LIBERIAN NATIONAL EXPORT STRATEGY ON TOURISM

2016-2020

Republic of Liberia

EIF Enhanced Integrated Framework
Trade for LDC development

International Trade Centre

This strategy was developed on the basis of the process, methodology and technical assistance of the International Trade Centre (ITC) within the framework of its Trade Development Strategy programme.

ITC is the joint agency of the World Trade Organization and the United Nations. As part of the ITC mandate of fostering sustainable development through increased trade opportunities, the Trade Development Strategy programme offers a suite of trade-related strategy solutions to maximize the development payoffs from trade. ITC-facilitated trade development strategies and roadmaps are oriented to the trade objectives of a country or region and can be tailored to high-level economic goals, specific development targets or particular sectors, allowing policymakers to choose their preferred level of engagement.

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The International Trade Centre (ITC)

Street address: ITC 54-56, rue de Montbrillant 1202 Geneva, Switzerland

Postal address: ITC Palais des Nations 1211 Geneva 10, Switzerland

Telephone: +41-22 730 0111

Fax: +41-22 733 4439

E-mail: itcreg@intracen.org

Internet: http://www.intracen.org

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ACKNOWLEDGEMENTS

The Government of Liberia has developed the National Export Strategy on Tourism (2016-2020) as part of its ongoing efforts to diversify the Liberian economy and harness the significant Tourism based resources of the country. The formulation of the strategy was led by the Ministry of Information, Culture and Tourism (MICAT) and Ministry of Commerce and Industry (MOCI) with the technical assistance of ITC. The strategy was made possible through the generous financing of the Enhanced Integrated Framework (EIF).

The strategy is included in Liberia's overall National Export Strategy (NES) portfolio which includes earlier developed export strategies comprising the Cocoa, Oil Palm, Rubber, Fisheries, and Cassava sectors.

Liberia's export strategy on Tourism was shepherded by the Honorable Minister for Information, Cultural Affairs and Tourism, Minister Eugene Lenn Nagbe, and the Honorable Minister for Commerce and Industry, Minister Axel M Addy. At ITC, the strategy was developed under oversight of Anton Said, Chief of the Export Strategy section at ITC. Rahul Bhatnagar, Adviser, provided overall coordination and technical lead. Barkue Tubman-Zawolo, ITC National Coordinator for the initiative and Coordinator of the Liberia Tourism Exploratory Committee, provided invaluable country intelligence, and coordination support throughout and beyond the design process. The technical support of Karla Solis, Chiquita Johnson was consistently appreciated throughout the strategy design process. Technical inputs and in-country participation by extended members of the ITC delegation (Adama Bah, Dale Honeck, Daudi Sumba, Jess Ponting, and Theo Nagel) was instrumental in developing a realistic and implementable strategic plan of action. The consistent advisory and coordination support of Simon Hess, EIF Coordinator, from the inception to strategy finalization stage was influential in successful delivery of the initiative.

This document represents the ambitions of the private and public sector stakeholders for the development of the sector. Stakeholders' commitment and comprehensive collaboration have helped build consensus around a common vision that reflects the realities and limitations of the private sector, as well as of policymakers and trade-related institutions. This strategy is the end-product of many individuals, enterprises and public institutions.

In particular, we wish to thank the following key contributors:

Ministry of Information, Cultural Affairs and Tourism:

- **Eugene Lenn Nagbe**
  Minister

Ministry of Commerce & Industry:

- **Axel M Addy**
  Minister
- **Sayon Henry Yaidoo**
  Coordinator/Economic Advisor
  MOIC Single Projects Implementation Unit (SPIU)
- **Stephen Towain Marvie, Jr.**
  Deputy Minister for Commerce and Trade

Enhanced Integrated Framework (EIF)

- **Ratnakar Adhikari**
  Executive Director
- **Simon Hess**
  Coordinator

World Trade Organization (WTO):

- **Dale Honeck**
  Senior Counsellor, WTO

International Trade Centre:

- **Anton J. Said**
  Chief, Export Strategy
- **Rahul Bhatnagar**
  Adviser, Export Strategy and Competitiveness
- **Karla Solis**
  International Consultant
- **Franck Bonzemba**
  Trade Promotion Officer
- **Adama Bah**
  Guest Expert, Responsible Tourism Consultant
- **Marnie McDonald**
  Technical Editor
- **Barkue Tubman-Zawalo**
  ITC National Coordinator
- **Chiquita Johnson**
  National Consultant
- **Theo Nagel**
  International Consultant
- **Daudi Sumba**
  Guest Expert, Vice Director Africa Wildlife Foundation, Kenya
- **Jess Ponting**
  Guest Expert, Director, Center for Surf Research
  L. Robert Payne School of Hospitality & Tourism Management
  San Diego State University
- **Jesús Alés**
  Graphic Design and Layout

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FOREWORD BY H.E. **ELLEN JOHNSON SIRLEAF**, PRESIDENT, REPUBLIC OF LIBERIA

I take particular pride and pleasure in welcoming the Liberia Tourism Trade Strategy. The document in essence, depicts, what Liberia as a tourism destination area is and what it can be, showcasing the diversity of our country, people, and culture. From our vast forests, countless water assets, and sandy coast, our wealth of landscapes are virtually untouched by the hand of man.

Over 560 kilometers of coastline, characterized by a near unbroken sand-strip, warm Atlantic waters, and some of the largest waves in the world, make Liberia an ideal destination for surfing. Within our borders, 40% of the West African rainforest can be discovered: Sapo National Park gives visitors an exclusive peek into the unbound natural beauty of the surrounding landscape, unique in its rare flora, fauna and wildlife.

The diversity of our landscapes is mirrored in our culture: with 16 different tribes. Liberia has a unique history and culture, mirrored (patterned) in languages, dance, and culinary pleasures.

I would like to extend my profound thanks to all stakeholders, especially to EIF of the WTO, who provided the financial resources to develop this document, and ITC, who developed the Strategy and Action Plan.

FOREWORD FROM HONORABLE **EUGENE LENN NAGBE**, MINISTER FOR INFORMATION, CULTURAL AFFAIRS AND TOURISM, REPUBLIC OF LIBERIA

The **Ministry of Information Culture Affairs and Tourism** takes distinct pleasure in welcoming the Tourism Trade Strategy and its detailed Plan of Action.

Tourism is a important poverty reduction tool that has the ability to create jobs attack youth employments , create jobs for women, boost the economy, encourage investment, decentralize development activities, promote the wealth, beauty, rich culture and heritage of the republic of Liberia. Tourism is an industry of industries and Liberia stands to benefit greatly from a culturally, vibrant, inclusive sustainable tourism industry.

Tourism as we see more often has become one of the worlds largest industries and one of its fastest growing economic sectors. We have seen many countries in and out of Africa where tourism is seen as a main mechanism for development, as it stimulates new economic activities.

Liberia is rich in culture, and has potential for amazing eco, adventure, wildlife, coastal and marine tourism, however there are some challenges we must overcome from the negative image of the Ebola crisis, which we have overcome as a nation, to infrastructure challenges in accessing certain parts of the country, data collection, complete inventory, human capacity challenges. We are pleased that this Strategy not only lays out the potential, clearly identifies the challenges and also creates a road map with its strategic and detailed plan of Action.

The Tourism Trade Strategy addresses the way forward by providing Liberia with a detailed Plan of Action (PoA) that will facilitate growth in the sector within the next 5-year period. Through the steps outlined in the PoA, Tourism stakeholders in Liberia will improve their capability to offer competitive products, improve lives, define and develop policies that governs the sector, boost the economy strengthen the private sector, empower youth and women.

The completion of this strategy with International Trade Center (ITC) at the helm has exceeded our expectations, not only in the successful mobilization of sector stakeholders, but also in facilitating extensive and fruitful discussions between public and private sectors. Using its contact to leverage some of the worlds and african leading experts in sustainable tourism in various sectors from leading organizations. Over 300 representatives attended two consultations, which was held in Monrovia, but also in highlighting the importance of decentralization, inclusiveness, private sector and youth involvement, Consultations were also held in Bong County, Sinoe Country, Cape Mount County and Grand Bassa County all with strong support from Local government, and community youth leaders, women leaders, civil society and local private sector allowing for a informed and realistic evaluation of the challenges and opportunities the sector currently faces. This inclusive approach ensured that all stakeholders were committed to the process.

This strategy is a sign of how cohesive collaboration and coordination can achieve high results. Special thanks and appreciation to Her Excellency President Ellen Johnson Sirleaf for her vision of a better Liberia and the push for developing a sustainable tourism industry. This process would not be complete were it not for the collaboration and leadership of the Ministry of Commerce and Industries, and support of the Ministry of youth and Sports and all the government agencies. I would like to say a special thank you to Enhanced Integrated Framework (EIF) for the support and guidance. The Partnership with the ITC was priceless the Coordination and passion for Liberia's development was unmeasurable and Liberia is grateful.

This Strategy is articulated around six strategic objectives:

1. Spur policy focus and improve the business/investment climate for the Tourism sector
2. Improve necessary infrastructure for supporting the sector
3. Improve skills development in the sector
4. Ensure environmental sustainability and integration of local community involvement in the sector development process
5. Improve institutional capacities and coordination in the sector
6. Improve the Liberian Tourism brand, and Develop robust Tourism offerings

In order to maintain the momentum the Ministry is taking steps towards establishing The first ever national Liberia Tourism Website as well as the commencing activities at the Kpatawee waterfalls in Suahkoko Bong County both which will support the implementation of objectives defined in this Plan of Action.

FOREWORD BY HONORABLE **AXEL M ADDY,** MINISTER FOR COMMERCE & INDUSTRY, REPUBLIC OF LIBERIA

It is with pleasure that we launch Liberia's Export Strategy on Tourism 2016-2020 as we strive to diversify our economy and create sustainable employment for our people, but most importantly for our youth. As a naturally endowed nation, it is clear that unlocking the potential of the tourism sector can serve as a key pillar in our drive for economic diversification for inclusive growth. With the longest coastline, the largest remaining rainforest in West Africa, numerous rivers, lakes and lagoons and a rich culture rooted in the journey and convergences of African, American and Caribbean heritage, there is a lot to experience all that is positively Liberian.

Visitors that have arrived on our shores have always noted the huge potential for tourism including surf-based tourism, ecotourism sites and attractions, wildlife sites and attractions, culture and heritage sites and attractions. We now have taken one step forward in transforming the tourism sector by developing the Liberia's Export Strategy on Tourism 2016-2020. For the first time we have now put together a road map to unlocking the potential of tourism in Liberia.

As a trade in services, a properly structured tourism sector can be a major contributor to GDP as it has been in many other countries. Today it is considered the fourth largest export category at the global level, representing roughly 6 percent of the world's export and valued at USD 1.5 trillion in exports. Tourism employs 70 percent of women and half of the workers are at most 25 years of age. The potential direct impact of tourism is substantial. For example, in the Gambia, also located in West Africa, tourism directly contributed 5.1% of total GDP, creating 29,000 jobs in 2014.

We welcome the successful mobilization and keen interest demonstrated by all stakeholders in the industry, and looks forward to working together during the implementation phase of the Strategy.

I would like to thank all our partners including the Enhanced Integrated Framework (EIF), International Trade Center (ITC), and Liberian Committee on Tourism, Liberia Tourism Network and other public and private stakeholders who helped to ensure that the Strategy was finalized and ready for distribution.

I am particularly pleased with the level of energy, coorperation and collaboration among all the stakeholders including my counterpart on this project, the Ministry of Information, Culture and Tourism under whose leadership this initiative has come to fruition. I am equally excited about the pilot projects, the #PositivelyLiberian Web Portal showcasing Liberia's tourism destinations and operators and the Kpatawe Water Falls community project. These two however small projects, will serve as key examples of what little is needed to begin to have positive impact in the implementation of the Strategy.

I truly believe, our collective efforts in #PositivelyLiberian, rebranding our nation for the rich endowments we have been blessed with, can contribute to our peace and reconciliation process while creating new employment opportunities for our youth. Together, lets promote the Strategy and promote all things #PositivelyLiberian.

FOREWORD BY **DR. RATNAKAR ADHIKARI**, EXECUTIVE DIRECTOR OF THE ENHANCED INTEGRATED FRAMEWORK

It brings me great joy that the Enhanced Integrated Framework (EIF) could help facilitate this key strategy for the development of tourism in Liberia. Recent research by the EIF and the UN World Tourism Organization highlights the global importance of tourism as a key means for development. Tourism is the world's third largest export category; it is identified as a priority in 94% of EIF Countries; and in 2015, it generated more trade income than categories such as food and automotive products. Over recent years, tourism arrivals for the Least Developed Countries (LDCs) have grown at almost three times the global average and have played a key role in enabling the graduation of countries from LDC status. Our research concludes, however, that tourism as a sector remains underfunded, and in order to access Aid for Trade (AfT), the first step is for the countries to clearly prioritize needs and mainstream tourism trade into national development strategies. This is what Liberia has done.

From experience, we know that effective trade related strategies are critically important. However, we also know that strategies are only effective firstly, when they are fully owned by all key stakeholders; and secondly, when resources are available to implement them. In this, the EIF has already committed to providing seed funding to start pilot initiatives with the objective of providing tangible and visible impacts for the Liberian people. In this way, we believe that other key investors, including the private sector, the Government and other development partners, will have the initial results and momentum to effectively take this strategy forward into implementation.

The EIF as a global partnership works towards trade for development in Liberia and other LDCs, and as a framework, it brings together the cooperation and expertise of the UN World Tourism Organization, ITC and other key international agencies. Importantly, the work of the EIF has only been possible through the generous support of the Donors to the EIF Trust Fund, many of whom are currently active development partners in Liberia.

The EIF is proud to have been in partnership with Liberia since 2007, with ongoing support financing the sector strategies for tourism and wood furniture, the Diagnostic Trade Integration Study Update as well as long term institutional support dedicated towards the mainstreaming of trade and coordination of AfT in Liberia. We look forward to continuing to work with Liberia to maximize the development potential of trade, now and into the future.

FOREWORD BY **ARANCHA GONZÁLEZ**, EXECUTIVE DIRECTOR, ITC

Liberia is on a determined march towards developing a robust tourism sector that will help the country diversify its portfolio of productive economic sectors and at the same time provide socio-economic dividends for all Liberians. ITC is privileged to support Liberia in the formulation of this first-ever Tourism Export Strategy, a result of a comprehensive consultative process involving more than 200 participants from public and private sector entities. This five-year strategy, spanning 2016–2020, identifies key bottlenecks and high-return investments for developing the country's tourism sector and will provide the fundamental building blocks on which institutional and enterprise-level capabilities in the tourism sector may be developed.

The business case for pursuing the tourism sector in Liberia is robust. The global tourism industry accounts for as much as 30% of the world's services exports. International tourism arrivals are expected to grow to 1.8 billion by 2030. The total contribution of the tourism industry to the global economy was valued at US$ 7.6 billion in 2014. Liberia possesses rich tourism assets and can boast tropical forests, diverse wildlife with endemic species, some of the best surfing in Africa, and a unique cultural heritage among other treasures. If developed in a sustainable manner, the entire country stands to benefit.

As a proud nation emerging from the shadows of conflict and the more recent Ebola epidemic, Liberia would gain from sustained efforts to develop its tourism potential. Necessary improvements to hard and soft infrastructure range from the development of food sanitation frameworks to enhancing the capabilities of private sector associations.

Sustainability is a key prerequisite for tourism to thrive. Respect for inclusive participation of local communities would ensure that investments and developmental interventions do not disrupt existing relationships and harmony. Youth – which currently constitute a high percentage of both Liberia's population and the country's unemployed – must be at the centre of activities to bolster the tourism sector. The strategy also focuses on environmental preservation and rehabilitation so that future generations of Liberians can enjoy the dividends from the country's tourism assets.

In terms of market potential, Liberia's tourism industry stands to benefit from the high number of expatriates working with international development partners and private companies stationed in the country. This market segment can constitute practical testing grounds for new products, and provides a close-at-hand market for tourism operators to expand operations. In time, new markets and products will emerge in line with improved capabilities.

Indeed, this strategy focuses on pilot initiatives as a growth mechanism to build tourism operators' expertise and experience from the current low base. Based on the success of these pilots, activities can be retained and scaled up to more ambitious levels. This approach is expected to help sector operators as well as policymakers rapidly move up the learning curve associated with facilitating growth in this sector.

ITC has been involved in Liberia's growth story for several years through a variety of trade-related technical initiatives. ITC helped the country draft its National Trade Policy and National Export Strategy, and provided support throughout the World Trade Organization accession process leading up to its entry into the global trade body in July 2016. In addition to the Tourism Export Strategy, ITC is also facilitating the development of Liberia's Rubberwood-Furniture trade strategy. These new sector strategies are integral components of the country's export strategy. ITC's support to Liberia will start with strategy formulation and will continue with implementation. It is now the time to support the country by mobilizing adequate resources, starting with those needed for piloting select activities.

As the country stands poised to make strides in tourism development, ITC remains committed to provide support as a reliable partner committed to Liberia's growth.

(cc) jbdodane. Robertsport Beach.

ACRONYMS

ATM	Automated Teller Machine
EU	European Union
FDA	Forest Development Authority
GDP	Gross Domestic Product
LINTA	Liberian National Tourism Association
LISGIS	Liberia Institute of Statistics and Geo-Information Services
LNIC	Liberia National Investment Commission
MICAT	Ministry of Information, Cultural Affairs and Tourism
MoCI	Ministry of Commerce and Industry
MoE	Ministry of Education
MoYS	Ministry of Youth and Sports
NGO	Non-Governmental Organization
PoA	Plan of Action
SDSU	San Diego State University
SME	Small and Medium-sized Enterprise
TAL	Tourism Association of Liberia
TVET	Technical and Vocational Education and Training
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNV	United Nations Volunteers
UNWTO	World Tourism Organization
WTO	World Trade Organization

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EXECUTIVE SUMMARY

Liberia is a country in transition. Fortified by recent accession to the World Trade Organization (WTO), a decade of economic growth, a private sector hungry for success and a public sector willing to facilitate this growth, the country made impressive strides in the period between the end of the civil war and the recent Ebola outbreak. With the epidemic under control and a Government determined to steer the brand of the country away from images of conflict and disease, the focus has converged on one sector: tourism.

Plans are ongoing for establishment of a Liberian national tourism authority to serve as an autonomous and principal Government agency to promote and regulate the tourism sector. In the interim period, the President's Tourism Exploratory Committee has been set up to guide development efforts and advise policymakers. The two tourism associations in the country – the Liberian National Tourism Association (LINTA) and the Tourism Association of Liberia (TAL) – have taken steps to improve collaboration. At policy level, efforts to incorporate tourism into key policy instruments such as the Liberia Revenue Code, the Investment Law, and the National Trade Policy have been proposed. In practical terms, tourism is now a priority sector for the Government aimed among other things to spur economic diversification. This trade strategy, developed between November 2015 and June 2016 as a result of an extensive and consultative process in Monrovia as well as regional consultations, is expected to be the blueprint for achieving the overall vision of tourism as a growth driver for the economy.

GLOBAL TRENDS SUPPORT A STRONG BUSINESS CASE FOR PURSUING TOURISM

The reasons for placing a focus on Liberian tourism are practical from an economic point of view. According to the World Tourism Organization (UNWTO), the tourism industry is the fourth-largest export category at the global level, representing roughly 6% of the world's exports, valued at about US$ 1.5 trillion and reaching as high as 30% of the world's services exports. International tourism arrivals are expected to grow to 1.8 billion by 2030. The total contribution of the tourism industry to the global economy was valued at US$ 7.6 trillion in 2014.

Apart from being one of the fastest-growing sectors, tourism is also a key driver of socioeconomic development. It is an important economic activity and a major source of employment in most of the countries around the world. It is estimated that one out of 11 jobs is generated by the tourism industry. Women are roughly 70% of the tourism labour force and half of the workers are aged 25 or younger. Moreover, the vast majority of tourism-related businesses in developing countries are small businesses, either micro or small and medium-sized enterprises (SMEs) which often operate in the informal economy. The sector is also a beacon for investments. Tourism investments globally are expected to grow at an annual rate of 4.6% over the next 10 years, to reach approximately US$ 1,336 billion in 2025.

SHIFT TOWARDS EMERGING ECONOMIES

The tourism industry has shown steady growth over the past six decades and increasing diversification in the number of destinations, going beyond the traditional destinations of Europe and North America. Between 1980 and 2010, the share of emerging economies as destinations increased from 30% to 47% and it is expected that their market share will expand even further.[1]

International tourist arrivals in emerging economy destinations are expected to grow at double the rate (4.4%) of advanced economy destinations (2.2%). In consequence, international arrivals in emerging economies will surpass those in advanced economies before 2020.

1. United Nations Conference on Trade and Development (2013). Sustainable tourism: Contribution to economic growth and sustainable development, p. 4. Expert Meeting on Tourism's Contribution to Sustainable Development Geneva, 14–15 March. TD/B/C.I/EM.5/2. Available from http://unctad.org/meetings/en/SessionalDocuments/ciem5d2_en.pdf.

UNWTO projections[2] indicate that, in 2030, 57% of international tourist arrivals will be in emerging economy destinations and 43% in advanced economy destinations.

The African region represents 6% of worldwide tourism arrivals and a roughly 3% share of worldwide tourism receipts.[3] International arrivals to Africa grew by 5% between 2010 and 2014. In 2014, the destinations that showcased the strongest growth rates in terms of international arrivals were Togo (39.1%), Sierra Leone (35%), Niger (30.9%), Nigeria (23.5%) and Angola (23.1%).[4] In past decades, Liberia's neighbours, including Sierra Leone and the Gambia, have taken concerted steps to develop the tourism sector.

Breaking down the importance of the different types of tourism in Africa by expenditure, leisure tourism is the most significant category, valued at approximately US$95.9 billion in 2014. Forecasts estimate that the value of leisure tourism will reach US$160.9 billion in 2025. Meanwhile the value of business tourism is expected to reach US$69.9 billion by 2025.[5]

From a base of roughly 7 million visitors in 1990, the sub-Saharan Africa region received 28 million visitors in 2009.[6] For the region, the direct contribution of tourism to regional gross domestic product (GDP) in 2014 was estimated at US$44.5 billion, or the equivalent of 2.6% of the region's total GDP. Moreover, the tourism sector has directly supported approximately 6 million jobs at the regional level, or 2.5% of total employment.

LIBERIA: A COUNTRY RICH IN TOURISTIC POTENTIAL

The current tourist offering of Liberia can be split into four major subgroups.

1. Surf-based tourism

Liberia possesses excellent conditions for coastal and maritime tourism. Among the country's current tourism offerings are surfing and surfing-related activities, particularly in Robertsport; deep sea fishing; Buchanan, etc.

Liberia's 560 km of coastline is characterized by a near unbroken sand strip, unexplored beaches and 'world-class' waves.[7] The most famous location for surfing activities is Robertsport, roughly three hours away from Monrovia. Robertsport counts three main surfing points. The country's tropical coast, beaches with warm ocean temperatures year-round and rich marine resources offer great potential for tourism.

Certain activities such as surfing and fishing in Liberia are gaining increasing international attention as tourist attractions. Surfing activities and surf tourism in Liberia are slowly providing the country with a good reputation among the global surf community. Although the first surfers appeared in the country around the 1970s, it was only when the 2006 film *Sliding Liberia* was released that the country started being considered in the world surfing scene. In the years since, there have been efforts to stimulate surfing in the country, including individual and private-sector-led initiatives. The impact of some of these initiatives, such as the Kwepunha Surf Academy, has been relatively high among local youth. Young people are accessing surfing lessons and participating in community services such as beach sanitation in return.[8]

2. Ecotourism sites and attractions

Liberia enjoys rich natural capital with high touristic potential. Liberia's natural attractions include two natural forest reserves, wetlands and mangroves, and biological and landscape diversity.

One of the main natural sites with ecotourism potential in Liberia is the Kpatawee Waterfalls, managed by a local community. The waterfalls are about three hours away from Monrovia by car and the road is paved for most of the route. Being surrounded by a dense forest, Kpatawee Waterfalls possess an attractive combination of natural beauty and local friendliness. Two cascades exist, the smaller being the closest to the road and the larger one reachable by roughly an hour of trekking. Liberian nationals already enjoy events and activities in this location in spite of the lack of basic amenities and services, e.g. food and beverages. Ecotourism activities would have a great impact on the socioeconomic development of the local community.

2. World Tourism Organization (2015). *Tourism Highlights, 2015 Edition*, p. 14. Available from http://skift.com/wp-content/uploads/2015/06/wttc-june-2015-report.pdf.

3. African Development Bank, Africa House at New York University and Africa Travel Association (2014). *Africa Tourism Monitor*, vol. 2, Issue 1, November. Available from http://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/Africa_Tourism_NOV_2014.pdf.

4. African Development Bank (2016). Tourism Data for Africa, National Accounts Main Aggregates Database 1970–2013. Available from http://tourismdataforafrica.org/viqtxj/national-accounts-main-aggregates-database-1970-2013. Accessed 5 May 2016.

5. Ato (2015).

6. World Bank (2011). *Africa Region Tourism Strategy: Transformation through Tourism – Harnessing Tourism for Growth and Improved Livelihoods*. Washington, DC. Available from https://openknowledge.worldbank.org/handle/10986/12841.

7. http://surfcredits.org/

8. BBC Travel (2015). The making of child surfers, not child soldiers, 11 November. Available from http://www.bbc.com/travel/story/20151022-the-making-of-child-surfers-not-child-soldiers.

Other Liberian natural sites with potential for ecotourism are the several cultural villages across the country (e.g. Behsao), Edina and Libassa Lodge. Ecotourism practices are already being implemented at the latter.

3. Wildlife sites and attractions

Wildlife is Liberia's hidden treasure – concealed under the canopies of the country's vast forest cover comprising more than 40% of the overall land – and has hitherto remained veiled from policy and institutional focus. If properly rehabilitated and conserved, wildlife resources could play an essential role in Liberia's tourism growth story.

Liberia is endowed with approximately 42% of the Upper Guinea Forest of West Africa, rich in endemic flora and fauna. There are two Upper Guinea biodiversity hotspots: Sapo National Park and East Nimba Nature Reserve. East Nimba is contiguous with the Mount Nimba Strict Nature Reserve, the highest point in West Africa. Sapo National Park, located in Sinoe County, is another important popular Liberian tourist attraction. Sapo National Park is home to rare birds and a high diversity of mammals such as elephants, monkeys, antelopes and Liberia's national symbol, the pygmy hippopotamus. Adding to the lack of adequate hospitality infrastructure and services, tourism in this natural site is constrained by difficult accessibility. The park is located approximately 300 km from Monrovia but requires a 14-hour drive in off-road conditions.

Mount Nimba cuts across Guinea, Côte D'Ivoire and Liberia. Although the Liberian side of the mountain is not demarked as a United Nations Educational, Scientific and Cultural Organization (UNESCO) World Heritage Site, it contains amazing wildlife including chimpanzees and a wide variety of birds. One challenge is the high level of degradation of this location due to former mining activities. Another constraint limiting tourism activities is the lack of any hospitality services.

While there are several hundred species of undomesticated mammals, birds and reptiles in Liberia's ecosystems, a few stand out as offering unique tourism potential. These include the pygmy hippopotamus, chimpanzees, manatees, forest elephants, zebra duikers and others living in habitats that are in places pristine and in others endangered.

4. Culture and heritage sites and attractions

Liberia also has remarkable historical and cultural assets. There is great ethnic, religious and linguistic diversity in the country. Sixteen major tribes coexist in Liberia, each with their own traditions and religious beliefs. Namely, these tribes are the Gbandi, Bassa, Belle, Dey, Gio, Gola, Grebo, Kissi, Kpelle, Krahn, Kru, Loma, Mano, Mandingo, Mende and Vai. Additionally, there are the Americo-Liberians whose ancestors once migrated to Liberia from the United States of America during the eighteenth century and who provide the country with a truly unique history and culture which has influenced every level of Liberian society, economy and political organization.[9]

Historical and cultural assets include Harper, formerly an important administrative centre and the capital of Maryland County. Harper is an historic place filled with ruins of abandoned buildings. Another example is Providence Island which has been identified by the Government as a potential historical attraction. Providence Island was the first place where former American slaves arrived in 1822. Other relevant historic and cultural sites include the Executive Mansion, the Masonic Temple, the centre of Behsao, the Centennial Pavilion (a Liberian landmark), the Firestone Rubber Plantation (one of the most valuable historical sites in the country) and the Liberian National Museum. The latter was established in 1958 and displays cultural artefacts and national historic items.

The country's special historic linkage with the United States makes it a unique location for genealogy tourism, particularly among African-American visitors.[10] In addition, some tour operators[11] are leveraging local social entrepreneurs to showcase their work and develop 'social impact tours'.

STEEP CONSTRAINTS TO OVERCOME

When the constraints across the breadth of the value chain are considered, the entire venture of developing this sector seems daunting. There are a number of challenges that must be overcome along the supply-side, business environment, market-side, and socioeconomic and environmental dimensions before the country can reap the benefits of tourism. The overall outcome is that the sector has remained in the shadows of an informal economy.

In all senses, the sector is starting out from a low base. A natural consequence of the early stage of maturity of the sector is the high level of fragmentation among tourism operators, who work in relative isolation with limited collaboration. In this environment, product development has stagnated, private sector outreach to policymakers has remained low until recently, and the institutional support capacities of public sector institutions such as the Ministry of Information, Cultural Affairs and Tourism (MICAT), the Liberia National Investment Commission (LNIC) and others have been taken up by competing priorities instead of tourism.

9. Best, Kenneth Y. (1974). *Cultural Policy in Liberia*. Paris: The Unesco Press Available from http://unesdoc.unesco.org/images/0000/000090/009047eo.pdf.

10. Taste of Liberia Cultural Festival (2015). *Event Fact Sheet*. Available from http://www.tasteofliberia.com/wp-content/uploads/2014/05/Taste-of-Liberia_FINAL-EPK.pdf.

11. Barefoot Liberia in partnership with the Business Start-up Center (Monrovia) and the Accountability Lab.

©**jule-abroad.**blogspot.com. Kpatawee watrefalls.

Institutional support is especially in need of improvement. The national park system – which governs Sapo National Park, among others – was completely destroyed after the civil conflicts and despite a number of development initiatives the Park is desperately in need of financial/technical/infrastructural support. The park is a haven for endemic species as well as the endangered pygmy hippopotamus and a proper rehabilitation strategy could pay significant dividends in the form of tourism revenues as well as funds/technical means for conservation purposes.

Product development needs to be spurred. The tourism product on offer for tourists, regardless of niche, is weak and tourism operators have struggled to develop products that are easily appreciated and absorbed by tourists. There is a near total absence of structured tourism products readily available in the market, whether guided tours originating from hotels or tour operators, or easily absorbable city, coastal, wildlife, etc. Offerings. There is an important need for operators to not only develop but also test products in the market and retain/scale up the ones that show promise. Even with the United Nations Mission in Liberia drawdown, there is a significant United Nations, non-governmental organization (NGO) community in Liberia which has medium to high purchasing power for tourism products but is rather starved of consumable tourism products such as tours, clean beaches with facilities, etc. Additionally, the large concessionaires have significant numbers of international staff that live in Liberia or travel there on a frequent basis. These easy-to-reach market segments should be tapped into. The domestic market is also an important segment which can help tourism operators gain experience, capabilities and a good revenue base for making operational and capital investments.

High electricity and fuel-based operating costs prove burdensome for sector operators. Deficient basic infrastructure due to the nearly complete destruction of the capacity of the country to supply energy and safe water during the civil war is a significant barrier for tourism operators; plus low investment in such sectors. Electricity coverage and reliability is poor, particularly in rural areas, and operators bear high costs of supplying electricity during the whole day through privately owned diesel generators.

Skills development is another major challenge requiring urgent redressal and support. There are only two hospitality training institutes in the country, both of which have cited major challenges in sustaining operations. None of the major universities have a specific thrust on tourism. Skills development in the hospitality segment is solely managed on a needs basis by select and individual hotels through on-the-job training programmes.

From the perspective of buyers' requirements, tourist security and health infrastructure are critical factors for the majority of international tourists. Liberia elicits a perception of poor scores in both and this will need to be addressed.

From a branding and perception point of view, Liberia is in a disadvantageous position. Negative reviews and travel warnings by foreign media and governments discouraging travel to Liberia, as well as other security and health concerns, hinder development. A Liberian presence in international tourism fairs and exhibitions is needed to change the existing perception, along with promotion of Liberian tourist sites which can encourage domestic tourism. Additionally, there are inadequate brand promotion efforts by the Government and private sector operators, including absence of a marketing strategy to counteract the country's negative image and to position Liberian tourist destinations. There is also a weak national awareness of tourist sites/attractions among domestic consumers as well as international tourists.

There is a need to increase the involvement of Liberian youth in productive activities involved in the tourism value chain and away from their current levels of marginalization. This is an opportunity which, if properly leveraged, could yield significant benefits to the sector. Another reason for the urgent need to involve youth is the pressure on Monrovia. Driven by the lack of economic activities outside Monrovia, youth leave their communities and migrate to Monrovia in search for jobs. Thus a city meant for half a million people is hosting nearly 1 million people, or 25% of the country's population, resulting in fragmented communities. There is an urgent need to develop economic opportunities in other counties through which youth can be persuaded to move back home, resulting in reverse migration and decreased pressure on Montserrado County, as well as socioeconomic benefits to the youth and their communities. Youth groups in the country are well organized and maintain strong ties with their communities. This bodes quite well for designing and implementing projects with a strong youth component.

From a developmental perspective, due consideration for community rights and environmental preservation will need to be strictly maintained. The Liberian experience with respect to communities benefiting from development activity in and around their community lands has been mixed, and special focus will be required to ensure that tourism sector development provides communities with equitable benefits.

Environmental protection is one of the most critical challenges facing the Liberian tourism sector and is the net result of a multitude of causes. These include a review of environmental regulations currently in place; weakness in law enforcement to protect natural sites and attractions (e.g. several threatened species such as sea turtles, illegal fishing activities); lack of awareness-raising campaigns directed at local communities on the importance of biodiversity conservation; high levels of degradation of nature sites due to former mining activities, e.g. Mount Nimba; and insufficient information and data collection on national natural resources, which prevents coherent policymaking.

FUTURE PERSPECTIVE

This Strategy is geared around three pivots – piloting promising projects and retaining/scaling up ideas that work; focusing on select geographical areas initially and broadening the scope gradually; and niche-based project development centred around the four thematic areas.

1. Pilots: The strategy for rolling out implementation will centre on developing pilots and retaining/scaling up successes. This approach will ensure that resources are invested in areas that show potential for success, will attract new partnerships in the form of development partners and investors, and ensure that sparse resources are judiciously utilized. This is especially relevant given the low base of the Liberian tourism sector, which is in many ways an unproven commodity and requires significant resources. Donors and development partners will also need convincing to include tourism in their mandate and pilots are an appropriate mechanism to develop the business case for doing so.

2. Focus on select geographical areas to scale up as the Strategy progresses: The Strategy will focus initially on four key regional nodes apart from Monrovia. These are Robertsport (surfing), Buchanan, Kpatawee Falls (and related areas in Bong County) and Sapo National Park in Sinoe County. These are areas with high potential that can lead tourism development and offer success stories and lessons learned which will be integrated in other areas. It is anticipated that pilots that are successful in these areas can then be expanded to other parts of the country in the latter half of the Strategy time frame.

3. Niche product development: The Strategy will follow niche-based development in order to concentrate effort and resources in tourism niches with high potential. Four niches have been identified – surfing tourism, ecotourism, wildlife tourism and cultural tourism. The combination of the pilots-based approach, the sharp geographical focus and the niche product development is expected to provide an optimum return on investment for the resources invested in Strategy implementation. All four niches have high potential for development and to a significant degree their business case has already been proven through ad hoc activities which yielded results in the pre- and post-civil war periods.

More than 120 activities have been identified with comprehensive attributes including priority, time frame, target measures and lead/supporting implementing partners, among others. The segmentation of these activities along priority levels and time frames is especially important as it allows for efficient planning and sequencing of priority activities.

