical museum operator, however, the number of international tourists visiting its sites is increasing, while the number of domestic tourists is declining.

Increasing number of international visitors at historical war sites

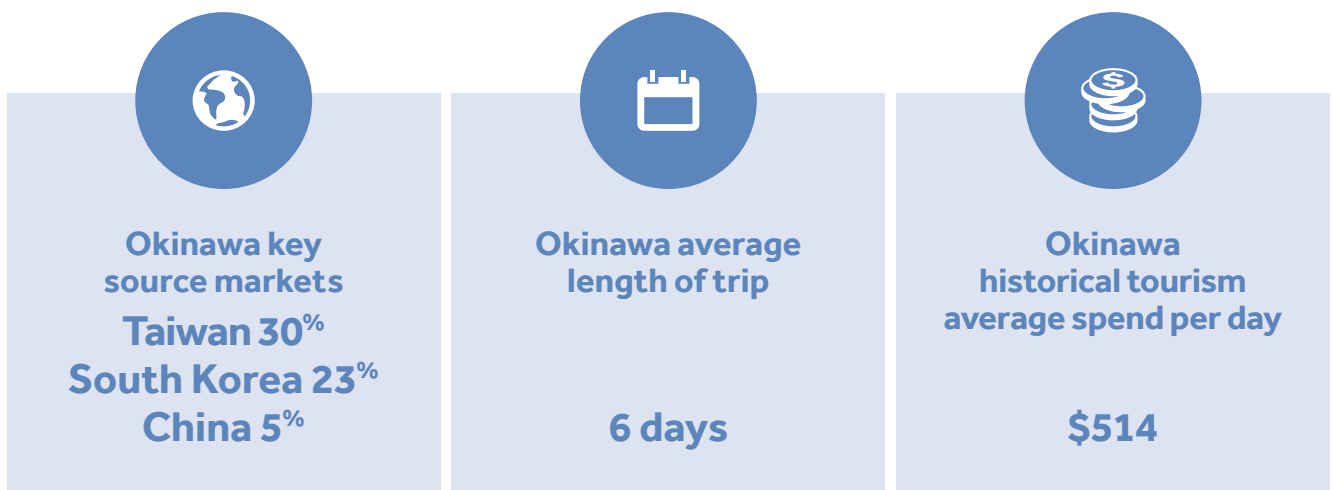
The number of international tourists visiting historical sites in Okinawa has grown due to an increasing government focus on the international market. International visitor numbers to one of Okinawa’s main historical tourism sites, the Peace Memorial Museum, increased at a nine percent compound annual growth rate from 2000 to 2016 (3,600 visitors in 2010 to 14,000 visitors in 2016) (Okinawa Prefectural Peace Memorial Museum 2017). Personnel at the Okinawa Conventions Visitors Bureau (OCVB), the prefectural tourism bureau, indicated that there were more visitors to memorial sites from Europe and America than from Asia in 2016.

The 5th Okinawa Prefecture Basic Plan for Tourism Promotion

The OCVB broadened its marketing focus to western and other Asian markets.²⁶ In the past, marketing efforts were focused on attracting domestic visitors from the main islands of Japan and neighboring Asian countries, such as Taiwan, China, and Korea, based on cultural, linguistic, and religious similarities. However, the latest 5th Okinawa Prefecture Basic Plan for Tourism Promotion initiated in 2012, set the following goals to be achieved by 2022 (Ozawa 2015):

- To reach 1 trillion yen in tourism income;
- To reach an average spend of \$900 (100,000 yen) per tourist per visit;
- To reach an average length of stay of five days; and
- To reach 10 million inbound tourists, with two million to come from overseas.

2.4.3 Arrivals, Length of Stay, and Spend



Source: Okinawa Prefectural Government 2018 and compilation of inbound and outbound operator tour package trip lengths and prices.

26 Based on a trade interviews

Okinawa received 2.1 million international visitors in 2016 (Okinawa Prefectural Culture and Tourism Sports Division Tourism Policy Division 2018). Taiwan was the largest international source market, with 607,300 visitors (30 percent), followed by China with 449,200 visitors (22 percent), and South Korea with 431,300 visitors (21 percent). According to an air transport survey conducted by the Okinawa Prefectural Government in 2016, the average duration of stay in Okinawa was six days for package tour participants. Tour operators in Okinawa reported that the spending on day-tour bus packages covering historical war sites was about \$45 (5,000 yen) per person per day. Average tourist spend per trip in Okinawa in 2016 was \$900 (98,097 yen) broken down into on average, \$226 (24,594 yen) for accommodation, \$110 (12,030 yen) for transportation, \$250 (27,223 yen) for souvenir and shopping, \$196 (21,396 yen) for food, \$55 (6,021 yen) for entertainment and admission fees, and \$63 (6,834 yen) other spending (Okinawa Prefectural Government 2017). Full package tours including accommodation, meals, tours, and ground transportation cost approximately \$514 per day.

2.4.4 Product Availability, Quality, and Pricing

Main historical war sites in Okinawa:	
Peace Memorial Park and Museum	<ul style="list-style-type: none"> • Memorial for the Battle of Okinawa gives an overview of the lead-up to the battle, the battle itself, and the reconstruction of Okinawa • The park offers free entry, but the museum costs about \$2.60 (300 yen) per adult • Managed by the Okinawa Prefecture Peace Memorial Foundation; reopened in 2000 and regularly maintained
Himeyuri Peace Memorial Museum	<ul style="list-style-type: none"> • Memorial to commemorate the Himeyuri Student Corps during the Battle of Okinawa and for peace • The museum costs \$2.70 (310 yen) per adult • Managed by the Himeyuri Foundation
Former Japanese Navy Underground Headquarters	<ul style="list-style-type: none"> • A historical site at which the Japanese Navy used an underground tunnel system as its headquarters during the Battle of Okinawa • Entrance fee is \$3.90 (440 yen) per adult • Managed by the OCVB and renovated in 2008
Cornerstone of Peace	<ul style="list-style-type: none"> • A monument located in Peace Memorial Park that commemorates those who lost their lives during the Battle of Okinawa • Free entry
Todoroki Cave	<ul style="list-style-type: none"> • One of Okinawa's "gama" caves, used by the military and civilians to take refuge • Free entry

The quality of historical sites in Okinawa is high as they are managed by the OCVB or a foundation supported by the families of WWII survivors. Funding for site maintenance is derived from visitors' entrance fees. Parks in the memorial sites are maintained by the Okinawa Prefectural Government.

International tourist-friendly measures have been put in place,²⁷ such as:

- English-speaking tour guides, peace guides, and portable multilingual audio guides;
- Information panels with English descriptions at the sites;
- Promotional pamphlets printed in English, Korean, and Mandarin; and
- Five-minute explanatory tapes narrated in English played at the sites.

27 Based on trade interviews

Tour operators in Okinawa do not organize history-specific tours, but rather bundle them with other attractions on the island to encourage tourists to visit them. The government in Okinawa is hesitant to promote historical war sites to Asian tourists due to low interest. In particular, South Korean tourists have low interest in visiting the sites (Okinawa Prefectural Government 2017).

