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A full-page background image of a lush tropical forest at sunset. The sky is a mix of orange, yellow, and light blue, with soft clouds. The foreground is filled with dense green foliage, including several tall palm trees on the left side.

# ACTION PLAN FOR **SUSTAINABLE** **TOURISM** **DEVELOPMENT**

LIBERIA PROTECTED AREAS NETWORK



ACTION PLAN FOR  
**SUSTAINABLE**  

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**TOURISM**  

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**DEVELOPMENT**  

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LIBERIA PROTECTED AREAS NETWORK

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# Introduction

## Purpose of the Plan

The objective of this plan is to assess and prioritize tourism development opportunities, define pilot projects, and prioritize actions that will help catalyze sustainable tourism development in Liberia. It builds on the Liberian National Export Strategy On Tourism, 2016-2020 (NES) and is focused on the same Strategic Objectives<sup>1</sup>:

1. Enhance the business/investment climate for tourism development
2. Improve critical tourism-related access and infrastructure
3. Promote investment in visitor services and experiences
4. Ensure social and environmental sustainability through community integration
5. Stimulate tourism demand through marketing, branding, and product development

This plan can be viewed as a first phase of the NES, with a more targeted strategy for implementation, centered on the country's current and proposed Protected Areas (PPAs), including:

- Sapo National Park
- Gola National Park
- Grebo-Krahn National Park
- Lake Piso Multi-Use Reserve
- Gbi (Krahn Bassa) PPA
- Cestos-Sankweini PPA
- Wonegisi PPA
- Kpo Mountain PPA
- Foya PPA

## Methodology

The process used to prepare this draft plan included:

- Review of prior plans, studies and reports related to tourism, biodiversity, socio-economic development in Liberia, and program documents from rural economic development initiatives within and near targeted landscapes. A bibliography of studies reviewed and analyzed is provided in Appendix B.
- Analysis of relevant tourism trends at national and regional levels
- Assessment of current tourism supply and demand, access constraints, socio-economic conditions, conservation threats, etc., in targeted landscapes, where data was available, or fieldwork could be conducted
- Assessment of the current and projected future market positioning of targeted landscapes
- Analyze opportunities for tourism growth

The project team also reviewed where data was available, local, national and regional tourism trends that are relevant to potential tourism development in targeted landscapes, including potential market segments, trends reflecting scale and nature of demand, pricing and positioning, origin of visitors, activity preferences and visitor behavior, as well as private sector investor interest and support. Phases of work included:

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<sup>1</sup> The NES Capacity Building strategic objective (SO) is omitted as a standalone activity and instead integrated as a core component of each of the other SOs.

## Desk research

Collection and review of all existing primary and secondary data and literature available. There was very little data available on the specific characteristics of current tourism trends in Liberia, including visitor numbers, demographic profiles, average length of stay, average spending, or primary travel motivations.

## Stakeholder Interviews

With government officials from several different ministries and agencies, directors and staff of conservation organizations, multilateral and bilateral donors, private sector tourism associations, individual tourism businesses, and the project management team.

## Fieldwork

Researchers visited the targeted landscapes and other relevant sites that were accessible given road conditions (rainy season) to verify findings from desk research and collect additional data through site visits and consultations with protected areas managers.

## Plan Rationale

Liberia's lowland and highland forests, and the biodiversity within them, indigenous cultures, history, and heritage are its most unique features, or in tourism terms, its core competitive strengths.

The primary focus of most tourism development efforts in Liberia to date has been on its coastline. While Liberia has beautiful beaches, most countries along the African coast do as well, and many have beaches that are equally or more attractive, more developed, and more accessible. The lack of focus on the country's interior has been driven by a lack of access, which in turn has inhibited tourism-related investment in and around protected areas. While coastal and marine tourism do have important contributions to make to Liberia's overall tourism offer, the future of its tourism industry lies in the development of these inland assets and core competitive strengths.