Figure 1: *Strategic and operational objectives of the Liberia Tourism Strategy*

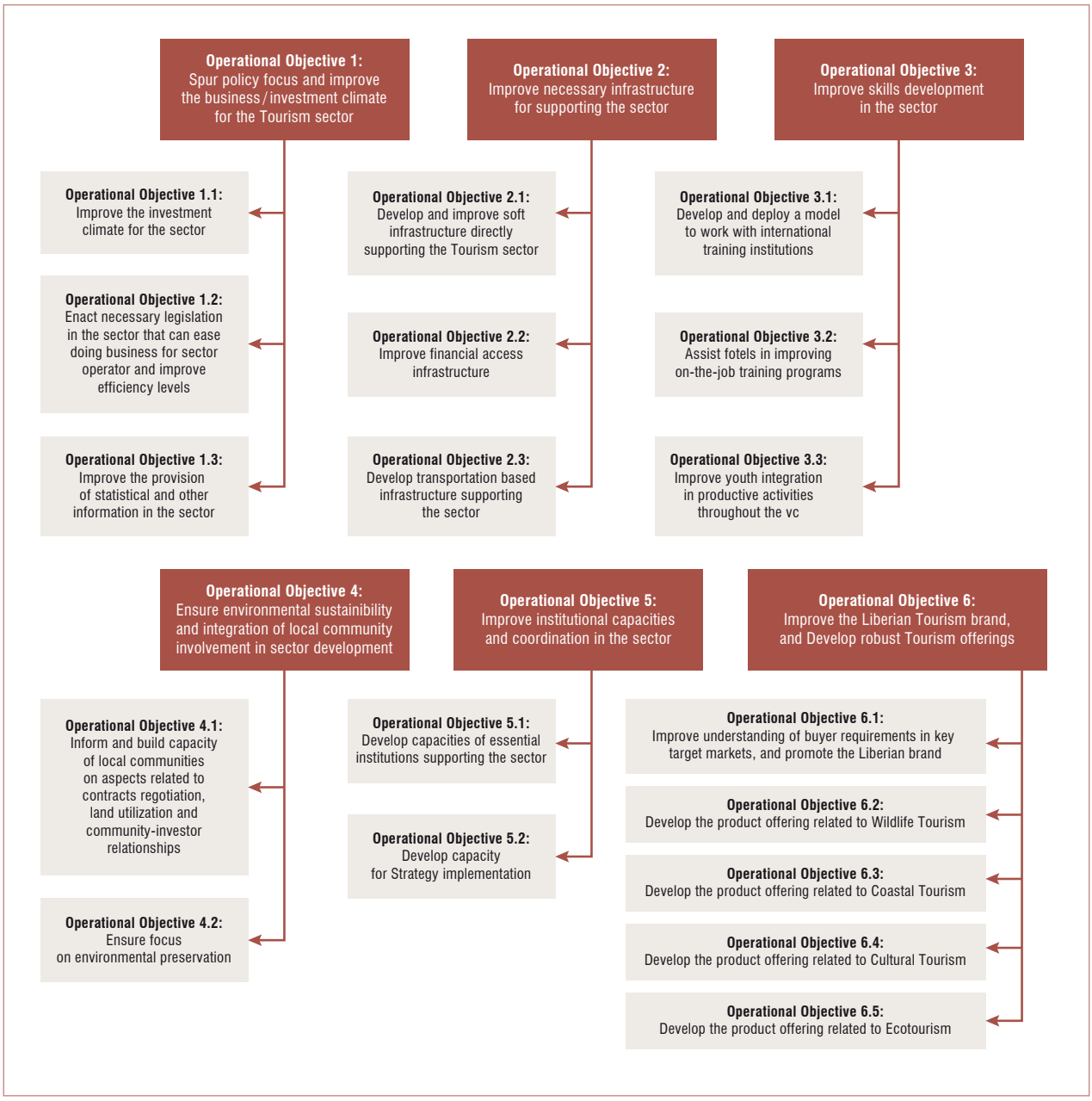


Figure 1 delineates six strategic objectives that will form the cornerstone of the Strategy.

Strategic objective 1: Spur policy focus and improve the business/investment climate for the tourism sector

The future state of the sector will involve an enhanced focus on policies and the facilitation of a conducive business environment for tourism operators and an enhanced investment climate for domestic and international investors. Once the policy framework is in place, the operationalization of regulations and laws can begin. This is expected to result in significant gains over the medium-to-long term. Activities will involve those that directly focus on formulating and enacting legislation and policies as well as activities that focus on improving provision of information that can be used by policymakers, technical institutions, the private sector and potential investors

Strategic objective 2: Improve necessary infrastructure for supporting the sector

Infrastructure development will be key to developing the sector and supporting tourism actors in their operations. The focus will be on improving both hard (mainly

(cc) jbdodane. Montserrado, Liberia.

(cc) David Stanley. Beachside barbeque at Sinkor, Monrovia, Liberia.

transportation and road infrastructure) and soft (such as exploration of alternate sources of energy and development of rest stops along key tourist routes) infrastructure. Infrastructural improvements to financial access will also be vital and it is envisaged that, in the future, sector operators will have better access to finance and tourists will benefit from secure and flexible means of withdrawing money, paying for hotels, etc.

Strategic objective 3: Improve skills development in the sector

Acknowledging that the skills development gap in the sector is one of the most important points in need of redressal, a number of short-, medium- and long-term activities have been identified to improve human capital in the sector. This will be achieved by expanding the expertise and capacities of skills providers (training institutions such as existing hospitality schools as well as universities, potentially) and employers such as hotels/restaurants/resorts. Where required, expertise will be brought in from outside Liberia in order to help training institutions develop their own capacities.

Activities under this strategic objective will be inextricably linked to the important issue of youth employment and entrepreneurship. It is expected that the sector will be a major employer of young people in the future and the skills development, youth, employment and entrepreneurship angles must be strengthened.

Strategic objective 4: Ensure environmental sustainability and integration of local community involvement in the sector development process

In order to ensure the success of Strategy implementation, it is essential that two aspects are paid particular attention: inclusive participation of local communities and due consideration of the environment in all project design and implementation activities. The Strategy design process has attempted to ensure that this focus remains the centre of attention through the provision of regional consultations in addition to Monrovia. Plan of Action (PoA) activities are designed with this focus in mind. Strategy implementation will also maintain this focus.

Strategic objective 5: Improve institutional capacities and coordination in the sector

Similarly to the policy gap on tourism, Liberian institutions have not been attuned to the needs of the tourism sector. These include institutions including ministries, technical agencies, associations and other institutions across the wide spectrum of the value chain. Strategy implementation thus includes a strong focus on building institutional capacities in the sector so that they can in turn support tourism sector operators. Examples include advocacy-based activities for passing the pending act to form the Liberian national tourism authority and capacity-building activities for the national sector associations.

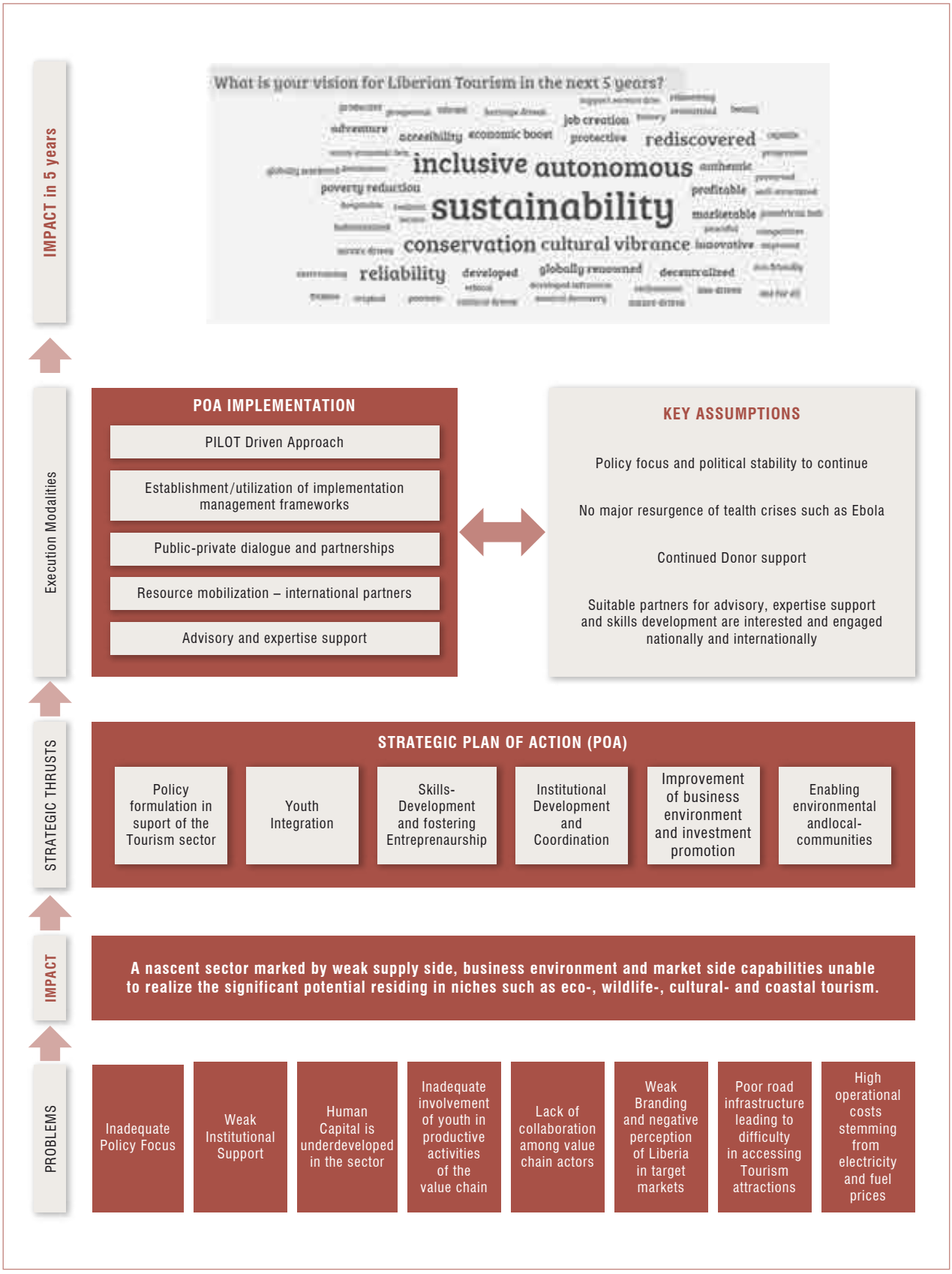
This strategic objective also includes support activities for implementation management such as identification and operationalization of a secretariat for managing and monitoring Strategy implementation.

Strategic objective 6: Improve the Liberian tourism brand and develop robust tourism offerings

Activities falling under this strategic objective are focused on brand development and promotion of the tourism sector in key market segments. Product development will also be a core focus, with detailed project activities elaborated for the four niche segments identified as central to this Strategy time frame. It is anticipated that implementation of these activities will lead to increased/improved brand recognition and absorption of Liberian tourism products.

Figure 2 provides an overview of the 'theory of change' pertaining to the sector as influenced by the five-year Strategy.

Figure 2: *Theory of change*



ENSURING A SMOOTH TRANSITION TO IMPLEMENTATION

The development of the future value chain for the tourism sector is a five-year project defined through a consultative process between public and private sector stakeholders in Liberia. Achieving the strategic objectives and realizing the future value chain depends heavily on the ability of sector stakeholders to immediately start implementing and coordinating the activities defined in the Strategy's PoA.

The Strategy in and of itself will not alone suffice to ensure the sector's sustainable development. Such development will require the careful coordination of various activities. While the execution of these activities will allow for the Strategy's targets to be achieved, success will depend on the ability of stakeholders to plan and coordinate actions in a tactical manner. Apparently unrelated activities must be synchronized across the public sector, private sector, NGOs and local communities in order to create sustainable results.

As a follow-up to the President's Exploratory Committee on Tourism, a sector steering committee – comprised of key public and private institutions – will be established, with the mandate to shepherd sector development by coordinating activities, monitoring progress and mobilizing resources for implementation over the five-year time frame of the Strategy implementation. To assist the committee in discharging its duties, a secretariat will act as an operational body, assisting by: collecting and managing data to monitor progress and impact of Strategy implementation; elaborating project proposals and building partnerships to mobilize resources to implement the Strategy; ensuring effective communication and networking for successful Strategy implementation; and other important tasks.

Both the sector steering committee and its secretariat will work hand-in-hand with existing entities established to streamline Government operations and enhance donor operations. These include the Special Projects Implementation Unit housed in the Ministry of Commerce and Industry (MoCI), the President's Tourism Exploratory Committee and others. It may be conceived that the secretariat is accommodated as part of an existing entity with an extended mandate and resources allocated to it.

The key success factors for effective implementation will include the following: ensuring capacities of the sector steering committee (and its secretariat) and other key entities involved in the tourism value chain are maintained; full private sector support and participation; proactive communication; and facilitating adequate resource mobilization and resources meant for implementation.

(cc) jbdodane. Beach of Robestsport.

CONCLUSION

Despite occasional shocks such as the financial crisis of 2009, the global tourism industry has shown virtually uninterrupted growth. Tourism shows particular promise for developing countries. The tourism industry is one of the largest and fastest-growing sectors in the global economy and a key driver for socioeconomic development, as it is labour-intensive and stimulates SME growth and investment. Tourism has been used in other countries as an economic driver for growth which can widely support poverty reduction. Tourism also has an important spillover effect, spurring growth in closely related sectors and subsectors such as agriculture, furniture manufacturing, foods and beverages, and infrastructure development.

A more vibrant tourism industry in Liberia is achievable and will act as a means of enabling economic development while improving employment and overall socioeconomic development. Liberia enjoys rich natural capital with high touristic potential which can be leveraged in a reasonable time frame. There are significant challenges to overcome but the opportunities far outweigh the challenges. Other post-conflict destinations have been able to overcome their negative international image in the process of reviving their tourism industry. Their efforts required integrated approaches, public–private sector partnerships and investment and marketing campaigns, among others.

This five-year Strategy is expected to establish the fundamental building blocks for the sector and enable robust Liberian tourism products to be tested and scaled up. At the end of the five-year period, it is envisaged that the base of the sector would have increased to a point that new niches and more visionary approaches can be employed. The future of Liberian tourism is bright, provided sector stakeholders, including Liberian policymakers and enterprises, can remain focused on this important endeavour.

(cc) Erik Cleves Kristensen. Liberian surfing championships.

GLOBAL AND REGIONAL PERSPECTIVE

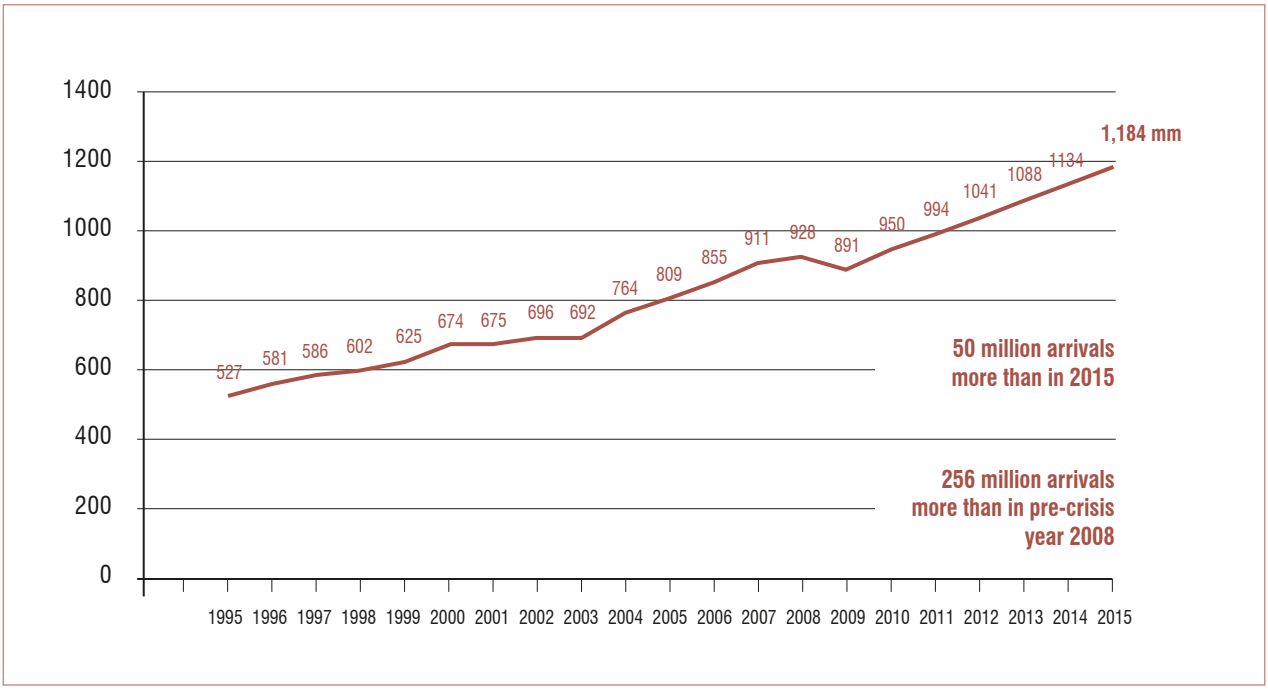
A SIGNIFICANT EARNER OF EXPORT REVENUES AND INVESTMENT BENEFICIARY

According to UNWTO (2015), the tourism industry is considered the fourth-largest export category at the global level after fuels, chemicals and automotive products, representing roughly 6% of the world's exports, valued at about US$ 1.5 trillion and reaching as high as 30% of the world's services exports.

Further, UNWTO (2015) indicates that the number of international tourist arrivals reached 1.1 billion in 2014, roughly double the number of total arrivals (527 million) in 1995. It is expected that this number will reach 1.8 billion international arrivals by 2030. Accordingly, the value of international tourism receipts has more than doubled from between 1995 (US$ 415 billion) and 2014 (US$ 1.245 billion).

According to the World Travel and Tourism Council, the tourism industry globally generated US$ 2,364.8 billion directly in 2014 and is expected to grow at an annual rate of 3.3% until 2025. Furthermore, investment in the travel and tourism sector was US$ 814 billion in 2014, 4.3% of total investment. Investment in the sector is expected to grow at an annual rate of 4.6% over the next 10 years, to reach approximately US$ 1,336 billion in 2025.

Figure 3: *International tourist arrivals 1995–2015 (millions)*



Source: World Tourism Organization (2015).

Table 1: *Global performance of the tourism sector*

World	2014 USD bn[1]	2014 % of total	2015 Growth[2]	USD bn[1]	2015 % of total	Growth[3]
Direct contribution to GDP	2,364.8	3.1	3.7	3,593.2	3.3	3.9
Total contribution to GDP	7,580.9	9.8	3.7	11,381.9	10.5	3.8
Direct contribution to employment[4]	105,408	3.6	2.0	130,694	3.9	2.0
Total contribution to employment[4]	276,845	9.4	2.6	356,911	10.7	2.3
Visitor exports	1,383.8	5.7	2.8	2,140.1	5.6	4.2
Domestic spending	3,642.1	4.7	3.7	5,465.0	4.1	3.8
Leisure spending	3,850.2	2.3	3.3	5,928.8	2.5	4.1
Business spending	1,175.7	0.7	4.0	1,679.0	0.7	3.2
Capital investment	814.4	4.3	4.8	1,336.4	4.9	4.6

[1]2014 constant prices & exchange rates; [2]2015 real growth adjusted for inflation (%); [3]2015-2025 annualised real growth adjusted for inflation (%); [4]'000 jobs

Source: World Travel and Tourism Council (2015).

ONE OF THE FASTEST-GROWING SECTORS IN THE GLOBAL ECONOMY AND AN IMPORTANCE SOURCE OF EMPLOYMENT, ESPECIALLY TO THE YOUTH SEGMENT OF THE LABOUR FORCE

The tourism industry is one of the largest and fastest-growing sectors of the global economy and a key driver of socioeconomic development. The total contribution of the tourism industry to the global economy was valued at US$ 7.6 billion in 2014.[12] It is an important economic activity and a major source of employment in most of the countries around the world. Indeed, it is estimated that one out of 11 jobs is generated by the tourism industry. Women are roughly 70% of the tourism labour force and half of the workers are aged 25 or younger.[13] Moreover, the vast majority of tourism-related businesses in developing countries are small businesses, either microenterprises or SMEs, which often operate in the informal economy.

THE TOURISM PRODUCT MAP REFLECTS A DIVERSE SECTOR INVOLVING A WIDE RANGE OF ACTIVITIES, ACTORS AND STAGES

Segmentation of the tourism sector is useful in order to have a better understanding of the specific expenditure patterns, buyer requirements, products, services and inputs involved in the industry. According to UNWTO, in 2014 over half of global visits were for leisure (53%), while the remainder were purposed-based (non-leisure): namely for health, religion and other reasons (27%); business and professional (14%); and non-specified (6%).

Figure 4 below presents a breakdown of types of tourism by two major reasons for travelling, i.e. leisure and purpose-based. This non-exhaustive list elaborates on mainstream classifications and incorporates new categories which are relevant to the Liberian tourism industry, namely culture and heritage tourism; wildlife tourism; ecotourism; and coastal, maritime and inland water tourism.

LEISURE TOURISM

Leisure tourism involves activities of persons visiting another place for their own entertainment or other benefit according to their interests. For example, cultural tourism is travelling to experience the history, folklore and culture of a people. Nature tourism can be described as travelling for the purpose of enjoying or learning about nature.

12. According to: World Travel & Tourism Council (2015). *Travel & Tourism Economic Impact 2015: World*. London: WTTC.

13. World Tourism Organization (2015). *Tourism Highlights, 2015 Edition*. Available from http://skift.com/wp-content/uploads/2015/06/wttc-june-2015-report.pdf; and United Nations Conference on Trade and Development (2013). Sustainable tourism: Contribution to economic growth and sustainable development, p. 4. Expert Meeting on Tourism's Contribution to Sustainable Development Geneva, 14–15 March. TD/B/C.I/EM.5/2. Available from http://unctad.org/meetings/en/SessionalDocuments/ciem5d2_en.pdf.

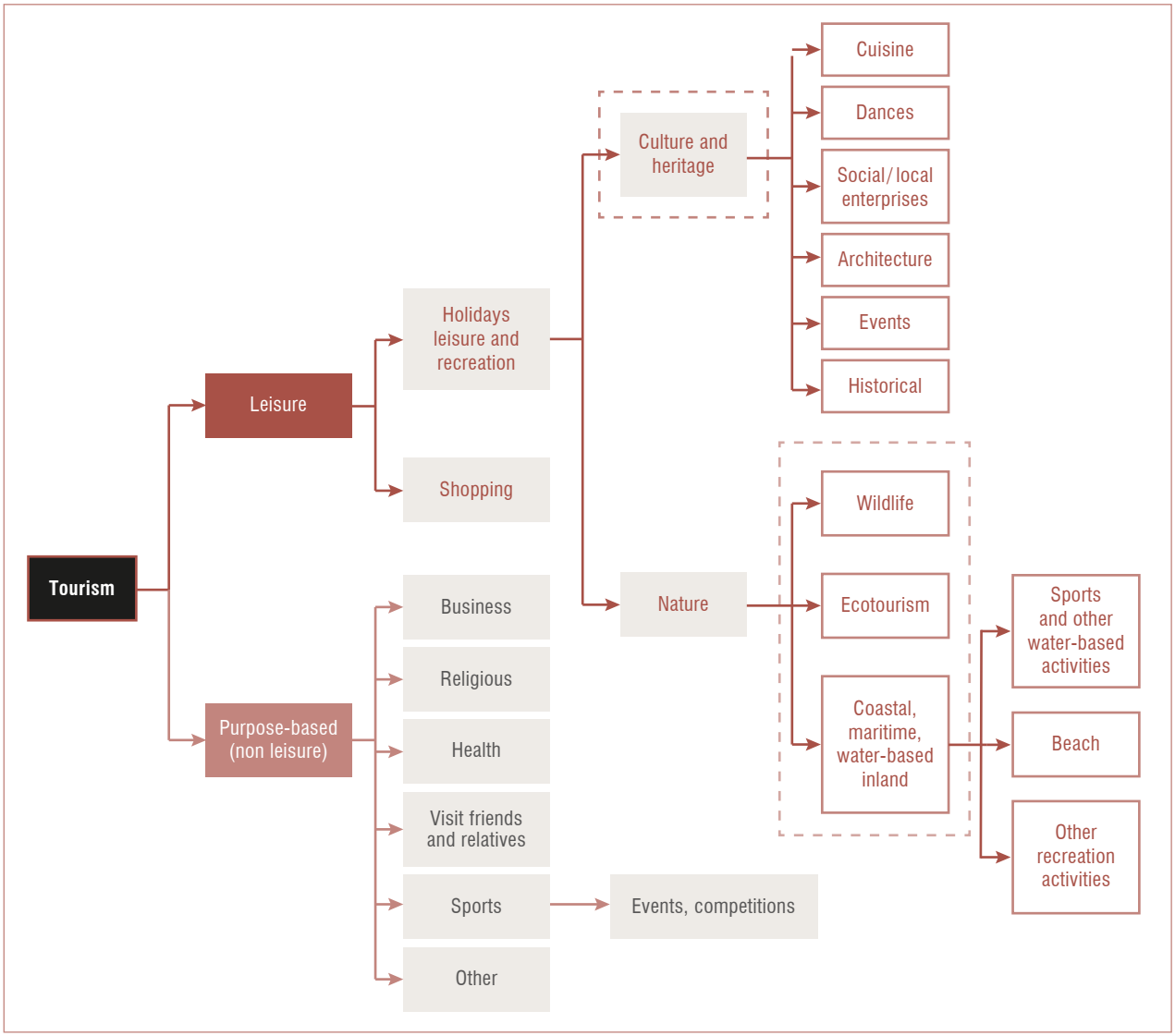
Within the leisure tourism category, a further subdivision can be made: tourism for the purpose of holidays, leisure and recreation; and tourism for the purpose of shopping. The latter can be defined as the act of travelling in order to purchase consumer goods, whether for personal use or as gifts, except for resale or for use in a future productive process.

On the other hand, travelling for holidays, leisure and recreation is associated with a broad range of activities undertaken during the trip which could include, for example, visiting natural or man-made sites, cruising, or attending or practising a sport as a non-professional activity, among others.

PURPOSE-BASED TOURISM

Purpose-based tourism is travelling for reasons other than leisure; for instance, for business, for medical services or for religious reasons. Travel for business and meetings, incentives, conferences and exhibitions accounts for a major chunk of this segment. Health/medical tourism can be defined as travel for the main purpose of improvement of health. Religious tourism involves visiting a place of spiritual significance. Participation in sporting competitions also falls under this category

Figure 4: *Tourism product map (dashed boxes indicate Liberia-specific segments)*



Source: International Trade Centre.

Box 1: Nature tourism – a prominent driver

Nature-based tourism covers a wide range of niche markets. Activities carried out under this category of tourism include: birdwatching, countryside motorcycling, observing marine and terrestrial wildlife, hunting and rafting, among others.

Nature-based tourism: definitions

Nature-based tourism can be conceptualized as 'all tourism directly dependent on the use of natural resources in a relatively underdeveloped state, including scenery, topography, water features, vegetation and wildlife'.

Source: International Union for Conservation of Nature.

Although this niche market is difficult to measure, UNWTO estimates that nature tourism accounts for approximately 20% of global tourism. Moreover, it suggests that this tourism category is growing three times faster than the whole tourism industry. The drivers behind nature tourism can be classified as social and technology-related.[1] These include:

- Growing interest in new experiences, authenticity, activities and value for money
- Ageing population
- Growing use of Internet and social media networks

Increasing importance of niche markets such as birdwatchers.

In a similar manner, nature tourism can be further classified in subgroups. In view of the Liberian tourism context, three major subgroups have been identified: wildlife, ecotourism, and coastal and maritime tourism.

TRAVEL AND TOURISM GENERATES A DIRECT ECONOMIC IMPACT BUT IT ALSO PRODUCES SIGNIFICANT INDIRECT AND INDUCED CONTRIBUTIONS

The indirect impact includes output and employment generated by:

- Investment spending related to the sector, such as new aircraft purchases and hotel construction;
- Government collective travel and tourism spending, which refers to public spending destined to support the travel and tourism sector such as tourism marketing and promotion, and resort area sanitation services;
- Domestic purchases from tourism suppliers, such as catering services by airlines and information technology services by travel agents.

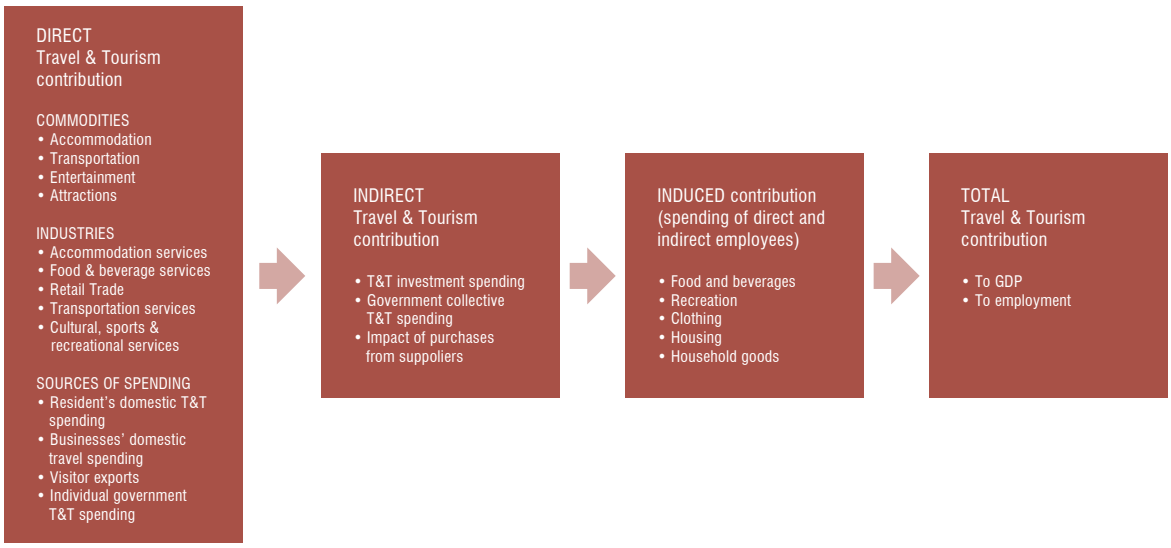
On the other hand, the 'induced' contribution measures output and employment supported by the spending of those directly or indirectly employed by the sector, e.g. recreation, clothing.

TOURISM REPRESENTS AN INCREASING MARKET SHARE OF EMERGING ECONOMIES

The tourism industry has shown steady growth over the past six decades and increasing diversification in the number of destinations, going beyond the traditional destinations of Europe and North America. From 1980 to 2010, the share of emerging economies as destinations increased from 30% to 47% and it is expected that their market share will expand even further.[14]

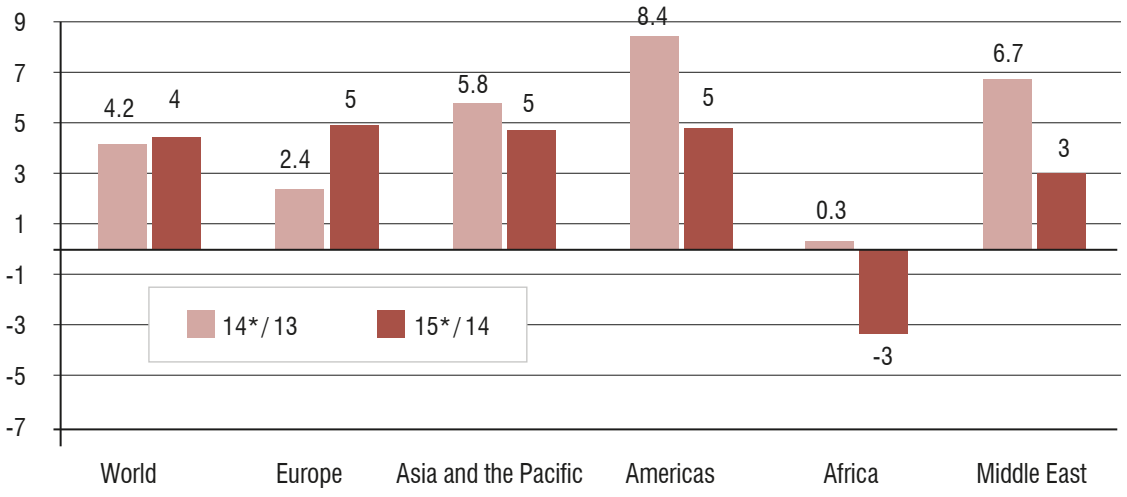
14. United Nations Conference on Trade and Development (2013). Sustainable tourism: Contribution to economic growth and sustainable development, p. 4. Expert Meeting on Tourism's Contribution to Sustainable Development Geneva, 14–15 March. TD/B/C.I/EM.5/2. Available from http://unctad.org/meetings/en/SessionalDocuments/ciem5d2_en.pdf.

Figure 5: *Economic contribution of travel and tourism*



Source: World Travel and Tourism Council (2015).

Figure 6: *International tourist arrivals in 2013/14 and 2014/15 by region (% change)*



Source: World Tourism Organization (2015).

International tourist arrivals in emerging economy destinations are expected to grow at double the rate (4.4%) of arrivals in advanced economy destinations (2.2%). In consequence, international arrivals in emerging economies will surpass those in advanced economies before 2020. UNWTO projections[15] indicate that in 2030, 57% of international tourist arrivals will be in emerging economy destinations and 43% in advanced economy destinations.

The region that will experience the largest growth is Asia and the Pacific, growing at an annual rate of 4.9%. In 2030, this region is predicted to reach 535 million international tourist arrivals. Likewise, the Middle East and Africa regions are expected to more than double their international arrivals during this period, from 61 million to 149 million and from 50 million to 134 million respectively.

15. World Tourism Organization (2015). *Tourism Highlights, 2015 Edition*, p. 14. Available from http://skift.com/wp-content/uploads/2015/06/wttc-june-2015-report.pdf.

AFRICA ACCOUNTS FOR A SMALL BUT INCREASING SHARE OF TOURISM ARRIVALS AND IS FORECAST TO GROW DUE TO A DIVERSE PRODUCT BASE

Africa accounts for 6% of worldwide tourism arrivals and a roughly 3% share of worldwide tourism receipts.[16] International arrivals to Africa grew by 5% from 2010 to 2014. In 2014, the destinations that showed the strongest growth rates in terms of international arrivals were Togo (39.1%), followed by Sierra Leone (35%), Niger (30.9%), Nigeria (23.5%) and Angola (23.1%).[17]

Breaking down the importance of the different types of tourism in Africa by expenditure, leisure tourism is the most significant category, valued at approximately US$95.9 billion in 2014. Forecasts estimate that the value of leisure tourism will reach US$160.9 billion in 2025. Meanwhile the value of business tourism is expected to reach US$69.9 billion by 2025.[18]

Major African tourism resources can be –non-exhaustively– classified in alignment with the aforementioned tourism categorizations.

CULTURE AND HERITAGE TOURISM

Culture and heritage tourism has been highlighted as a fast-growing segment of the tourism industry, specifically of sub-Saharan Africa, despite the underrepresentation of the subregion's sites on the UNESCO World Heritage List. Countries such as Ghana have been relatively successful in promoting themselves as heritage destinations, leveraging their slave trade monuments. Other countries such as Mali and Senegal have promoted their music festivals, while Burkina Faso has done the same with its film festival.

This type of tourism is associated with a range of cultural attractions, events and activities travellers participate in during their trips. For example: cuisine, indigenous performing arts, architecture and museums.

Culture and heritage tourism: definition

Culture tourism can be defined as the 'movements of persons for essentially cultural motivations such as study tours, performing arts and cultural tours, travel to festivals and other cultural events, visits to sites and monuments'.

According to UNWTO (2014) over 430 million cultural trips were made in 2013 out of the total flow of 1,087 million international tourist trips. The growth of the industry can be explained by drivers related to supply and demand. Given the fast pace of growth of cultural tourism, many local and national governments stimulate the development of cultural activities and attractions through targeted policies to compete in this market segment. The following demand and supply-side factors are responsible for the growth of the cultural tourism segment globally.

Demand-side factors (source)

- Increased interest in culture, particularly as a source of identity and differentiation in the face of globalization;
- Growing levels of cultural capital, stimulated by rising education levels;
- Ageing populations in developed regions;
- Postmodern consumption styles, emphasizing personal development rather than materialism;
- A desire for direct forms of experience;
- The growing importance of intangible culture and the role of image and atmosphere;
- Increased mobility creating easier access to other cultures.

Supply-side factors

- Development of cultural tourism to stimulate jobs and income;
- Cultural tourism was seen as a growth market and 'quality' tourism;
- An increasing supply of culture as a result of regional development;
- The growing accessibility of information on culture and tourism through new technologies;
- The emergence of new nations and regions eager to establish a distinct identity (e.g. the impact of newly-independent states in Central and Eastern Europe);
- A desire to project the external image of regions and nations;
- Cultural funding problems related to increasing cultural supply.

16. African Development Bank, Africa House at New York University and Africa Travel Association (2014). *Africa Tourism Monitor*, vol. 2, Issue 1, November. Available from http://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/Africa_Tourism_NOV_2014.pdf.

17. African Development Bank (2016). Tourism Data for Africa, National Accounts Main Aggregates Database 1970–2013. Available from http://tourismdataforafrica.org/viqtxj/national-accounts-main-aggregates-database-1970-2013. Accessed 5 May 2016.