A number of outbound operators, such as Beyond Band of Brothers Tours and Valor Tours, specialize in international war history tours and are a key source of international historical tourism. These operators take tourists to war sites around the world and Okinawa is usually a stop in a tour of a series of countries. However, prices tend to be high as they cover multiple countries. For example, an all-inclusive (accommodation, transportation, museum entrance, and guide fees) multi-country tour of 15 days could cost about \$14,000 (Beyond Band of Brothers Tours 2018).

Popularity of product offerings

Product offerings in Okinawa are popular because:	Archival films and survivor testimonials shown at the museums are thought-provoking, educational, and teach visitors not to take peace for granted.
	Sites such as the Peace Memorial Museum are interactive and engaging, allowing visitors to send world peace messages.
	Sites are well maintained and preserved.

Accommodation options

Tourists are offered a wide range of accommodation choices at varying price points, locations, and luxury levels. Accommodation options available for international visitors include hotels, traditional-style ryokans (inns), private houses, and hostels, but the most popular option is hotels. Hotel prices range from \$40 to more than \$900 per night depending on the accommodation type chosen (TripAdvisor 2018). The government has legalized short-term rentals of private homes for up to 180 days per year, which provides additional accommodation options for tourists (Japan Times 2018).

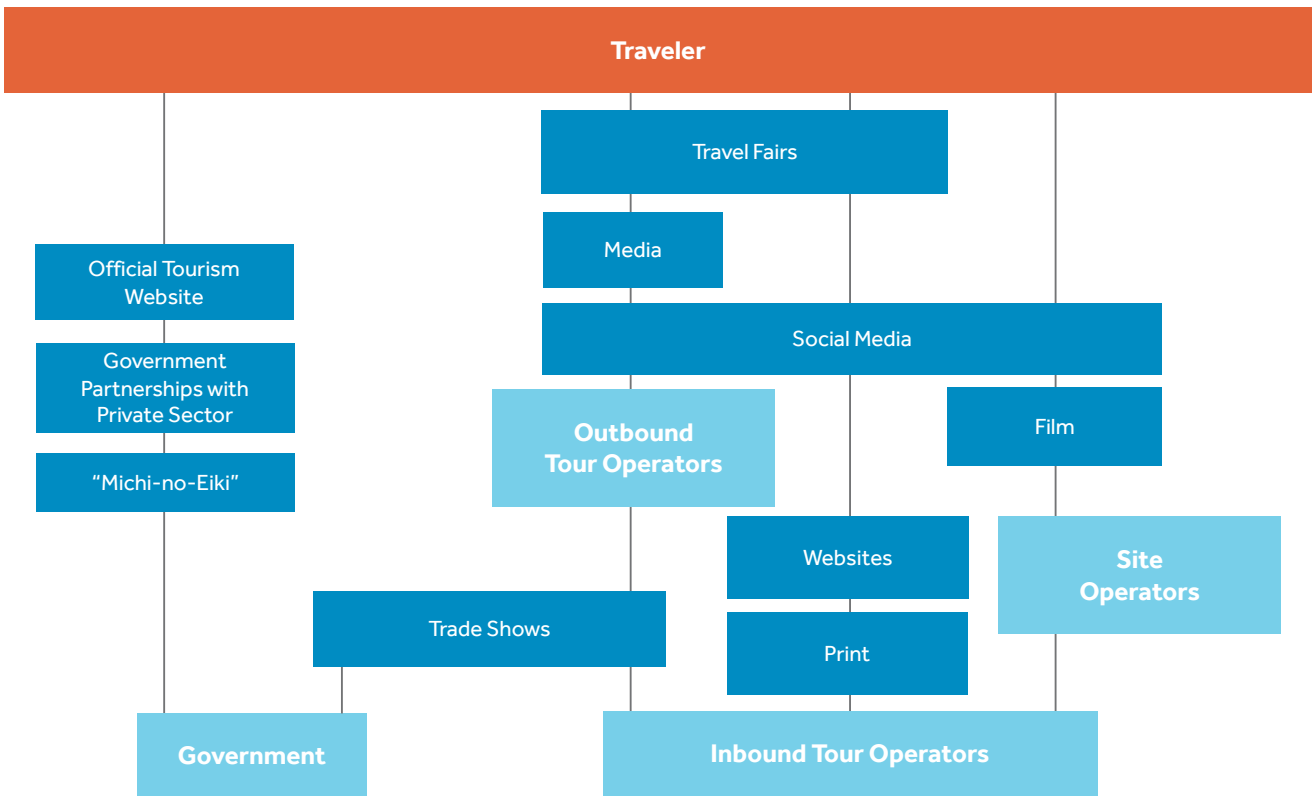
2.4.5 Marketing

In recent years, the Okinawa Prefectural Government and private sector have shifted their marketing focus from domestic tourists to European and American tourists (NIAC 2013). According to an interview with a key travel agency, the tourism infrastructure is ready to support strategies that aim to attract these markets for historical tourism purposes. For instance, Okinawa's international tourist website is available in nine languages and offers suggested itineraries for first-timers visiting Okinawa. A multilingual contact center that offers tourist information, translation services, and support for traveler emergencies also supports international tourism in Okinawa.

The primary marketing channel used by the government to promote historical tourism offerings to international tourists is print, including brochures and travel guides. The national and local prefectural governments also actively market Japan and Okinawa on a global level, but they do not specifically market historical war sites. The government places greater emphasis on promoting Okinawa as an overall fun holiday destination.

Marketing efforts have traditionally been focused on domestic markets, while there is potential for ground operators to target the much larger western market in the future. Historical site operators promote their sites through print brochures and on their individual websites. Other marketing efforts promoting historical tourism include online channels and media exposure through outbound tour operator efforts. USA-based tour operators, such as Beyond Band of Brothers,²⁸ that have gained media attention in the USA have featured military sites around the world, including those in Okinawa, for the international community. Similarly, in Australia, historian and television presenter Mat McLachlan has attracted media attention with his historical battlefield tours business – Mat McLachlan Battlefield Tours.²⁹

Figure 4 Marketing distribution channels for Okinawa’s historical tourism market



Government

Okinawa’s government focuses on promoting overall mass market tourism offerings in Okinawa, such as beaches, marine activities, shopping, and cultural tourism, whereas private sector operators focus on promoting historical tourism.

- **Print:** Site operators owned by the Okinawa Conventions Visitors Bureau (OCVB) rely heavily on print media to reach out to international tourists who have already arrived in Okinawa. This includes printing free maps, guides, and brochures. Officials from the OCVB pay regular visits to hotels in Naha City to distribute the brochures and place them on hotel lobby counters.
- **Travel fairs:** The OCVB participates in global travel fairs. Promotions focus on portraying Okinawa as a destination where many activities are available, from yoga at a heritage site to marine activities such as snorkeling.