Liberia's rainforests and biodiversity assets also provide critical environmental services

to the country, and the planet, including the generation and maintenance of soil fertility for agricultural production; carbon sinks that help to combat global climate change; reliable water flows for drinking water, irrigation, and hydroelectric power generation; and habitats for thousands of plant and wildlife species, many of them endangered and endemic, that support sustainable livelihoods. These resources are increasingly under threat.

Primary threats include:

- Unsustainable hunting
- Cutting of forests for fuelwood/charcoal
- Both regulated and unregulated logging
- Illegal or unregulated artisanal and alluvial gold and diamond mining
- Increasingly unsustainable shifting cultivation

Sustainable tourism presents the country with a unique opportunity to protect critical environmental assets and services, exploit their long-term (non-extractive) economic value, create alternative livelihoods, preserve and celebrate indigenous culture, and improve rural standards of living.

It is also an important potential strategy for promoting broad-based economic growth, as a high value-added economic activity with significant linkages to a variety of other economic sectors, including transportation, construction, agriculture, and banking. Finally, it is a labor-intensive industry that creates a wide range of low-to-high-skill jobs, particularly for women and young people, and significant opportunities for small business and micro-enterprise development.

## Challenges and Opportunities

While these targeted landscapes and the communities that surround them offer a rich mix of potential visitor experiences, it is unlikely they will be sufficient, on their own (i.e., as standalone destinations), to stimulate significant tourism-related demand within the short to medium term (5-10 years), given current access constraints, lack of investment in visitor services, interpretation, and other challenges.

The proposed strategy is to address access and investment-related challenges through targeted pilot projects in protected areas and

to combine these biodiversity assets with other components of the tourism offer – urban and indigenous culture, history, heritage, beaches, watersports and other activities and attractions highlighted in the NES – to create unique and diverse travel experiences that can be marketed to domestic, expat, Diaspora, and international travelers and that have the potential to stimulate growth in visitor arrivals, spending, and tourism-related investment.

Given the numerous challenges the country faces in alleviating poverty and developing basic infrastructure, and a widening fiscal deficit, it is critical, in our view, that the proposed plan be very focused, and minimize, at least in the short term, the burden on government ministries and agencies to drive the tourism development process. This is the major shortcoming of the NES approach to implementation – the government, for most proposed actions, is defined as the lead actor. Successful implementation will require that a much broader range of actors drive a tourism development process that integrates a wide range of specialized expertise and dedicated technical and financial resources.

## Proposed Approach

Successful development of pilot projects will require prioritized interventions to improve access to targeted landscapes (road improvements and ideally aviation), reduce barriers to travel to and within the country (visa and immigration policy), enhance the tourism-related business and investment environment (investment incentives, access to credit, tax/tariff policy, concessions policy), create new visitor services and experiences (technical assistance, skills development, investment), and increase awareness of Liberia as a travel destination (marketing and promotion).

While the Forestry Development Authority and a variety of ministry portfolios including tourism, immigration, aviation, public works, culture, and community development have critical roles to play in building a foundation for tourism growth, most currently lack the industry-specific experience or the budgetary resources to assume primary responsibility for plan implementation. The most important role they and most governments play is to create

an attractive environment for private-sector investment, and regulate development to ensure sustainability, a level playing field, and that benefits are spread broadly across the wider economy.

Other actors, including a small but dynamic private sector tourism industry, conservation and other non-governmental organizations, donors, and international financial institutions will need to play a central role in plan implementation, in partnership with the government.

The government's primary role (as proposed) in the first phase of implementation would be to create a more conducive environment for tourism development, through changes to tourism-related immigration, aviation, investment and other policies. The success of proposed pilot projects will hinge, to a significant degree, on the successful design and implementation of those policy measures.

The proposed approach is to pursue very focused development and promotion of two pilot tourism circuits that integrate the targeted landscapes that are the most accessible, best protected, and offer the most compelling and unique potential visitor attractions. It is centered on defining a critical path and core activities required to successfully launch both circuits within the next 24-36 months.