18. Ato, 2015

(cc) Together Liberia, Ken Harper. Golden Image Awards, Liberia.

WILDLIFE TOURISM

Wildlife tourism is often defined as travelling with the main purpose of observing animals in their natural environment. Globally, wildlife tourism is estimated at 12 million trips annually. In this context, Europe is the most important source region. Specifically, the United Kingdom of Great Britain and Northern Ireland, Germany, Scandinavian countries and the Netherlands are the most promising source markets. The Centre for the Promotion of Imports from Developing Countries (2015)[19] indicates some product specifications which are important for European travellers regarding wildlife tourism. These include:

- Quality of wildlife experience: preference for destinations with an abundance of animal species and availability of unique resources, native fauna and/or endangered species;
- Natural surroundings: richness and uniqueness of natural surroundings of a destination;
- Non-wildlife activities: usually oriented towards nature and culture such as canoeing or visits to workshops with local craftsmen;
- Knowledge: profound knowledge about the destination among local tour guides, as well as safety measures;
- Flexible offerings: possibility for travellers to create their own travel programmes;
- Comfort: which is not equal to luxury. It largely depends of the age of the traveller. Younger travellers are the most likely to choose budget options rather than comfort.

The most common practices of wildlife tourism in Africa are safaris. In this regard, East Africa and Southern Africa are the most popular destinations for safari tours. The second most-practised wildlife tourism activity in the region is birdwatching. A study by UNWTO (2014)[20] further describes that a typical wildlife watching tour in Africa would involve groups of six people and would have a duration of approximately 10 days. Regarding the cost of this type of tour, the daily price per person per day is US$ 433 on average.

ECOTOURISM

Ecotourism is another specific tourism category which entails more socially and environmentally responsible travel. The concept of ecotourism has interlinkages with other

19. Centre for the Promotion of Imports from Developing Countries (CBI) (2015). *Product Factsheet: Wildlife Tourism from Europe.* Available from https://www.cbi.eu/sites/default/files/product-factsheet-europe-wildlife-tourism-2015.pdf.

20. World Tourism Organization (2014). *Towards Measuring the Economic Value of Wildlife Watching Tourism in Africa*. Briefing paper. Madrid, Spain: UNWTO. Available from http://apta.biz/wp-content/uploads/2014/10/UNWTO-Wildlife-Study_Report.pdf.

types of tourism relevant to Liberia such as wildlife tourism and cultural tourism. Ecotourism activities can include exploring, kayaking and diving as long as they comply with the following definition.

Ecotourism definition:
Ecotourism is the travel to fragile, pristine and usually protected areas that strive to be low impact and usually small scale. It helps to educate the traveller, provides funds for conservation, directly benefits the economic development and political empowerment of local communities and fosters respect for different cultures and for human rights.

Source: Honey, Martha (1999).

The value of ecotourism, therefore, goes beyond its economic dimension. It is difficult to provide an accurate estimation of the global value of ecotourism, given its complex categorization. Nonetheless, it is estimated that the number of ecotourists was roughly 83 million in 2013.[21]

Ecotourism is of particular relevance for Africa. Countries such as Kenya, South Africa and Zimbabwe have invested heavily to promote ecotourism. Several models have been introduced in ecotourism projects in Africa where the management and ownership of the ventures can be the responsibility of the communities, or the private or the public sector. In all of them, the contribution of ecotourism to local development and poverty reduction in remote rural areas is crucial.

Kenya, South Africa and Namibia are leading examples of ecotourism in the region. Success stories in these countries showcase ecolodges built by local communities with local materials. These efforts have not only contributed to the conservation of animals but have also had positive impacts on local communities.

COASTAL AND MARITIME TOURISM

Coastal –and specifically surfing– tourism is a rapidly expanding niche offering great potential for Africa. The region's 26,000 km of coastline offers ease access to great waves and unexplored and uncrowded beaches, making it attractive for surf communities across the world. The International Surfing Association is making efforts to promote the expansion of the sport in the region through the organization of surfing competitions and surf camps, among other activities. West African countries such as Sierra Leone, Liberia, Ghana and Côte D'Ivoire have been identified as having the most potential as emerging surf spots.

21. Kosonen, Jaakko (2015). Ecotourism and Neste NEXBTL renewable diesel. Thesis, Helsinki Metropolia University of Applied Sciences.

Surfing tourism alone is estimated to be a US$ 130 billion[22] industry carried out in more than 160 countries with tens of thousands of coastal communities impacted. Surfing tourism is defined as travelling for the purposes of surfing, learning to surf or attending a surf event. Estimates suggest that currently 35 million people surf worldwide and by 2050, this number will be 50 million reflecting a high annual growth rate. Surfing tourism has emerged, along with recreational surfing, as a multibillion-dollar industry which encompasses equipment and clothing, amateur and professional sporting events, and domestic and international tourism.

Surfing tourism is particularly important because in several destinations it has been the stepping stone to developing a more holistic coastal and maritime tourism industry. Examples include many regions of Indonesia, Costa Rica, Panama and Nicaragua. Besides, surf tourism can have a greater economic impact with the development of related services such as surf schools and it can also be a catalyst for developing more sustainable tourism because it is often considered an environmentally aware activity.

Factors influencing future growth of the segment

- High rate of growth of surfers from both developed and emerging markets, and growth is expected to keep on an upward trajectory.
- The resiliency of the sector, as evidenced by Bali after the 2002 bombings, where surf tourism actually increased while mainstream tourism declined. This was driven by the promise of uncrowded waves.
- The sector has the potential to pull in tourists year-round. Examples include Lagundri Bay in Indonesia where learners from Europe flock to the location during the off-season.
- Surfing will be represented in the 2020 Olympics to be held in Tokyo and the resulting exposure is expected to drive more tourism numbers.
- There is a high degree of camaraderie between surfers and the sector is highly represented online through discussion groups. There is a high degree of accurate research and information available to potential tourists online.
- The sector is experiencing a high degree of product diversification built around, but not relegated to, the traditional surfing product. Examples include stand-up paddleboarding, kitesurfing, surf and yoga retreats, women-only surf trips, training and coaching camps, schools for training surfing instructors, and study-abroad classes.

22. O'Brien, D. and Eddie, I. (2013). Benchmarking global best practice: Innovation and leadership in surf city tourism and industry development. Keynote presentation at the Global Surf Cities Conference, Gold Coast City, 28 February and 1 March.

(cc) Erik Cleves Kristensen. Beach at Robertsport.

Policy considerations for developing the surf tourism segment

- Crowding of surf tourism resources is a legitimate concern, leading to losses in yield and associated environmental, social and cultural impacts. Ample case studies exist for countries that have drawn up responses to control crowding, ranging from Maldives and Fiji (exclusive access granted to resorts based on exclusive use zone around resort islands), to Papua New Guinea (surf tourist numbers governed by a quota established by the national surfing association and the private sector) and the Mentawai Islands (moorings used to limit the number of boats accessing breaks).

- Sustainability is considered very important by consumers. In a survey of 3037 surfers conducted by the Centre for Surf Research, the following figures emerged:

  - The vast majority (92%) of the respondents noted that surf travel businesses should be undertaking sustainability initiatives;
  - A large majority (84%) of surf travellers look to be sustainable themselves when abroad;
  - Close to half (42%) of the respondents have researched the sustainability of surf travel;
  - A majority (70%) of respondents noted that sustainability performance will influence their future choice of surf travel;
  - A huge proportion (91%) would choose sustainable surf travel providers if prices and amenities were equal;
  - Over three-quarters (76%) would pay at least a 5% premium on sustainable surf travel, while 30% of respondents noted that that they would pay 15% or more for sustainable surf travel.

- Protection of surfing areas (breaks) actually increases the value in terms of longevity/sustainability of resources as well as the premiums that surfers are willing to pay for such protected areas. UNESCO has designated nine World Surfing Reserves in Australia, Mexico, Peru, Chile and Portugal. The Center for Surf Research has developed a Sustainable Tourism Operator's Kit for Evaluation certification based on Global Sustainable Tourism Council and International Organization for Standardization standards customized to the specific requirements of surf resorts, surf schools and surf destinations.

TOURISM TRENDS IN THE SUB-SAHARAN REGION INDICATE STEADILY RISING DEMAND FOR SUB-SAHARAN TOURISM PRODUCTS IN THE PAST DECADES

From roughly 7 million visitors in 1990, the subregion reached 28 million visitors in 2009.[23] For sub-Saharan Africa, the direct contribution of tourism to regional GDP in 2014 was estimated at US$44.5 billion or the equivalent of 2.6% of the region's total GDP. Moreover, the tourism sector has directly supported approximately 6 million jobs at the regional level, representing 2.5% of total employment. A slight decline of this contribution to 2.4% is forecast for 2025.

Moreover, the majority of tourists arriving to the sub-Saharan region are leisure tourists, or roughly 36% of the market in 2009. Meanwhile, business travellers comprised approximately 25% of international arrivals during the same year

23. World Bank (2011). *Africa Region Tourism Strategy: Transformation through Tourism – Harnessing Tourism for Growth and Improved Livelihoods*. Washington, DC. Available from https://openknowledge.worldbank.org/handle/10986/12841.

Table 2: *Sub-Saharan Africa tourism sector performance*

World	2014 USD bn[1]	2014 % of total	2015 Growth[2]	USD bn[1]	2015 % of total	Growth[3]
Direct contribution to GDP	44.5	2.6	3.3	75.9	2.6	5.1
Total contribution to GDP	114.8	6.8	3.2	195.6	6.8	5.1
Direct contribution to employment[4]	5,972	2.5	-0.1	7,535	2.4	2.4
Total contribution to employment[4]	14,592	6.2	-0.1	18,558	5.9	2.4
Visitor exports	31.5	6.9	3.1	52.4	7.3	4.9
Domestic spending	51.0	3.0	3.8	87.4	2.2	5.2
Leisure spending	52.8	1.7	3.4	90.8	1.7	5.2
Business spending	29.7	0.9	3.7	49.0	0.9	4.8
Capital investment	18.6	5.5	4.8	29.6	5.1	4.3

[1]2014 constant prices & exchange rates; [2]2015 real growth adjusted for inflation (%); [3]2015-2025 annualised real growth adjusted for inflation (%); [4]'000 jobs

Source: World Travel and Tourism Council (2015).

Box 2: Key tourism offerings for Africa

The World Bank (2011) identified the major opportunities for tourism product offerings for the African continent. Cultural heritage tourism, safari tourism, beach tourism and business tourism, among others, are highlighted as areas of high potential for the industry in this subregion.

Figure 7: *Tourism opportunities in sub-Saharan Africa*

Source: World Bank (2011).

THE LIBERIAN TOURISM VALUE CHAIN

IMPORTANT NICHES

The current tourist offering of Liberia can be categorized in four major subgroups.

COASTAL, MARITIME AND INLAND WATER-BASED SITES AND ATTRACTIONS

Liberia possesses excellent conditions for coastal and maritime tourism. Among the country's current tourism offerings, there are surfing and surfing-related activities –particularly in Robertsport– deep sea fishing, Buchanan, etc. Liberia's tropical coast, beaches with warm ocean temperatures year-round and rich marine resources offer great potential for tourism. Certain activities such as surfing and fishing in Liberia are gaining increasing international attention as tourist attractions.

Liberia's 560 km of coastline is characterized by a near unbroken sand strip, unexplored beaches and 'world-class' waves.[24] The most famous location for surfing activities is Robertsport, roughly three hours away from Monrovia. Robertsport has three main surfing points: Fisherman's Point, Cotton Trees and Cassava Point.

The waves are extremely good and uncrowded, which is extremely rare and extremely valuable. Another key part of the offering is the friendliness of the local surfers. Another really interesting part of the surf offering is the extremely user-friendly nature of the 'paddle out', which refers to the act of paddling out from the beach to access the waves. In many places with high-quality waves this involves paddling hundreds of metres and getting battered by large waves along the way. At Robertsport, as a result of the way the waves break in relation to the land, it is a simple matter of jumping in at the right place and taking a few strokes. It is very safe and very user-friendly.

Surfing activities and surf tourism in Liberia are slowly providing the country with a good reputation among the global surf community. Although the first surfers appeared in the country around the 1970s, it was only when the 2006 film *Sliding Liberia* was released that the country started being considered in the world surfing scene. In the ensuing years there have been efforts to stimulate surfing in the country, including individual and private-sector-led initiatives. The impact of some of these initiatives, such as the Kwepunha Surf Academy, has been relatively high among local youth. Young people are taking surfing lessons and participating in community service such as beach sanitation in return.[25]

The Atlantic coast of Liberia also features an abundance of maritime resources. The aquatic fauna of Liberia is diverse and is the basis of important economic activity for the country. These resources can also have economic potential for tourism. Sailing and sport fishing activities, whether for beginners or for experts (extreme fishing) can be carried out within Liberia's Exclusive Economic Zone (186,322.2 km2). Further, Liberia would be highly attractive for fishing aficionados due to the abundance of species such as marlin, tuna and swordfish, considered big game fish –i.e. large fish renowned for their sporting qualities– which can be found only an hour away from the coast.

Not only fish are found in abundance. Whales and dolphins can also be spotted in Liberian waters. Dolphins, for example, can be seen within 20 miles of the coast, particularly during January, February and March. This opens possibilities for tourist activities such as dolphin and whale watching.

ECOTOURISM SITES AND ATTRACTIONS

Liberia enjoys a rich natural capital with high touristic potential. Liberia's natural attractions include two natural forest reserves, wetlands and mangroves, and biological and landscape diversity.

One of the main natural sites with ecotourism potential in Liberia is Kpatawee Waterfalls, managed by a local community. The waterfalls are about three hours away

24. http://surfcredits.org/support/liberia/

25. BBC Travel (2015). The making of child surfers, not child soldiers, 11 November. Available from http://www.bbc.com/travel/story/20151022-the-making-of-child-surfers-not-child-soldiers.

from Monrovia by car and the road is paved for the largest part of the route. Being surrounded by a dense forest, Kpatawee Waterfalls possess an attractive combination of natural beauty and local friendliness. Two cascades exist, the smaller being the closest to the road, and the bigger one reachable by roughly an hour of trekking. Liberian nationals already enjoy events and activities in this location in spite of the current lack of basic amenities services, e.g. food and beverages. Ecotourism activities would create a great impact on the socioeconomic development of the local community.

Other Liberian natural sites with potential for ecotourism are the several cultural villages across the country (e.g. Behsao), Edina and Libassa Ecolodge. Ecotourism practices are already being implemented in the latter.

Box 3: Private sector perspectives – Libassa Ecolodge

Libassa Ecolodge is Liberia's first and only ecotourism resort, located in Marshall, Liberia. The company was established in October 2012 by Rudolph and Lisa Antoune. The resort is open from October to July with an average of 250 guests per week. Country of origin of guests: 50% Liberia, 50% foreigners (Lebanese, Indians, Chinese, Europeans, other Africans). Currently the target market is the local market. Libassa's amenities include short-term accommodations – guests can stay a month or less (18 rooms) – a restaurant, swimming pool, and beach and lagoon (water activities). When considering future planning, the Lodge wants to create relationships with outbound tour operators in being able to properly promote Liberia and Libassa as an appealing tourist attraction site.

Libassa aspires to provide educational, adventurous experiences in natural environments and indigenous communities. The company also aims to have as little impact as possible on the environment in both the building and the operating of the lodge, and through the activities offered to its guests. They make it a duty to sustain the cultural integrity of the local people by hiring members of the community and respecting their habitat and traditions. The company generates revenue for the conservation of nature and betterment of local communities through ecotourism initiatives.

Regarding challenges, co-owner Rudolph Antoune notes that infrastructure is a huge issue, most especially regarding road access in the rainy season when the roads become extremely muddy. The road is unpaved and it takes about 30 minutes to get there from Monrovia. Electricity is also a challenge due to the fact that the company has to use a generator. This is not only a huge cost but also goes against the 'ecotourism appeal of the resort'. Finding qualified staff and managers is another challenge. Libassa does not hire from any training institutions but they do hire from the local community. They are open to providing internship opportunities to qualified students/graduates of local training institutions. The small size of the market is also a challenge. The company is aware of the need to appeal to international tourists. For this to work smoothly, they feel that visa on arrival services need to be adopted by the Government to encourage the arrival of more tourists. Currently the company advertises locally via social media and a very active Google Expat List Serve. They do not advertise internationally due to Liberia's poor public image. They rely on their website and Trip Advisor to entice international guests. In tackling this challenge there is a need for the country to be promoted positively by the Government internationally.

WILDLIFE SITES AND ATTRACTIONS

Wildlife is Liberia's hidden treasure – concealed under the canopies of the country's vast forest cover (comprising more than 40% of the overall land) – and has remained hitherto veiled from policy and institutional focus. If properly rehabilitated and conserved, wildlife resources could play an essential role in Liberia's tourism growth story. The following excerpt provides an insight into the diversity of Liberia's forests:

> Liberia's forests are exceptionally diverse, with high rates of endemism and harbouring many more species that are close to extinction outside the country. It is home to approximately 125 mammal species, 590 bird species, 74 known reptiles and amphibians and over 1,000 described insect species. Notable fauna include a few of the remaining significant populations of the African forest elephant *(Loxodonta africana cyclotis)* in West Africa; several viable populations of the pygmy hippopotamus *(Hexaprotodon liberiensis)*; antelope species Jentink's duiker *(Cephalophus jentinki)*, the zebra duiker *(C. zebra)* and the Liberian mongoose *(Liberiictis kuhni)*; and large primate populations, including the Diana monkey (*Cercopithecus Diana*), the red colobus *(Procolobus badius)*, the black and white colobus *(Colobus polykomos)* and the chimpanzee *(Pan troglodytes verus)*.[26]

26. World Bank (2010). *Establishing The Basis For Biodiversity Conservation in Sapo National Park and in South-East Liberia, Project Implementation Completion Report*. Flora And Fauna International.

Liberia is endowed with approximately 42% of the Upper Guinea Forest of West Africa, rich in endemic flora and fauna. There are two Upper Guinea biodiversity hotspots: Sapo National Park and East Nimba Nature Reserve. Sapo National Park, located in Sinoe Province, is another important popular Liberian tourist attraction. Sapo National Park is home to rare birds and a high diversity of mammals such as elephants, monkeys, antelopes and Liberia's national symbol, the pygmy hippopotamus. Adding to the lack of adequate hospitality infrastructure and services, tourism in this natural site is constrained by difficult accessibility. The park is located approximately 300 km away from Monrovia but driving there is a 14-hour journey in off-road conditions.

East Nimba is contiguous with the Mount Nimba Strict Nature Reserve, the highest point in West Africa. Mount Nimba cuts across Guinea, Côte D'Ivoire and Liberia. Although the Liberian side of the mountain is not marked as a UNESCO World Heritage Site, it contains amazing wildlife including chimpanzees and a wide variety of birds. One of the challenges in this location is the high level of degradation due to former mining activities. Another constraint limiting tourism activities is the lack of any hospitality services.

While there are several hundred species of undomesticated mammals, birds and reptiles in Liberia's ecosystems, a few stand out as offering unique tourism potential. These include the pygmy hippopotamus, chimpanzees, manatees and others living in habitats that are in some places pristine and in others endangered.

Box 4: Sapo National Park

Sapo National Park is Liberia's largest protected area of rainforest and its only national park. Named after the local Sapo (or Sao) tribe, the park was gazetted in 1983, covering an area of 1,308 km^2 (505 square miles). The Sapo National Park Act (An Act for the Extension of the Sapo National Park) on October 10, 2003 expanded the size of the park to 1,804 km^2 (697 square miles).

Located in the Upper Guinean Forest ecosystem, Sapo National Park consists entirely of lowland rainforest, including swampy areas, dryland and riparian forests. It represents one of the – if not the most – intact forest ecosystems in Liberia.

Containing some of the largest remaining intact blocks of the threatened Upper Guinean Forest, it provides a stronghold for several globally endangered species including the pygmy hippopotamus, the West African chimpanzee and the zebra duiker. Yet there appears to be an astounding amount still to be discovered about this ecosystem, with six new plant species found in one 2009 botanical survey of Sapo National Park alone.

Source: Fauna & Flora of Liberia (2015).

Box 5: The pygmy hippopotamus

The pygmy hippopotamus (*Hexaprotodon liberiensis*) is a large mammal species whose closest living relatives, besides the common hippopotamus, are whales. The pygmy hippo looks broadly similar to the common hippo but is significantly smaller and does not exhibit the sexual dimorphism (the two sexes having notably different appearances) that is seen in the common hippo. The species is currently classified on the International Union for Conservation of Nature Red List as endangered, with its rapid decline attributed to habitat degradation and bushmeat hunting. There are estimated to be fewer than 3,000 individuals left in the wild in Liberia, Côte d'Ivoire and Sierra Leone but this estimate is likely to be inaccurate because little is known about the species, there has been no recent census work and their habitat has been much degraded. Sapo National Park is identified by the International Union for Conservation of Nature as a vital area for the survival of the species. Pygmy hippopotami are kept successfully in captivity in a number of zoos across the world and ZSL London Zoo holds an adult male and female.

Source: Wildlife Extra (2008).

(cc) Kabacchi. Pygmy Hippopotamus.

CULTURE AND HERITAGE SITES AND ATTRACTIONS

Liberia has also remarkable historical and cultural assets. There is great ethnic, religious and linguistic diversity in the country. Sixteen major tribes coexist in Liberia, each with their own traditions and religious beliefs. Namely, these tribes are the Gbandi, Bassa, Belle, Dey, Gio, Gola, Grebo, Kissi, Kpelle, Krahn, Kru, Lorma, Mano, Mandingo, Mende and Vai. Additionally, there are the Americo-Liberians whose ancestors once migrated to Liberia from the United States during the 1900s, providing the country with a truly unique history and culture which has influenced every level of the Liberian society, economy and political organization.[27]

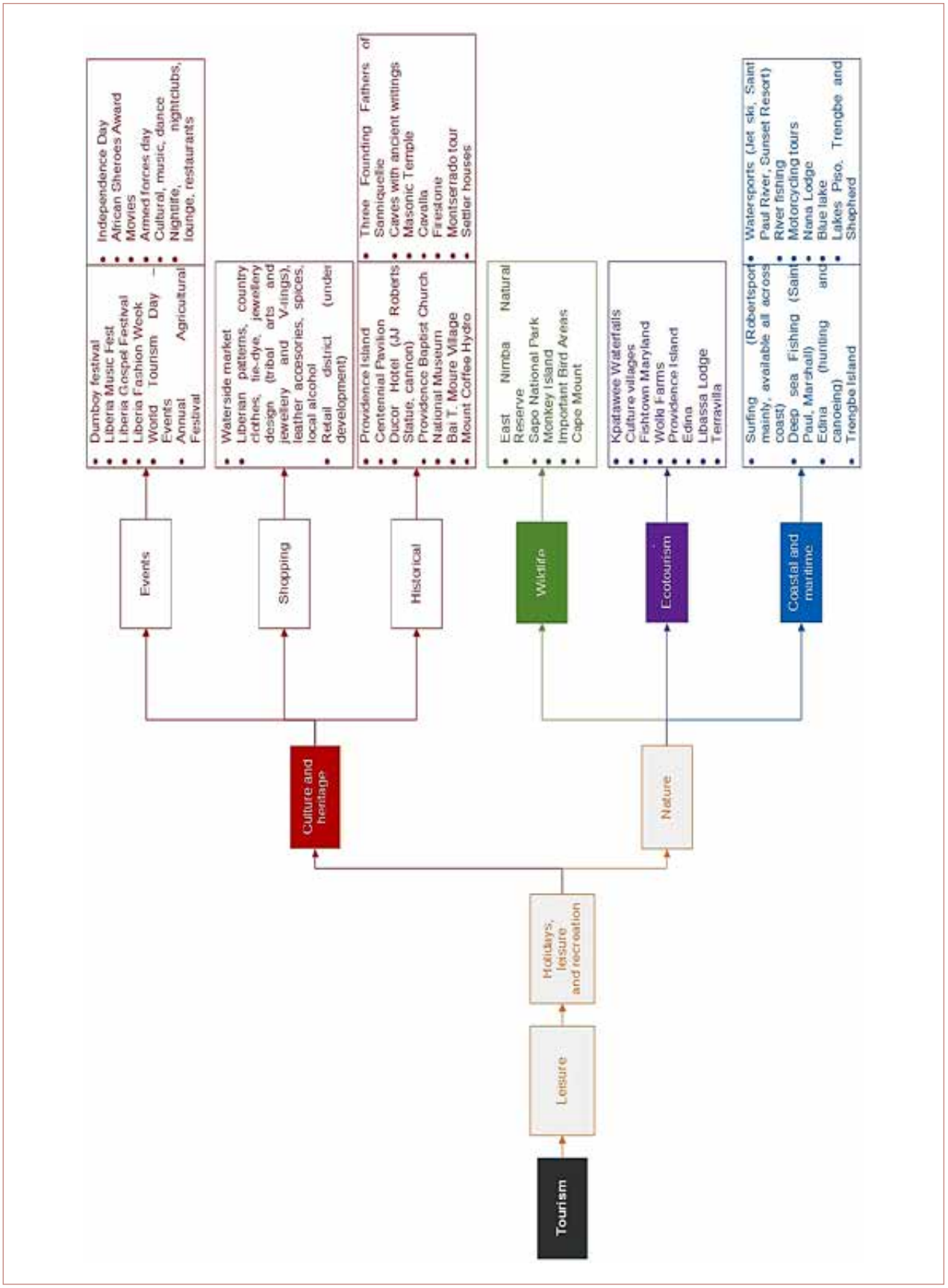
Historical and cultural assets include Harper, formerly an important administrative centre and the capital of Maryland County. Harper is an historic place filled with ruins of abandoned buildings. Another example is Providence Island, which has been identified by the Government as a potential historical attraction. Providence Island was the first place where former American slaves arrived in the country in 1822. Other relevant historical and cultural sites include the Executive Mansion, the Masonic Temple, the centre of Behsao, the Centennial Pavilion (a Liberian landmark), the Firestone Rubber Plantation (one of the most valuable historical sites in the country) and the Liberian National Museum. The latter was established in 1958 and displays cultural artefacts and national historical items. The country's particular historical link with the United States makes it a unique location for genealogy tourism, particularly among African-American visitors.[28] In addition, some tour operators[29] are leveraging local social entrepreneurs to showcase their work and develop 'social impact tours'.

27. Best, Kenneth Y. (1974). *Cultural Policy in Liberia*. Paris: The Unesco Press. Available from http://unesdoc.unesco.org/images/0000/000090/009047eo.pdf.

28. Taste of Liberia Cultural Festival (2015). *Event Fact Sheet*. Available from http://www.tasteofliberia.com/wp-content/uploads/2014/05/Taste-of-Liberia_FINAL-EPK.pdf.

29. Barefoot Liberia in partnership with the Business Start-up Center (Monrovia) and the Accountability Lab.

Figure 8: *Tourism product map of Liberia*



KEY VALUE CHAIN ACTORS

The key actors involved in the tourism value chain broadly comprise local travel agents, accommodation providers, tour guides, transportation companies and input suppliers, such as food and beverage providers.

Immigration, Customs

The immigration authorities at Roberts International Airport are the first value chain actors with whom international tourists interact. Except for citizens from the Economic Community of West African States and the Republic of Korea, all foreigners entering Liberia must hold a valid visa. Issuing a visa on arrival is extremely rare.

Local tour operators

There only a couple of tour operators functioning in the country. The tour packages currently being offered are rather limited and not regular. In the case of culture-based tourism, hotels often offer historical tour services ad hoc.

Box 6: Private sector perspectives – West Tourism Management

West Tourism Management is a Liberian-based brand and boutique tour operator with the goal of encouraging and promoting pan-African travel and investment. Owned by Liberian entrepreneur Chiquita A. Johnson, the company specializes in a variety of travel and tourism services and is proficient and passionate about highlighting unique and memorable experiences in African destinations, most especially Liberia and the Gambia. Established in June 2015, the brand has a special focus on luxury, responsible tourism and investment relations, and caters to the millennial traveller niche market. West Tourism Management products and services include tour operations, accommodation reservation and booking services, itinerary management, travel representative services, ground transport services, excursion management, event coordination, concierge services and tourism investment relations.

The company is currently pinpointing exclusive destinations and working with communities in Liberia to highlight unique experiences in destinations. This project will focus on promoting authentic Liberian art, culture and wellness practices. Once a road map is developed and a pilot is launched, the company plans to use similar pilots in Buchanan and Suakoko District. West Tourism Management is actively working towards the demo phase of a West African travel mobile app that can be used to book an entire travel experience from beginning to end. They are currently seeking funding of about US$20,000 to complete the app.

The main motivations behind the West Tourism Management brand are to assist in rebranding Liberia and shifting the way the world sees the country by promoting it and its tourism potential positively. The company is also working towards making sure the Liberian people are properly sensitized about both the positive and negative effects of tourism, and encourages community/cultural tourism development which can lead to job creation and employment opportunities.

According to Chief Executive Officer Chiquita Johnson, there is a need for Liberia to establish:

> *'a tourism development area outside of Monrovia. A tourism development area is a designated area that is promoted for tourism development. It will be a place that is promoted to investors in providing various lodgings, restaurants, attractions, nightlife/entertainment facilities, etc. In the Gambia for example, the tourism development area is known as Senegambia. Robertsport, Grand Cape Mount County will be a perfect place to pilot something like this in Liberia. A tourism district office should also be established here. The tourism development area should have its own airport for tourists to fly in and out directly and bypass negative aspects of the country. Currently there is only a landing strip in Grand Cape Mount County. The opportunity to turn this into a fully functioning airport would be a huge benefit.'*

Event organizers

For sports-based tourists travelling from the European Union (EU) and the United States, surf tournaments organized by local or international surf organizations constitute their first/direct contact in Liberia. Regional tourists (particularly from Sierra Leone) also travel to Liberia for sport tourism, specifically for the Liberian marathon. These events include the 5th Annual Liberian National Surfing Championships held recently, presented by Kwepunha Retreat, Surf Resource Network, and The Liberian Surfing Federation.

Further, both expatriates and Liberian nationals participate in the aforementioned sports activities. Other events in which they participate include gastronomic festivals and beach parties. The usual communication channels to advertise these events are expat forums and e-mail lists, occasionally airline magazines, social media, radio advertisements and text messages, among others.

Accommodations

It is estimated that almost 130 accommodations are established in Liberia, including hotels, motels and guest houses. Most of them are concentrated in Montserrado and Nimba Counties (35 and 32 accommodation establishments, respectively), followed by Lofa, Grand Gedeh and Margibi Counties (11, 10 and 10 accommodation establishments, respectively).

Most accommodation establishments are concentrated in the capital, Monrovia, in Montserrado County. In addition, for sports-based tourists, accommodations available include – besides hotels and motels – surf resorts, lodges, camping sites and home stay options. Commonly camping sites and villas are available as accommodation options for nature-based tourism. It is worth noting that no reliable listing exists of accommodation based options for tourists.

A key function is carried out by food and beverage suppliers who provide inputs to hotels and restaurants. Construction and maintenance providers engage in the development of infrastructure to facilitate and support activities in the sector. Lastly, equipment suppliers provide all the necessary machinery and tools for value chain actors to execute their roles.

Travel services

There are currently five international carriers flying to Liberia on a non-daily basis. Although certain airlines suspended or cancelled their services to Roberts International Airport, there has been a slow recovery in the number of flights since the Liberia was declared Ebola-free.

Although in most cases they are not formalized, travel services are offered in the country. They include car rentals, motorcycle transport services, and rental of boats –whether for the sea or lakes– and canoes.

Table 3: *Liberian accommodation establishments by location*

Location (county)	Number (2014)	Share (%)
Bomi	2	2
Gbarpolu	7	5
Grand Bassa	5	4
Grand Cape Mount	5	4
Grand Gedeh	10	8
Grand Kru	2	2
Lofa	11	9
Margibi	10	8
Maryland	6	5
Montserrado	35	27
Nimba	32	25
Rivercess	1	4
Sinoe	3	2
Total	**129**	**100%**

Source: LISGIS.

Tourism support services

There are no tour guides available at key historical and cultural sites. Moreover, fees charged to tourists are not standardized. The situation is similar for nature-based tourists. Key attractions such as Kpatawee Waterfalls and Sapo National Park do not have sufficient numbers of well-trained tour guides.

THE INSTITUTIONAL LANDSCAPE FOR THE LIBERIAN TOURISM SECTOR

The overall trade support network for Liberian tourism is considered for the Strategy as the aggregate institutional framework in the country, bringing together those trade and investment support institutions that have an interest in, or a bearing on, the development and competitiveness of the tourism sector. Broadly, the trade and investment support institutions providing services to the Liberian tourism sector can be categorized in the following support areas:

- Policy support network
- Trade services network
- Civil society network.

The policy support network is comprised of ministries and competent authorities responsible for influencing and/or implementing policies at the national level. From this perspective, the focus on the sector is just emerging. Tourism has not been a priority in the development agenda of the country, which is explained by the urgent challenges the country faced after many years of violent civil conflict. As a consequence, the sector has lacked governmental guidance in the development of a common tourism policy that fosters sector growth in alignment with the Government's medium- and long-term objectives. Further, there has not been a clear definition of leadership and responsibilities among policy support institutions either.

The current institutional structure of the Liberian tourism sector lacks coordination between support institutions, which generates a rather fragmented institutional landscape. However, there are indications of positive evolution in this regard. There is increasing recognition of the importance of forming partnerships and fostering cooperation among public and private sector institutions. Moreover, the creation of a unifying Liberian tourism authority is under development. In principle, this agency will gather major public and private sector stakeholders with the objective of promoting the tourism sector through a common policy.

(cc) Multimedia Photography & Design - Newhouse School. The Cape Hotel in Mamba Point, Monrovia. Photo by Cameron Zohoori.

Another issue is the lack of management capacities at the majority of relevant institutions. This factor has been recognized as a crucial constraint, particularly vis-à-vis future strategic planning for sector development. Lack of financial resources has also been identified as a key barrier to promoting the sector at the international level through affiliations and memberships in relevant institutions such as the UNWTO and ATA; and to supporting partnerships and capacity-building activities with international tourism development partners.

MICAT is the governmental body responsible for promoting the tourism industry. Created by executive law in 1965, MICAT is empowered to design policies aimed at developing the tourism sector, as well as supervising and monitoring tourism programmes at the national level.

In the 1980s, the People's Redemption Council mandated the reorganization of MICAT through the establishment of the National Bureau of Culture and Tourism, under Decrees 46 and 47. The National Bureau of Culture and Tourism has responsibility for collecting and disseminating information on historical and natural sites in Liberia, and regulating all official matters regarding culture and tourism, among others.

The main institutions in the sector are shown in box 7.