28 <http://www.beyondbandofbrothers.com/>
 29 <http://battlefields.com.au/>

The OCVB's recent participation includes:

- The Family Travel Festival held in Shanghai in November 2017. The OCVB took part in the event to promote Okinawa tourism to the Chinese market, in particular to Chinese families.
- The Travel Expo held in February 2017 across various cities in Australia. Participation was organized by the Japan National Tourism Organization (JNTO) office in Australia, and OCVB represented Okinawa Prefecture.
- The Okinawa Matsuri held in Hong Kong in March 2017, organized by the Okinawa Prefectural Government and the OCVB.
- **Trade shows:** The government and inbound operators market to outbound operators internationally by attending trade shows. Recent participation included:
 - The International Luxury Travel Market (ILTM) Asia Pacific travel fair held in Shanghai in June 2017. The event targeted Chinese luxury travelers. As part of its efforts to promote Okinawa as a luxury destination, the OCVB promoted resorts and luxury tours, such as helicopter tours, in order to diversify its tourism offerings and ensure sustainability of the overall tourism industry in Okinawa.
- **Official government tourism website:** The Okinawa Prefectural Government has an online tourism brand, "Be. Okinawa", promoting general Okinawa tourism, ranging from leisure to urban activities. The website also creates and features short films.
- **Government partnerships with private sector companies:** Due to the presence of U.S. military bases in Okinawa, there is speculation that Okinawa risks being attacked by terrorists.³⁰ The government collaborates with airline and media companies as part of its broader marketing efforts to promote the message that Okinawa is "safe and secure." One example is the partnership between the Okinawa Prefectural Government and the Singapore Changi Airport Group formed in 2014.
- **Michi-no-Eiki:** The prefectural government has eight Michi-no-Eiki along highways across Okinawa. These are roadside rest areas that also serve as information centers for tourist sites in Okinawa.
- **Social media:** The Okinawan government utilizes Facebook, Instagram, and YouTube to reach out to consumers directly and promote the overall destination. It does not use Twitter.

Private sector

The private sector does not heavily market tourism internationally, although the infrastructure to support international tourists puts Okinawa in a position to do so. Private sector operators focus, instead, on persuading tourists who are already in Okinawa to participate in other tourism activities.

Infrastructure built to accommodate international tourists includes site development, such as English information plates and multi-lingual audio guides. General tourism infrastructure supporting international tourists also helps historical tourism operators function easily in terms of transportation and attracting tourists locally.

- **Print:** Historical attractions rely on print brochures to promote historical sites and attract international tourists. Brochures are distributed in hotel lobbies and tourist information points.
- **Film:** The 2016 Hollywood war movie *Hacksaw Ridge*, which depicts the Battle of Okinawa, raised awareness and generated interest in visiting the battle sites. Tourists who wish to focus on these sites, such as the Maeda Escarpment, can request an individual tour in English.³¹ Information plates in English were displayed at the sites after the film's release in order to facilitate sharing the history with international visitors.

³⁰ Based on trade interviews

³¹ Based on an interview with government officials

- **Websites:** Official war sites provide detailed information, such as directions, fees, floor plans, preview information, background history, print publications that can be purchased, and past visitor comments. Online resources such as www.Dark-Tourism.com also provide information about what to see at the sites.
- **Social media:** According to a government survey conducted by the prefectural government with international visitors in 2016, respondents stated that personal blogs were the most useful in giving the visitors travel tips before and during their trip. Online review sites such as TripAdvisor and travel blogs are key to marketing the online travel community. Past visitors on tours write about their experiences on tour operator review pages such as Beyond Band of Brothers Tours or post feedback on TripAdvisor, with links to the attraction's website.
- **Media:** Outbound tour operators in the USA have been gaining media interest because of their niche tour packages. This helps generate awareness of Okinawa's war tourism offerings through greater publicity.
 - *Forbes Magazine* featured a USA-based military tour operator because of its unique offering.
 - Radio stations and television networks have conducted interviews with the founder of a military tourism company.
 - Online media channels such as Facebook, Twitter, and YouTube are also marketing tools that outbound tour operators use to post and feature historical sites that are covered in the tour packages.
- **Travel fairs:** Inbound operators participate in global travel fairs, together with the government, to promote Okinawa's leisure and marine activities. Nine travel agencies attended the Okinawa Matsuri held in Hong Kong in March 2017, organized by the Okinawa Prefectural Government and the OCVB.
- **Outbound tour operators:** Outbound tour operators are one of the main channels through which Okinawa receives historical tourists focused purely on historical tourism. Outbound operators, such as Beyond Band of Brothers, offers tours to Okinawa and has a ready customer base to leverage.

2.4.6 Tourism Development

The overall historical tourism infrastructure in Okinawa is well developed and management of the historical war sites is the responsibility of the OCVB and foundations, supported by the families of WWII survivors. Most sites have archival films, survivors' testimonials, multilingual audio guides, and English information plates, providing a variety of ways to learn and interact with the attractions.

Peace guide training

Peace guides give a personal interpretation of the war, taking tourists on a journey back in time. Together with archival films and survivors' testimonials, the storytelling creates a unique experience for tourists. Guiding in Okinawa has developed to provide multiple perspectives. Peace guides volunteer to take tourists to the USA military bases and historical war sites and share with them views of the war from an ordinary citizen's perspectives. By contrast, normal tour guides explain the war from the point of view of the military.

The Okinawa Peace Network (OPN) runs training courses several times a year to educate volunteer peace guides and provide practical guiding skills. The course includes lectures on the Okinawa War and post-war history, as well as fieldwork, where trainees are taken to WWII memorial sites and taught how to introduce the sites to tourists. There are currently about 180 registered volunteer peace guides Okinawa, mainly schoolteachers, taking tourists to WWII sites.³² Only a small number of these guides can conduct tours in English, so international tourists usually need to hire an interpreter to accompany the peace guides.

32 Based on trade interviews

Tour guide training

Since 2007, the Okinawan government has granted licenses to Okinawa residents who take and pass a tour guide test in an effort to regulate and boost guiding capacity. According to an interview conducted with the government, about 190 people currently hold a license and more than half of them have passed the English language guide test. The Okinawa Interpreter Guide Association holds two-day training courses every February to improve the skills and knowledge of its members at the sites.

The OCVB is responsible for developing marketing plans and tourism infrastructure in cooperation with the local governments of all Okinawa islands and the private sector, such as airlines, travel agencies, and transportation companies. The OCVB was recently approved as a registered destination marketing organization in August 2017. As such, the OCVB will be able to obtain more funds from the central government and use these for marketing purposes.

Visa deregulations

Since 2013, inbound arrivals have benefited from ongoing visa deregulation in Japan. For example, visa requirements were simplified for Chinese visitors in May 2017, especially for those applying for single- and multiple-entry visas, and for Chinese nationals living abroad. This has made the travel experience to Japan more seamless and enjoyable facilitating Chinese tourism to Japan. These measures are expected to support the ongoing growth of Chinese arrivals in 2018. According to prefectural statistics, about 504,000 international visitors (20 percent) were from China in 2017 (Okinawa Prefectural Government 2018).

Accommodation development

There are many resorts in Okinawa, offering a wide variety of accommodation options in terms of budget and quality; but specialized accommodation types have not been considered important. In recent years, accommodation operators have expanded their presence to the peripheral areas of the mainland. Secondary islands have yet to be developed.

Challenges

According to a government survey conducted in 2012, international visitors found that getting around in Okinawa was difficult and frustrating due to the lack of English signs or English announcements outside tourist sites. The government has since improved English capabilities to attract foreigners to the island. There is now a call center in Okinawa, which provides tourist information in English; historical sites that offer multilingual audio guides; and a private sector that now employs local English-speaking guides.