The guiding principle underpinning this approach is simple, "nothing succeeds like success." In other words, the most viable strategy to stimulate tourism-related investment, increase awareness of Liberia as a travel destination, and provide the government with a rationale for devoting scarce resources to more broad-based tourism development efforts is to demonstrate the potential of tourism as a powerful economic development and conservation strategy.

The objective of this plan is to provide a roadmap for delivering those success stories, and through that process build up the skills and knowhow required for more broad-based development, build local capacity, identify Liberia-specific best practices (what works and what doesn't, in a Liberia context), and lay a foundation for full implementation of the NES.



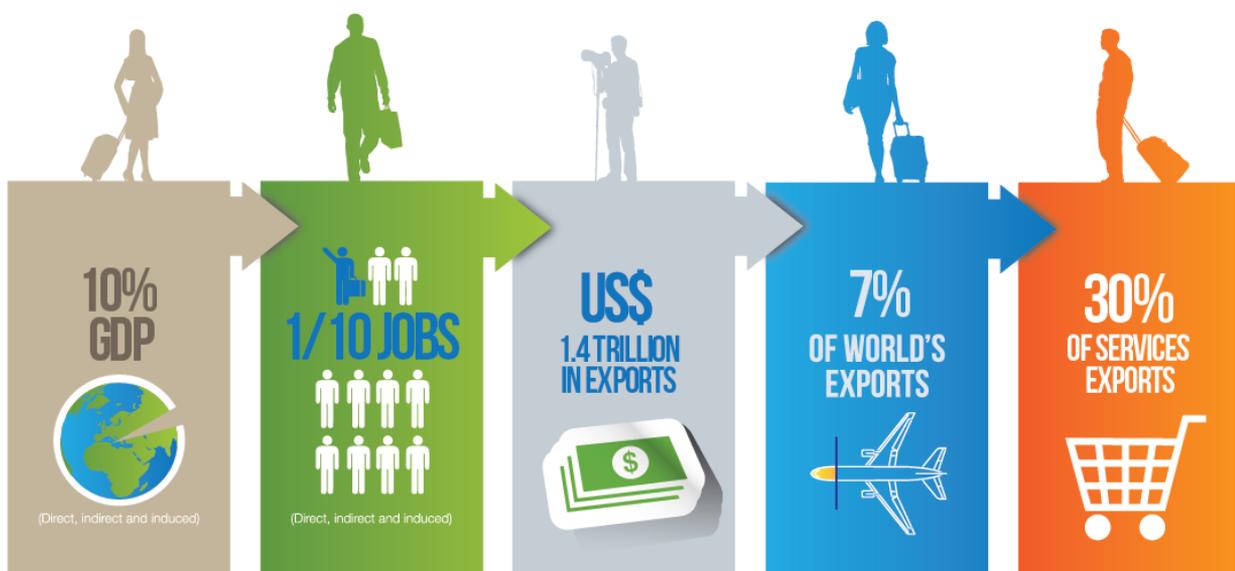
**WHY TOURISM?**



Travel and Tourism is one of the world's largest, fastest growing, and most dynamic economic sectors. Globally it accounts for 10% of economic output (US\$2.3 trillion), 10% of employment (313 million jobs), and 30% of services exports. Over the next decade, it is projected to expand 40 percent faster than global GDP (4% per year, vs. 2.7%), behind only banking and financial services.<sup>2</sup>

On the African continent, Travel and Tourism accounts for an estimated 8.1% of total economic output (US\$177bn), 6.5% of total employment (22.7 million jobs), and 9.7% of total exports (US\$48.7bn).<sup>3</sup> It is projected to grow by 4.2% per year over the next decade.