Box 7: Policy support institutions supporting the tourism sector

Policy support institutions	Mission / roles
MICAT	MICAT is responsible for promoting the tourism industry in the country. Further, MICAT has the mandate of recommending policy measures to stimulate its development, as well as regulating the sector. Such activities are carried out through the National Bureau of Culture and Tourism under MICAT.
MoCI	Trade policy, business registration, regulation (food and beverages, imports and exports, fuel, goods), local development of SMEs. MoCI leads national efforts on private sector/trade development in key economic sectors including tourism. It formulates policies in pursuance of the Government's economic transformation agenda, focusing attention on priority sectors, overall micro, small and medium-sized enterprise development, industrial development and coordination with other ministries and agencies. Part of the current policy focus of MoCI is to encourage the diversification of investments in the country beyond extractive industries to include other relevant sectors such as tourism.
LNIC	LNIC provides support services to domestic and foreign investors in order to attract, facilitate and retain quality investments in Liberia. As such, LNIC has specific incentives to encourage investment in the tourism sector. LNIC also provides support to domestic enterprises on business plans and market intelligence.
Ministry of Foreign Affairs	The Ministry of Foreign Affairs plays a key role in the sector in issuing visas to Liberia, representing the country in the international diplomatic arena and liaising with international cooperation.
Ministry of Public Works	Tasked with closing the country's infrastructure gap, the Ministry of Public Works develops and implements appropriate strategies and programmes to develop not only road networks but also social infrastructure, as well as regularizing the construction industry.
Ministry of Transport	The Ministry of Transport's mission is to achieve an efficient transport system (air, land and maritime infrastructure) by providing policies to ensure service delivery and infrastructure development.
Ministry of Finance and Development Planning	The Ministry of Finance and Development Planning is responsible for formulating, institutionalizing and administering economic, development planning, fiscal and tax policies.
Forest Development Authority (FDA)	The Forest Development Authority is responsible for planning, implementing and monitoring all resource management programmes and enforcing regulations associated with national parks (e.g. Sapo National Park), as well as the promotion of tourism and ecotourism in such areas through its Division of Wildlife Conservation and Protected Area Management.
Ministry of Youth and Sports (MoYS)	As the governmental institution responsible for the formulation and implementation of policies and programmes supporting youth development, MoYS has implemented an initiative to provide training of youth in vocational areas, including hospitality.
Ministry of Education (MoE)	The mission of MoE is to provide quality education for all through the formulation of plans and policies and the design of development projects for all aspects of the education sector.
Civil Aviation Authority	The Civil Aviation Authority is tasked with providing regulatory and supervision services for a safe civil aviation sector. The Civil Aviation Authority provides licences to travel agencies and commercial airlines to operate in the country

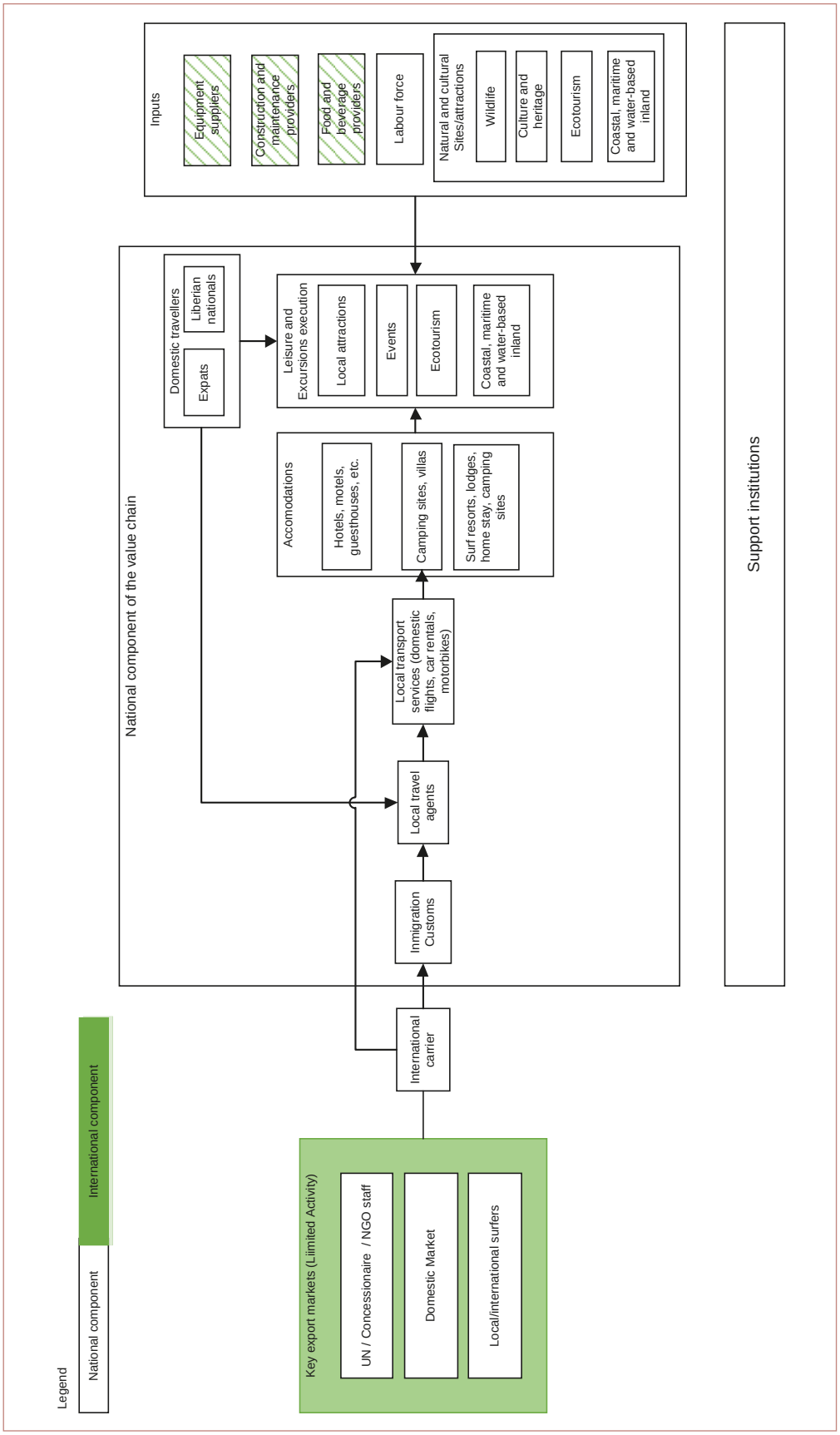
Box 8: Trade services institutions supporting the tourism sector

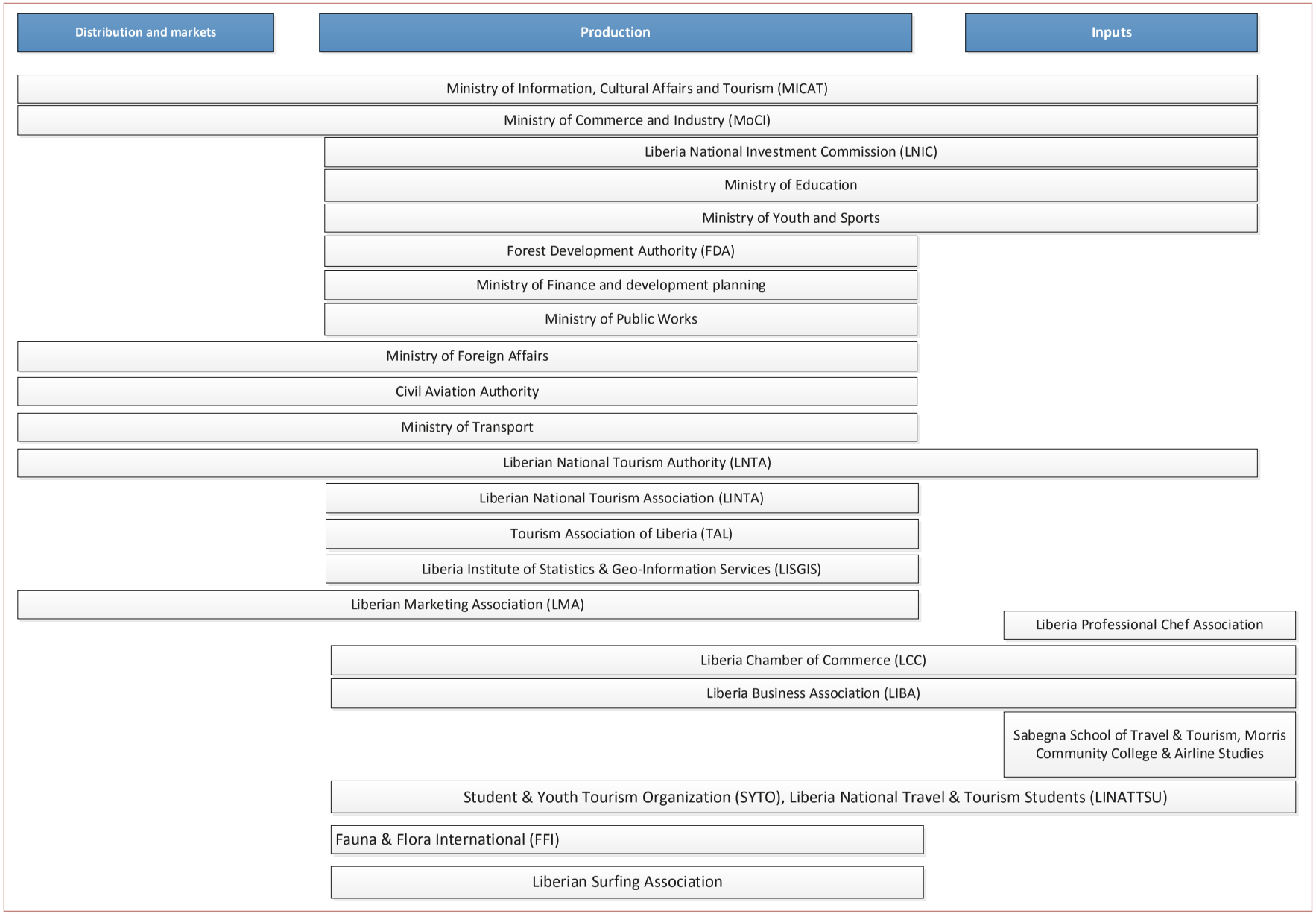
Trade services institutions	Mission / roles
Liberian national tourism authority	The creation of the Liberian national tourism authority is in process. This body will be the Government agency with sole responsibility for encouraging, promoting and developing tourism in Liberia, also serving as a regulatory agency with respect to strategic sectors of tourism. Among other responsibilities, the Liberian national tourism authority will be tasked with: • Designating, regulating and supervising enterprises operating in the sector; • Developing, managing and supervising tourism sites and tourism infrastructure projects; • Promoting and marketing Liberia as a tourist destination; • Providing technical and financial assistance for tourism projects.
LINTA	LINTA is currently in its developmental phase. Its mission will be to unify the voices of Liberian tourism operators to promote the tourism industry in Liberia.
TAL	TAL's mission is the promotion of tourist-related activities and policies with the ultimate objective of promoting the tourism sector. TAL's goals are to: • Establish a framework for public–private sector stakeholder collaboration in identifying and promoting activities aimed at improving the tourism industry; • Initiate dialogue with relevant stakeholders for selecting and providing infrastructure and policy guidance for the sector • Seek partnerships at the local and international levels to promote tourism in Liberia.
Liberia Institute of Statistics & Geo-Information Services (LISGIS)	LISGIS is responsible for collecting, managing, coordinating, supervising, evaluating, analysing, disseminating and setting quality standards for statistical information.
Liberian Marketing Association	The Liberian Marketing Association is an autonomous Government institution which organizes and manages the markets. Its main responsibility is maintaining the market infrastructure around Liberia.
Liberia Professional Chefs Association	The activities of the Liberia Professional Chefs Association include organizing trainings in areas such as basic food hygiene, hospitality and hotel management. The Association also seeks to ensure acceptable standards among its members.
Liberia Chamber of Commerce	The Chamber's mission is to represent and build the capacity of members, and to advocate for reforms that contribute to an enabling and conducive environment for the private sector.
Liberia Business Association	The Liberia Business Association provides capacity-building services to Liberian businesses.

Box 9: Civil society institutions supporting the tourism sector

Civil society institutions	Mission / roles
Sabegna School of Travel and Tourism	The Sabegna School of Travel and Tourism is a privately owned institution offering training programmes to people of all ages. It offers diplomas in hotel/tourism management, customer service, travel agent training and excursion management, among others. The School also supports students by connecting them to companies for potential internships.
Morris Community College and Airline Studies	Morris Community College and Airline Studies offers training in careers related to the travel industry such as airline ticketing and travel agency management.
Student and Youth Tourism Organization	The Student and Youth Tourism Organization's aim is to provide and sustain an adequate environment for the participation of young people in tourism development. The Organization's main objectives are: • To initiate youth participation in the establishment of public–private sector partnership in tourism efforts; • To update the skills capacity of Liberia's youth with respect to the tourism sector; • To stimulate value added in arts and handicrafts.
Liberia National Travel and Tourism Student Union	Liberia National Travel and Tourism Student Union advocates with the Government on behalf of those schools imparting education in travel and tourism, alongside the students' body.
Fauna & Flora International	Fauna & Flora International contributes to the protection and conservation of natural sites in Liberia with potential for tourism development. For example, in collaboration with the FDA, Fauna & Flora International has supported the re-establishment of Sapo National Park, where it currently engages in activities such as capacity-building support and ecological research.
Liberian Surfing Association	The Liberian Surfing Association works to grow the sport of surfing within Liberia. Moreover, the association uses surf as a means of youth mentoring and education, and a positive outlet for the youth of the country. It holds an annual surfing championship as well as water safety training courses, introduction to lifeguarding courses and weekly beach clean-ups. Their members work towards improving the livelihoods of their communities and act as ambassadors for tourists visiting the country.

Figure 9: *Current sector value chain*




Distribution and markets
Production
Inputs
Ministry of Information, Cultural Affairs and Tourism (MICAT)
Ministry of Commerce and Industry (MoCI)
Liberia National Investment Commission (LNIC)
Ministry of Education
Ministry of Youth and Sports
Forest Development Authority (FDA)
Ministry of Finance and development planning
Ministry of Public Works
Ministry of Foreign Affairs
Civil Aviation Authority
Ministry of Transport
Liberian National Tourism Authority (LNTA)
Liberian National Tourism Association (LINTA)
Tourism Association of Liberia (TAL)
Liberia Institute of Statistics & Geo-Information Services (LISGIS)
Liberian Marketing Association (LMA)
Liberia Professional Chef Association
Liberia Chamber of Commerce (LCC)
Liberia Business Association (LIBA)
Sabegna School of Travel & Tourism, Morris Community College & Airline Studies
Student & Youth Tourism Organization (SYTO), Liberia National Travel & Tourism Students (LINATTSU)
Fauna & Flora International (FFI)
Liberian Surfing Association

(cc) Abby flat-coat. Upgrade in view – room 409.

CURRENT PERFORMANCE OF THE LIBERIAN TOURISM SECTOR

Tourism is a labour-intensive sector which can potentially be a significant contributor to the Liberian economy. In 2010, the Liberian tourism industry directly employed 195,000 people. Moreover, 74.7% of tourism-related employment is estimated to benefit women, indicating that sectoral growth would have strong implications for gender issues.

Although there are insufficient data regarding the number and origin of international arrivals to the country, it is estimated that most foreign travellers are European and United States nationals. Three categories of tourists exist, based on the current core tourist offerings in the country (i.e. sports, nature and historical). Business connections between domestic and international travel agents are almost non-existent and thus international visitors usually organize their own travel through online booking platforms.

On the other hand, the relatively large expatriate community in Liberia working in United Nations entities and NGOs, along with Liberian nationals, constitutes another important market segment for the sector.

International tourism receipts for Liberia were approximately 15.01% (US$232 million) of GDP in 2011. The contribution of international tourism in exports was 18.56% in the same year. There are no updated statistics regarding the contribution of the tourism sector to total employment. Nevertheless, the potential of tourism for employment creation in the country has been widely acknowledged. The limited availability of reliable statistics makes it difficult to describe with accuracy the size and dynamics of Liberia's tourism sector both in terms of volumes and value.

As mentioned previously, the Ebola virus caused high economic costs, particularly in the Liberian tourism sector. Hotels and restaurants were adversely affected by the reduction of commercial flights and occupancy from international visitors. Weekly flights diminished from 27 weekly in August to only six in September (2014). Likewise, some hotels reported 10% occupancy rates as a result of the crisis.

Table 4: *Liberia's tourism value indicators*

Indicator	Value	Year
International tourism, receipts, current US$	US$91 million	2014
International tourism, receipts, % of GDP	15.01%	2011
International tourism, receipts, % of total exports	18.56%	2011

Source: World Bank and NationMaster based on World Bank data.

As a consequence, employment in the sector was negatively impacted as hotel workers were either laid off or had their working days reduced.[30] Although there is no available information on the number of international visitors to Liberia, data from OAG (Air Travel Intelligence) estimates that total seat capacity was down by roughly 65% in January 2015 compared with January 2014.[31]

CURRENT POLITICAL, LEGAL, REGULATORY AND DEVELOPMENT FRAMEWORK

Government support to the tourism industry has been rather limited, as reflected by the lack of a national tourism policy, the absence of initiatives to further develop the sector and the lack of information available for the industry.

NATIONAL TOURISM POLICY

In recognition of the potential of the tourism industry as an engine of investment, employment and economic growth, the Government of Liberia is in the process of developing the first Liberian national tourism policy, with the aim of promoting domestic and international tourism in the country by enabling a competitive business environment which facilitates and encourages investment in the sector. Such a policy will mandate the development of national and regional tourism strategies with actionable plans. In addition, the national tourism policy would consider several cross-cutting issues, particularly the empowerment of local communities, youth and women; and the conservation of the natural environment through the implementation of sustainable and developmental tourism practices in Liberia.

LIBERIAN NATIONAL TOURISM AUTHORITY – TO BE ESTABLISHED

The Liberian National Tourism Authority Act (2013), which is awaiting ratification, mandates the establishment of the Liberian national tourism authority, which will serve as the principal governmental agency responsible for encouraging, promoting and developing tourism as a major socioeconomic activity to generate foreign currency and employment in Liberia, as well as serving as a regulatory agency with respect to strategic sectors of tourism. The main functions of the authority will be:

- To designate, regulate and supervise enterprises operating in strategic sectors of tourism as defined by the authority;
- To develop, manage and supervise national parks, monuments, heritage sites and tourism infrastructure projects nationwide;
- To provide technical and financial assistance to qualified tourism projects, investors and proponents (both Government and private)
- To generate revenues through investment, loans or otherwise, to fund both national and corporate developmental needs and/or undertakings;
- To promote and market Liberia as a desirable tourist destination through the publication of tourism publicity and promotional materials, and participating in tourism fairs and exhibitions;
- To designate, regulate and supervise tourism enterprise zones;
- To generate employment and, consequently, income for the Government and people of the Republic of Liberia;
- To simulate the provision of other services and the strengthening of linkages to other sectors of the Liberian economy;
- To improve the quality of life of the Liberian population through the provision of educational and recreational events and opportunities;
- To promote high standards in the tourism industry through training and human resource development.

NATIONAL CULTURE POLICY

Lastly, the Liberia National Culture Policy, currently under implementation by the Bureau of Culture at MICAT, incorporated actions and recommendations with both direct and indirect impact on the tourism sector. Such policy proposed that local communities should work in partnership with relevant stakeholders to ensure that cultural and natural assets are protected and sustained for the promotion of tourism. Specifically, the Bureau of Culture is responsible for:

- Identifying and inscribing more of Liberia's major monuments, cultural and natural sites to be potentially recognized on the UNESCO World Heritage List;
- Strengthening the National Museum by working on projects to provide it with the necessary organs, management structure and resources to enable it to safeguard and exhibit the material heritage of Liberia to professional standards;
- Establishing strategies and structures to enhance the renovation, care and management of historic monuments, and cultural and natural sites.

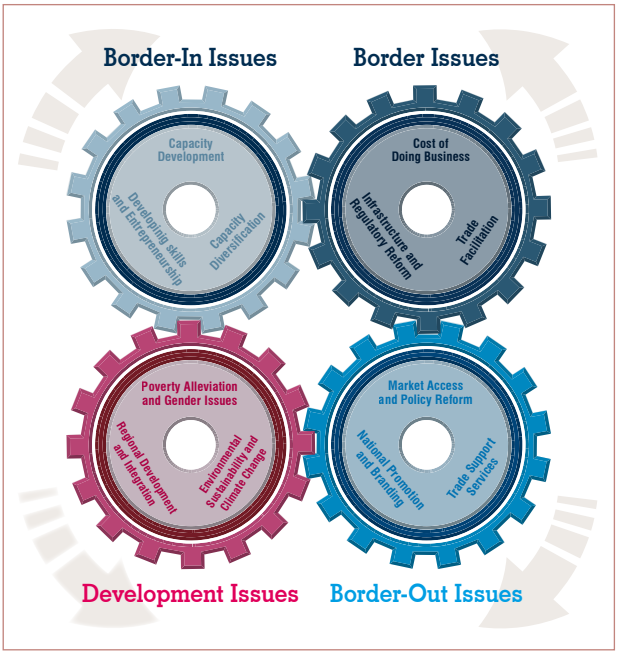
30. World Bank (2014). *The Economic Impact of the 2014 Ebola Epidemic: Short and Medium Term Estimates for Guinea, Liberia, and Sierra Leone*. Available from http://www.fao.org/fileadmin/templates/loge/docs/WorldBank_Ebola.pdf.

31. World Tourism Organization (2015) (a). *UNWTO World Tourism Barometer*, vol. 13, January. Available from https://wolfganghthome.files.wordpress.com/2015/02/unwto_barom15_01_january.pdf.

STRATEGIC ISSUES AND COMPETITIVENESS CONSTRAINTS

Traditionally, the scope of trade strategies has been defined in terms of market entry, such as market access, trade promotion and export development. This ignores several important factors in a country's competitiveness. For a trade strategy to be effective it must address a wider set of constraints, including any factor that limits: the ability of firms to supply export goods and services; the quality of the business environment; and the development impact of the country's trade, which is important to its sustainability. This integrated approach is illustrated by the four gears framework schematic on the right.

The tourism sector faces significant challenges that are currently impeding its growth. While some of the constraints are obvious (such as how to build the Liberian tourism brand in light of Ebola and the post-conflict environment, dedicating resources to tourism amid competing priorities, etc.), there are many nuances and root causes that must be addressed in order to strengthen the value chain. These issues and corresponding root causes are noted below and addressed through the Strategy's PoA.



The four gears are comprised of the following:

Border-in gear: Supply-side issues affect production capacity and include challenges in areas such as availability of appropriate skills and competencies, diversification capacity, and technology transfer.

Border gear: Business environment constraints are those that influence transaction costs, such as regulatory environment, administrative procedures and documentation, infrastructure bottlenecks, certification costs, Internet access and cost of support services.

Border-out gear: Market entry constraints are essentially external to the country (but may also be manifested internally), such as market access, market development, market diversification and export promotion.

Development gear: Social and economic concerns include poverty reduction, gender equity, youth development, environmental sustainability and regional integration.

Box 10: Overall impact of constraints impacting the tourism sector

A nascent sector marked by weak supply-side, business environment and market-side capabilities, unable to realize the significant potential residing in niches such as ecotourism and wildlife, cultural and coastal tourism.

(cc) Links. Lake Piso, Liberia.

BORDER-IN GEAR – SUPPLY-SIDE ISSUES

Product development in the tourism sector has stagnated

The tourism product on offer, regardless of niche, is weak, and tourism operators have struggled to develop products that are easily appreciated and absorbed by tourists. There is a near total absence of structured tourism products readily available in the market, whether guided tours originating from hotels or tour operators, or easily absorbable city, coastal, wildlife or other offerings.

Poor awareness of tourist attractions and sites by potential consumers in international as well as domestic markets is a concern. Another reason for weak product development is lack of coordination among value chain actors including hotels, taxis and restaurants, as well as weak distribution channels. There is also a marked unwillingness to develop products due to a perception of high risk involved by operators, i.e. no-one wants to undertake the risks of spearheading new products due to the risks associated with testing an unproven commodity in an unproven market. Operators also noted a high degree of mistrust among sector stakeholders and this has contributed to the lack of innovation and testing of new products

Lack of statistical information on the sector, limiting market segmentation and informed policymaking

The lack of statistics has a direct impact on decision-making by policymakers as well as awareness creation regarding the sector. Mechanisms for collecting tourism statistics in the country are quite weak and need to be developed. The lack of focus on collecting information on tourism originates right from visa procedures (Liberia does not issue tourism visas) to the airport (landing cards do not have tourism as one of the options for the 'purpose of visit category') to hotels (no feedback mechanism for collecting information from hotels).

The information gap extends to enumeration of tourist sites (with related information for each site such as available feeder services, health services, accommodation, etc.) and associated rehabilitation requirements. Other gaps include absence of accurate data on the number or categories (origin, age, reason for travel, etc.) of international arrivals to Liberia. There is also a lack of national guidelines for the use of techniques and methodologies to collect statistical information for the sector, low coordination among relevant institutions such as LISGIS and MICAT for data collection, and an absence of established dissemination channels for sector quantitative and qualitative data.

Tourism associations require broad-ranging technical and strategic advisory support

The two main private sector associations in the sector – LINTA and TAL – need assistance in developing their strategic plans and developing free and paid services that are relevant to the needs of their members and can help the associations become financially sustainable. Both organizations have also discussed opportunities for collaboration and ensuring that the presence of two associations with overlapping mandates does not cause confusion and fragmentation in the sector, without a definite resolution so far. In an environment with limited resources, a low base, enterprises with low capabilities and a donor base that is hesitant to devote resources, the presence of two contentious agencies will likely lead to some challenges for the sector unless a protocol for collaboration is strictly defined and followed.

Box 11: Private sector perspective – TAL / LINTA

TAL and LINTA focus on gathering local tourism professionals to promote Liberian tourism. Both organizations are centred on promoting sustainable development in the tourism industry. TAL, located in Monrovia, was incorporated in June 2013 by Liberian Burgess Houston, while LINTA was founded in 2014 by Liberian Shadrene Howard. Where LINTA is currently still in the developmental phase, TAL has begun some projects. TAL's vision is to 'revitalize, enhance and promote tourism in the country in order for Liberia to be recognized as a major tourism development catalyst and destination by the year 2021.' LINTA's mission is to 'unify the voices of tourism operators such as airlines, hotel and catering trades, car hire, travel agents and tour operators with the aim of fostering, encouraging and promoting the sustainable development and viability of the tourism industry in Liberia.' In recent times it has been suggested that the two associations merge to become one.

The organizations work towards the development of the sector by working with the Government of Liberia and MICAT by offering policy proposals (submitted a draft tourism policy to MICAT in 2011), training/capacity-building and destination management.

In February 2016 both TAL and LINTA contributed their suggestions about what it would take to get the Liberian tourism industry to the next level in a tourism consultation hosted by the International Trade Centre. On 3 March 2016 TAL met with the vice-president of Liberia to discuss avenues through which the tourism industry can help Liberia become a middle income country by 2030. The presentation focused on sensitization, capacity-building, gaining access to funding, and entrepreneurship in the sector.

The main motivation for promoting tourism is the need for economic growth. Tourism is known as a sector that spurs the growth of a country's GDP and also empowers youth and gender diversity in employment and job creation. Additional motivating factors include a cleaner and safer environment, room for increased security and health care, and the potential for investment.

The key challenges the organizations face are access to funding and the lack of belief and unification in the industry. Right now there is a keen interest in reaching out to international organizations like the United States Agency for International Development and UNWTO to seek funding. An additional challenge is the lack of statistical data for the industry. There is a need for the organizations to partner with similar associations in popular destinations to gain advice and participate in information sharing. There is also a need for private–public sector collaboration. The organizations want to make sure affiliates of both private and public sector stakeholders become active members.

The organizations aim to designate a 'tourism destination area' within Liberia. This will be an area with the sole purpose of catering to tourists and their needs. TAL hopes to begin this process in Robertsport, Grand Cape Mount County. Here it will establish an official office where it can work directly with communities and locals to spread awareness, develop projects and promote investment. Grand Cape Mount County will serve as a pilot for this initiative, which can eventually be spread to Margibi, Grand Bassa and Bong Counties, as suggested by LINTA.

Weak organization levels prevent sector stakeholders from capitalizing on their strengths for a common cause

Main root causes: Lack of coordination and collaboration among institutions stems from the absence of a national association that unifies public and private sector stakeholders. The two associations, LINTA and TAL, have made recent efforts to increase cooperation levels; however, these efforts need to be improved. Overlaps in their mandate in a resource-constrained environment mean that they will compete for donor and national development resources, and achieving financial sustainability will be difficult due to the low membership levels which will be further fragmented between the two associations. This will continue to remain a challenge in the short-to-medium term.

The two associations are relatively new and in need of financial and capacity-building support. Paid membership levels are low as sector operators are hesitant to make the investment, being unsure of the value of services on offer.

WTO accession presents a need for awareness-building among sector operators

There is a fair bit of uncertainty among sector stakeholders about what impact Liberia's WTO accession will have on them. In this regard, sensitization is required to properly inform operators on the areas in which they will likely face increased competition and areas in which they will not. It is extremely important for the sensitization to happen soon in order to build accurate perceptions and dispel rumours and misinformation.

BORDER GEAR – QUALITY OF THE BUSINESS ENVIRONMENT ISSUES

The road infrastructure outside Monrovia is underdeveloped, making it challenging to secure access to some major tourist sites and attractions

The high cost of construction of paved roads compared with laterite roads is one of the reasons for their low development. A significant number of networks are deteriorated and in need of maintenance. Roads are vulnerable to weather conditions, with few all-season roads available and low population density in rural areas. Additionally, the railway network is limited and focused on fulfilling the needs of concessionaire operations rather than public usage. The cumulative result is that access to main tourist destinations outside Monrovia remains a challenge.

High electricity and fuel-based operating costs prove burdensome for sector operators

Liberia suffers from deficient basic infrastructure due to the nearly complete destruction of the capacity of the country to supply energy and safe water, which occurred during the civil war. Access to electricity is not yet spread across the country, particularly in rural areas. The high incidence of power shortages leads to high costs of supplying electricity during the whole day through privately owned diesel generators.

The infrastructure for human capital development for tourism is extremely weak

There are two private hospitality training institutions and both cite significant capacity challenges in terms of facilities, lack of adequately trained trainers to deliver high-quality training and curricula updates. Low maturity levels of the sector mean attention has not been paid to this important issue. There is no national curriculum for hospitality training and there is an absence of nationally certified performance standards for training in tourism and hospitality management. There is also a need to establish robust on-the-job training/apprenticeship programmes that can supplement the formal training institutions. Additionally, the weak dialogue between relevant public sector institutions (e.g. MICAT and MoE), technical and vocational education and training (TVET) institutions and sector actors also hinders development in this area.

Limited access to trainings for young people outside Monrovia is also a challenge. Given the low base of the sector currently, the human capital infrastructure outside Monrovia is very weak. Additionally, the private sector has very little commitment to providing on-the-job training in collaboration with training institutions, although this is expected to change as the sector develops.

The hotel segment suffers from uneven quality levels

The main root causes are poor governance in the sector and the lack of a basic regulatory framework for adequate rating/monitoring of hotels. Currently, hotels rate themselves rather than through a structured review mechanism. There is also a lack of transparency and clarity on which specific guidelines are meant to be complied with during inspections.

The lack of national standards as reference points to reward quality improvement creates further challenges. Coordination and overlap of functions with other public agencies inspecting health standards and food safety has also been cited as a contributing factor.

Box 12: Private sector perspective – Sabegna School of Travel and Tourism

Sabegna School of Travel and Tourism was founded in 1998 by Henry B. Benson. The institution is located in Monrovia and currently has about 200 students. The school offers diplomas in hotel/tourism management, cargo handling, customer service, travel agent training and excursion management. The institute's training programmes are not limited to youth only but are available to people of all ages who are qualified and have met the criteria for eligibility for admission. Moreover, Sabegna is a career school and the trainings are geared towards those desiring employment or self-employment. Over the years, it has had more female participants than male participants. On a yearly basis, the percentage of females to males has been 95% to 5% annually. Candidates seeking admission to the institution must be high school graduates. The school is recognized by the Liberian Government and MoE, specifically the Bureau of Science, Technical and Vocational Education, and Special Education, and has 10-month training programmes.

Besides giving diplomas, the institution helps provide internships for deserving students. However, some of the internships are accepted and some are turned down by other institutions. They would like to seek assistance in convincing companies to see the need for providing internships to their students. The school advertises it programmes via radio communications and print media. Though this is being done, the Academic Dean, David Massey, states, 'the attraction of people to venture into various career paths has to do with their own inner desire and preferences. In my opinion I think they see as fanciful and lucrative aspiring to be an employee within the travel agent field'. The Sabegna School of Travel and Tourism is a privately owned institution. Current fees are:

- Standard National Diploma _____30,100 LRD (US$350)
- Higher National Diploma _____15,800 LRD (US$175)

A major challenge Sabegna faces is that the school is currently renting the building that they are in and are obligated to share the space. As this is the case, the hours of operations are now 1.00 p.m. – 5.00 p.m. Monday to Friday. There is a need for a new building to offer more classrooms and increased hours of operations, and to allow for about 200 more students to attend the school. The institution seeks private–public partnerships between the Government and the school to secure funding for the advancement of the institution as well as its services. They are also anxious to gain access to teacher training that can be conducted by an international institution. They would like to see teachers trained in subjects that are not currently being offered in order to increase the amount of courses they have. Currently the Sabegna School of Travel and Tourism is open to working with any international tourism institution in order to boost its standard.

Box 13: Private sector perspective – Royal Grand Hotel

The Royal Grand Hotel is a full service hotel located in Monrovia and was established in 2013 by the Eid family. Occupancy rates ranges from 20% to 90%. The backgrounds of the guests are diverse but most originate from the United States and Canada, Western Europe, Nigeria, Kenya, Ghana, Senegal, Côte D'Ivoire, China, Japan and Indonesia. Currently, the main target markets are consultants working for NGOs and the United Nations, as well as some private corporations that are involved in aid projects or new business ventures in Liberia. The hotel amenities include short-term accommodations (58 rooms), three restaurants, a spa, a banking hall, conference facilities (one conference room), a business centre, two travel agencies, a coffee shop and ground transportation rental.

According to General Manager Wael Hariz, the hotel has future plans including having a tour operations kiosk or housing a local tour operator in the hotel to cater to tourists, and upgrading the hotel website to promote tourism in Liberia. The hotel is currently promoted via word of mouth, on Trip Advisor and in inflight magazines. They do not work with any outbound operators at this time but are open to doing so.

Since opening the hotel has been faced with some challenges. The bad public image of West Africa due to Ebola and security issues is a challenge to increasing arrivals. The Ebola epidemic has caused a lasting drop of about 20% in the business due to the shutdown/slowdown of the mining sector and some other sectors. The use of generators is also an issue due to the high cost. The generators consume 15,000 gallons of fuel per month in addition to the cost of maintaining the generators, which is around US$5,000 per month. According to Wael, 'there is a need for the tourism industry to be more unified. There are some good attempts to promote the potential of the industry but stakeholders in the sector need to participate in more information sharing. There is no practice regarding information sharing. People usually get information via word of mouth.' He also states, 'there is a need to standardize the quality of all hotels and resorts operating in Liberia'.

Box 14: Private sector perspective – Passion Hotel

Passion Hotel was founded in 2008 by Liberian entrepreneurs Mr. and Mrs. S. Peter Varpilah. It is a full service hotel located in Gbanga, Liberia (Bong County). The hotel provides short-term accommodations (30 rooms), a full restaurant service, and catering and conference facilities. In promoting Bong County as a tourist destination the hotel is working towards offering tour services and linking with local tour operators to encourage more leisure travellers to come to Gbanga. Currently, the hotel mainly caters to expat / NGO / business travellers. They are appreciative of this business but would like to see more tourists stay with them. In achieving this they are working towards promoting Gbanga as 'a city out of the city' to tourists. There are challenges with staffing, training and the customer service skills of employees. Lack of electricity is another major challenge. There is a huge cost associated with running a generator. In the future, Mrs. Varpilah would like to franchise the hotel to expand to other areas of the country.

Food sanitation regulations are required, along with enhanced market surveillance

There is hesitance among expats to expand their consumption of food products – apart from the typical food outlets that they frequent – due to a perception of poor food quality. A nationwide food sanitation regulation accompanied by market surveillance capabilities needs to be deployed to ensure a minimum level of quality. Such food sanitation regulations will become the precursors for compliance with international food safety standards.

The air transportation structure will need to be expanded, keeping in mind the limited flight connectivity to and within Liberia and the relatively small air transport market

There are no direct flights from key markets in the EU to Monrovia and most flights are routed through Freetown. The frequency of flights to Liberia, including intra-African connections, is relatively low. A major drop in commercial flights to the country has been experienced as a consequence of the 2014 Ebola outbreak, although operations are limping back to normalcy. The airport infrastructure within the country to serve domestic flights is also deficient but, if upgraded, could offset the challenges posed by the bad road conditions.

Box 15: Private sector perspectives – Aspen Medical

Aspen Medical Liberia was established in Monrovia in 2014. It is Monrovia's leading private medical clinic offering world-class general medical and trauma care and serving the public and private sectors, diplomatic community, NGOs and other groups.

Aspen Medical products and services include primary care, trauma care, specialized equipment for diagnostic and critical care support, emergency room and patient stabilization facilities, observation/recovery room, pharmacy, in-house laboratory testing and specialty services. In 2016 Aspen introduced a B1900C twin turboprop aircraft that provides aero-medical evacuation capabilities and general aviation services – a first. There has never been a dedicated aero-medical evacuation aircraft based in Liberal of such a high standard. Aspen Medical is motivated to bring Liberia's health-care system up to international standard. To do this effectively it works towards reaching people in rural areas that do not have access to health care. It also strives to provide adequate health care for people living in Liberia as well as tourists that are in need. Additionally, Aspen Medical works towards making sure those in need of care can get the best treatment at hospitals in the various countries that they are connected to.

According to Managing Consultant Jeff White, Aspen Medical faces many challenges, stating, 'doing business in Liberia is difficult due to lack of regulations. This makes Liberia a tough business environment.' Tax and labour laws are confusing and there is a lack of regulations stating a specific amount to be paid (prices vary at different entities when they should not). Furthermore, there seems to be a lack of information sharing and understanding of what exactly is required to do business in the country by entities such as the Bureau of Immigration and Naturalization, and MoCI. 'This is confusing for businesses and could scare away potential investors.' Aspen Medical also experiences issues with Customs, where prices are too high and procedures do not allow for goods to be brought in smoothly. Mr. White also stated the need for landing strips and electricity to be brought up to standard in various counties: 'infrastructure is poor in these areas'. These things are a hindrance for being able to pick people up by plane in emergency situations. This is something to consider strongly when identifying future tourist destinations in Liberia.