2.4.7 Transportation Efficiency

Getting to Okinawa

New routes with major and low-cost carriers have been launched and direct flights from Tokyo Haneda and Osaka Kansai International Airports have increased, making it more convenient for air travelers to access the island. The latest major foreign airline to add Okinawa to its route network is Korean Airlines. As part of the 5th Okinawa Prefecture Basic Plan for Tourism Promotion, a second runway is being constructed to boost Naha Airport's air traffic capabilities. It is scheduled for completion by 2020 (Ozawa 2015).

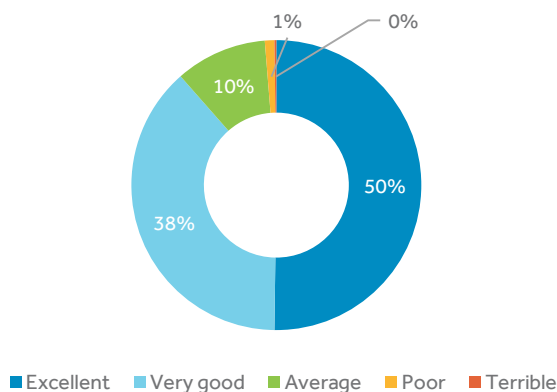
Getting around Okinawa

Naha Airport serves as a hub to connect the main island to other domestic airports and to airports on the outlying islands of Okinawa. As of 2017, there were 13 airports in Okinawa. Traveling within Okinawa is convenient across all major modes of transportation, as transportation infrastructure is highly developed and well maintained. On the main island, transportation options include monorail, bus, car, and taxi. Flights and ferries go to Okinawa's outlying islands, where transportation options include bus, car, motorcycle, and bicycle. On the main island, visitors can access the three major historical sites by local bus, monorail, and taxi. The government has begun construction of Okinawa's monorail extension, which is scheduled for completion in 2019, connecting Naha to Urasoe. Car rentals represent the preferred mode of transportation for international visitors (Okinawa Prefectural Government 2017) due to their flexibility and the lack of English translations on public transportation.

Under the 5th Okinawa Prefecture Basic Plan for Tourism Promotion, the prefectural government has developed two circular and seven radial routes to provide smoother traffic flow in Naha. A prefectural government survey conducted with international visitors in 2012 revealed that they were dissatisfied with the heavy traffic in Naha (Kono & Kobayashi 2013). A network of "ladder-structure roads" consisting of National Route 58, the Okinawa Expressway, and National Route 329 has also been constructed to connect Southern and Northern Okinawa.

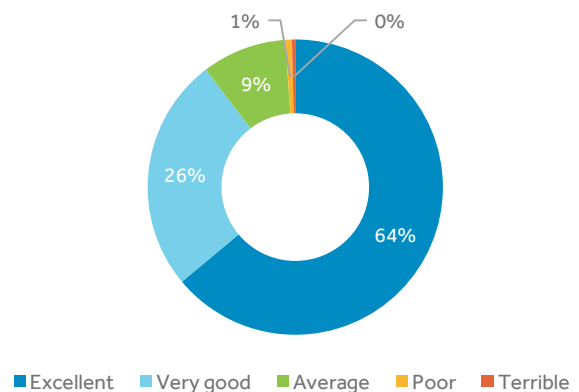
2.4.8 Customer Satisfaction

Okinawa Peace Memorial Park: Review Ratings*



*Out of 470 reviews on TripAdvisor, as of December 4, 2017

Himeyuri Peace Museum: Review Ratings*



*Out of 280 reviews on TripAdvisor, as of December 4, 2017

TripAdvisor shows that at least half of past visitors who left reviews were very satisfied with their visit. Positive comments were made regarding:

- The thought-provoking, educational experiences, giving insight into the war and teaching the value of peace;
- The spaciousness and serenity of the sites;
- The variety and quality of displays on-site; and
- The availability of multilingual portable audio guides.

A 2016 prefectural government survey³³ revealed that all American visitors surveyed were very satisfied with their visits to the historical sites. Visitors from Asian countries were less satisfied. Satisfaction levels among visitors from Hong Kong were at 69 percent, Taiwan at 58 percent, China at 53 percent, and South Korea at 13 percent.

Based on reviews of accommodation providers in the Naha city center area on Booking.com, accommodation options that generally have low scores (less than a 6.5 review score) perform badly in terms of cleanliness and comfort. Some reviewers commented that the hallways and rooms felt “cramped,” and had “bad lighting”, and that the “environment is dirty”.

2.4.9 Analysis of Success Factors

The success of Okinawa’s historical tourism to date can be attributed to:

- Well-developed tourism infrastructure;
- Bundling of historical war sites with other attractions in Okinawa;
- Marketing efforts by outbound tour operators specializing in military tours; and
- High-quality guides creating a meaningful experience for visitors.

Well-developed tourism infrastructure

Strong destination management has allowed Okinawa to create high quality products, tourism infrastructure, transportation infrastructure, and easy access to historical sites. Site infrastructure is well maintained and operators take the initiative to improve content, facilitate storytelling, and add supporting content for international tourists. Archival films, survivors’ testimonials, multilingual audio guides, and English information plates form the basic infrastructure of the sites. Site management is either the responsibility of the tourism bureau or foundations, which ensures that the quality of the product offerings in Okinawa is high. Transportation developments have also made getting to and around the island easier for international tourists.

Bundling of historical war sites with other attractions in Okinawa

Bundling historical war sites with other tourist attractions through packaged itineraries and a tour narrative in Okinawa has succeeded in attracting international visitor traffic to the sites. Okinawa tour operators do not rely on tour packages that promote only war sites, due to Asian visitors’ lack of historical connection to war memorial sites.

33 Sample sizes for the prefectural government survey carried out with international tourists are as follows: Taiwan (521), Korea (589), Hong Kong (287), China (404), and the USA (14)

Marketing to outbound tour operators specializing in military tours

Outbound operators specializing in military tours play an important role in raising awareness and attracting international visitors to Okinawa's historical war sites. Focusing on directly marketing to outbound tour operators who specialize in military tours helps to build knowledge about the destination and fosters relationships with key players that can bring in tourists. Another important marketing channel is using print and packaged tours to market offerings to tourists who are already in the country. This requires a strong network of operators that are willing to cross market attractions and tours.

High-quality guides creating a meaningful experience for visitors

Good guides are key to providing tourists with a holistic perspective on the war and a meaningful, educational experience. Okinawa offers both general tour guides and peace guides to provide a variety of perspectives on historical events. Peace guides add an additional layer to the education that visitors receive from their visit, as they offer different interpretations of the war. This creates a unique tour experience for tourists as they would normally only learn about the military perspective of events.