Africa was, until recently, one of the world's fastest growing destinations, with tourist arrivals



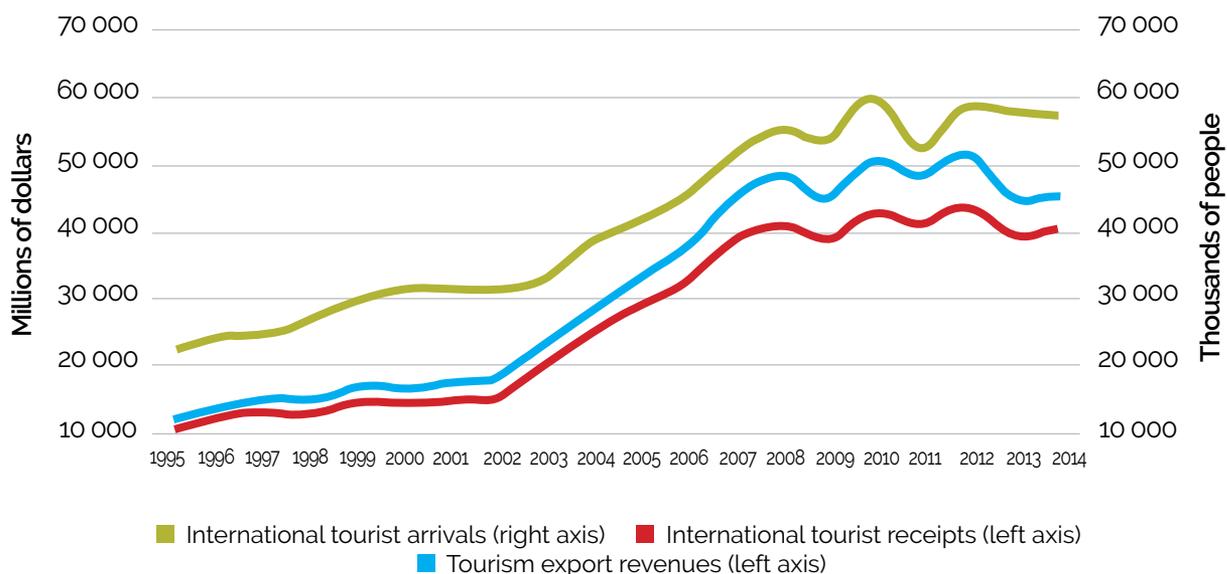
## WHY TOURISM MATTERS

© World Tourism Organization (UNWTO) July, 2017

<sup>2</sup> WTTC, "Benchmark Report, 2017 – World Summary"

<sup>3</sup> WTTC, projections in constant 2017 dollars and exchange rates

### Africa: International tourist arrivals, international tourism receipts and tourism export revenues, 1995-2014



increasing by 300% between 1995-2010. The global financial crisis, Arab Spring and the Ebola outbreak combined to slow that trend, with relatively little growth in the region registered between 2011- 2015.

The prior trend, however, now appears to be reasserting itself, with visitor arrivals growing by 7.6% in 2016, 9% in 2017, and 7% in 2018.