Aspen Medical aims to continue to build a more robust medical system in Liberia. The company aspires to build surgical suites to meet international standards both in Monrovia and other parts of Liberia. In the future they hope to acquire larger planes to be able to fly direct to hospitals in Germany and other parts of Europe to provide Liberians with superior health care.

The institutional coverage outside of Monrovia is very weak

Key institutions such as MICAT, LNIC and MoCI need to improve their level of coverage outside Monrovia as their regional network is currently quite weak. As the sector develops it will require more support from the trade support institutions outside Monrovia, specifically in expected tourism hubs such as Robertsport. Therefore it is an important prerequisite for the sector.

Liberia does not currently issue tourism visas and this has ramifications for brand perception and statistics collection, among other issues

Tourism visas are not issued by Liberia, which is a policy based on security considerations. There is also a lack of visa on arrival or online visa services, although this is currently under review. These constraints need to be reviewed so that the information gap and brand perception can be improved.

The support infrastructure for tourists to access information across the value chain is weak

Insufficient tourist facilities and services stem from the lack of adequate accommodation facilities outside Monrovia. There is also a complete absence of tourist service centres and tourist information kiosks both in and outside Monrovia. The lack of basic amenities such as rest stops, toilets and first aid centres is spread across key routes between tourist nodes (complicated by the poor road infrastructure).

Part of the challenge also lies in the lack of communication channels between support institutions and local authorities. As the sector grows, coordination between supporting institutions in Monrovia and regional nodes will need to improve as well.

The transportation infrastructure within Monrovia, at Monrovia airport and in Monrovia regional hubs is weak and does not inspire confidence in tourists

There is currently no system of standardized rates for taxis between the airport and Monrovia. There are some taxi companies, such as Solo Cab in Monrovia, which have started offering standardized rates as well as a clean and secure transportation experience, and this must be encouraged. An enforcement mechanism is also required in order to ensure compliance by taxi drivers.

The transportation infrastructure between Monrovia and other locations is quite poor and requires thought on development of alternate means of transport such as seaplane or ferry boat access in addition to road improvements.

The Liberian National Tourism Authority Act needs to be ratified and the agency established as an autonomous body working in close collaboration with MICAT

An act for establishing the Liberian national tourism authority has been drafted and is pending approval by the senate. Once approved, the agency will be established as an autonomous body separated from but working in close collaboration with MICAT. The Liberian national tourism authority, which in organizational terms closely mirrors a tourism board in other counties, is considered essential for driving policies and development projects in the sector as well as encouraging innovation. The pending Act must be approved and ratified as soon as possible so that efforts to operationalize such a body can begin.

Box 16: Private sector perspectives – Mission Aviation Fellowship International

Mission Aviation Fellowship International is a Christian organization that focuses on sharing the love of Jesus Christ through aviation and technology so that isolated people may be physically and spiritually transformed. They established a Liberian office in October 2015. Mission Aviation services include mission work, medical flights, transport of NGO and medical workers, accommodating commercial passengers (very rare) and the reconstruction of runways and airstrips. In recent times Mission Aviation assisted in the completion of the Tapeta airstrip located in Nimba County and also constructed a maintenance base at the James Spriggs Payne Airport so planes can be serviced. Mission Aviation Fellowship is motivated to open Liberia though accessibility, which is being done by reconstructing airstrips in various counties. Country Director Emile Kundig states that current challenges include finding capable staff. He also mentioned the need for more aircraft. Currently there is only one aircraft, which they are renting, and they would like to acquire at least two they can call their own. In moving forward, Mission Aviation wishes to extend their services to Liberia's neighbouring countries and also fly commercially for those that want to participate in 'voluntourism'.

There is an immediate need to restructure the entire national park system, starting with Sapo National Park

The national park infrastructure was largely destroyed during the conflict and prior initiatives for rebuilding capacities at Sapo National Park have met with mixed success due to a host of challenges. For one, the damage to the park is complete and no fixed-term development project will be able to get the park up and running unless there is significant focus placed on ensuring sustainability in terms of revenue generation/financial operations; human capital development including park rangers and administrative/management personnel; conservation efforts; and technical overhaul. The park has enough potential – in terms of its endemic flora and fauna resources, as well as brand recognition through species such as the pygmy hippopotamus – to draw in a large number of tourists but essential prerequisites include infrastructure and technical improvements, development of a comprehensive strategic plan for at least the next five years and meeting the staffing requirements of the park. The focus can be scaled up to other locations as time progresses.

There is also a need to explore alternate means of funding that can be used for maintaining the protected areas, perhaps through a trust fund. Existing funds/conservation programmes that are defunct (such as the Pygmy Hippo Foundation) need to be revived.

A competent wildlife authority should be established to guide development in the wildlife segment

Wildlife and their associated habitats are two of Liberia's most precious resources and currently there is no competent authority for handling wildlife issues. While the FDA has a mandate to oversee the country's forest resources and MICAT is in charge of the overall tourism sector, it is unclear which agency bears the mandate to pursue proper planning and development in the wildlife sector.

The system for incentivizing tourism investments is both unclear and limited for potential investors

Both investors and Liberian investment seekers face uncertainty due to unclear policies providing incentives to invest in the sector. The lack of sector focus at the policy level extends to investment promotion as well, and there is a lack of accurate data available to investors. Limited promotion of the tourism sector to potential investors abroad also acts as a barrier to investment. There is a need for LNIC, MoCI and other institutions to develop clear procedures for linking potential investors with investment seekers, reviewing tourism-specific investment regulations (including linking the review of the Liberia Revenue Code with the tourism sector) and speeding up tourism promotion/attraction efforts in prioritized segments such as entertainment, ecotourism, etc.

Equally important is the requirement for LNIC to maintain efficient post-deal support and facilitation for investors, as this has a bearing on the sustainability of investments and continued interest of investors.

Weak financial infrastructure presents challenges to tourists

There are too few automated teller machines (ATMs) in the country and weak connectivity of ATMs to global electronic banking networks. Travellers cheques are not accepted in the country. Individuals are required to be present in person for credit card payments which, coupled with the limited number of point of sale terminals in the country, is not conducive to attracting international tourists.

Access to finance is a significant issue for sector operators, preventing operational and strategic management

The lack of policy focus on tourism has translated to inadequate focus by banks on the needs of sector operators. The limited access to credit stems from the absence of soft loans or other types of financial tools available for small stakeholders in the sector, which limits their ability to expand their businesses. Banks associate tourism sector operators with the high credit risks associated with small businesses and the lack of a financial system able to manage these risks.

BORDER-OUT GEAR – MARKET ENTRY ISSUES

Negative perception of Liberia in target markets due to the recent Ebola outbreak and past conflicts has the net impact of Liberia not being viewed as a tourist destination

Liberia elicits a perception of an unsafe destination due to an association with conflict and health hazards. Negative reviews and travel warnings by foreign media and governments discourage travel to Liberia in association with the aforementioned facts and other security and health concerns. There are genuine weaknesses in the health and security infrastructure and recent events (Ebola, Lassa fever outbreaks, United Nations Mission in Liberia drawdown) have exacerbated perceptions of weaknesses in target markets. A more proactive approach is needed to alleviate concerns in international markets and spread the message that Liberia is safe and open for business and tourism.

(cc) Michael Keating. Lunch on the Beach of Robertsport.

Additionally, tourist security and health infrastructure are critical factors that the majority of international tourists will seek to have satisfied before they consider Liberia as a viable tourism destination.

Liberia tourism needs to be promoted better in international and domestic markets

Inadequate brand promotion efforts by the Government and private sector operators include the absence of a marketing strategy to counteract the country's negative image and to position Liberian tourist destinations. A national marketing and branding campaign is needed to position the Liberian tourism brand. Wildlife assets such as the pygmy hippopotamus can be used to develop the tourism and wildlife brand. A tourism video, marketing collateral and an increased online presence would also go a long way in promoting the sector.

The limited presence of Liberia in international tourism fairs and exhibitions further prevents brand development and awareness of Liberia tourism. Public sector institutions involved in tourism (such as MICAT) and private sector entities (including the tourism associations LINTA and TAL, as well as individual private sector tourism operators) need to increase their presence in international trade fairs as a means of improving awareness and at the same time promoting Liberia as a destination. On a related front, more can be done to strengthen the awareness of tourist sites/attractions in the domestic market as a means to spur national tourism.

Understanding of buyer requirements in key markets needs to be improved

Buyer requirements are specific requirements that need to be satisfied for a particular market segment before tourists in that particular market agree to consume the product. Therefore, product development should start from the markets. It is essential for Liberian tourism operators to better understand the buyer requirements of particular markets so that they can tailor their offerings accordingly. For instance, if the surfing sector wants to attract university students from the EU who may be interested in exploring the Liberian surf proposition and costs are an important factor (buyer requirement) for them, then the operators would need to meet the price point or provide a combination of product offerings for a higher price so that the students can appreciate the value. Currently, this market-driven approach to product development is not in place and needs to be introduced.

Sector operators have not capitalized on a ready market in the form of domestic Liberian consumers as well as the high number of expats who either reside in Liberia or visit on missions or work visits

There is a ready market in Liberia in the form of high number of expats –with medium to high purchasing power– who either live in or travel frequently to and from Liberia. These expats work at the United Nations, international NGOs and international concessionaires with operations in the country. Faced with limited choices, these consumers frequent a select number of establishments. This market segment constitutes a significant opportunity for Liberian tourism operators to test and expand their product base.

The domestic market has also not been properly tapped by Liberian operators for much the same reasons. As with other sectors, the domestic market is essential and cannot be neglected if the sector is to grow and become sustainable. Given the recent experience of expats leaving the country during the Ebola crisis, this market segment is essential to sustainability.

A disconnect exists between the price point for surf tourism in Liberia (airfares, travel times, nightly rates both in Monrovia and Robertsport) and the offering (outside of the quality of the waves)

The low-end traveller who would have no problem with the relative hardships of travel in terms of visas, post-Ebola stigma, the challenging aesthetics driving out of Monrovia and the open defecation common in Robertsport would baulk at paying up to $60 per night for very simple accommodations with many service gaps. The higher-end surf tourists who can afford the cost would baulk at the quality of the accommodations and service levels in Robertsport. The current value product is not at a level that could be plugged into one of the few surf tourism wholesaler/retailer lists of offerings. Therefore, hotels/lodges in surfing areas need to consider the appropriate price point carefully.

DEVELOPMENT GEAR

There is significant potential to increase the involvement of Liberian youth in productive activities involved in the tourism value chain and away from the current levels of marginalization

With 70% of the population under the age of 35, the business case for involving youth has been clear from the start in Liberia. In Africa, 60% of the unemployed are youth, a worrisome sign when it is considered that the population of 200 million African youth will double by 2045.

Another reason for the urgent need to involve youth is the pressure on Monrovia. Driven by the lack of economic activities outside Monrovia, youth leave their communities and migrate to Monrovia in search of jobs. This has resulted in a city meant for half a million people hosting nearly 1 million, or 25% of the country's population, leaving fragmented communities in rural areas. There is an urgent need to develop economic opportunities in other counties through which youth can be persuaded to move back home, resulting in reverse migration and decreased pressure on Montserrado County, apart from the socio-economic benefits to youth and their communities.

Overall, there is a lack of training opportunities in tourism for youth, especially outside Monrovia in key tourist destinations, although young people are enthusiastic about getting involved in tourism activities, as evidenced by activity in the surfing sector. Programmes providing economic alternatives for young people involved in tourism activities are required and there is a strong need for better alignment between the educational offering and private sector needs, including soft skills (e.g. communication, time management) and customer service knowledge. The skills shortage is accentuated by weak academic foundations at the primary and secondary school level, further strengthening the business case for an overhaul of the educational system.

Care for the environment will need to accompany development in the tourism sector in lockstep

The record in environmental protection in Liberia has been mixed. In the past, weakness in law enforcement to protect natural sites and attractions as well as illegal activity related to mining, hunting, farming, etc. have damaged areas important from natural history, wildlife and community angles. A high level of degradation of nature sites due to former mining activities, including in areas such as the UNESCO World Heritage Site Mount Nimba Strict Nature Reserve, has been recorded.

Although awareness of the need to protect these areas is increasing, it will be critical to ensure that the environment is kept squarely in mind during project design and implementation, especially as activity in development and investment ramps up. There will be a need to revisit environmental regulations currently in place. Improvements will also be required in any awareness-raising campaigns directed at local communities on the importance of biodiversity conservation.

There is also insufficient information and data collection on national natural resources. An enumeration and subsequent gap analysis to assess the current state and requirements of major tourism sites is needed.

Ensuring that communities receive equitable benefit from investments and tourism activities that occur near or on their land is essential

One of the central tenets of the Strategy design process has been community involvement, especially during the regional consultations. This focus will continue during the implementation of project activities. It is important to involve communities in making informed and empowered decisions on projects that affect their land. Communities will decide for themselves –with due advice provided by experts as required –on the optimum and agreeable model for land ownership, operations, revenue sharing and other aspects.

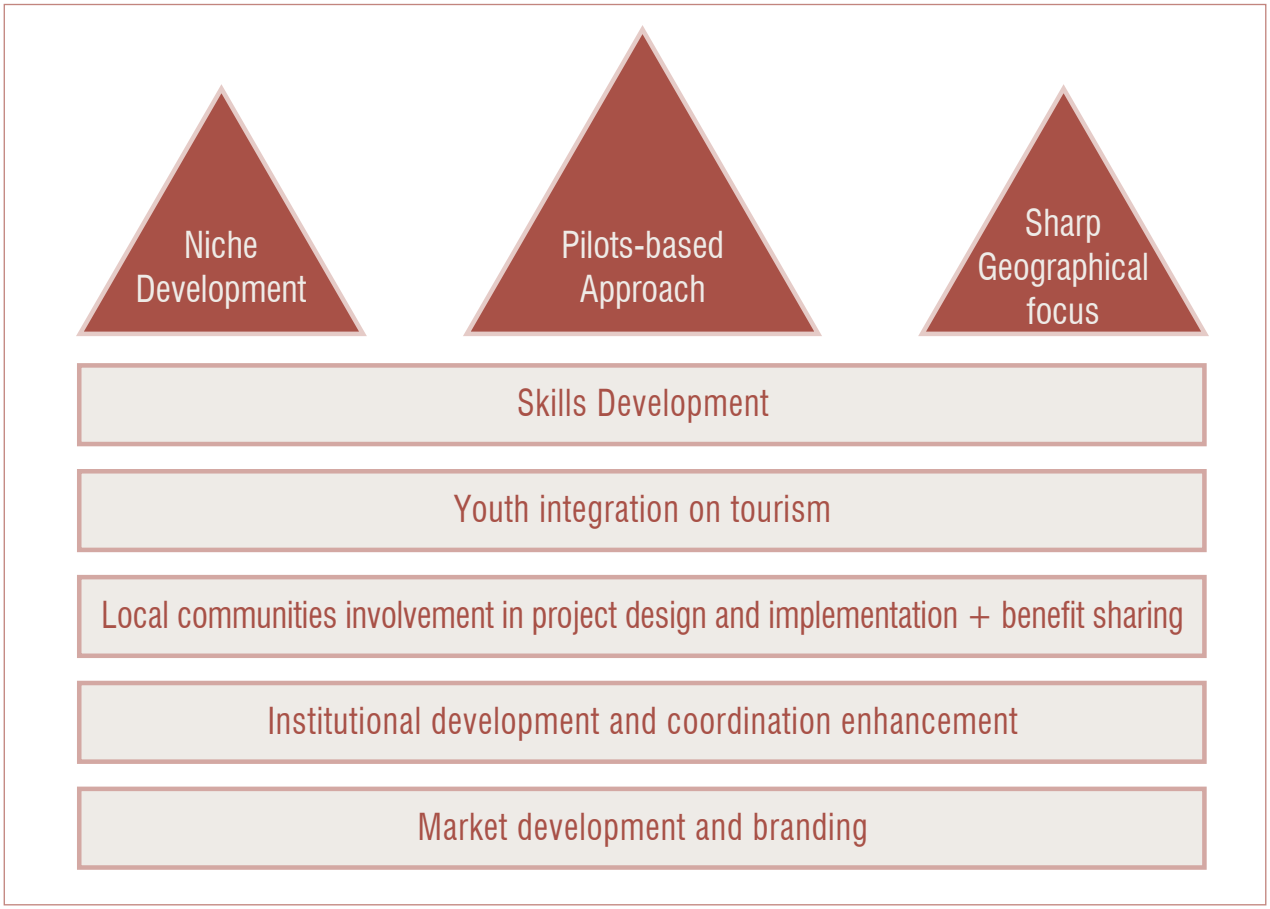
STRATEGIC DIRECTION OF THE SECTOR IN THE FUTURE

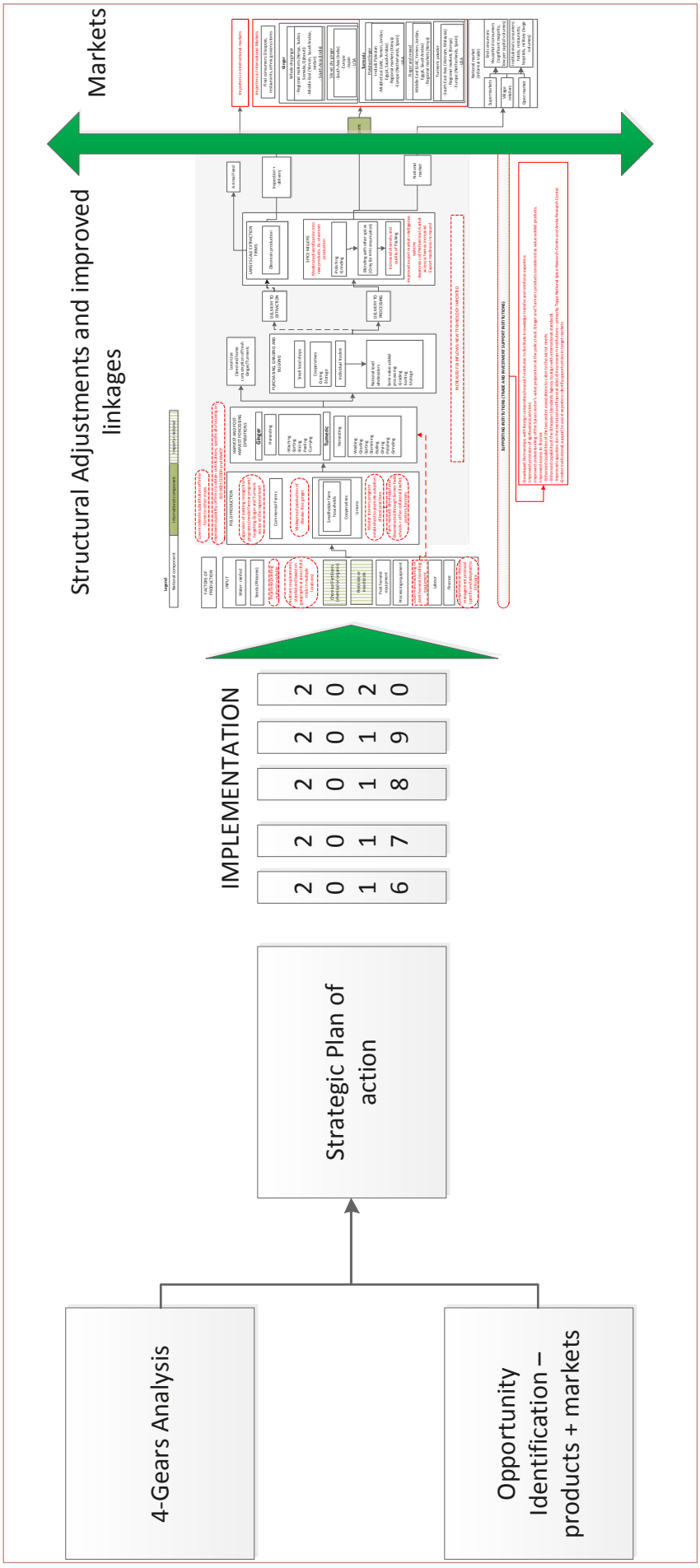
FUTURE VALUE CHAIN

The future value chain reflects the expected impact stemming from implementation of the PoA activities over the next five years. The implementation of these activities will lead to a future state that is characterized by greater competitiveness across the value chain. As indicated in figure 10, the targeted efforts detailed in the PoA address the constraints identified in the four gears analysis as well as specific opportunities in target markets and product diversification.

The scope for improvements is immense and extends across the value chain. In some cases the scope involves strengthening of existing linkages as well as creation of new linkages and process flows. Market development will also be a focus area, aimed at developing domestic markets as well as other key market segments.

Figure 10: *Future value chain*




Markets
Structural Adjustments and improved linkages
IMPLEMENTATION
2016 2017 2018 2019 2020
Strategic Plan of action
4-Gears Analysis
Opportunity Identification – products + markets

1. Pilots! Pilots! Pilots! – The strategy for rolling out implementation will centre on developing pilots and retaining or scaling up successes. This will ensure that resources are invested in areas that show potential for success and will also attract new development partners and investors, as well as ensuring that sparse resources are judiciously used. This is especially relevant given the low base of the Liberian tourism sector, which is an unproven commodity and requires significant resources. Donors and development partners will also need convincing to include tourism in their mandate and pilots are an appropriate mechanism to develop the business case for doing so.

2. Focus on select geographical areas to scale up as the Strategy progresses – Similarly to the 'pilots-based' approach, the Strategy will focus initially on four key regional nodes apart from Monrovia. These are Robertsport (surfing), Buchanan, Kpatawee Falls (and related areas in Bong County) and Sapo National Park in Sinoe County. These are areas with high potential that can lead tourism development and offer success stories and lessons learned which will be integrated in other areas. It is anticipated that pilots that are successful in these areas can then be expanded to other parts of the country in the latter half of the Strategy time frame.

3. Niche product development – The Strategy will follow niche development in order to concentrate effort and resources in tourism niches with high potential. Four niches have been identified: surfing tourism, ecotourism, wildlife tourism and cultural tourism. The combination of the pilots-based approach, sharp geographical focus and niche product development is expected to provide an optimum return on the resources invested in Strategy implementation. All four niches have high potential for development and, to a significant degree, their business case has already been proven through ad hoc activities which yielded results in the pre- and post-civil war periods.

4. Policy and institutional capacities development – Given the lack of focus on the tourism sector, institutions ranging from ministries to private sector associations have, until recently, been slow to react and develop services geared towards the sector. Without this institutional focus, the sector will not thrive. Therefore the Strategy will focus on strengthening coordination between trade and investment support institutions and incorporating a tourism focus in institutional mandates where necessary. The policy focus has been steadily increasing and this needs to be maintained, whether through the establishment of the Liberian national tourism authority or consideration of tourism in the ongoing review of the Liberia Revenue Code.

5. Setting up implementation management structures will be critical to the sustainability of Strategy implementation. A core team comprised of public and private sector institutions will be formalized. A secretariat will be identified and empowered to assist the core team in shepherding the implementation process.

6. Leveraging markets closest to home – Even with the United Nations Mission in Liberia drawdown, there is a significant United Nations and NGO community in Liberia that has medium–high purchasing power but is rather starved of consumable tourism products such as tours, clean beaches with facilities, etc. Additionally, the large concessionaires have significant numbers of international staff that live in Liberia or travel there frequently. Most concessions are based outside Monrovia so if products are developed close to them, this will constitute a ready market. These markets must be tapped into, especially considering that they are located in the country.

7. The domestic market is also important and is comprised of consumers with low–medium purchasing power. Catering to the tastes of this domestic market will help companies build localized (and unique) products, and gain experience and revenue which in turn will build the capacities of firms to cater to market segments with more advanced buyer requirements.

8. No growth without community involvement – The Strategy incorporates the feedback received from local communities and groups in each of the regional consultations. Ensuring that communities receive equitable benefit from investments and tourism activities that occur near or on their land is essential. MICAT, LNIC and other agencies have recognized the need to involve tribal groups and local communities in project design and implementation, and this will be integral to the overall implementation process.

9. Integration of youth in productive activities plus human capital development (including entrepreneurship development) across the value chain – In recognition of the high proportion of youth in Liberia's population and the high unemployment rate in this segment, the PoA focuses heavily on proactively involving youth.

10. Youth groups are well organized in the country and maintain strong ties with their communities. This bodes quite well for designing and implementing projects with a strong youth component. The PoA therefore is heavily geared towards skills development, entrepreneurship development and job placement for Liberian youth interested in tourism. A significant number of activities in the PoA will involve youth.

11. Skills development at multiple levels – Skills development is a major challenge requiring urgent redressal and support. External expertise from regional and international institutions that are centres of excellence will be sought and brought into the country through means including curricula upgrades for Liberian training institutes, Master Trainer courses, exchange programmes, etc. At the enterprise level, support will need to be provided to hotels and other tourism operators to establish on-the-job training programmes. Apprenticeship programmes will be expanded and mechanisms established to connect jobseekers to companies. These range from setting up job boards to job fairs.

12. A large number of linkages with other value chains offer significant room for fostering cross-sectoral collaborations – These linkages have been comprehensively analysed during the Strategy design and will be actively explored throughout the Strategy implementation process.

13. Environment – The environmental dimension will be a key element of the Strategy implementation process. Community involvement, as well as bodies such as the Environmental Protection Agency, will be integral to project elaboration and implementation to ensure that the environment remains a priority during the entire time frame of the Strategy.

Figure 11: *Tourism cross-sectoral linkages*

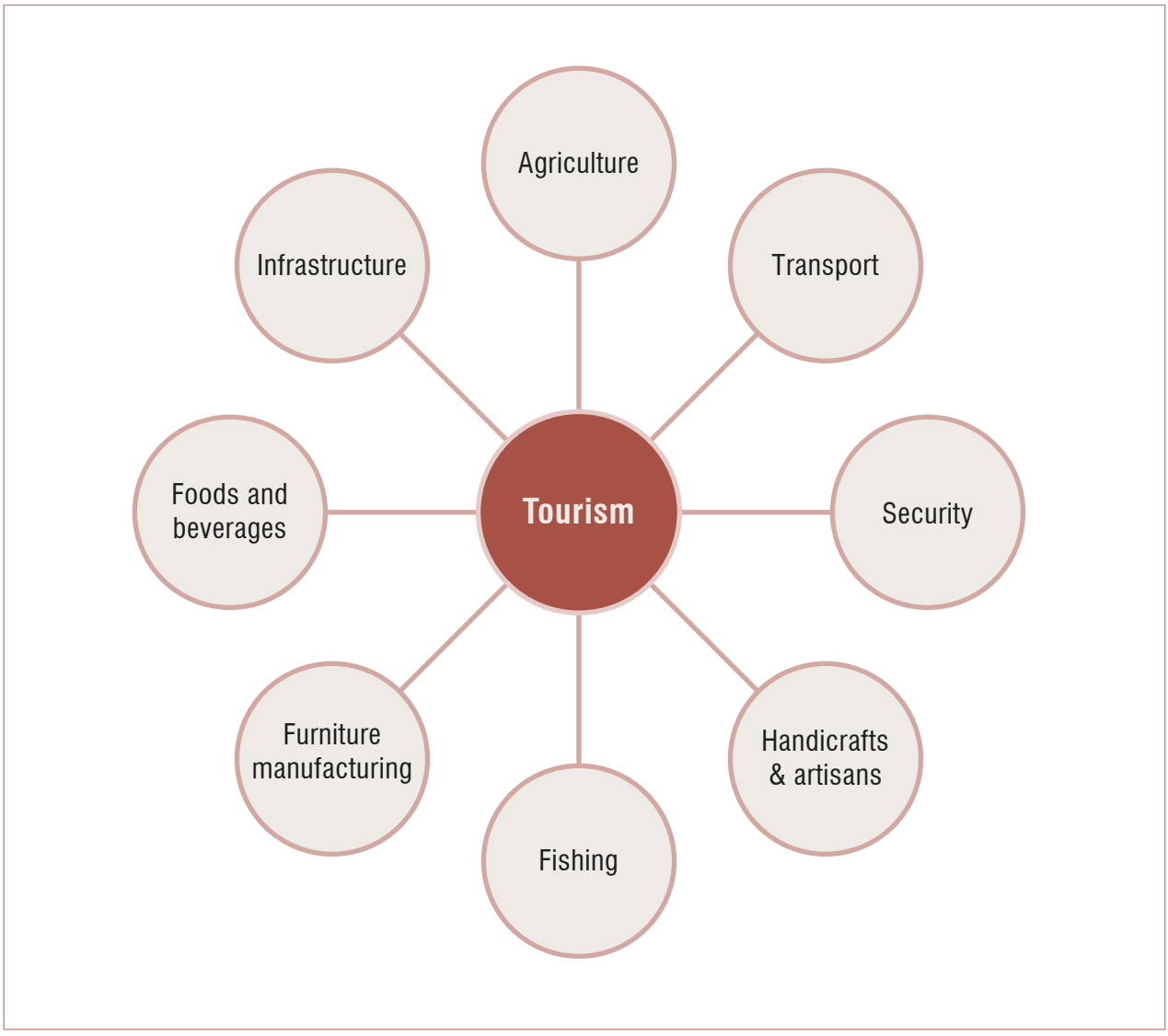
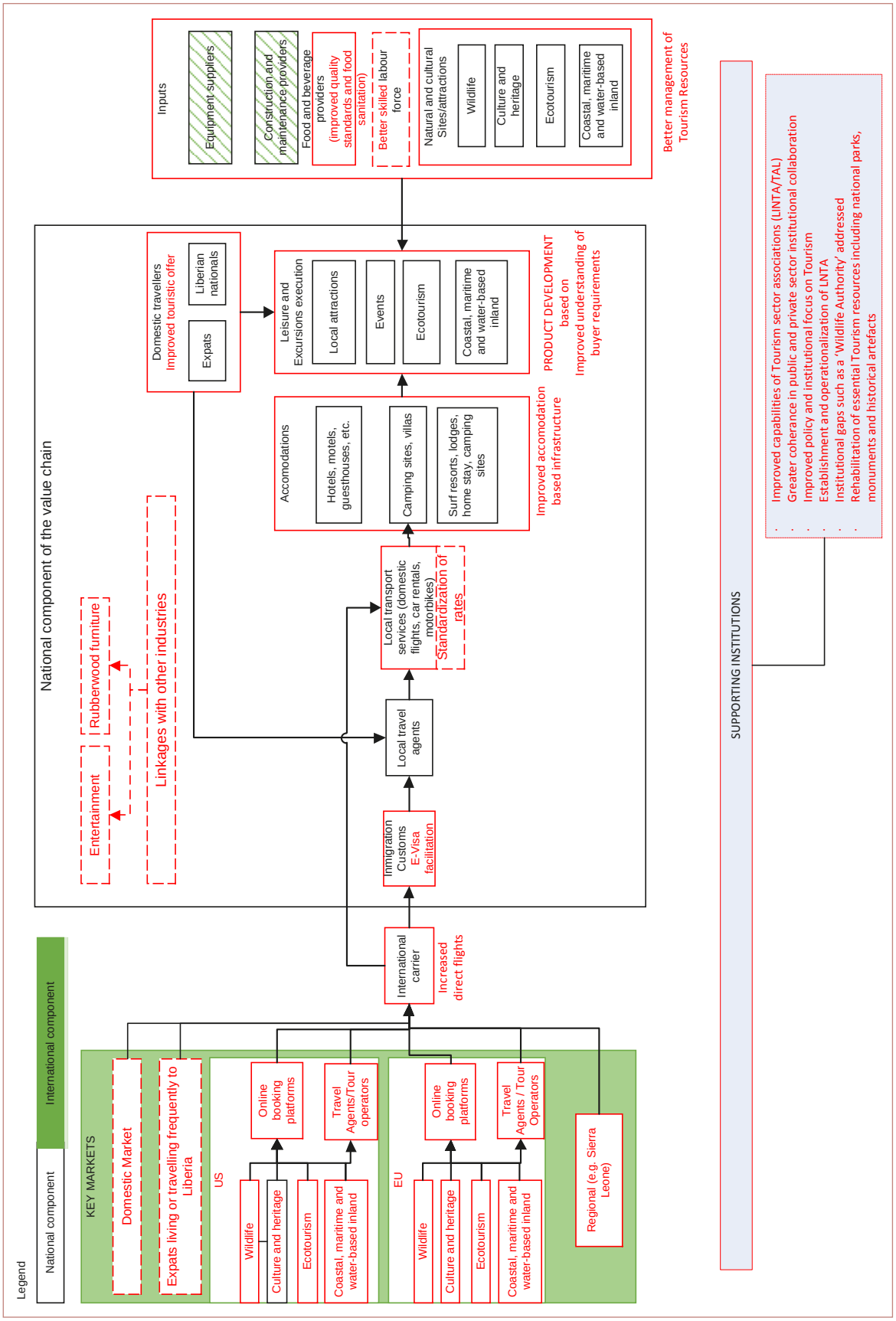


Figure 12: *Future value chain*



Box 17: Reviving tourism in post-conflict destinations

Post-conflict locations face the following common challenges in developing the tourism sector:

- Ensure health and safety of potential visitors.
- Effectively communicate that message across all channels to restore confidence.
- Improve national infrastructure and human capital.

The first and biggest challenge is to ensure the safety of potential visitors and effectively communicate that message across all channels to restore tourists' and investors' confidence. Along with rebuilding national image, improving national infrastructure and human capital are other fundamental areas that need to be addressed to recover the tourism industry. Although reviving tourism is challenging, there have been successful cases of relatively quick revivals of tourist arrival numbers and sector restructuring in post-conflict countries.

Sri Lanka

Sri Lanka is a prominent case of tourism recovery in a post-conflict situation. The country recently emerged from a three-decade-long civil war which caused massive destruction of lives, livelihoods and infrastructure. The civil war prevented almost all tourism on the island, particularly on the northern and eastern sides.

The Government of Sri Lanka developed a National Tourism Strategy with the objective of sustaining the revival of the sector. Several measures have been implemented, including a one-stop unit to facilitate investment in the industry, the 'home stay' programme to provide facilities for tourists and the 'Visit Sri Lanka' 2011 programme which helped attract tourists from new markets. For the latter, key attractions in the country were categorized in eight themes: Heritage, Festive, Scenic, Essence, Thrills, Bliss, Pristine and Wild. Additionally, the Government invested in infrastructure and services, including programmes to train informal service providers to bring them to formality.

Since the end of the conflict, tourism has steadily risen from about 400,000 in 2009 to surpass 1,500 million international arrivals in 2014, which represented an increase of 4.7% over the previous year. Additionally, tourism has become the third-largest earner of foreign exchange for the country and a large source of employment. Moreover, as home to eight UNESCO world heritage sites, pristine beaches and beautiful landscapes, the country has been selected as best travel destination by several travel magazines.

Rwanda

Rwanda's violent past marked by a civil war and genocide dominated the international image of the country for several years. The aftermath of the conflict left the country with many pressing and enormous challenges such as the reintegration of refugees and former rebels into society and the development of a justice system. The development of tourism was not a top priority in the beginning and it was certainly difficult to attract tourists after the genocide. Nevertheless, the sector was able to restart activities fairly quickly.

There were several factors that contributed to the recovery of the tourism sector. The most important one was the restructuring of the Rwanda Office of Tourism and National Parks in 2001. A strategy was carried out with the objective of creating high-value and low environmental impact experiences for ecotourists, explorers and individual business travellers. Moreover, the strategy included investments in tourism infrastructure and facilities, an international marketing campaign and partnerships with international tour operators in order to improve the reputation of the country. Efforts to improve the national image included highlighting the country's mountain gorillas, dense tropical forests, green hills and lakes. In addition, hotels, restaurants and other businesses were renovated, refurbished and relaunched after the establishment of the Rwanda Private Sector Federation in 1999, which facilitated a privatization process.

As a result, the tourism industry in Rwanda has experienced a true post-conflict boom, successful not only in reviving its gorilla tourism but also attracting business and conference travellers. Rwanda tourism revenues reached US$303 million in 2014 and the Government has set a target of US$860 million in tourism revenues by 2016, according to the Rwanda Development Board. Further, Rwanda received 1.22 million visitors in 2014, which was an increase of 97,000 visitors compared with 2013.