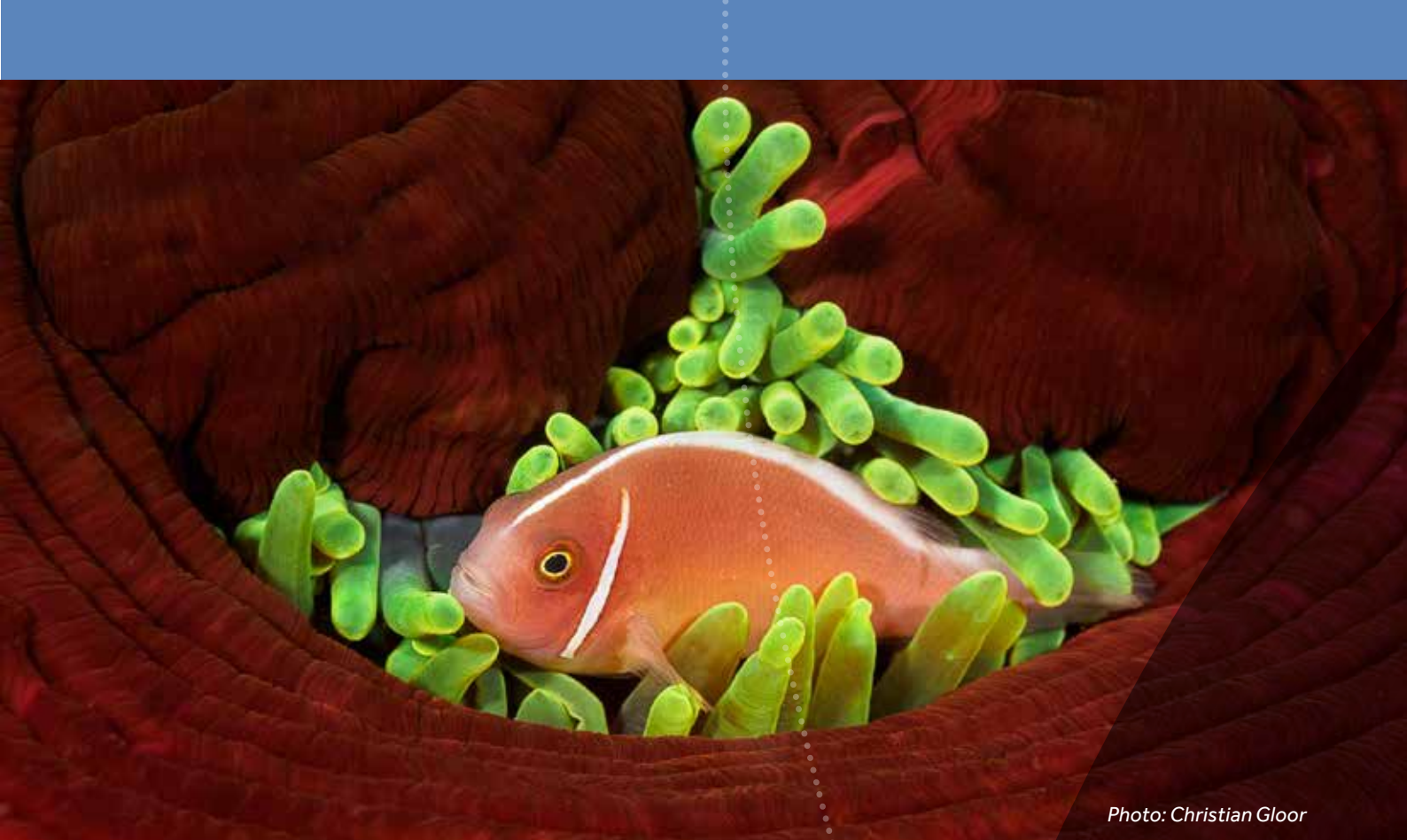


Photo: Christian Gloor

COMPARISON DESTINATION ANALYSIS

2.5 DIVING SULAWESI, INDONESIA

2.5 Diving – Analysis of the Diving Segment in Sulawesi

2.5.1 Key success factors

- **Direct flights between key source markets and Sulawesi.** Increased, regular flights from existing and emerging source markets provide a steady flow of tourists at competitive flight prices.
- **Proactive and collaborative marketing by the government and private sector.** National and provincial governments specifically promote diving through their overall destination marketing efforts, while the private sector complements this with direct marketing to travel agents and use of online channels, websites and social media, to reach international divers.
- **Targeted policy and marketing decisions to grow emerging markets.** Government and private sector in Sulawesi worked together to identify and target emerging markets with specific potential in the dive sector, such as the Chinese market.
- **Collaborative management approach to marine parks.** Having representation from government, private sector, and local communities enables a comprehensive discussion of priorities and facilitates effective management of Sulawesi's 16 million hectares of gazette marine protected areas.
- **Active private sector representation in sector management.** The North Sulawesi Watersports Association participates in shaping park policies; oversees awareness, education, and employment in villages near diving sites; and plays a strong role in upholding service quality and standards.

2.5.2 Overview

Sulawesi is widely regarded as one of the top 10 dive destinations in the world. Its world-famous Bunaken National Park features more than 8,000 hectares of coral reefs and a variety of fish species (UNDP 2012). The other major dive site in Sulawesi is Lembeh Straits.

To preserve the biodiversity of the area, the government has instituted policies to conserve marine and coastal ecosystems. Indonesia's marine biodiversity has been under threat from inland activities, including deforestation, pollution, destructive fishing practices (including cyanide fishing and blast fishing), diver damage, and trash. To combat these issues, policies have been implemented prohibiting the use of fish-catching methods that damage fishery management zones,³⁴ stipulating that marine tourism operators must obtain a permit,³⁵ and introducing guard patrols in protected areas.³⁶ The private sector is involved in marine conservation through the North Sulawesi Watersports Association (NSWA), which has a strong voice in national park policy and management, the education of villagers, and the employment of villagers directly in dive operations. By 2012, the government had established 16 million hectares of MPAs and is committed to increasing the total MPAs to 20 million hectares by 2020 (Setyawati 2014).

³⁴ Act No. 31 Year 2004 on Fisheries and its amendment (Law No. 45 Year 2009)

³⁵ Act No. 27 Year 2007 on Management of Coastal and Small Islands

³⁶ Government Regulation No. 60 Year 2007 on Fisheries Resource Conservation

2.5.3 Arrivals, Length of Stay, and Spend



Source: *Republika.co.id* 2018 and compilation of inbound and outbound operator tour package trip lengths and prices.

Key source markets

During May 2017, key source markets for Sulawesi were China (49 percent), Singapore (2 percent), and Germany (1.6 percent) (BPS 2017). The source markets became even more skewed towards Chinese tourists in December 2017, with Chinese tourists making up 84 percent of international tourist arrivals, followed by Singapore at five percent and Malaysia and USA international tourist arrivals at one percent (*Republika.co.id* 2018). The high percentage of Chinese tourists is a relatively recent phenomenon; prior to 2017, the major arrival source markets were Singapore, Malaysia, USA, and Germany. For the first half of 2017, from January to June, North Sulawesi recorded 37,027 international tourist arrivals, an increase of 414 percent over the 7,197 arrivals in the first half of 2016 (BPS 2017). In June 2017, Sam Ratulangi International Airport recorded 4,678 international tourist arrivals, an increase of 261 percent over the same month in 2016 (BPS 2017). In December 2017, the trend continued, with 8,587 foreign tourist arrivals, an increase of 33 percent on November 2017 (6,400 tourists) and an increase of 125 percent on December 2016 (3,800 tourists) (Great Indonesia 2018).