STRATEGIC OBJECTIVES

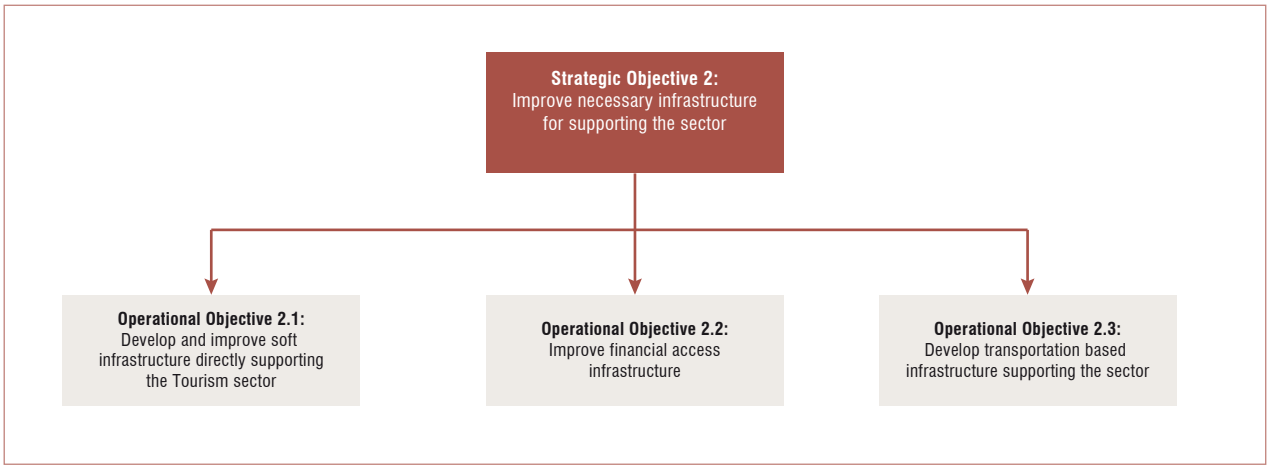
Strategic objective 1: The future state of the sector will involve an enhanced focus on policies and the facilitation of a conducive business environment for tourism operators, and an enhanced investment climate for domestic and international investors. Once the policy framework is in place, the operationalization of regulations and laws can begin and is expected to result in significant gains over the medium-to-long term. Activities will involve those that directly focus on formulating and enacting legislation and policies, as well as activities that focus on improving provision of information that can be used by policymakers, technical institutions, the private sector and potential investors.

The Strategy proposes the following steps to develop the policy focus on tourism and to improve the business and investment environment.

	Activity
1.1.1	Sensitization workshops to improve awareness of WTO accession implications, to ensure that correct information is disseminated and accurate perceptions are created among tourism sector operators.
1.1.2	Conduct an initial due diligence study to identify promising investment opportunities in Liberia which could be of interest for international tourism investors.
1.1.3	Develop and institutionalize a mechanism for Liberian tourism operators to channel investment opportunities to LNIC which can then be used to approach potential investors.
1.1.4	Based on the portfolio of identified opportunities, identify potential investors and facilitate business-to-business meetings and delegations to Liberia. Involve Liberian diplomatic and commercial representations overseas to liaise with potential investors.
1.1.5	In consideration of the ongoing review of the Liberian Revenue Code, review / propose tenets for attracting international investors to the tourism sector.
1.1.6	Establish specific investment attraction provisions to encourage international film studios to see Liberia as an affordable option for movie production. Brief feasibility study involving consultations to result in recommendations.
1.1.7	Develop a branding strategy for the sector for both domestic and international markets.
1.1.8	Ensure that LNIC can provide continued post-deal facilitation and monitoring for / of investors through dedicated support. Post-deal support to include an efficient conflict resolution mechanism for mediating disputes between the community and investors.
1.1.9	Identify and highlight in which international tourism fairs Liberia should be represented and facilitate national participation.
1.2.1	Speed up the adoption of the Liberian National Tourism Authority Act by the senate through a sensitization and advocacy campaign aimed at stressing the importance of the Liberian national tourism authority to the overall tourism sector. A White Paper will be developed and shared with key stakeholders including policymakers.
1.2.2	Permit tourist visa issuance by consulates, which will allow easier tracking and analysis of tourism statistics.
1.2.3	Consider the introduction of e-visa filings.

	Activity
1.2.4	Develop standardized rates for taxis in Monrovia to provide a degree of comfort for tourists in terms of rate transparency, with set prices for key routes. Implement enforcement mechanisms to ensure that taxi drivers are compliant with these rates. Initiate a system of certifications for authorized taxis after compliance with certain requirements and standards. In parallel, establish a mechanism for consumers to report complaints.
1.2.5	Develop a Liberian food sanitation regulation that will enforce minimum quality standards to be followed by businesses serving food, including hotels, restaurants and food outlets. Regulation to be accompanied by strict enforcement mechanisms.
1.3.1	Review / introduce an information flow mechanism for recording visitors' arrival / departure information between the Airports Authority, LISGIS and airlines. As a related project, assist LISGIS in developing an electronic database linked to the Internet where this information can be accessed by relevant entities for their purposes.
1.3.2	Negotiate with WTO (or other partners) to assist national authorities to understand the requirements related to implementing the Tourism Satellite Account framework. Leverage free WTO seminars about services statistics to support public entities to improve the collection of statistics. As a first step, seek WTO help for services statistics, together with UNWTO and others for basic services statistics.
1.3.3	Conduct airport surveys, with trained staff interviewing passengers in the departure lounge.
1.3.4	Conduct a mapping exercise to enumerate and gather information on existing tourism sites in the country. Information required will include available feeder transportation services, accommodations, medical facilities and security information. Develop a platform (Internet and phone applications) to disseminate gathered information.
1.3.5	As a secondary follow-up to the tourism enumeration exercise, identify infrastructure and rehabilitation needs associated with each site. Develop funding proposals for a set of prioritized sites.
1.3.6	Promote the lesser-known attractions in Liberia by using print and electronic media to target Liberian nationals.
1.3.7	Develop an inventory of suppliers for the tourism sector (e.g. food and beverages, equipment, car rentals).
1.3.8	Organize an annual domestic trade fair for Liberian businesses to offer their services to domestic tour operators.

Strategic objective 2: Infrastructure development will be crucial to develop the sector and support tourism actors in their operations. The focus will be on improving both hard infrastructure (mainly transportation and road) and soft infrastructure such as exploration of alternate sources of energy, development of rest stops along key tourist routes, etc. Financial access infrastructural improvements will also be key and it is envisaged that, in the future, sector operators will have better access to finance and tourists will benefit from secure and flexible means of withdrawing money, paying for hotels, etc.

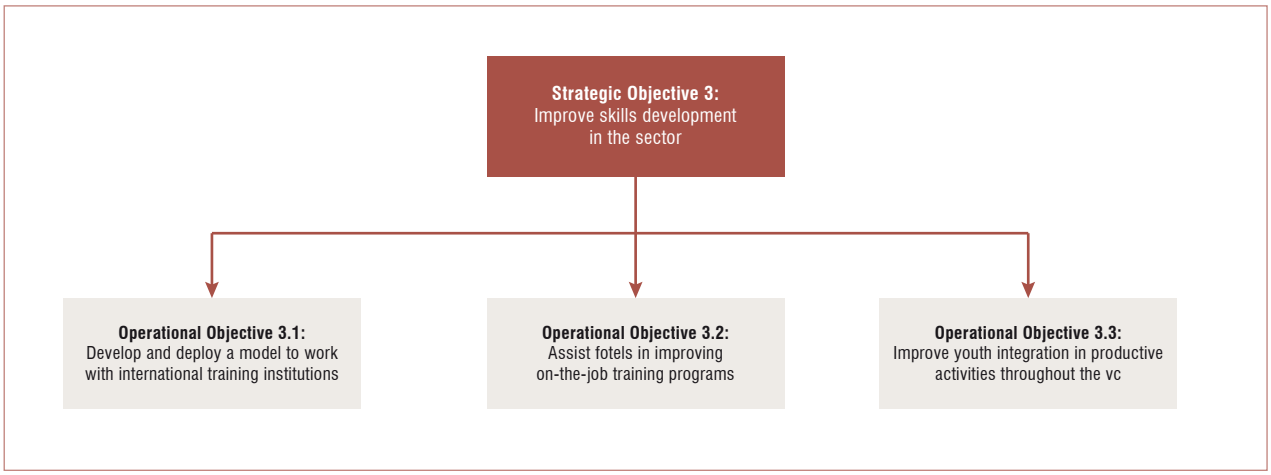


	Activity
2.1.1	For Liberian sites recently inducted into the UNESCO World Heritage List, clearly understand the associated requirements in terms of management and maintenance, and ensure resources from the national budget are dedicated to their upkeep.
2.1.2	Starting from the priority locations, develop MICAT posts in key areas as a nodal agency for collecting information. In parallel, develop protocols to collect, vet and feed information collected from various entities ranging from immigration authorities to local MICAT posts.
2.1.3	Introduce a rating policy for hotels which are in line with international standards and initiate steps to accredit the system with internationally agreed regulations.
2.1.4	Identify options for harvesting alternate sources of energy including solar and hydropower as a means to reduce the energy costs for tourism operators. Options to be recorded through a White Paper.
2.1.5	Develop a network of rest stops along key routes leading from Monrovia to prioritized non-Monrovia tourism attractions.
2.1.6	Establish a network of tourism offices or helping posts that will function as a one-stop shop. The first office will be set up in Monrovia and manned by an initial batch of officers who will train following batches.
2.1.7	In order to improve the security climate in key tourist areas, introduce a cadre of police dedicated to serving tourists. Cadre to be empowered to ensure quick resolution of complaints.
2.1.8	Improve access to ATMs in the country, especially in non-Monrovia locations.
2.2.1	Negotiate with the major payment gateway providers, specifically MasterCard and Visa, to streamline operations in the country. Specifically with respect to online payments, introduce a facility for card processing without the physical presence of the cardholder so that tour operators and hotels can process bookings more efficiently.
2.2.2	Identify and prioritize road linkages between Monrovia and key tourism destinations for inclusion in existing and future road improvement projects. Priority locations to include: Robertsport, Buchanan, Kpawatee and Sapo.
2.3.1	Develop seaplane and ferry boat transportation infrastructure linking Monrovia to Robertsport and Buchanan. Conduct an initial feasibility study to this effect, that should result in a tender if deemed viable.
2.3.2	Advocate and jointly explore with airlines the feasibility of direct flights from key market segments including the EU. As an initial step aimed at helping airlines with their due diligence, jointly explore the business case from a demand perspective.
2.3.3	Using the due diligence and recommendations already provided through the National Export Strategy and other infrastructure assessments, develop the national inland waterway infrastructure so that tourists can have better access through transportation along rivers, lakes and other inland water sources.
2.3.4	Conduct a feasibility study to assess the potential for bamboo use in the Liberian tourism sector.

Strategic objective 3: Acknowledging that the skills development gap in the sector is urgently in need of redressal, a number of short-, medium- and long-term activities have been identified to improve the human capital in the sector. This will be achieved by expanding the expertise and capacities of skills providers (training institutions such as existing hospitality schools as well as, potentially, universities) and employers such as hotels/restaurants/resorts. Expertise will be brought in from outside Liberia where required in order to help training institutions develop their own capacities.

Activities under this strategic objective will be inextricably linked to the important issue of youth employment and entrepreneurship. It is expected that the sector will be a major employer of young people in the future and the skills development, youth, and employment and entrepreneurship angles must be strengthened.

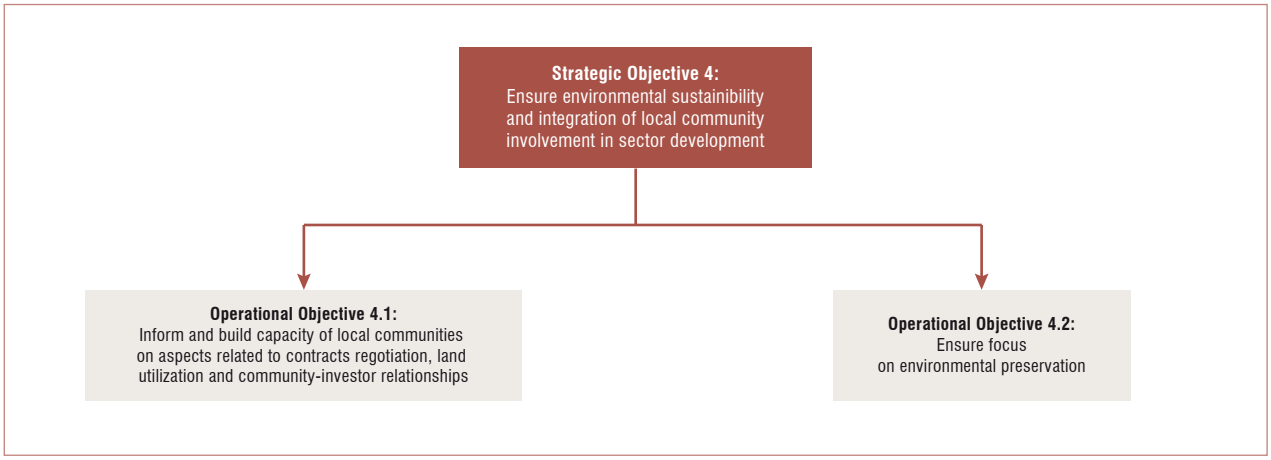
(cc) jbdodane. Reflections in the Bomi Blue Lake, Liberia.



	Activity
3.1.1	Develop collaboration agreements with reputable institutions from African (and other international) hospitality institutes to support the set up / improvement of hospitality and culinary schools (improve standards and support curriculum). • Assist Liberian institutes to identify differentiation factors for developing a Liberian flavour. • Compliance with international standards. • International partner to procure certification and provide it to local partners (verification from international partners on an annual basis).
3.1.2	Develop and deploy Training of Trainer programmes involving a batch of Liberian trainers attending semester-length courses in international partner institutions.
3.1.3	Develop and introduce a national curriculum for tourism studies in Liberia in collaboration with international and regional institutes (such as schools in Ghana and the Gambia) and the private sector. Integrate existing Liberian curriculum (including informal cultural knowledge) in the institutes.
3.1.4	Involve United Nations Volunteers (UNV) to sponsor tourism trainers and experts who will be integrated within the broad spectrum of institutions supporting the tourism sector, including ministries, the tourism authority (forthcoming), universities, etc.
3.1.5	Upgrade teaching standards in tourism training institutes through a train the trainers programme, where instructors in hospitality TVET schools get access to capacity-building by experts from regional / international hospitality training institutions.
3.2.1	Assist hotels and hospitality operators in developing apprenticeship / on-the-job training programmes that will feature newly inducted trainees dividing time between training and work. Training courses will include confidence-building as part of a client management course. Work with select hotels and operators on a pilot basis to test out apprenticeship programmes.
3.2.2	Launch a training programme aimed at developing professional guides. Programme to include a certification post-training for qualified candidates. Aspects of training to include: • Customer service • Comprehensive background knowledge on tourism sites. Train bilingual guides in the case of specific tourism sites that appeal to certain target markets.
3.2.3	In a bid to increase mobility in the sector for qualified and experienced workers, establish the provision of accreditation after a certain amount of job experience in the sector. Encourage hotels and other tourism employers to sign up for this accreditation programme wherein they can sign-off / approve / rate their experience in working with the candidates. Consider case studies including Chile, etc. in this regard.

	Activity
3.2.4	Develop a tourism school in Robertsport as a means of developing human capital in line with improving tourism infrastructure. Select areas of training: • Customer service and hospitality management • Tour guides • Cross-cultural interaction • Lifeguards. School to be linked with activity on developing a surf school. Pilot to be scaled up to Buchanan and other locations based on success levels.
3.2.5	As a pilot initiative, launch a job fair in the sector involving tourism operators and jobseekers. Scale up the initiative based on the results.
3.3.1	Establish a mechanism by which job vacancies can be posted (TVET or university websites) and youth, as well as other members of the workforce, can submit their résumés to interested employers. Mechanism to be both paper-based and online.
3.3.2	Align with existing programmes that target youth in at-risk communities in Monrovia and regional locations, and involve them in productive tourism activities through short, intense trainings and job placement with tourism operators.
3.3.3	Develop continuous workshops targeting young people working in the sector to develop transferable soft skills such as customer service, communication, health and safety, and teamwork skills.
3.3.4	To cultivate and stimulate a culture of entrepreneurship among hospitality students, connect successful entrepreneurs as 'youth entrepreneurship ambassadors or champions' with schools, as in the German experience. Tourism champion entrepreneurs would visit schools to share their experience, daily work and business-related activities.
3.3.5	Train youth-headed start-ups in business management and entrepreneurship with a particular focus on the tourism industry to support the sustainable growth of their businesses and their productive integration to the sector.

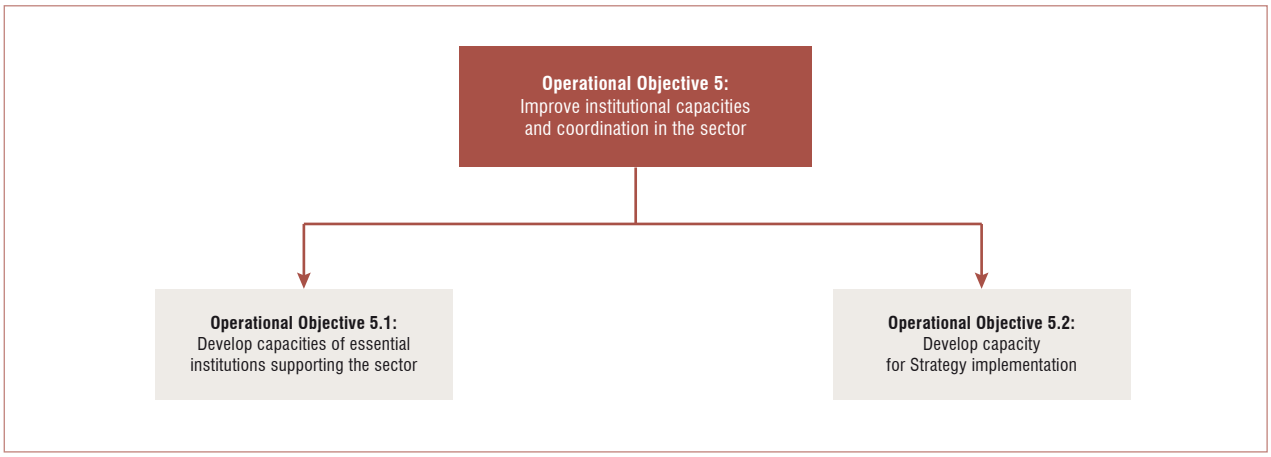
Strategic objective 4: In order to ensure the success of Strategy implementation, it is essential that two aspects are paid particular attention – inclusive participation of local communities and due consideration of the environment in all project design and implementation activities. The Strategy design process has attempted to ensure that this focus remains the centre of attention through the provision of regional consultations in addition to Monrovia. PoA activities are designed with this focus in mind. Strategy implementation will also maintain this focus.



	Activity
4.1.1	Develop LNIC's presence and linkages with local communities so it can continually gather information and build trust and relationships with the overall goal of strengthening Government–communities relationships vis-à-vis investments. Use proposed extension of MICAT presence outside Monrovia.
4.1.2	Create awareness – through a series of consultations – among local communities near key tourist sites about the potential benefits of tourism for them and the value of preservation of their environment, culture and heritage. Build their capacity on smallholding tourism ventures such as food preparation services and handicraft production as a way to diversify income opportunities.
4.1.3	Assist local communities in getting organized and bringing their handicraft products to market. Assistance to include: • Standardization of products with a unique differentiation factor (Liberian) and market Liberian-made products; • Integration with destination marketing; • Helping artisans organize into associations; • Assisting artisans to bring their product to market in collaboration with the one-stop shop established in Monrovia and increasing their presence at the airport.
4.1.4	Develop a vocational school for women to impart training on weaving traditional clothes, handicrafts and other skills. Connect groups to the market.
4.1.5	Guide community groups in counties linked to tourist sites in better understanding the tourism-based opportunity, and create formal entities and partnerships (transportation, catering, lodging, security, guides).
4.1.6	Develop a network of local tour guides in non-Monrovia areas who will cater to the market in line with increasing tourism demand. Initial focus on the four pilot locations and on the domestic market and existing expats in the country working for the United Nations, NGOs and the private sector as the target market segment.
4.1.7	Coach communities on the importance of effective contract negotiation and honouring contract terms with investors. Coaching will also focus on helping communities decide the right model for: • Financial and non-financial benefits; • Division of benefits by household versus community-based 'pots', ensuring financial transparency and management; • Sharing the benefits of transportation intra-community; • Mechanisms for leasing land for investors from landowners (families, communities).
4.1.8	Ensure quality and depth of linkages between wildlife parks / reserves and the local community. This can be achieved by ensuring that the local community is part of a sustainable supply chain of campsite catering teams, local guides, restaurants, supplies, etc. Also ensure that compliance with no-hunting zones is rewarded with compensation as originally promised to local communities.
4.2.1	Ensure that preservation of the environment and benefits to local communities are priority areas. Also ensure that enforcement of contracts is honoured by all parties.
4.2.2	Review the current level of enforcement related to laws and regulations protecting communities and the environment vis-à-vis concessionaire contracts.
4.2.3	Ensure proper land-use planning for ecotourism areas and adequate carrying capacity of the land to be used for tourism – using either policy adjustments or development of institutional capacities as required.
4.2.4	Recognize the value of Liberian surfing resources as a means to quantify the resources and use as a business case for protection through a White Paper that will be disseminated to key national entities and development partners.

Strategic objective 5: Similarly to the policy gap on tourism, Liberian institutions have not been attuned to the needs of the tourism sector. These institutions include ministries, technical agencies, associations and other institutions across the wide spectrum of the value chain. Strategy implementation thus includes a strong focus on building institutional capacities in the sector so that they can in turn support tourism sector operators. Examples include advocacy for passing the pending act to form the Liberian national tourism authority and capacity-building activities for the national sector associations.

This strategic objective also includes support activities such as identification and operationalization of a secretariat for managing and monitoring Strategy implementation.



	Activity
5.1.1	Advocate to pass the Liberian National Tourism Authority Act in the senate.
5.1.2	Build up the technical and human capital capacity of the Liberian national tourism authority.
5.1.3	Develop a comprehensive restructuring plan for the national park system, with the goal of capacitating the system. • Development of a strategic plan for the next five years • Human capital assessment and staffing needs • Infrastructure and technical assistance requirements.
5.1.4	Establish MICAT offices in each county to facilitate easier business registration for private sector operators in tourism.
5.1.5	Develop a tourism steering committee composed of public and private sector entities involved in advocacy and decision-making for the sector. The following goals will be key: • Advocate for the interests of the sector as a whole through regular round tables. Members to include Liberian national tourism authority, tourism associations, ministries and other key entities. • The committee will be responsible for effectively mobilizing and engaging implementing institutions to align all development policies to the Tourism Strategy, and for identifying activities that fall under their leadership and plan for required human and financial resources in the next five years. • The model would derive from success stories from countries including Ghana.
5.1.6	Identify types of private sector groupings that would be recognized by MICAT and the forthcoming Liberian national tourism authority as legitimate associations: for example, Liberian association of tour guides, among other types of private sector groupings.
5.1.7	Conduct a round table with major development partners, consulates and international private sector players to inform them about tourism products available, as well as hosting / catering / tour operator capabilities. This will promote uptake of existing tourism products within the expat community.
5.1.8	Develop the Liberian Motorcycle Transport Union's service capabilities as a transportation service through: • A licensing schemes for motorcycles to be affiliated to the Union as indicated by a sticker. • Training imparted to operators on customer courtesy, as well as to function as tour guides knowledgeable about local tourism.
5.1.9	Ensure that Liberian businesses are registered with the United Nations Development Programme business directory, including the United Nations Global Marketplace system, to ensure procurement officers in the United Nations and other entities know about services on offer. Facilitate a coaching session on registration of businesses.
5.1.10	Assist in developing capacities of tourism sector associations in areas including: • Strategic plan development; • Services development, thereby resulting in sustainable financial planning for the associations; • Inter-association cooperation mechanisms and advocacy needs.

	Activity
5.2.1	Identify and operationalize a physical secretariat that will support the committee in operational aspects such as donor liaison, reporting, etc. Secretariat could be an existing team / organizational unit in a public / private sector body that is already involved with the sector. Build human and technical capacity of the secretariat through targeted training as part of the onboarding process for the staff.
5.2.2	Deploy a robust monitoring and evaluation framework related to sector PoA implementation. The framework is to be integrated with secretariat activities and accompanied by an online tool for viewing project status, report generation, etc. Training on the framework and tool to be integrated in coaching provided to secretariat staff.
5.2.3	Initiate a donor round table to inform donors and development partners active in the country about resource mobilization needs and opportunities related to the sector.
5.2.4	In collaboration with donor and development partners who have expressed interest in supporting National Export Strategy implementation activities, elaborate individual activities into project fiches / proposals and provide assistance to partners in transitioning PoA activities to implementable project proposals.

Strategic objective 6: Activities falling under this strategic objective are focused on brand development, promotion of the tourism sector in key market segments and product development. Product development will also be a core focus, with detailed project activities elaborated for the four niche segments identified as central to this Strategy time frame. It is anticipated that implementation of these activities will lead to increased/improved brand recognition and absorption of Liberian tourism products. The following section describes the product development activities falling under this strategic objective.

KEY TARGET NICHES

The key niches identified for this Strategy's time frame are as follows:

1. Surf tourism
2. Wildlife tourism
3. Cultural tourism
4. Ecotourism.

Box 18: Private sector perspective – 'Pirates of the Liberian Sea'

Pirates of the Liberian Sea is owned by Paul Donovan and provides fishing charters, dolphin watching, sightseeing, harbour and river surveys, and water transportation in Liberia. They are based on the St. Paul River, and have vessels there, on Lake Piso, and in Robertsport and Buchanan. In appealing to their clients they offer full-day and half-day ocean, river and lake fishing trips. They are also looking into the possibility of providing water taxi services in and out of Monrovia.

According to Chief Executive Officer Paul Donovan, 'the Pirates business needs more hotels and guesthouses in the areas we operate in. Hotels need area attractions, beaches, activities, restaurants, cultural events, local craft outlets and tour companies.' He further states, 'tourism may not be large but using a website and several Facebook pages my 3,000 some Facebook friends see every fish caught, every scenic site, and my views of Liberia. This is the perfect way to promote my business'.

Donovan finds that there are many challenges. He notes the challenges foreigners face when dealing with immigration authorities at the airport. This process is not smooth and most times leaves visitors uneasy. The road network and traffic is also a challenge. He mentions the need to emphasize the creation of a tourist area or resort at Cape Mount to soften initial appearances of the country. 'Another challenge is that the Government needs to make doing business here easier. Requiring licences and permits is fine, but one's business does not have to become a hunting ground of Government officials and inspectors who are only visiting to get their meal for the day.' He notes that building tourism in Liberia must be carried out with the idea that all operators are dependent on each other; it cannot be looked at selfishly.

SURF TOURISM

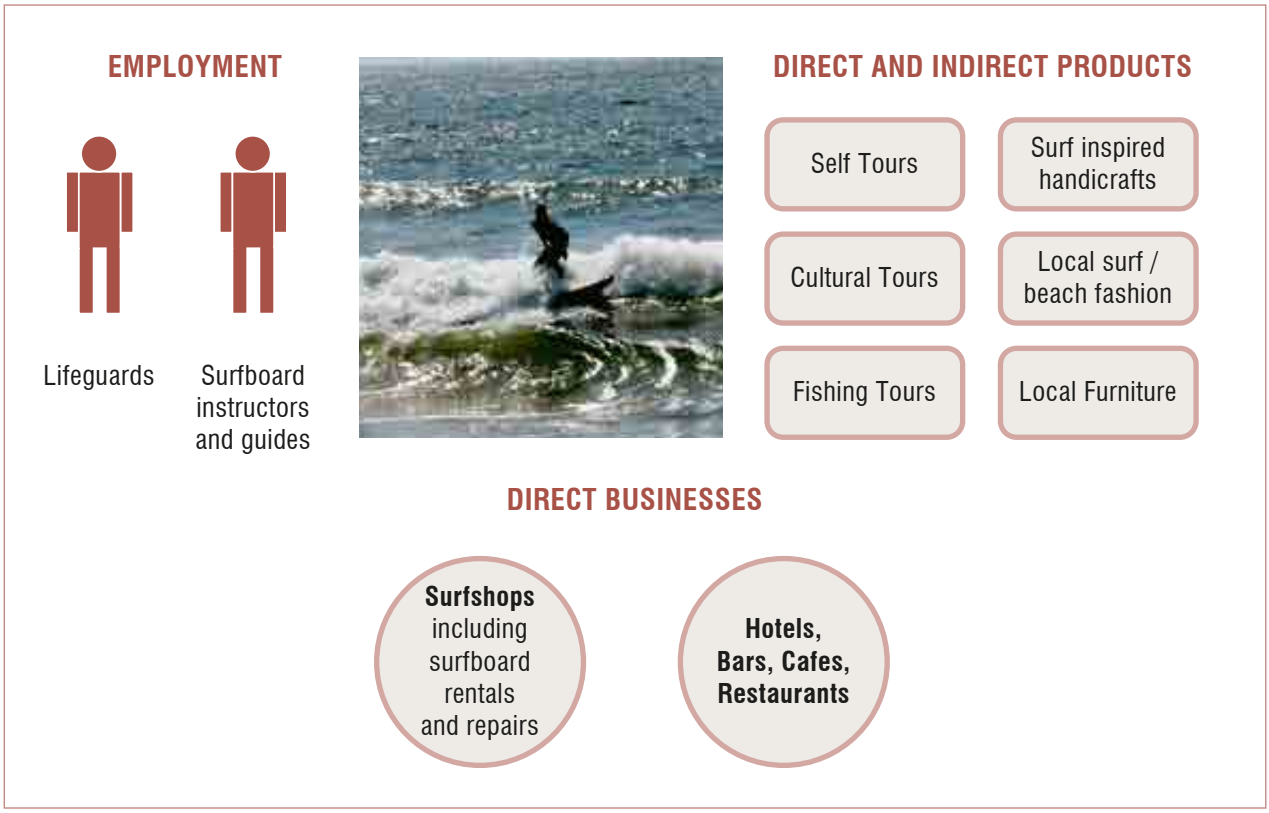
Coastal, maritime and inland water tourism is one of the most common types of tourism. Coastal environments are strongly linked to nature in terms of beaches, landscapes and fish, among others. Activities such as beach vacations and water-based sports (e.g. surfing) are activities frequently undertaken by travellers in this category.

While the surf segment has been identified as a strong candidate for initiating pilot projects, there are other segments with promise as well. The potential arises from the several rivers winding their way inland through Liberia's tropical canopies to the Atlantic Ocean, lake resources such as Piso which are revered for their rich flora and fauna, as well as the ocean (maritime tourism), which will constitute the focus in the medium–long term once the infrastructure is better developed. The Strategy contains activities aimed at developing capacities in the inland-water and maritime segment, while directly focusing on surf tourism.

Potential for surf tourism's impact on Liberia

1. A well-defined and proven business case involving surfing as a driver of coastal tourism. Success stories include Costa Rica, Indonesia, Jeffries Bay (South Africa), Nicaragua, Panama, Fiji, etc. There is potential for Liberia's surfing segment to drive growth in linked feeder services such as accommodation, food outlets, transportation, etc.
2. Relaxed buyer requirements indicate that typical surfing consumers do not require much infrastructure if the waves are good and uncrowded. This bodes well in Liberia's case given that the infrastructure is underdeveloped but with significant room for growth if market demand ramps up.
3. There is significant potential for developing linkages with other value chains, especially in the medium–longer term, such as clothing (wetsuits, swimwear), carpentry (surfboards and handicrafts), transportation, agriculture and fisheries. There is also significant employment potential, especially for youth, which is a priority area for Liberia.
4. As in the case of Papua New Guinea, the surfing sector can be used to increase the integration of women into the productive economy. In this particular case, women's empowerment is supported by building a set of economic activities around the surf tourism sector which women workers and entrepreneurs are well involved in and benefit from.

Figure 13: *Surf tourism product and employment potential*



(cc) Erik Cleves Kristensen. Liberian surfing championships.

The surf offering in the Robertsport area is very real, with good and uncrowded waves, attributes that are considered rare and valuable by the surfing community. The additional surf offering is the extremely user-friendly nature of the 'paddle out' (the process of paddling out from the beach to access the waves). In many places with high-quality waves this involves paddling hundreds of metres and getting battered by large waves along the way. At Robertsport, as a result of the way the wave breaks in relation to the land, it is a simple matter of jumping in at the right place and taking a few strokes. The resulting effect is that the 'paddle out' is very safe and very user-friendly. Additionally, the friendliness of the local community and surfers is a significant favourable attribute.

The learner arena – while not extensive and localized to Cotton's Point – is excellent for learning. Currently, a lack of surfboards suitable for surf lessons hampers the ability of locals to establish a surf school.

The Strategy proposes the following steps to develop the surfing segment.

	Activity
6.3.1	**Conduct an inventory and mapping of resources along the coast to assess the potential for coastal tourism in Liberia,** especially the surfing sector. This assessment would help further delineate the potential for the sector and provide ideas for product development, while at the same time assessing whether a viable business case exists for the sector.
6.3.4	**Marketing to the expat and foreign international NGO population based in Monrovia.** This segment represents significant foreign exchange and a semi-regular turnover of workers could ensure ongoing success. Also, the nature of surfing means that it is not just a 'one and done' proposition but can – and in the dry season already does – attract a reasonable level of repeat visitation. Strategically targeting this market with reliable third party information about the surf offering and experience through employers and agencies in Monrovia could help boost this market. Additionally, working creatively with Robertsport stakeholders to broaden non-surf tour offerings and to develop midweek activities and events that would draw this market out, outside of weekends, could be simple and powerful.
6.3.2	**Development of helpful guide materials:** Many destinations around Europe, Australia, the United States, Central and South America, and South-East Asia have developed surf guidebooks, maps and online resources. These are a great resource for those planning their travel to get a sense of what is involved, and in setting expectations at the right levels and mitigating risk. Potential for collaborating on a regional level with Sierra Leone (which has a similar offering to Robertsport) for preparation of these kinds of resources would be explored. This information would be useful for all potential markets, from the in-country expat community to all levels of the international market.

	Activity
6.3.3	**Publicize Liberian surfing offerings:** Help facilitate 'advertorial' visits by professional surfers for publication in electronic and print surf media. This could help to normalize the notion of travel to Liberia, currently trending towards post-conflict and Ebola-related perceptions. Funds to help facilitate this would be extremely helpful. A focus on some of the non-traditional but more proximal surfing populations in Africa and Europe – in addition to the more mainstream markets of the United States, Australia, Brazil and Japan – would be advisable.
6.3.8	**Build the paddleboarding product:** Liberia has significant potential for stand-up paddleboarding, especially the flatwater paddling available both directly off Fisherman's Beach and also on Lake Piso. Potentially, one can learn to paddleboard in a matter of minutes and simple tours of the lake and along Fisherman's Beach and the bay, as well as what are known as 'downwinders' (paddling downwind for long distances and being picked up by a support vehicle at the end), are extremely viable and easily established tour options that only require equipment and training.
6.3.9	**Advertise Liberia to associations of professionals:** This is a potential market which includes specific groups of surfers – such as the Association of Surfing Doctors, the Association of Surfing Lawyers, and even the International Association of Surfing Academics – which have chapters in multiple countries, whose members have high disposable incomes and are prepared to 'rough it' a little for a good cause. Proactively targeting such groups could yield multiple large group bookings. Marketing materials previously mentioned and specific marketing materials targeting the needs of each group would be produced.
6.3.6	**Establishing a surf school:** Helping to establish a locally run surf school would be a great initiative and would involve training of the instructors and procurement of suitable equipment such as surfboards.
6.3.15	**Conduct training to address a service gap in the surfing segment:** While the issue of higher quality accommodation is not easily addressed, addressing the existing service gap can be tackled relatively easily and in the shorter term. Professional expertise will be sought from institutions including the San Diego State University (SDSU) Center for Surf Research in coordination with the SDSU School of Hospitality and Tourism Management, using students and faculty in a train-the-trainer capacity in Robertsport.
6.3.7	**Ensure maintenance of beaches:** For the surfing segment to grow, safety and the cleanliness of beaches will need to be maintained. Community groups will be mobilized on a regular basis to ensure that beaches in the surfing spots remain clean. Community-led efforts will be vital to ensure maintenance and sustainability of the beaches.
6.3.5	**Expand the youth surfing festival through provision of multi-year financing and technical support.** The festival will put the spotlight on Liberia from both a surfing and youth focus, drawing in participants and tourists from the region initially, and thereafter drawing an international crowd from other parts of Africa and beyond.
6.3.10	**Develop linkages with the carpentry** sector to build boats, surfboards and other wooden products that can derive demand from coastal tourism.

Box 19: Private sector perspectives – Nana's Lodge

Nana's Lodge was founded in May 2008 by Liberian entrepreneur Musa Shannon and is located in Robertsport, Grand Cape Mount County. The resort is described as nature's playground for families and couples looking for quality time together, surfers and adventure seekers, or just for pure relaxation. The resort is usually frequented by 'weekenders' from Monrovia consisting of 85% expats and 15% Liberians. They receive between 100 and 150 guests per month. Nana's Lodge amenities include accommodations (eight rooms), a bar and restaurant, a campground and beach activities. In the past the resort has been known for surf tourism but these days the management wants to promote the resort and its environs as a hub for leisure events. The resort liaises with local entities, brands and event specialists in concept development for featured events, i.e. parties, festivals, tradeshows, sporting events, etc.

According to owner Musa Shannon, it is imperative for Robertsport to be sold as a tourist destination. Even though most people in Liberia know about the resort and its events due to word of mouth, it is not promoted internationally. This is because it is currently a small property and is not equipped for mass tourism. Since its opening the Lodge has made an impact in the community and has bettered the lives of locals. The resort currently has 15 employees that were hired from the local community. One of their motivations is to train youth in hospitality and tourism through internships. This is still in the idea phase.

WILDLIFE TOURISM

Major constraints/opportunities affecting the wildlife tourism segment, and Strategy responses

1. There is currently no umbrella wildlife authority in the country that can work in tandem or as part of the FDA. The net result is a lack of in-depth analysis into the state of the overall wildlife population and a consequent lack of robust recommendations that can be channelled into the policymaking and technical planning mechanism. For instance, deliberations on understanding the impact of illegal mining, hunting, farming and logging activities on the environment include strong voices from the FDA but there is no authoritative agency that can provide guidance on the impact on wildlife as well. There is thus a need to either boost the mandate and capacities of the FDA to include a wildlife section or constitute an entirely new body that will work closely with the FDA.

Strategy response

	Activity
6.2.1	Support the establishment of a competent wildlife authority in the country that will be linked to the national park system. The authority will draw up regulations on conversation and management of wildlife resources in the county. The authority will serve as the focal point for all wildlife matters and either work closely with, or within, the FDA.
6.2.2	For the proposed wildlife authority, develop and implement a resourcing plan to equip the authority in administrative, technical and human capital terms: • Technical equipment and associated training; • Broad training curricula for wildlife rangers; • Development of a multi-year strategic and operational plan. Adequate financial resources allocated for implementation at least for years 1 and 2, with an attached resource mobilization plan for facilitating financial sustainability for following years.

2. There is a pronounced information gap in the segment, whether relating to enumeration of wildlife resources or to the number of visitors absorbing wildlife tourism. Without data, technical and policy decisions will only be made on the basis of educated guesses and on a qualitative basis rather than based on factual data.

Strategy response

	Activity
6.2.8	Develop an endangered species list in Liberia that can be used as a basis for programme development.
6.2.12	Conduct an enumeration of the following services available at Sapo National Park, among others: • Accommodation (e.g. guest houses, camping sites) • Restaurants, food services • Medical facilities. Develop a directory and make the directory available to the FDA (for researchers visiting the park overnight) and MICAT.
6.2.11	Conduct an extensive exercise to map and enumerate wildlife resources in the country with a view to establishing a baseline that can guide policy decisions and be a starting point for efforts to conserve species and manage wildlife resources at a national level.

3. The road network connecting Monrovia to wildlife resource areas is poor, necessitating improvements before any significant number of tourists can travel to these areas. An example in point is the journey to Sapo National Park, which can take an arduous 10+ hours during the rainy season. In order to ensure a degree of convenience to travellers, certain road and related infrastructure improvements are proposed through the Strategy.

Strategy response

	Activity
2.2.2	Identify and prioritize road linkages between Monrovia and key tourism destinations for inclusion in existing and future road improvement projects. Priority locations to include: • Robertsport • Buchanan • Kpawatee • Sapo National Park.
2.1.5	Develop a network of rest stops along key routes leading from Monrovia to prioritized non-Monrovia tourist attractions. Additionally, facilitate growth of hotels / guesthouses / clinics along the main routes through a public–private development model.

(cc) shankar s. Pygmy Hippos.

4. The pygmy hippopotamus remains Liberia's strong but relatively untapped symbol of resilience that can be leveraged for country branding. While pygmy hippos are also found in Sierra Leone and Côte D'Ivoire, Liberia boasts the largest population, much of it spread in Sapo National Park. Against expectations, the species has survived Liberia's two civil wars, and although they remain notoriously introverted, scientists have confirmed through technological means (including camera traps) that the species has survived in some numbers (although the exact specifics are not available). The species can be a strong draw for tourists and also serve as a symbol of resilience for the country.

Strategy response

	Activity
6.2.7	Develop a conservation fund / rejuvenate the defunct Pygmy Hippo Foundation as a means to generate funds that can be used for research and protection of the pygmy hippo species. • Develop a pygmy hippo mascot symbol to be used for merchandise sales through the foundation. • Mobilize the diaspora to get involved through online fundraising, sales of merchandise and other support means. • In collaboration with Hummingbird Resources or another primary sponsor, facilitate the operationalization of the original goal of the Pygmy Hippo Foundation to serve as 'a bridge between industry and conservation, channelling financial and non-financial support into wilderness preservation and conservation'.[2] Develop a portfolio of research grants, internships and conservation projects centred around the species and involve national, regional and international specialists interested in conservation.

5. Despite strong potential, the wildlife product currently on offer is weak and requires strengthening. The Liberian wildlife product remains relatively weak and beyond arm's length except for intrepid adventure seekers, researchers and some faith-based groups. It needs to be refined and tailored to meet the short-term domestic market (including expats living in the country). Success in this market will facilitate experience and the increased revenues required to attract greater international tourists in the medium-to-long-term. There is currently a gap in terms of packaging and presenting the Liberian wildlife value proposition as a product. Interested consumers do not have a point of contact in the form of experienced tour operators who can organize visits and manage end-to-end logistics. Hotels do not offer these services and all logistics and planning is currently the burden of the tourist, which is not sustainable.

Strategy response

	Activity
6.2.6	Hotels, tour operators, local communities, and other actors in the value chain will join forces and develop daily / multi-day products for tourists to visit key wildlife areas including Sapo National Park and Mount Nimba Strict Nature Reserve.

6. Liberian wildlife reserves need to be preserved and rehabilitated, and at the same time key regional arrangements should be finalized to manage cross-border wildlife resources. As a result of the civil conflicts and the proliferation of illegal hunting, mining, farming, etc. activities close to important wildlife habitats, there is an urgent need to step up conservation efforts. Conservation efforts have faced consistent challenges ranging from policy enforcement to capacity

United States Agency for International Development. Aerial view of green African forest, Liberia.

development of park officials. Efforts would go beyond wildlife conservation and, in cases such as Sapo National Park, would require restructure and rehabilitation of the entire park complex.

Strategy response

	Activity
6.2.4	Develop an upgrading and restructuring plan for the entire Sapo National Park complex. Develop joint programming with potential partners to identify expertise and funding options. Focus areas to include: • Strategic and operational plan development; • Analysis of multi-year resource needs, including facilitation of the financial autonomy of the Park; • Community involvement in management of the Park and modalities for shared benefits; • Training and other needs to build the human capital throughout the Park's organization chart; • Forging strong linkages with the FDA and other institutions.
6.2.3	Establish a protected areas trust fund to drive Park management and to facilitate sustainability of conservation efforts in the country. This multi-partner trust fund would require multi-year financial support accompanied by a strict monitoring and evaluation framework.
6.2.5	Assess bottlenecks in developing the Gola Transboundary Park between Sierra Leone and Liberia, and launch advocacy efforts to complete formalities for opening the park.

	Activity
2.1.1	For Liberian sites recently inducted into the UNESCO World Heritage List (Mount Nimba Strict Nature Reserve and Providence Island), clearly understand the associated requirements in terms of management and maintenance, and ensure resources from the national budget are dedicated to their upkeep.
6.2.13	Support existing conservation efforts for manatees at Lake Piso Multiple Use Reserve through technical and financial support.

7. Community involvement in recent initiatives involving wildlife resources is uneven. For instance, even though communities living around Sapo National Park are enthusiastic about development opportunities in the ecotourism and wildlife tourism areas, they have expressed dissatisfaction at not receiving compensation in return for complying with the ban on hunting opportunities in Sapo. In order to ensure sustainable development in this niche segment, it is essential to maintain a high degree of transparency, fairness and equitable sharing of benefits originating from tourism revenues in and near local communities. This is especially important given that Liberia is a post-conflict country and the root causes of conflict are still festering under the surface. Quality and depth of linkages between wildlife parks/reserves and the local community must be ensured. This can be achieved by ensuring that the local community is part of a sustainable supply chain of campsite catering teams, local guides, restaurants, supplies, etc.

Strategy response

Activity
See specific activities under PoA strategic objective 4 related to community involvement and environmental protection.

Box 20: Private sector perspectives – Mangrove Paradise

Mangrove Paradise is located on the Du River / Mangrove Paradise Island. It is owned by Liberian entrepreneur Pinky Goll and has been in existence since 2008. The company's products and services include canoe tours, hiking, farming, and bird and monkey watching. In expanding the business, Goll mentions future plans of opening a full service restaurant, a variety store and a gift shop with branded products. She also aims to construct three guesthouses, establish a campsite, and add canoeing competitions and hang-gliding to their list of attractions. Mangrove Paradise aims to be recognized as a Liberian ecotourism site and to help promote Liberia in becoming a leading tourist destination. Though the company prides itself on empowering locals in the community by hiring within and teaching the importance of being environmentally friendly, they still have issues regarding a lack of respect for the environment by locals. Goll says, 'there is a need for them to be sensitized and penalized for going against the Environmental Protection Agency's regulations, including deforestation and mass fishing (putting explosives in the river to kill multiple fish at a time).' Regarding future growth of the company, Goll mentions the desire to partner with investors or organizations for the ecotourism mission to be realized.

(cc) Erik Cleves Kristensen. Beach of Robertsport.

CULTURAL TOURISM

Two important questions facing this tourism segment in any country are as follows:

- Where is the comparative advantage in an increasingly competitive marketplace?
- How can uniqueness be developed in an increasingly globalized world?

In other words, in a marketplace where there is global recognition of the potential of this segment and the competition is getting stiffer, how can Liberia use its tangible and intangible cultural assets to create a unique selling proposition that proves attractive to tourists?

Liberia has a history, culture, people and customs that amalgamate into a compelling story for promoting cultural tourism. However, like other segments, there is currently very little to offer in terms of products. If this segment is nurtured, it has significant capacity for drawing tourists in a manner that benefits local communities and tourism operators. If implemented in a manner that is coherent and well thought out, the positive impact will serve as a peacebuilding factor in the country.

Major constraints/opportunities affecting the cultural tourism segment, and Strategy responses

1. Rehabilitation of cultural resources – historic sites, museums, buildings – is an important consideration that has been neglected due to competing priorities, along with the ever-present constraints of lack of finance and technical expertise.

Activities	
6.4.1	Develop a priority list of sites, monuments and buildings at a national level that require rehabilitation and, specifically, funding and technical expertise. The list is to be divided between Monrovia and county levels. As a starting pilot, develop a rehabilitation plan for renovating resources such as museums in Monrovia and historically significant buildings that are deemed important from a city tourism point of view. Develop a multi-year project plan with resourcing needs. Invite bids for select projects, starting with Monrovia as the pilot location.
6.4.8	Develop a concept around Tala airport in Robertsport: • Renovation and operationalization of the airfield to develop connectivity with Roberts International Airport. • Development of a museum for expanding on Second World War historical significance.

2. As in the case of other tourism segments, product development is an essential prerequisite for Liberian cultural tourism to take off. Currently, very little outreach and product development centred around cultural tourism has taken place and examples are few and far between. Tangible products need to be developed and deployed with the assistance of various value chain actors and tested as pilots. Over time, a pipeline of projects is expected to emerge as a result of this piloting and scaling up approach.

Activities	
6.4.2	Explore opportunities for ethical fashion initiatives involving local Liberian designers and leveraging Liberian cultural heritage. Connect Liberian designers to the markets through high quality: Exposure to markets through participation in shows and events in Liberia and outside; • Technology and expertise support; • Financial support for procuring material and human capital, and for operating expenses.
6.4.3	Enhance / encourage existing national / yearly events, i.e. marathon, surf competition, Sheroes Awards, Liberia Music Awards.

(cc) Multimedia Photography & Design - Newhouse School. A shot from Together Liberia's stay in Cestos, the capital of Rivercess County. Photo by Cameron Zohoori.

Activities	
6.4.4	Develop cultural tours around the country, starting with select pilots focusing on the concept of African villages. Scale up pilots based on results.
6.4.5	For the fairgrounds in Buchanan, develop and promote a schedule of events.
6.4.6	Develop a set of city-based tourism products through collaboration with hotels and service providers including tour operators, guides and taxi services. Products to be aimed at the closest market segment at hand: the domestic market, including expatriates and visiting businesspeople and officials. Hotels and lodging venues will be the anchors for the products and will also include monitoring to measure uptake of the products. Based on performance, scale up and diversify products. Also use monitored results.
6.4.7	Develop a tourism website and a calendar of events that is updated regularly and viewed through the website. A vetted process for validating and entering events information on the calendar will also be deployed.
6.4.9	Develop a network of craft markets in the country with the view of promoting high-quality Liberian handicrafts to domestic and international tourists.

(cc) jbdodane. Bomi Blue Lake, Liberia.

ECOTOURISM

As noted earlier, ecotourism has cross-linkages with other tourism segments, including two segments which this Strategy has identified as having particular potential in Liberia: cultural tourism and wildlife tourism. Therefore, many PoA activities that are relevant for those segments also hold true for ecotourism.

The Strategy proposes the following steps to develop the ecotourism segment

	Activity
6.5.1	Develop a community-driven tourism product for Kpatawee Falls: • Proper fencing and gates for collecting gate fees from tourists based on an appropriate revenue model. • Toilet blocks. • Camping grounds. • Log cabins (to be developed at a later time). • Interpretation and storytelling by trained tour guides. • Tour guides to include arborists to discuss specific tree species. • Displays indicating history and specific information for visitors. • Linking the two falls with multiple walking trails. • Supplies shop at the entrance. • Cultural dances at the entrance with the possibility for tourists to try dance classes and buy traditional dresses. • Parking areas.

	Activity
6.5.2	Develop the brand image of Kpatawee Falls, capitalizing on the Ramsar Site classification according to the falls. Ensure that the requirements for maintaining the classification are always in compliance.
6.5.3	Deploy the community-led ecotourism model in Liberia for developing niche Liberian ecotourism products. The model would involve clear delineation of community / Government / private sector ownership versus management responsibilities. Consider successful examples in Madagascar, Kenya and other countries.
6.5.4	Explore the possibility of establishing the Montserrado and Du River Mangroves as a National Wildlife and Cultural Heritage Site to increase Monrovia's ecotourism potential.

(cc) Multimedia Photography & Design - Newhouse School. A shot from Together Liberia's stay in Cestos, the capital of Rivercess County. Photo by Cameron Zohoori.

HOW TO GET THERE – MOVING TO ACTION

The development of the future value chain for the tourism sector is a five-year project defined through a consultative process between public and private sector stakeholders in Liberia. Achieving the strategic objectives and realizing the future value chain depends heavily on the ability of sector stakeholders to start implementing and coordinating the activities defined in the Strategy PoA.

The Strategy in and of itself will not alone suffice to ensure the sector's sustainable development. Such development will require the coordination of various activities. While the execution of these activities will allow for the Strategy's targets to be achieved, success will depend on the ability of stakeholders to plan and coordinate actions in a tactical manner. Apparently unrelated activities must be synchronized across the public sector, private sector, NGOs and local communities in order to create sustainable results.

To ensure the success of the Strategy, it is necessary to foster an adequate environment and create an appropriate framework for implementation. The following section presents some of the key success conditions considered necessary for the Strategy to be effectively implemented.

ESTABLISH AND OPERATIONALIZE A PUBLIC AND PRIVATE COORDINATING BODY AND EXECUTIVE SECRETARIAT

Sector steering committee

A key success criterion for the Strategy is the ability to coordinate activities, monitor progress and mobilize resources for implementation. It is recommended that a steering committee comprising the key public and private sector entities be formed. This will function as a platform with a balanced representation of all major tourism stakeholders to share information in open communication.

Overall it is proposed that the steering committee be responsible for the following responsibilities related to Strategy implementation:

- Coordinate and monitor the implementation of the Strategy by the Government, private sector, institutions or international organizations to ensure implementation is on track;
- Identify and recommend allocation of resources necessary for the implementation of the Strategy;
- Assess the effectiveness and the impact of the Strategy;
- Ensure consistency with the Government's existing policies, plans and strategies, and align institutions' and agencies' internal plans and interventions with the Strategy PoA;
- Elaborate and recommend revisions and enhancements to the Strategy so that it continues to best respond to the needs and long-term interests of the national business and export community;
- Propose key policy changes to be undertaken based on Strategy priorities and promote these policy changes among national decision makers;
- Guide the sector secretariat in the monitoring, coordination, resource mobilization, and policy advocacy and communication functions to enable effective implementation of the Strategy;
- Provide the sector secretariat with the mandate and the necessary resources to fulfil its functions in an effective manner.

Composition of the sector steering committee

Given that the core team established during the Strategy development process was highly operational and effective, it is recommended that the sector steering committee be comprised of key entities from the core team, with special focus on ensuring equitable involvement of both the public and the private sector.

Secretariat

A secretariat will assist the sector steering committee in acting as an operational body responsible for the daily coordination, monitoring and mobilization of resources for implementing the PoA. It is proposed that it takes on this role with technical support from key ministries and technical agencies. The secretariat will be composed of one or two technical operators.

The core responsibilities of the sector secretariat should be to:

- Support functioning of the sector steering committee;

- Collect and manage data to monitor the progress and impact of Strategy implementation;
- Liaise with and coordinate development partners for Strategy implementation;
- Elaborate project proposals and build partnerships to mobilize resources to implement the Strategy;
- Follow up on policy advocacy recommendations from the sector steering committee;
- Ensure effective communication and networking for successful Strategy implementation.

Both the sector steering committee and its secretariat will work hand-in-hand with existing entities established to streamline Government operations and enhance donor operations. These include the Special Projects Implementation Unit housed in MoCI, the President's Tourism Exploratory Committee and others. It may be conceived that the secretariat is accommodated as part of an existing entity, with an extended mandate and resources allocated to it.

KEY SUCCESS FACTORS FOR EFFECTIVE IMPLEMENTATION

Capacities for managing implementation

The presence of the steering committee to oversee the implementation of the Strategy is a key success factor but it is not sufficient to effectively fulfil its assigned functions. It will be important that the capacities and skills of the sector secretariat be sufficient to ensure effective management of Strategy implementation. The secretariat should have knowledge of best practices in monitoring, programming, mobilizing resources and communicating results. It will be important to ensure the secretariat is adequately resourced and capacitated to effectively assume these responsibilities.

Private sector support and participation

As the primary beneficiary of Strategy implementation – through improved productive capacities, reduced costs of doing business, facilitated administrative procedures, enhanced access to finance, etc. – the private sector will need to be directly involved. The private sector clearly expressed during the Strategy design process its willingness to contribute, directly or in partnership with public institutions, to the implementation of the Strategy. Their implementation efforts can range from providing business intelligence to institutions to contributing to development projects, establishing processing and transformation units, advocacy, etc. In brief, the private sector's practical knowledge of business operations is essential to ensuring that the activities of the Strategy are effectively implemented and targeted.

Proactive networking and communication

The key implementing institutions detailed in the PoA need to be informed of the content of the Strategy and the implications for their 2016–2020 programming. This networking and communication is essential to build further ownership and provide institutions with the opportunity to confirm the activities they can implement in the short-to-long term. Communication and outreach to sector stakeholders is equally important to create momentum and support for the recommendations of the Strategy. This active communication normally speeds up implementation through greater engagement of all parties.

Resources for implementation

The steering committee and its operational secretariat, together with the authorities, will need to capitalize on the momentum gained as part of the Strategy design process in order to leverage additional support for efficient implementation. Resource mobilization, which is crucial and indispensable in supporting Strategy implementation, involves the identification of priority activities from the Strategy and proactive networking with various resource providers ranging from ministries to development partners, as well as national and foreign investors. Resource mobilization should be centralized at the secretariat and supported by the steering committee.

For effective implementation of the Strategy, the Government should define a minimum annual budget to be directed towards Strategy implementation. This will demonstrate the Government's commitment to strengthening the tourism sector and encourage partners to also support sector development.

In addition to national budget support, resource mobilization will also target development partners and foreign investors to support key areas of the Strategy PoA. Because the Strategy has been developed with political endorsement, private sector buy-in and collaboration between national institutions, it provides an adequate framework for development partners to plan interventions based on the Strategy PoA.

Investment flows to Liberia should also be considered as a valuable driver of Strategy implementation and overall trade development. The relevant authorities, such as MICAT, LNIC and MoCI, in partnership with the private sector, should target priority investment.

The various implementation modalities detailed will determine the success of Strategy implementation. However, high-level support from the Government, in collaboration with strong championship by the private sector, will be the real driver of successful Strategy implementation.

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CONCLUSION

Despite occasional shocks such as the financial crisis of 2009, the global tourism industry has shown virtually uninterrupted growth. Tourism shows particular promise for developing countries. The tourism industry is one of the largest and fastest-growing sectors in the global economy and a key driver of socioeconomic development, as it is labour-intensive and stimulates SME growth and investment. Tourism has been used in other countries as an economic driver for growth which can widely support poverty reduction. Tourism also has an important spillover effect, spurring growth in closely related sectors and subsectors such as agriculture, furniture manufacturing, foods and beverages, and infrastructure development.

A more vibrant tourism industry in Liberia is achievable and will act as a means of enabling economic development while improving employment and overall socioeconomic development. Liberia enjoys a rich natural capital with high touristic potential which can be leveraged in a reasonable time frame. There are significant challenges to overcome but the opportunities far outweigh the challenges. Other post-conflict destinations have been able to overcome their negative international image in the process of reviving their tourism industry. Their efforts required integrated approaches, public–private sector partnerships, investment and marketing campaigns, among others.

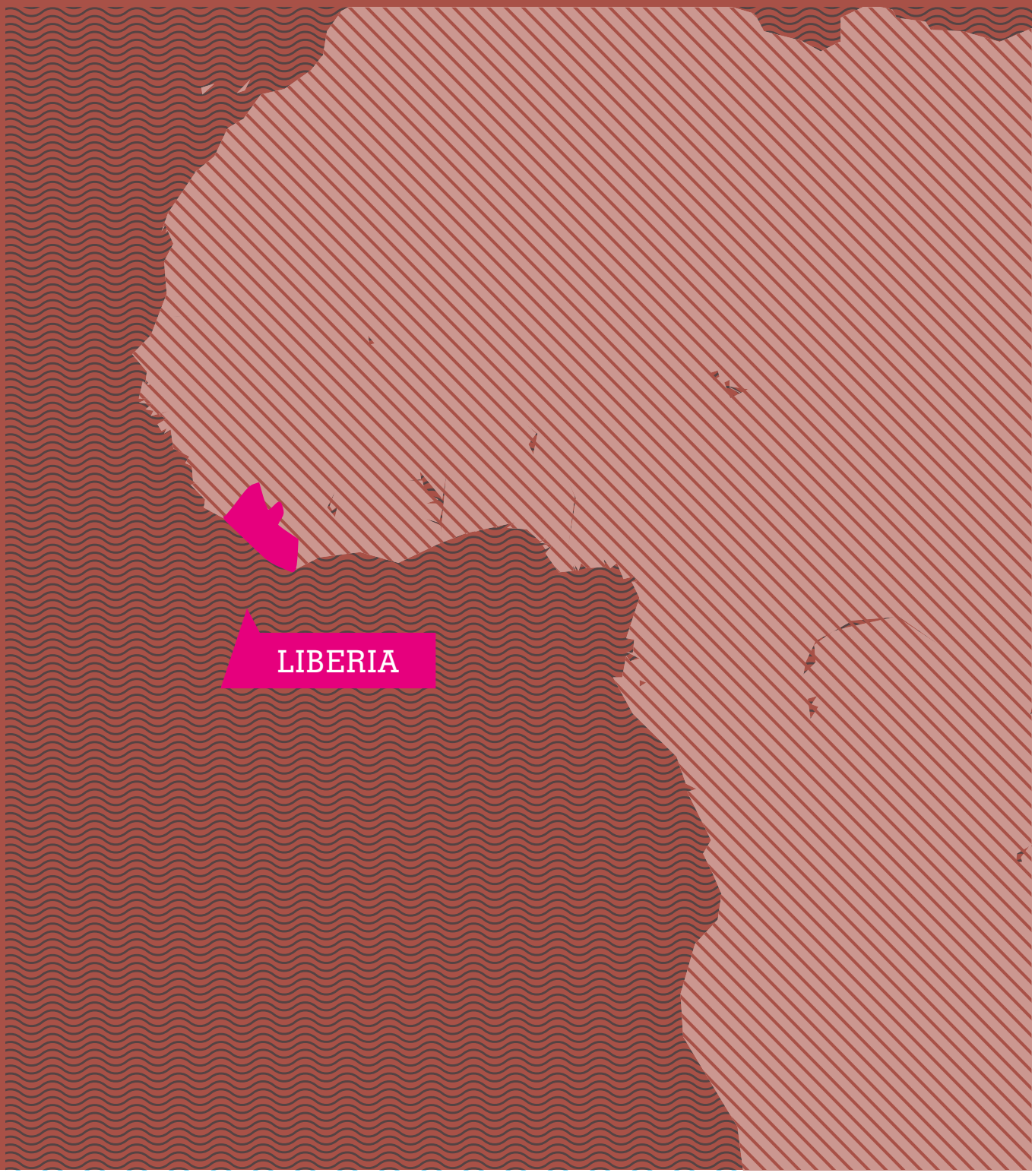
This five-year Strategy is expected to establish the fundamental building blocks for the sector and enable robust Liberian tourism products to be tested and scaled up. At the end of the five-year period, it is envisaged that the base of the sector will have increased to a point that new niches and more visionary approaches can be employed. The future of Liberian tourism is bright, provided sector stakeholders, including Liberian policymakers and enterprises, can remain focused on this important endeavour.

(cc) Moody College of Communication. World refugee day lk 1.

(cc) kath37. Robertsport.

LIBERIAN NATIONAL EXPORT STRATEGY
ON TOURISM

PLAN OF ACTION



Strategic objective 1: Spur policy focus and improve the business/investment climate for the tourism sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
1.1 Improve the investment climate for the sector.	1.1.1 Improve awareness – through sensitization workshops – of WTO accession implications for Liberian tourism operators, to ensure that correct information is disseminated and accurate perceptions are created among tourism sector operators. Specific areas of discussion : » Investment provisions for international investors; » Technical areas not affected by accession, and therefore not prone to external competition. Case studies of other countries where the tourism sector has scaled up as a result of external investment, joint ventures activity.	2						Entire value chain	Workshops held every quarter in 2017	MOCI	MICAT NIC LTEC	National Budget
	1.1.2 Conduct an initial due diligence study to identify promising investment opportunities in Liberia which could be of interest for international tourism Investors.	2						Investors, Liberians offering investment opportunities	Study conducted in 2017	MICAT	LINTA NIC MOCI LTEC	National Budget
	1.1.3 Develop and institutionalize a mechanism for Liberian tourism operators to channel investment opportunities to LNIC which can then be used to approach potential investors.	2						Investors, Liberians offering investment opportunities	Process institutionalized by mid-2017	NIC	Chambers of commerce, MFA LIBA LINTA MICAT LTEC	TBD
	1.1.4 Based on the portfolio of identified opportunities, LNIC to identify potential investors and facilitate business-to-business meetings and delegations to Liberia. Involve Liberian diplomatic and commercial representations overseas to liaise with potential investors.	2						Investors, Liberians offering investment opportunities	Hold initial set of business-to-business meetings in mid-2017. Hold regular events in Liberia, as well as lead regular Liberian delegations 2018–2020	MFDP	MICAT, MOCI LRA , LINTA, LIBA, Chamber of Commerce, LTEC	Low funding implication
	1.1.5 In consideration of the ongoing review of the Liberian Revenue Code, review / propose tenets for attracting international investors to the tourism sector.	1						Entire value chain	Adequate representation of the tourism sector is maintained throughout the review process and reflected in outputs	Liberia Revenue Authority	MICAT, MoCI, MOFDP	Low funding implication

Strategic objective 1: Spur policy focus and improve the business/investment climate for the tourism sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
1.1 Improve the investment climate for the sector.	1.1.6 Establish specific investment attraction provisions to encourage international film studios to see Liberia as an affordable option for movie production. Brief feasibility study involving consultations to result in recommendations. The feasibility study will also consider the specific case studies of countries including India, Ghana and Mauritius that have successfully developed this segment. Special focus on: » Linkages with youth development » Music video productions.	1						Investors, Liberians offering investment opportunities	Investment promotion package in place my mid-2017 / permit incentives and location packages	MICAT	NIC MOCI Movie Union Music Union Culture Union MOYS MIA LTEC LINTA	TBD
	1.1.7 Develop a branding strategy for the sector for both domestic and international markets.	1						Entire value chain	Five-year branding strategy in place	MICAT	LTEC LINTA MIA MYS	TBD
	1.1.8 Ensure that LNIC can provide continued post-deal facilitation and monitoring for / of investors through dedicated support. Post-deal support to include an efficient conflict resolution mechanism for mediating disputes between the community and investors.	2						Investors, local communities	Post-deal facilitation continues with adequate capacities developed	NBC	NIC MIA MICAT, MOCI	TBD
	1.1.9 Identify and highlight in which international tourism fairs Liberia should be represented and facilitate national participation.	1						Entire value chain	Pilot participation at the ITB and WTM	MICAT	LTEC LINTA MOFA	National budget, Donor funding
1.2 Enact necessary legislation to ease doing business for sector operators and improve efficiency levels.	1.2.1 Speed up the adoption of the Liberian National Tourism Authority Act by the senate through a sensitization and advocacy campaign aimed at stressing the importance of the Liberian national tourism authority to the overall tourism sector. A White Paper will be developed and shared with key stakeholders including policymakers.	1						Entire value chain	White Paper developed by end-2016 Act to establish Liberian national tourism authority passed by mid-2017	MICAT	All Stake Holders	National Budget
	1.2.2 Permit tourism visa issuance by consulates, which will allow easier tracking and analysis of tourism statistics.	2						Entire value chain	Visa issuance process adapted by mid-2017	MOFA	MICAT MOJ	National Budget
	1.2.3 Consider the introduction of e-visa filings.	2						Tourists	e-visa filing options available in early 2018	Ministry of Foreign Affairs	MICAT, Bureau of Immigration and Naturalization	National budget
	1.2.4 Develop standardized rates for taxis in Monrovia to provide a degree of comfort for tourists in terms of rate transparency, with set prices for key routes. Implement enforcement mechanisms to ensure that taxi drivers are compliant with these rates. Initiate a system of certifications for authorized taxis after compliance with certain requirements and standards. In parallel, establish a mechanism for consumers to report complaints.	1						Tourists, citizens, taxi operators	Standardized rate system introduced by mid-2017 for taxis exclusively allowed parking at airports and hotels	Ministry of Transportation	MICAT, Taxi Unions, LNP	National budget

Strategic objective 1: Spur policy focus and improve the business/investment climate for the tourism sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
1.2 Enact necessary legislation to ease doing business for sector operators and improve efficiency levels.	1.2.5 Develop a Liberian food sanitation regulation that will enforce minimum quality standards to be followed by businesses serving food, including hotels, restaurants and food outlets. Regulation to be accompanied by strict enforcement mechanisms.	1						Food outlets, including hotels and restaurants including small scale food outlets	Regulation in place by end-2017	MOH	MICAT, MOCI	Donor funding
1.3 Improve the provision of statistical and other information in the sector.	1.3.1 Review / introduce an information flow mechanism for recording visitors' arrival / departure information between the Airports Authority, LISGIS and the airlines. As a related project, assist LISGIS in developing an electronic database linked to the Internet, where this information can be accessed by relevant entities for their purposes. Incorporate county access as well.	1						Visitors/Tourisms, Policy makers	Conduct an initial gap analysis study to understand current information flow mechanisms and recommend solutions – end-2017 Deploy electronic database by end-2018	MICAT	Liberia Airport Authority , Bureau of Immigration, LISGIS, Building Markets, LAA	Donor funding
	1.3.2 Negotiate with WTO (or other partners) to assist national authorities in understanding the requirements related to implementing the Tourism Satellite Account framework. As a first step, seek WTO help for services statistics, together with UNWTO and others for basic services statistics. Leverage free WTO seminars about services statistics to support public entities to improve the collection of statistics.	3						Entire value chain	Seminars conducted in 2017	UNWTO	MICAT, MOCI	UNWTO
	1.3.3 Conduct surveys at airports with trained staff interviewing passengers in the departure lounge. Information to be gathered should include: » Nature of business conducted in Liberia » Type of tourism activity consumed (if any) » Challenges and areas of improvement, etc. Expand on customer service survey already started by LAA. Care will be taken to ensure that the surveyors are well-trained and pose a friendly, non-intrusive presence to passengers. Collected information will be stored, analysed and shared for better decision- making.	1						Entire value chain	Survey conducted continuously	LAA	MOYS MICAT LTEC MOJ	National budget
	1.3.4 Conduct a mapping exercise to enumerate and gather information on existing tourism sites in the country. Information required will include available feeder transportation services, accommodations, medical facilities and security information. Develop a platform (Internet and phone applications) to disseminate gathered information.	1						Entire value chain	Mapping exercise completed by end-2016	MICAT	LTEC LINTA	National budget
	1.3.5 As a secondary follow-up to the tourism enumeration exercise, identify infrastructure and rehabilitation needs associated with each site. Develop funding proposals for a set of prioritized sites.	1						Tourism sites	Infrastructure and rehabilitation needs identified by end-2017	MOCI	LINTA MICAT NIC LISGIS	National budget

Strategic objective 1: Spur policy focus and improve the business/investment climate for the tourism sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
1.3 Improve the provision of statistical and other information in the sector.	1.3.6 Promote the lesser-known attractions in Liberia by using print and electronic media, targeting Liberian nationals.	2						Rural Liberians	Campaign to expose unique qualities of counties initiatied	MICAT	LTEC MYS LINTA	National budget
	1.3.7 Develop an inventory of suppliers for the tourism sector (e.g. food and beverages, equipment, car rentals).	1						Private sector	Inventory developed and included in official tourism website and MOCI website based on quality service delivery	MICAT	MOCI, LTEC, LINTA	TBD
	1.3.8 Organize an annual domestic trade fair for Liberian businesses to offer their services to domestic tour operators. This will increase visibility and linkages within tourism actors at the national level.	2						Private sector	Domestic trade fair linking local-local and local-international stakeholders	MICAT	MOCI, LTEC,LiBA, chambers of commerce	TBD

Strategic objective 2: Improve necessary infrastructure for supporting the sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
2.1 Develop and improve soft infrastructure directly supporting the tourism sector	2.1.1 For Liberian sites recently inducted into the UNESCO World Heritage List (Mount Nimba Strict Nature Reserve and Providence Island), clearly understand the associated requirements in terms of management and maintenance, and ensure resources from the national budget are dedicated to their upkeep.	1						Mount Nimba Strict Nature Reserve and Providence Island	Compliance to be maintained on a rolling basis	MICAT	MOCI, LTEC	Donor funding possibly UNESCO
	2.1.2 Develop MICAT posts in key areas as the primary agency for collecting information, starting from the priority locations. In parallel, develop a protocol to collect, vet and disseminate information collected from various entities, ranging from immigration authorities to local MICAT posts.	1						MICAT	MICAT posts to be opened at Robertsport, Buchanan, Kpawatee and Sapo on a rolling basis starting in 2017 and thereafter extended to other locations	MICAT	MoYS, LTEC, BIN/MoJ, MIA	National budget
	2.1.3 Introduce a rating policy for hotels which are in line with international standards and initiate steps to accredit the system with internationally agreed regulations.	1						Tourists, Hoteling sector	Rating system to be introduced at the latest by early 2017	MICAT	LTEC	TBD
	2.1.4 Identify options for harvesting alternate sources of energy, including solar and hydropower, as a means to reduce the energy costs for tourism operators. Options to be recorded through a White Paper.	3						Tourism operators	White Paper developed by mid-2018	Ministry of Lands, Mines and Energy	LEC	TBD
	2.1.5 Develop a network of rest stops along key routes leading from Monrovia to prioritized non-Monrovia tourism attractions. Additionally, facilitate growth of hotels / guesthouses / clinics along the main routes through a public–private development model.	2						Youth and women	Rest stop network to be developed on a rolling basis in Robertsport, Buchanan, Kpawatee and Sapo initially, and then extended to other locations	Ministry of Public Works	MICAT, MIA, MOCI, county governments, LINTA	Donor funding
	2.1.6 Establish a network of tourism offices or helping posts that will function as a one-stop shop. An initial office will be set up in Monrovia and manned by initial batch of officers who will train following batches. Partner with county offices to use as tourist centers, requiring minimal overhead in terms of staff with administrative capabilities.	1						Tourists	Monrovia office to be developed by end-2017	LTEC	MICAT, MOYS	National budget
	2.1.7 In order to improve the security climate in key tourism areas, introduce a cadre of police dedicated to serving tourists. Cadre to be empowered to ensure quick resolution of complaints.	3						Tourists	Tourism police cadre established by mid-2018	Ministry of Justice	MICAT	TBD
	2.1.8 Conduct a feasibility study to assess the potential of bamboo use in the Liberian tourism sector.	3						Handicrafts, bamboo product manufacturers	Feasibility study completed by end-2017	FDA	MICAT, MOYS	National budget
	2.1.9 Improve the existing airport experience for travellers – focusing on the baggage claim area, lounge, duty free and cultural shops, eateries, transportation, security, parking facilities access to information when arriving and departure.	1						Travellers	Rolling basis	LAA	MICAT, CAA	TBD