The increase in the number of direct charter flights to Manado has encouraged more Chinese to travel to Sulawesi. The Ministry of Tourism has indicated that China is a focus market for the diving segment due to the large market potential. From 2011 to 2015, Chinese visitors to Indonesia grew by 20 percent. More recently, Manado recorded a 261 percent increase in Chinese visitors in June 2017 compared to the previous year as the result of an increase in the number of charter flights from China (BPS 2017) and visa-free travel for up to 30 days.

The government attributes the growth to the expansion of charter flights between Manado and Chinese cities.

- In February 2015, Garuda Airlines opened charter flights from cities in China, including Chengdu and Harbin.
- In July 2016, low-cost carrier Lion Air commenced charter flights from Macau and Shanghai to Manado, subsequently adding Guangzhou, Changsha, and Shenzhen routes. Flights are on Tuesdays, Thursdays and Saturdays using Boeing 737 aircraft. During high season, charter flights are increased to 19 times a week (The Jakarta Post 2017c).
- Indonesia's tourism ministry is incentivizing Indonesian airlines to offer flights to tier 2 and tier 3 cities in China through subsidies and joint promotions.

Length of stay and demographic

The average trip length is ten days with \$171 spent per day. This includes multiple dives per day; professional dive guides; equipment such as dive tanks, regulators, buoyancy control devices, and weights; accommodation; meals; and airport transfers.

Dive resorts attract an international demographic, including – in no particular order – tourists from Eastern Europe, Australia, North and South America, the United Kingdom, and Asia.

2.5.4 Product Availability, Quality, and Pricing

Main diving destinations in Sulawesi:

Bunaken National Park	Features 50 dive sites spread across five islands – Bunaken, Siladen, Manado Tua, Montehage, and Nain
Lembeh Straits	Features 50 dive sites, known as one of the best spots for muck diving ³⁷ in Indonesia

Dive tours are often offered as packages by resort operators, with costs ranging from \$1,600 to \$2,000 for nine days. Operators mostly offer Professional Association of Diving Instructor (PADI) courses for dive certifications and education.

Popularity of product offerings

Product offerings in Sulawesi are popular because:	Dive resorts and packages offer at least three dives per day, with diving equipment and professional diving guides included.
	Tourists are able to see the diverse marine life, biodiversity, and a wide variety of underwater topography.
	The large number of dive sites entices divers to return in the future to explore more sites.

Accommodation options

While dive resorts around Manado on the mainland are larger and have more facilities than those on Bunaken Island, they are farther away from the dive sites.

Accommodation on Bunaken Island ranges from small, simple properties to boutique-style properties. Only the top resorts on the island are able to hire highly experienced resort staff.³⁸ Accommodation in the area varies widely in quality and price. Agoda.com lists accommodation options from \$33 per night for a three-star resort to \$296 per night for a five-star resort.

Lembeh’s accommodation options range from budget to luxury. They are located along the main coastline, near the port town of Bitung, and on Lembeh Island. Most resorts are no more than 10 minutes transit by boat from Bitung.

³⁷ Muck diving refers to a type of diving that focuses on finding macroscopic marine life on the sea bed.

³⁸ Based on trade interviews with local accommodation operators

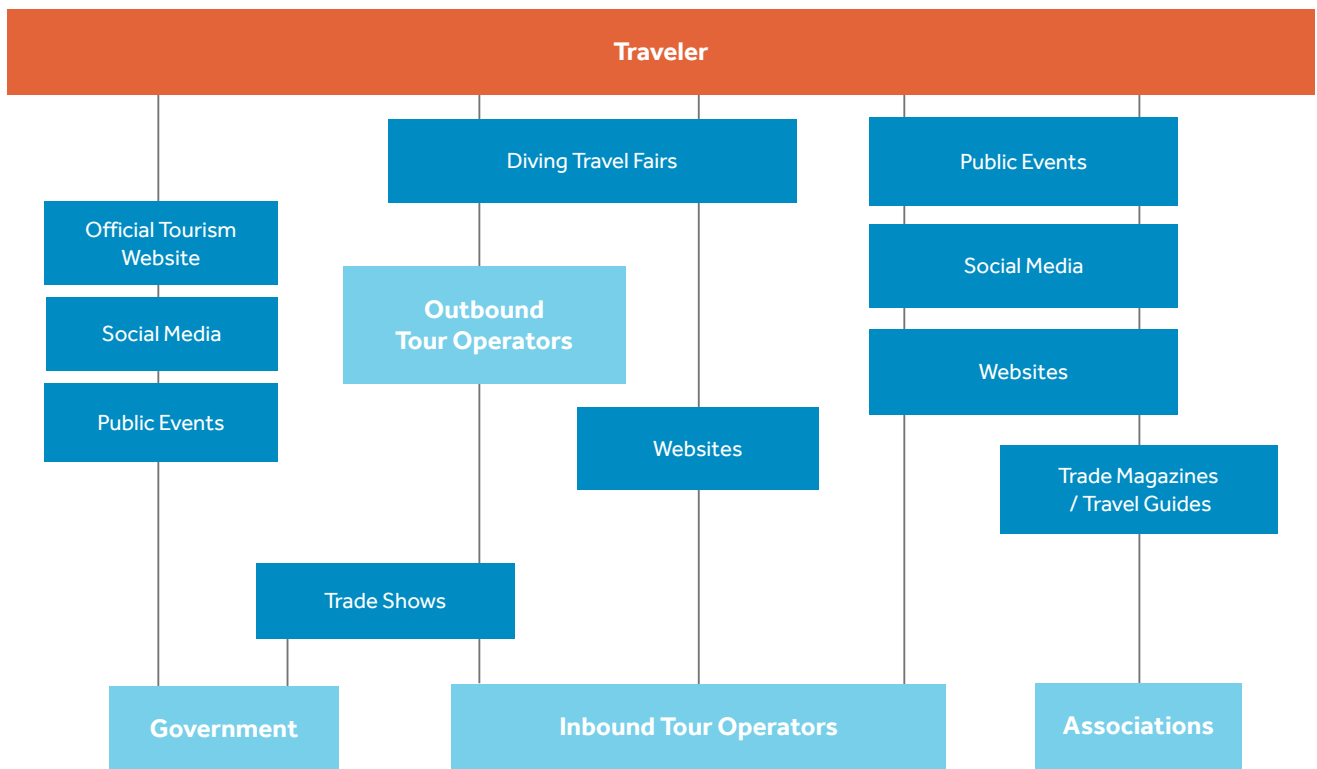
2.5.5 Marketing

Marine tourism marketing in Sulawesi is achieved through a public and private sector collaboration to participate in travel fairs and trade shows. The Indonesian central government and the provincial government of Manado promote diving as a country-level marketing effort to promote Indonesia as a destination.

The Indonesian central government has a regional tourism marketing strategy, with a focus on social media. Indonesia joined the ASEAN Tourism Marketing Strategy 2012–2015 with the aim of boosting recognition of Southeast Asia as a world-class tourism destination. The strategy includes the use of social media as a major tool to drive people to government tourism websites. Aspects taken into consideration in the strategy include marketing objectives, brand definition, target markets, media development and maintenance, content creation, social media campaigns, consultants to assist in creating campaigns, media distribution channels, distribution implementation, management structure of the marketing strategy, costs of running an e-marketing strategy, and the timeline for implementation.