Strategic objective 2: Improve necessary infrastructure for supporting the sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
2.2 Improve the financial access infrastructure.	2.2.1 Improve access to ATMs in the country, especially in non-Monrovia locations.	2						Tourists		MICAT	Liberian Bankers Association	TBD
	2.2.2 Negotiate with the major payment gateway providers, specifically MasterCard and Visa, to streamline operations in the country. Specifically with respect to online payments, introduce the facility for card processing without the physical presence of the cardholder so that tour operators and hotels can process bookings more efficiently.	2						Tourists, Vendors	Streamlined procedures introduced by early 2018	MICAT	Liberian Bankers Association	TBD
2.3 Develop transportation infrastructure supporting the sector.	2.3.1 Identify and prioritize road linkages between Monrovia and key tourism destinations for inclusion in existing and future road improvement projects. Priority locations to include: » Robertsport » Buchanan » Kpawatee » Sapo National Park.	1						Tourists	Rolling basis	Ministry of Public Works	Ministry of Transport, MICAT	TBD
	2.3.2 Develop seaplane and ferry boat transportation infrastructure linking Monrovia to Robertsport and Buchanan. Conduct an initial feasibility study to this effect that should result in a tender if deemed viable.	3						Tourists	At least one connection launched by end-2018	Ministry of Transport	Civil Aviation Authority, MICAT	TBD
	2.3.3 Advocate and jointly explore with airline companies direct flights from key market segments including the EU. As an initial step aimed at helping airlines with their due diligence, jointly explore the business case from a demand perspective.	2						Tourists	Rolling basis	Liberia Airport Authority	Airline companies, MICAT, CAA	TBD
	2.3.4 Using the due diligence and recommendations already provided through the National Export Strategy and other infrastructure-based assessments, develop the national inland waterway infrastructure so that tourists can have better access through transportation along rivers, lakes and other inland water sources.	2						Tourists	Rolling basis	Ministry of Transport	Ministry of Public Works, MICAT, LTEC	TBD

Strategic objective 3: Improve skills development in the sector.										
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
3.1 Develop and deploy a model to work with international training institutions.	3.1.1 Develop collaboration agreements with reputable hospitality institutes (from Africa and other international locations) to support the set up / improvement of hospitality and culinary schools (improve standards and support curriculum). » Assist Liberian institutes to identify differentiation factors for developing a Liberian flavour. » Compliance with international standards. » International partner to procure certification and provide it to local partners (verification from international partners on an annual basis).	1						Liberian hospitality institutes	Memorandum of Understanding signed by two international institutions by end-2017	MICAT / MoE	Les Roches and Glion as possible candidates, SDSU, the Gambia MOL, MOYS	Donor funding
	3.1.2 Develop and deploy training of trainer programmes involving batches of Liberian trainers attending semester-length courses in international partner institutions. The types of trainers required will need to be assessed and the length of training programme will accordingly vary. Initial focus on short-term, intensive courses.	1						Liberian hospitality institutes	Pilot initiative involving select 'future trainers' initiated in 2016 and spread over 2017–2018	MICAT / MoE	Les Roches and Glion as possible candidates, SDSU, the Gambia MOL, MOYS	Donor funding
	3.1.3 Develop and introduce a national curriculum for tourism studies in Liberia in collaboration with international and regional institutes (such as schools in Ghana and the Gambia), and the private sector. Integrate existing Liberian curriculum (including informal cultural knowledge) in the curriculum. The scope will extend to curriculum updates at different levels including technical, managerial, incorporating local linkages, etc.	2						Students, individuals interested in Tourism sector	» Collaboration agreements with international institutions formalized by end-2017 » National curriculum developed and rolled out by end-2018	MoE	MICAT	National budget
	3.1.4 Involve UNV to sponsor tourism trainers and experts who will be integrated within the broad spectrum of institutions supporting the tourism sector, including ministries, the LTEC, universities, etc.	1						Entire value chain	Initial cooperation agreements with UNV concluded by end-2016, with agreement on required expertise	MOE	MICAT, Universities	UNV
	3.1.5 Upgrade teaching standards in tourism training institutes through a train-the-trainers programme, where instructors in hospitality TVET schools get access to capacity-building from experts of regional / international hospitality training institutions. MOYS runs a Hospitality school that can be used as a model or pilot for capacity building	2						Liberian hospitality institutes	Training of trainers programme rolled out in 2017 with an initial batch of 5–10 trainers inducted	MICAT	Regional and international hospitality training institutions, LINTA, MOYS	Donor funding
3.2 Assist hotels in improving on-the-job training programmes.	3.2.1 Assist hotels and hospitality operators in developing apprenticeship / on-the-job training programmes that will feature newly inducted trainees dividing time between training and work. Training courses to include confidence-building as part of a client management course. Work with select hotels and operators on a pilot basis to test out apprenticeship programmes. MOYS runs an apprenticeship program with BDOTC and YOJT, the models can be used and/or modified	2						Hotels	Geographical areas of initial focus to include Monrovia / Grand Bassa / Grand Cape Mount / Sapo	LINTA / TAL	MICAT, MOYS	TBD

Strategic objective 3: Improve skills development in the sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
3.2 Assist hotels in improving on-the-job training programmes.	3.2.2 Launch a training programme aimed at developing professional guides. Programme to include a certification post-training for qualified candidates. Aspects of training to include: » Customer service » Comprehensive background knowledge on tourism sites. Train bilingual guides in the case of specific tourism sites that appeal to certain target markets.	1						Entire value chain	Rolling programme starting in late 2016 and continuing throughout the lifecycle of the Strategy	MICAT	LINTA / TAL, LTEC, MOYS, MOGDSW	Donor funding
	3.2.3 In a bid to increase mobility in the sector for qualified and experienced workers, establish the provision of accreditation after a certain duration of job experience in the sector. Encourage hotels and other tourism employers to sign up for this accreditation programme wherein they can sign-off / approve / rate their experience in working with the candidates. Consider case studies including Chile, etc. in this regard.	2						Individuals working in the Tourism sector	Accreditation programme to begin in early 2017	MICAT	Ministry of Labour, MoE, LTEC, LINTA / TAL	TBD
	3.2.4 Develop a tourism school in Robertsport as a means of developing human capital in line with improving tourism infrastructure. Select areas: » Customer service and hospitality management » Tour guides » Cross-cultural interaction » Lifeguards » Surf tourism School to be linked with activity on developing a surf school. Pilot to be scaled up to Buchanan and other locations based on success levels.	1						Robertsport Tourism	Tourism school in place by 2018 with initial batch of students inducted	MoE/MICAT	Liberian LTEC	Donor funding
	3.2.5 As a pilot initiative, launch a job fair in the sector involving tourism operators and jobseekers. Scale up the initiative based on the results.	2						Individuals interested in the Tourism sector	First iteration of job fair to be held by early 2017	LINTA / TAL	MICAT	TBD
3.3 Improve youth integration in productive activities throughout the value chain.	3.3.1 Establish a mechanism in which job vacancies can be posted (TVET or university websites) and youth, as well as other members of the workforce, can submit their résumés to interested employers. Mechanism to be both online and paper-based.	3						Individuals interested in the Tourism sector	Online system	MICAT	MoYS, hospitality schools	TBD
	3.3.2 Align with existing programmes that target youth in at-risk communities in Monrovia and regional locations, and involve them in productive tourism activities through short, intense trainings and job placement with tourism operators.	2						Individuals/Youth interested in the Tourism sector	Programme to be deployed by mid-2017	MoYS	MICAT, LTEC	National budget
	3.3.3 Develop continuous workshops targeting young people working in the sector to develop transferable soft skills such as customer service, communication, health and safety, and teamwork skills.	2						Individuals interested in the Tourism sector	Workshops held on a rolling basis	MoYS	MICAT, LTEC, hospitality schools	TBD
	3.3.4 To cultivate and stimulate a culture of entrepreneurship among hospitality students, connect successful entrepreneurs as 'youth entrepreneurship ambassadors or champions' with schools, as in the German experience. Tourism champion entrepreneurs would visit schools to share their experience, daily work and business-related activities.	3						Individuals interested in the Tourism sector	Ambassador programme to begin by end-2017 and scaled up based on success levels thereafter	MoYS	MICAT, LTEC	RBD
	3.3.5 Train youth-headed start-ups in business management and entrepreneurship, with a particular focus on the tourism industry, to support the sustainable growth of their businesses and their productive integration into the sector.	2						Individuals interested in the Tourism sector	Training programme in place by mid-2017	MoYS	MICAT, LTEC	TBD

Strategic objective 4: Ensure environmental sustainability and integration of local community involvement in the sector development process.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
4.1 Inform and build capacity of local communities on aspects related to contract negotiations, land use and community–investor relationships.	4.1.1 Develop LNIC's presence and linkages with local communities to continually gather information and build trust and relationships with the overall goal of strengthening Government–communities relationships vis-à-vis investments. Use proposed extension of MICAT presence outside Monrovia.	2						Investors/Liberians offering investments	Increased presence, starting with the four proposed pilot locations	LNIC	MICAT, MIA	National budget
	4.1.2 Create awareness – through a series of consultations – among local communities near key tourist sites on the potential benefits of tourism for them and the value of preservation of their environment, culture and heritage. Build their capacity on smallholding tourism ventures such as food preparation services and handicraft making as a way to diversify income opportunities.	1						Local communities	Consultations held every quarter, starting with the four proposed pilot locations	MICAT	LTEC, LINTA, MIA	National budget
	4.1.3 Assist local communities in getting organized and bringing their handicraft products to market. Assistance to include: » Standardization of products with a unique differentiation factor (Liberian), market Liberian-made products; » Integration with destination marketing; » Helping artisans organize into associations; » Assisting artisans to bring their product to market, in collaboration with the one-stop shop established in Monrovia, and increase their presence at the airport.	2						Small business owners /women owned enterprises /youth owned enterprises	Multidimensional support programme in place by mid-2017 and continuing on a rolling basis	LINTA	Community groups, MOCI, Art and craft union	Donor funding
	4.1.4 Develop a vocational school for women for imparting training on weaving traditional clothes, handicrafts and other skills. Connect groups to the market.	2						Women entreprenaurs	Vocational school established in one pilot location by end-2018	MICAT /MGDSW	LINTA, community women's groups, MGCSP, MOE, MOYS	National budget /donor funding
	4.1.5 Guide community groups in counties linked to tourist sites in better understanding the tourism-based opportunity and create formal entities as well as partnerships (transportation, catering, lodging, security, guides).	2						Community groups	Series of consultations held in 2016 and 2017 in key tourism nodes	MICAT	President's Tourism Exploratory Committee, Liberian national tourism authority	TBD
	4.1.6 Develop a network of local tour guides in non-Monrovia areas who will cater to the market in line with increasing tourism demand. Initial focus on four pilot locations. The target market segment will be the domestic market and existing expats in the country working for the United Nations, NGOs and the private sector.	1						Individuals seeking to work in the Tourist sector	National tour guide association formed by end-2017, affiliated to LINTA	MICAT	LINTA LTEC	National budget
	4.1.7 Coach communities on the importance of effective contract negotiation and honouring contract terms with investors. Coaching will also focus on helping communities decide the right model for: a. Financial and non-financial benefits; b. Division of benefits to households versus community-based 'pots' and ensuring financial transparency and management; c. Sharing the benefits of transportation intra-community; d. Mechanisms for leasing land to investors from landowners (families, communities).	1						Local communities, investors	Rolling initiative	LTEC / MICAT	LINTA / TAL	TBD

Strategic objective 4: Ensure environmental sustainability and integration of local community involvement in the sector development process.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
4.1 Inform and build capacity of local communities on aspects related to contract negotiations, land use and community–investor relationships.	4.1.8 Ensure quality and depth of linkages between wildlife parks / reserves and the local community. This can be achieved by ensuring that the local community is part of a sustainable supply chain of campsite catering teams, local guides, restaurants, supplies, etc. Also ensure that compliance with no-hunting zones is rewarded with compensation as originally promised to local communities.							Local communities	Rolling basis	CI,	MIA,	TBD
4.2 Ensure focus on environmental preservation.	4.2.1 Ensure that preservation of the environment and benefits to local communities are priority areas. Also ensure that enforcement of contracts is honoured by all parties.	1						Local communities, investors	A series of consultations with local communities and key official actors	EPA	FDA, MICAT	Flora and Fauna Intl.
	4.2.2 Review the current level of enforcement related to laws and regulations protecting communities and the environment vis-à-vis concessionaire contracts.	2						Local communities, environment, investors	Review completed by end-2016 and recommendations provided to authorities	MICAT	LNIC, MoCI, LTEC, NBC	TBD
	4.2.3 Ensure proper land-use planning for ecotourism areas and adequate carrying capacity for the land to be used for tourism – using either policy adjustments or development of institutional capacities as required.	1						Environment, local communities	On a rolling basis	MICAT	LNIC, MoCI, EPA	TBD
	4.2.4 Recognize the value of Liberian surfing resources as a means to quantify the resources and use as a business case for protection through a White Paper that will be disseminated to key national entities and development partners.	1						Surfing resources	White Paper developed by mid-2017	SDSU Center for Surf Research	MICAT	Donor funding

Strategic objective 5: Improve institutional capacities and coordination in the sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
5.1 Develop the capacities of essential institutions supporting the sector.	5.1.1 Advocate to pass the Liberian National Tourism Authority Act in the senate, which will result in the establishment of the tourism authority.	1						Entire sector	Rolling basis	LTEC	MICAT	National budget
	5.1.2 Build up the technical and human capital capacity of the Liberian national tourism authority. Develop a comprehensive resource needs plan and	3						LNTA	Rolling basis	LTEC	MICAT	National budget
	5.1.3 Develop a comprehensive restructuring plan for the national park system, with the goal of capacitating the system. » Development of a strategic plan for the next five years » Human capital assessment and staffing needs » Infrastructure and technical assistance requirements.	2						National park system	Restructuring plan developed and funding secured by end-2018	MICAT	FDA, LTEC, EPA	Donor funding
	5.1.4 Develop a tourism steering committee comprised of public and private sector entities involved in advocacy and decision-making for the sector. Key goals: » Advocate for the interests of the sector as a whole through regular round tables. Members to include Liberian national tourism authority, tourism associations, ministries and other key entities. » The committee will be responsible for mobilizing and engaging implementing institutions to align all development policies to the Strategy, and to identify activities that fall under their leadership and plan for the required human and financial resources over the next five years. » The model will derive from success stories from countries including Ghana.	1						Entire sector	Steering committee in place by mid-2017	MICAT	MoCI, MOYS,LTEC, LINTA, TAL, Ministry of Agriculture, Ministry of Foreign Affairs	National budget
	5.1.5 Identify types of private sector groupings that would be recognized by MICAT and the forthcoming Liberian national tourism authority as legitimate associations, e.g. Liberian association of tour guides, among others.	3						Private sector operators	List to be maintained by Liberian national tourism authority and vetted by MICAT on a rolling basis	MICAT	LTEC	National budget
	5.1.6 Conduct a round table with major development partners, consulates and international private sector players to inform them about available tourism products, as well as hosting / catering / tour operator abilities. This will promote expat tourism within Liberia.	1						Entire sector	Round table held by end-2016	MICAT	MOCI, LTEC, LINTA / TAL	National budget
	5.1.7 Develop the Liberian Motorcycle Transport Union's service level as a transportation service through: » Licensing schemes for motorcycles to be affiliated to the Union as indicated by a sticker. » Training imparted to drivers on customer courtesy, as well as to act as tour guides.	2						Liberian Motorcycle Transport Union	Liberian Motorcycle Transport Union's capacities developed on a rolling basis	Liberian Motorcycle Transport Union	Ministry of Transport, LINTA / TAL, LNP	TBD
	5.1.8 Ensure that Liberian businesses are registered with the United Nations Development Programme business directory, including the United Nations Global Marketplace system, so as to ensure procurement officers in the United Nations and other entities know about the services on offer. Facilitate a coaching session on registration of businesses.	1						Liberian Tourism operators seeking to contract services to international agencies in country	Round table held before end-2016	United Nations Development Programme	LINTA / TAL, LTEC, MOCI	Low funding implication

Strategic objective 5: Improve institutional capacities and coordination in the sector.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
5.1 Develop the capacities of essential institutions supporting the sector.	5.1.9 Help tourism sector associations develop capacities in areas including: » Strategic plan development; » Development of services, resulting in sustainable financial planning for the associations; » Inter-association cooperation mechanisms and advocacy needs.	1						Tourism sector associations	Capacity-building programmes implemented on a rolling basis	LINTA / TAL	MICAT, LTEC	Donor funding
	5.1.10 Establish a specific section on improving customer service in the sector.	2						Entire sector	Section developed by 2017	MICAT	LTEC, LINTA	TBD
5.2 Develop capacity for Strategy implementation.	5.2.1 Identify and operationalize a physical secretariat that will support the committee in operational aspects such as donor liaison, reporting, etc. The secretariat could be an existing team / organizational unit in a public / private sector body that is already involved with the sector. Build human and technical capacity of the secretariat through targeted training as part of the onboarding process for staff.	1						Entire sector	Secretariat identified and appropriate capacity-building conducted on a rolling basis	MICAT	LINTA, LTEC	TBD
	5.2.2 Deploy a robust monitoring and evaluation framework for PoA implementation. The framework is to be integrated with secretariat activities and accompanied by an online tool for viewing project status, report generation, etc. Training on the framework and tool is to be integrated in coaching provided to secretariat staff.	1						Entire sector	Monitoring and evaluation framework in place by mid-2017	MICAT	LINTA	International Trade Centre
	5.2.3 Initiate a donor round table to inform donors and development partners active in the country about resource mobilization needs and opportunities in the sector.	1						Entire sector	Initial donor round table held by early 2017; thereafter on a rolling basis	MICAT / LTEC	LINTA, MOCI, MOYS	Donor Funding
	5.2.4 Working with partners who have expressed interest in supporting National Export Strategy implementation, elaborate individual activities into project proposals and help partners turn PoA activities to implementable projects.	1						Entire sector	Conducted on an ongoing basis post-2016	MICAT	LINTA	Donor Funding

Strategic objective 6: Improve the Liberian tourism brand and develop robust tourism offerings.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
6.1 Improve understanding of buyer requirements in key target markets and promote the Liberian brand.	6.1.1 Conduct surveys in key target markets to better understand buyer prerequisites and aspects in which the Liberian tourism sector can be differentiated.	1						Tourism operators	Surveys completed by mid-2017 in key target markets including the EU, United States, Australia and the regional market	MICAT/LTEC	LTEC	TBD
	6.1.2 Commission a tourism-themed video on Liberia and exhibit it in key locations.	2						Tourism operators	Tourism video completed by mid-2017	MICAT/LTEC	LTEC, LINTA / TAL	Donor funding
	6.1.3 Assess the coverage of Liberian consulates and visa-issuing representations vis-à-vis key target markets (business and leisure visitors). Based on the assessment, consider expanding representation or create other mechanisms for visitors to get Liberian visas.	2						Entire value chain	Rolling basis	Ministry of Foreign Affairs	MICAT, LTEC	Donor funding
	6.1.4 Conduct extensive documentation of the history of key tourism locations such as Robertsport, Buchanan, etc. based on traditional knowledge residing with community elders and other sources.	2						Pilot areas	Documentation process completed for four pilot locations – Robertsport, Buchanan, Kpatawee, and Sapo	LTEC	MICAT	Donor funding
	6.1.5 Develop a brand mascot for Liberia and associate it with a variety of marketing campaigns, both domestic and in key international markets.	2						Entire value chain	Branding campaign to begin by mid-2017	LTEC	MICAT	TBD
6.2 Develop the product offering related to wildlife tourism.	6.2.1 Support the establishment of a competent wildlife authority in the country that will be linked to the national park system. The authority will draw up regulations on conservation and management of wildlife resources in the county. The authority will serve as the focal point of all wildlife matters and either work closely with, or within, the FDA.	2						Wildlife segment	Rolling process	MICAT	FDA, LTEC, EPA	WWF, UNESCO, National Budget
	6.2.2 For the proposed wildlife authority, develop and implement a resourcing plan to equip the authority in administrative, technical and human capital terms: » Technical equipment and associated training; » A broad training curriculum for wildlife rangers; » Development of a multi-year strategic and operational plan; » Adequate financial resources allocated for implementation at least for years 1 and 2, with an attached resource mobilization plan to facilitate financial sustainability beyond that.	2						Wildlife segment	Rolling basis	MICAT	FDA, LTEC, EPA	Door funding
	6.2.3 Establish a protected areas trust fund to drive park management and to facilitate sustainability of conservation efforts in the country. This multi-partner trust fund would require multi-year financial support accompanied by a strict monitoring and evaluation framework.	1						Entire sector	Trist fund established, and funded by end 2018	MICAT	LTEC, FDA	Donor funding

Strategic objective 6: Improve the Liberian tourism brand and develop robust tourism offerings.												
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
6.2 Develop the product offering related to wildlife tourism.	6.2.4 Develop an upgrading and restructuring plan for the entire Sapo National Park complex. Develop joint programming with potential partners to identify expertise and funding options. Focus areas to include: » Strategic and operational plan development; » Analysis of multi-year resource needs, including facilitating the financial autonomy of the Park; » Community involvement in management of the Park and modalities for shared benefits; » Training and other needs to build the human capital throughout the Park's organization chart; » Forging strong linkages with the FDA and other institutions;	1						Sapo natioak park	Restructuring plan approved by end-2017	MICAT	FDA, LTEC, Ministry of Public Works, Conservation International, World Wildlife Fund, UNESCO	Donor funding
	6.2.5 Assess bottlenecks in developing the Gola Transboundary Park between Sierra Leone and Liberia, and launch advocacy efforts to complete formalities for opening the Park.	2						Liberian and Sierra Leone Tourism	Analytical report developed by end-2017	MICAT	LTEC, MoCI	TBD
	6.2.6 Bring hotels, tour operators, local communities and other actors in the value chain together to develop daily / multi-day products for tourists to visit key wildlife areas including Sapo and Mount Nimba Strict Nature Reserve.	2						Entire sector	At least 5 products deployed by end-2014	LINTA/TAL		TBD
	6.2.7 Develop a conservation fund / rejuvenate the defunct Pygmy Hippo Foundation as a means to generate funds that can be used for research and protection of the pygmy hippo species. » Develop a pygmy hippo mascot symbol to be used for merchandise sales through the Foundation. » Mobilize the diaspora to get involved through online fundraising, sales of merchandise and other means of support. » In collaboration with Hummingbird Resources or another primary sponsor, work towards the original goal of the Pygmy Hippo Foundation to serve as a bridge between industry and conservation, channelling financial and non-financial support into wilderness preservation and conservation. » Develop a portfolio of research grants, internships and conservation projects centred around the species and involve national, regional and international specialists interested in conservation.	1						Liberian Pygmy Hippo population	Proposal for rejuvenate of fund developed by mid-2017. Resource mobilization initiated by end-2017	Pygmy Hippo Foundation	FDA, MICAT, LTEC	Donor funding / National budget
	6.2.8 Develop an endangered species list in Liberia that can be used as a basis for programme development.	1						Wildlife tourism segment	List developed by end-2016	MICAT	FDA, LTEC,FFI, IUCN	Conservation International
	6.2.9 Develop an educational programme for schoolchildren to expose them to animals and wildlife with the goal of cruelty prevention and developing wildlife appreciation.	2						Schoolchildren	Programme developed by mid-2017 and rolled out to select schools	MoE	MICAT	National budget
	6.2.10 Launch a reintegration programme to train former hunters in Sapo as tour guides for wildlife watching and herbalism, including first aid training.	2						Sapo national park system	Programme in place by late-2017	MICAT	LINTA, LTEC	TBD
	6.2.11 Extensively map and enumerate wildlife in the country with the view of establishing a baseline that can guide policy decisions and be a starting point for conservation efforts and managing wildlife resources nationally.							Wildlife tourism segment	Enumeration completed by end-2017	FDA	MICAT, LTEC	TBD

Strategic objective 6: Improve the Liberian tourism brand and develop robust tourism offerings.												
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
6.2 Develop the product offering related to wildlife tourism.	6.2.12 Enumerate the following services available at Sapo National Park, among others: » Accommodations (e.g. guest houses, campsites) » Restaurants, food services » Medical facilities. » Develop a directory and make it available to the FDA (for researchers visiting the park overnight) and MICAT.	2						Sapo national park system	Enumeration conducted by 2018	MICAT	LTEC; MOYS, FDA, EPA	TBD
	6.2.13 Support existing manatee conservation efforts at Lake Piso Multiple Use Nature Reserve through technical and financial support.	1						Manatee conservation efforts	Rolling basis	MICAT	LTEC, FDA, EPA	TBD
6.3 Develop the product offering related to coastal tourism.	6.3.1 Conduct an inventory and mapping of resources along the coast to assess the potential for coastal tourism in Liberia.	1						Coastal tourism segment	Inventory study completed by mid-2017	MICAT	Center for Surf Research (SDSU School of Hospitality and Tourism Management) Liberian Surfing Association, LINTA	Donor funding
	6.3.2 Develop surf guidebooks, maps and online resources based on success stories from locations including Europe, Australia, the United States, Central and South America, and South-East Asia. These resources will help tourists planning their travel to get a sense of what is involved, setting expectations at the right levels and mitigating risk. Consider involving Sierra Leone in preparing these kinds of resources at a regional level.	1						Surfing segment operators	Rolling basis	Liberian Surfing Association	Center for Surf Research (SDSU School of Hospitality and Tourism Management), LINTA, MICAT	Donor funding
	6.3.3 Facilitate 'advertorial' visits by professional surfers for publication in electronic and print surf media, partially to help normalize the notion of travel to Liberia. Focus on some of the non-traditional but closer surfing populations in Africa and Europe in addition to the more mainstream markets of the United States, Australia, Brazil and Japan.	2						Surfing segment operators	Facilitated visit by select surfers and accompanying media in 2017	Center for Surf Research (SDSU School of Hospitality and Tourism Management)	Liberian Surfing Association, LINTA, MoYS, MICAT	Donor funding
	6.3.4 Conduct marketing to the expat and foreign NGO population based in Monrovia. Strategically target this market with reliable third party information about the surf offering and experience through employers and agencies in Monrovia as a means to boost this market. Additionally, work creatively with Robertsport stakeholders to broaden non-surf tour offerings and develop midweek activities and events that would draw this market out, outside of weekends.	1						Expats living in Liberia	Rolling basis	MICAT,	Liberian Surfing Association , LINTA, MOYS	National budget
	6.3.5 Expand the youth surfing festival through provision of multi-year financing and technical support.	1						Surfing segment operators	Crowdsourcing campaign initiated by early 2017 and completed by mid-2017	MoYS	MICAT, Liberian Surfing Association, Student & Youth Tourism Organization	Possible Kickstarter support

Strategic objective 6: Improve the Liberian tourism brand and develop robust tourism offerings.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
6.3 Develop the product offering related to coastal tourism.	6.3.6 Establish a locally run surf school with adequate training of instructors and suitable equipment. The use of facilities (e.g. borrowing surfboards) by local youth can be subject to their attendance at school.	2						Surfing segment operators	Surf school established by 2017	Center for Surf Research (SDSU School of Hospitality and Tourism Management)	Liberian Surfing Association, MoYS, MICAT, LTEC	Donor funding
	6.3.7 Launch a campaign for the continuous cleaning and maintenance of beaches at major tourists sites involving local youth, communities and NGOs.	1						Liberian beaches, tourists	Campaign launched by end-2016	MICAT	LMA, Youth and community groups, EPA	National budget
	6.3.8 Explore the potential of stand-up paddleboarding, focusing on the flatwater paddling available both directly off Fisherman's Beach and also on Lake Piso. Organize training sessions, combined with simple tours of the lake and along Fisherman's Beach and the bay, as well as 'downwinders' (paddling downwind for long distances being picked up by a support vehicle at the end).	1						Tourism operators in Lake Piso	Initial feasibility study completed by mid-2017	Center for Surf Research (SDSU School of Hospitality and Tourism Management)	Liberian Surfing Association, LINTA, MICAT	Donor funding
	6.3.9 Proactively target specific groups of surfers such as the Association of Surfing Doctors, the Association of Surfing Lawyers and even the International Association of Surfing Academics, which have chapters in multiple countries and whose members have high disposable incomes and are prepared to 'rough it' a little for a good cause. The focus is to be on securing multiple large group bookings. Make available existing as well as specific marketing materials targeting the needs of each group.	1						Surfing sub-segment in Robertsport	Advocacy and marketing campaign initiated by early-2017	LINTA	Liberian Surfing Association, LTEC, MoYS, MICAT, Center for Surf Research (SDSU School of Hospitality and Tourism Management)	Donor funding
	6.3.10 Develop linkages with the carpentry sector to build boats, surfboards and other wooden products that can derive demand from coastal tourism.	3						Carpentry sector operators	Buchanan and Robertsport to be pilot initiatives	MICAT	Carpentry Union, LINTA	National budget
	6.3.11 In coastal areas, develop ways for tourists to rent motorcycles.	2						Tourists, coastal tourism operators	Rental initiatives to start by end-2017	Motorcycle Transport Union	MICAT, MoCI, LINTA, LTEC	TBD
	6.3.12 Conduct a study to identify the most suited areas for deep sea fishing tourism, including aspects such as safety and sustainability.	2						Coastal tourism segment operators involved/ interested in marine activities	Study conducted by 2018	LMA	MICAT	TBD
	6.3.13 Develop complementary water-based tours and services focused on deep sea fishing.							Coastal tourism segment operators involved/ interested in marine activities	Rolling basis	MICAT		TBD
	6.3.14 Develop a project around marine turtle nesting and conservation in Buchanan.	3						Buchanan ecosystem	Project elaborated by end-2017	FDA	EPA, MICAT	TBD

Strategic objective 6: Improve the Liberian tourism brand and develop robust tourism offerings.											
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
6.3 Develop the product offering related to coastal tourism.	6.3.15 To address the service gap connected to the surfing–hospitality segment, develop a train-the-trainer facility as a pilot initiative. The facility will impart skills to youth and other candidates interested in employment opportunities within the segment. Scale up the initiative to other locations based on results.	2						Surging segment in Robertsport	Pilot established in Robertsport	SDSU Center for Surf Research (SDSU School of Hospitality and Tourism Management)	MoYS, LTEC	Donor funding
6.4 Develop the product offering related to cultural tourism.	6.4.1 Develop a priority list of sites, monuments and buildings at a national level that require rehabilitation and, specifically, funding and technical expertise. The list is to be divided between Monrovia and the counties. As a starting pilot, develop a rehabilitation plan for renovating resources such as museums in Monrovia and historically significant buildings that are deemed important from a city tourism point of view. Develop a multi-year project plan with resourcing needs. Invite bids for select projects, starting with Monrovia as the pilot location.	1						City of Monrovia, Cultural tourism operators in Monrovia	Priority list to be developed by early 2017 Rehabilitation plan developed by mid-2017 Renovation to begin on a rolling basis	City of Monrovia	MICAT, MoCI	TBD
	6.4.2 Explore opportunities for ethical fashion initiatives involving local Liberian designers and leveraging Liberian cultural heritage. Connect Liberian designers to the markets through high quality: » Exposure to markets through participation in shows and events in Liberia and outside; » Technology and expertise support; » Financial support for procuring material and human capital, and for operating expenses.	1						Women and Girls, Youth	Assessment mission by the International Trade Centre to be conducted by mid-2017 Programme will potentially be launched by late 2017	MICAT	MoCI, LINTA, LTEC	International Trade Centre
	6.4.3 Enhance / encourage existing national / yearly events, i.e. marathon, surf competition, Sheroes Awards and the Liberia Music Awards. The awards show will encourage better customer service standard and improved service delivery.	2						Cultural tourism operators	Rolling basis	LINTA / TAL		TBD
	6.4.4 Develop cultural tours around the country, starting with select pilots focusing on the concept of African villages. Scale up pilots based on results.	2						Cultural tourism operators	First tour to be rolled out by end-2016	LINTA / TAL	MICAT	TBD
	6.4.5 Develop and promote a schedule of events for the fairgrounds in Buchanan.	2						Buchanan tourism operators	Schedule of events developed by end-2016	County government	MIA, MICAT, LINTA / TAL	TBD
	6.4.6 Develop a set of city-based tourism products through collaboration with hotels and service providers including tour operators, guides and taxi services. Products to be aimed at the closest market segment at hand: the domestic market, including expatriates and visiting businesspeople and officials. Hotels and lodging venues will be the anchors for the products, and will also include monitoring to measure uptake of the products. Based on performance, scale up and diversify products. Also use monitored results.	1						Entire value chain	Between 5 and 10 products to be developed and deployed by end-2016	LINTA / TAL	MICAT	TBD
	6.4.7 Develop a tourism website and a calendar of events that is updated regularly and can be viewed through the website. A vetted process for validating and entering events information on the calendar will also be deployed.	1						Entire value chain	Website and calendar of events developed by end-2016	LINTA / TAL	LTEC	TBD

Strategic objective 6: Improve the Liberian tourism brand and develop robust tourism offerings.												
Operational objective	Activities	Priority 1=high 2=med 3=low	Implementation period					Beneficiaries	Targets	Lead implementer	Supporting implementers	Possible funding source
			2016	2017	2018	2019	2020					
6.4 Develop the product offering related to cultural tourism.	6.4.8 Develop a concept around the Tala airport in Robertsport: » Renovation and operationalization of the airfield for developing connectivity with Roberts International Airport; » Development of a museum for expanding on Second World War historical significance.	3						Robertsport communities	Concept completed by end-2018	MICAT	Ministry of Transport, MoCI, county government	National budget
	6.4.9 Develop a network of craft markets in the country with the view of promoting high-quality Liberian handicrafts to domestic and international tourists.	2						Handicraft producers	Rolling basis	LINTA / TAL	LTEC	National budget
	6.4.10 Establish yearly Tourism award. The awards show will encourage better customer service standard and improved service delivery.	1						Tourism operators	First iteration of the awards to be held in 2017 as a pilot	MICAT	LTEC, MOYS, MOCI, LINTA	TBD
6.5 Develop the product offering related to ecotourism.	6.5.1 Develop a community-driven tourism product for Kpatawee Falls: a. Proper fencing and gates for collecting gate fees from tourists based on an appropriate revenue model; b. Toilet blocks; c. Camping grounds; d. Log cabins (to be developed later); e. Interpretation and storytelling by trained tour guides; f. Tour guides, including arborists to discuss specific tree species; g. Displays indicating history and specific information for visitors; h. Linking the two falls with multiple walking trails; i. Supplies shop at the entrance; j. Cultural dances at the entrance with tourists able to try dance classes and buy traditional dresses; k. Parking areas.	1						Ecotourism segment operators, Kpatawee community	Rehabilitation for Kpatawee Falls completed by early 2017	MICAT, LTEC	LINTA / TAL	Donor funding
	6.5.2 Develop the brand image of Kpatawee Falls, capitalizing on the Ramsar Site classification according to the falls. Ensure that the requirements for maintaining the classification are always complied with.	2						Ecotourism segment operators, Kpatawee community	Branding campaign completed by end-2017	LINTA/TAL	MICAT	Donor Funding
	6.5.3 Deploy the community-led ecotourism model in Liberia to develop niche Liberian ecotourism products. The model will involve clear delineation of community / Government / private sector ownership versus management responsibilities. Consider successful examples in Madagascar, Kenya and other countries.	2						Ecotourism segment operators	Rolling basis	MICAT	African Wildlife Fund	
	6.5.4 Explore the possibility of establishing the Montserrado and Du River Mangroves as a National Wildlife and Cultural Heritage Site to increase Monrovia's ecotourism potential.	2						Ecotourism segment operators	Rolling basis	MICAT	African Wildlife Fund	

(cc) UNMEER/Samuel Shilajiru. Montserrado, Liberia, on 7 March 2015.

(cc) jbdodane. Robertsport fishermen.

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International Trade Centre

Street address: 54-56, rue de Montbrillant
1202 Geneva, Switzerland
Postal address: Palais des Nations
1211 Geneva 10, Switzerland
Telephone: +41-22 730 0111
Fax: +41-22 733 4439
E-mail: itcreg@intracen.org
Internet: www.intracen.org