Private sector operators specifically target divers through travel agents and directly via online marketing. They also participate in trade shows with the government to promote diving in specific markets, such as Japan and China.

Figure 5 Marketing distribution channels for Sulawesi’s diving market



Government

- **Travel fairs:** Participating in international diving travel fairs to promote diving in Indonesia is a key priority for the Ministry of Tourism and the provincial government of Manado. A recent travel fair that the government participated in was the Asia Dive Expo (ADEX) held in Singapore in April 2017.
- **Trade shows:** Participating in trade shows to connect with companies in the business of diving is another priority. Recent participation in trade shows:
 - The Tokyo Marine Diving Fair held in Japan in April 2017; and
 - The Diving and Equipment Marketing Association's annual trade show that was held in Orlando, Florida, USA in November 2017 and attended by representatives of the Ministry of Tourism and the provincial government of Manado.
- **Sales mission:** The "China Diving Sales Mission," held in multiple cities in July 2017 targeted the growing Chinese dive sector. During the mission, the sales team held events and met with outbound operators.
- **Government tourism website:** The Ministry of Tourism relies on its official website³⁹ to promote diving as part of tourism offerings in Indonesia.
- **Social media:** Popular channels, such as Facebook and Twitter, are used to reach out to the online community for wider influence. Diving destinations in Indonesia are included in the broader social media marketing efforts of the central government.
- **Public events:** Participation in public events, such as festivals, is another way the government promotes diving tourism. Upcoming events include:
 - The "Celebrate the Sea Festival," an international underwater photography event organized by *Ocean Geographic*, will be held in Manado in March 2018. The highlight of the event is the photography shoot-out competition, which is sponsored by the provincial government of Manado and several NSW-affiliated resorts.

Private sector

- **Travel agents:** Approximately 75 percent of tour operator business comes from travel agents, so marketing to them is a high priority. Building direct relationships with travel agents who already have a base of diving customers is an efficient way of marketing to tourists.⁴⁰ Relationships are built through visiting trade shows and networking.
- **Websites:** According to interviews with resort operators, 25 percent of their business comes directly from their websites. For this reason, it is important for resorts to have well-presented content available and quick response rates to queries generated via their websites.
- **Social media:** Tour operators recognize the importance of having an online social media presence. Community-based forums such as ScubaBoard, DeeperBlue, and ScubaSG allow divers to share their experience, tips, and reviews of dive sites. They utilize social media outlets such as Facebook, Twitter, and TripAdvisor to engage with followers and gain feedback on their services. Social media marketing is important because word-of-mouth spreads quickly.⁴¹ Generally, the private sector does not work directly with blogs; they may, however, ask guests to leave a review for them, either on their website or on a review site such as TripAdvisor. Divers may also log onto the PADI website to find PADI affiliated dive centers and resorts globally.

³⁹ The official Ministry of Tourism of Indonesia website has a dedicated diving and snorkeling section: <http://www.indonesia.travel/gb/en/experience/experience-the-adventure-wonders-of-indonesia>

⁴⁰ Based on trade interviews with Sulawesi dive resort operators

⁴¹ Based on trade interviews with Sulawesi tour operators

- **Online magazines:** Diving magazines are another marketing channel for tour operators. One prominent magazine is *DIVE Magazine*. It is distributed through print and digital media and regularly features dive destinations around the world. As it caters specifically to divers, tour operators advertise their resorts and diving packages in the magazine. Tour operators can also invest in becoming a *DIVE* travel partner. This means having their own webpage on the *DIVE* website, featured banners, and promotions on *DIVE*'s travel offers page.
- **Travel fairs:** Tour operators participate in international diving travel fairs to promote their diving packages to diving tourists directly. A recent travel fair that Sulawesi operators participated in alongside the government was ADEX 2017.
- **Trade shows:** Trade shows are a channel for developing relationships with outbound operators. Together with the Ministry of Tourism, tour operators take part in international trade shows to promote their dive offerings.
- **Public events:** Tour operators also attend public events such as the Celebrate the Sea Festival to increase diving tourism promotion.

2.5.6 Tourism Development

Collaborative management

Bunaken National Park follows a collaborative management approach, forming the framework for tourism in the destination. Key institutions, such as the Bunaken National Park Concerned Citizen Forum, the North Sulawesi Watersports Association (NSWA), and the Directorate General of Forest Protection and Nature Conservation, work together to coordinate activities with the Bunaken National Park Management Advisory Board (DPTNB). The Board is made up of representatives from the central government, provincial government, university, local community, and the NSWA. The DPTNB is responsible for capacity-building efforts involving tourism knowledge within the local community, and then managing the funds collected from entrance fees. The DPTNB saw the need to invest in capacity-building of tourism knowledge among local communities prior to engaging other park stakeholders. In the past, conflicts in managing marine protected areas (MPAs) occurred because local communities and stakeholders were not involved (Eghenter et al 2007).

In 2000, a new park entrance fee system was implemented to enable the DPTNB to oversee fund management. It has since been able to raise fees to spend on park management activities, such as reef restoration and beach clean-ups. Previously, the authority to collect entrance fees remained with the central Indonesian government.

Tourism and hospitality training

The Sekolah Tinggi Ilmu Ekonomi Pariwisata Yayasan Pariwisata Manado (STIEPAR), was established in Manado in 1999 to offer a university-level tourism program. The school was established with donor funding for the infrastructure. While privately managed, the government is involved in reviewing and approving the curriculum to ensure that national standards are maintained. The school aims to prepare students for the tourism sector in areas of tour and travel, tourism, and hospitality management. STIEPAR's precursor, the Institute for Research and Community Service at Sam Ratulangi University, was created in 1996, but offered only short courses in tourism, travel, and bartending. Due to the recognized need to develop tourism services in Sulawesi, a proposal was submitted to the government for the creation of a more advanced program. STIEPAR had conducted its program for seven years before the Maranatha Foundation assisted in the construction of a new campus, completed in 2009. Students become professionals in their fields, equipped with the knowledge of how to plan and operate tours, operate travel businesses, manage attractions, and manage hotel business operations.

Challenges

Overlapping duties among government bodies is an issue that has led to inefficient management of marine protected areas (MPAs). The Ministry of Forestry and the Ministry of Marine Affairs and Fisheries are responsible for managing coastal resources in Indonesia, causing an overlap in duties. In order to delineate responsibilities, an initial effort saw the Ministry of Forestry handing over eight marine conservation areas and marine tourism parks to the Ministry of Marine Affairs and Fisheries in 2009. As of 2012, the Ministry of Forestry manages 32 national MPAs with the remaining 10 sitting with the Ministry of Marine Affairs and Fisheries (Setyawati 2014).

Another challenge faced by the diving industry in Sulawesi is the language barrier. Although there are English-speaking travel agents in Manado and English-speaking service staff at resorts, the language barrier is still a significant issue in lower-end accommodation and diving operations. This limits the service level that staff can provide to customers and makes it difficult to resolve any issues that might occur. With the recent large increase in the number of Chinese tourists, inbound operators in Sulawesi recognize the importance of adapting their service to address the new demographic as well. Minister for Tourism Arief Yahya publicly encourages operators to develop products and services that cater for the new arrivals (TTG Asia 2016).

Environmental degradation as a result of tourism is managed by running clean-up programs and raising awareness. In 2007, the DPTNB advised that the recommended capacity for Bunaken National Park was 9,000 to 10,000 dives per annum (Kholil and Tangian 2012). Any additional dive traffic is recognized as potentially damaging to the coral reefs. Solid waste, garbage, and water contamination from local communities also affect the quality of dive sites. The NSWA plays a key role in initiating clean-up operations, such as sponsoring an “Earth Day Reef Clean-up” to improve capacity and minimize environmental impact.

The NSWA is tasked with improving concerns surrounding safety issues, diving best practices, and diving guide standards. The NSWA is responsible for:

- Education – Supporting the education of marine tourism and marine-friendly practices;
- Employment – Employing local villagers directly in the marine tourism industry in occupations such as boatmen, dive guides, or receptionists; and
- Enforcement – Conducting patrols using the Bunaken Preservation Fund under a Patrol Agreement with the marine police unit and enforcing bans on anchoring.

2.5.7 Transportation Efficiency

Getting to Sulawesi

International visitors can enter Sulawesi by plane at either Makassar’s Sultan Hasanuddin International Airport or Manado’s Sam Ratulangi Airport, using several airline options. Popular airlines include SilkAir, which flies three times a week from Singapore to Makassar and four times a week to Manado. Other airlines flying to Sulawesi include Garuda Indonesia, China Southern Airlines, Air China, and Lion Air. According to Sulawesi dive operators, 75 percent of inbound arrivals are international tourists, and 55–65 percent (22,000) of these arrivals come for marine tourism.

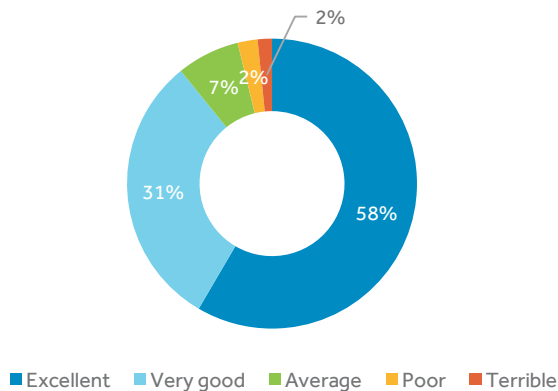
Getting around Sulawesi

International tourists prefer to travel around Sulawesi by plane, as it is more reliable and safer than traveling by bus. The Trans-Sulawesi Highway that connects Makassar to Manado for more than 1,900 km is narrow, windy, and dangerous. Access to the highway is also occasionally cut off during periods of heavy rain.

The government began constructing the Trans-Sulawesi Railway in 2016 to connect Makassar and Manado, creating a reliable low-cost transportation alternative. This 1,600-kilometer route is set to begin operations in 2018 and will provide a new mode of transportation that takes more time but is cheaper than air travel and still reliable. The provincial government of North Sulawesi continues to show its commitment to improving transportation infrastructure and accessibility on the island. It has also completed a feasibility study on constructing another railway line to connect Manado and Bitung. Other future efforts include building a new 28-kilometer road in Likupang and constructing a tramway along Manado Bay to connect Wori and Tateli (PwC 2017).

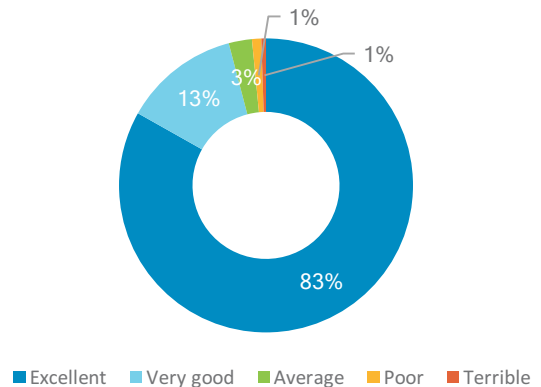
2.5.8 Customer Satisfaction

Bunaken National Park: Review Ratings*



*Out of 628 reviews on TripAdvisor, as of December 4, 2017

Lembeh Straits: Review Ratings*



*Out of 196 reviews on TripAdvisor, as of December 4, 2017

Online reviews from travel review website TripAdvisor indicate that visitors have been very satisfied with their diving visits to Sulawesi. Only about 5% of reviewers for Bunaken noted some issues with the cleanliness of dive sites.

2.5.9 Analysis of Success Factors

The key success factors that have made diving a popular tourist activity in Sulawesi to date are:

- Direct flights between key source markets and Sulawesi;
- Proactive and collaborative marketing by the government and private sector;
- Targeted policy and marketing decisions to grow emerging markets;
- Collaborative management approach to marine parks; and
- Active private sector representation in sector management.

Direct flights between key source markets and Sulawesi

Increased, regular flights from existing and emerging source markets provide a steady flow of tourists at competitive flight prices. The availability of almost daily direct flights to Singapore, a major transport hub, as well as to several Tier II cities in China, supports increased arrival numbers by allowing mid-range and smaller budget travelers access to the destination.

Proactive and collaborative marketing by the government and private sector

National and provincial governments specifically promote diving through their overall destination marketing efforts, while the private sector complements this with direct marketing to travel agents and use of online channels, websites and social media, to reach international divers. On a regional level, the Indonesian central government has put in place a tourism marketing strategy focusing on social media to drive international tourists to its tourism website. The government is proactive in marketing diving tourism at an international level. This includes participating in trade shows and targeted sales missions globally, as well as using social media as part of a broader tourism strategy. Social media marketing includes campaigns, content creation, and engaging consultants to create campaigns.

Targeted policy and marketing decisions to grow emerging markets

Government and private sector in Sulawesi worked together to identify and target emerging markets with specific potential in the dive sector. Tourism stakeholders identified the positive trends in the Chinese dive markets and engaged in specific activities to reach these markets. This included the China Diving Sales Mission in July 2017. Critical to the success of accessing this emerging market was government support to address access issues by putting in place a visa-on-arrival for Chinese tourists and increasing direct charter flights.

Collaborative management approach to marine parks

Having representation from government, private sector, and local communities enables a comprehensive discussion of priorities and facilitates effective management of Sulawesi's 16 million hectares of gazette marine protected areas. Community engagement empowers local residents to have a stronger voice and stake in protecting the marine parks. By being involved and employed in the tourism industry, local communities understand the importance of sustainability and environmental protection in growing diving tourism. The involvement of the NSWA also ensures that dive operators from the private sector have a voice in park management and protection.

Active private sector representation in sector management

Sulawesi's diving segment is successful because it has an active private sector association. The NSWA, which represents the diving sector and has a voice in park management policies, has been active in educating locals in marine tourism and marine-friendly practices, supporting the employment of local villagers, and enforcing patrols. This creates an environment in which tourism is a focus for everyone and a coordinated effort is made to grow the industry.

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