### Outlook for International Tourist Arrivals

|                      | 2008        | 2009         | 2010        | 2011        | 2012        | 2013        | 2014        | 2015        | 2016        | 2017        | Average a year | projection 2018 (issued January) |
|----------------------|-------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|----------------------------------|
|                      | Real change |              |             |             |             |             |             |             |             |             |                |                                  |
|                      | Full year   |              |             |             |             |             |             |             |             | Jan.-Dec.   | 2005-16        | between                          |
| <b>World</b>         | <b>2.0%</b> | <b>-4.0%</b> | <b>6.7%</b> | <b>4.7%</b> | <b>4.7%</b> | <b>4.9%</b> | <b>4.3%</b> | <b>4.7%</b> | <b>3.7%</b> | <b>6.8%</b> | <b>4.0%</b>    | <b>+4% &amp; +5%</b>             |
| Europe               | 0.4%        | -5.3%        | 3.0%        | 6.4%        | 3.8%        | 5.1%        | 2.0%        | 4.7%        | 2.3%        | 8.4%        | 2.9%           | +3.5% & +4.5%                    |
| Asia and the pacific | 1.4%        | -1.4%        | 13.4%       | 6.5%        | 7.3%        | 6.8%        | 6.0%        | 5.4%        | 7.7%        | 5.9%        | 6.4%           | +5% & +6%                        |
| Americas             | 2.7%        | -4.9%        | 6.7%        | 3.6%        | 4.4%        | 3.6%        | 8.5%        | 5.9%        | 3.6%        | 3.2%        | 3.8%           | +3.5% & +4.5%                    |
| Africa               | 2.9%        | 4.5%         | 9.3%        | -0.7%       | 4.6%        | 4.4%        | 1.1%        | -3.1%       | 7.6%        | 9.0%        | 4.7%           | +5% & +7%                        |
| Mid East             | 20.0%       | -5.4%        | 14.6%       | -9.3%       | 2.6%        | -1.5%       | 9.9%        | 4.0%        | -4.3%       | 4.4%        | 4.7%           | +4% & +6%                        |

Source: World Tourism Organization (UNWTO) ©

Data as collected by UNWTO APRIL 2018)



Beyond the statistics, there are a variety of other, equally important reasons why tourism represents one of the country's most important economic development opportunities. They include:

**Comparative Advantage** – With its rich biodiversity, vibrant living culture, heritage and history, the country's tourism asset base is unique. That uniqueness provides important potential competitive advantages.

**Development Goals** – Women make up 60-70% of the global tourism work force, with half of workers 25 and younger. It is also an important tool for rural economic development and poverty reduction, as most tourism assets,

in Liberia and throughout the developing world, are in rural areas.

**Micro, Small, and Medium-sized Enterprise (MSME) Development** – Most tourism-related businesses in emerging markets are micro-enterprises and small businesses.

**Backward and Forward Linkages** – Sectors that are closely aligned with and benefit directly from tourism development include agriculture, construction, manufacturing, infrastructure, financial services, and knowledge and technology transfer.

**Preservation and Celebration of Cultural and Natural Heritage** – by giving them economic value, as tourism assets.



## LIBERIA TOURISM CONTEXT

## Overview

Given the challenges Liberia has faced over the past three decades, it is not surprising that its tourism industry is under-developed. The potential silver lining in that lack of development is that the country can learn from the mistakes of other destinations and attempt to replicate approaches that have proven to be successful. It also has the opportunity to take advantage of technological advances, changing market conditions, and new ways of thinking about tourism that can help to accelerate the development process, drive sustainability, and ensure that the benefits of industry development are spread broadly throughout the country.

The overarching challenge in exploiting these opportunities is to define a targeted, properly sequenced set of activities that makes the best use of limited financial resources and tourism knowhow, maximizes the country's return on investment, and lays a foundation for future tourism growth.

## Assessment

The basic building blocks of a successful tourism destination include:

1. **Interesting visitor experiences** – wildlife tracking, cultural interactions, etc.
2. **Access** – to the destination and attractions within it
3. **High quality visitor services** – accommodations, interpretation, transportation, etc.
4. **Market awareness** – marketing and promotion

All are closely interlinked.

The country has a rich mix of unique and potentially world-class attractions and visitor experiences, particularly in and near its national parks and PPAs. Most of these attractions and experiences are not, however, "tourism ready."

This lack of readiness is driven by two primary factors:

**The Landscape** – Unlike East African savannahs, wildlife in Liberia's dense tropical forests is difficult to see. Interpretation is critical to maximizing the value of those wildlife assets and includes training of wildlife trackers and bird guides, habituation of primate groups, trail development, signage, and ideally man-made attractions that can augment those nature-based experiences, potentially including visitor interpretation centers, canopy walks, zip lines, bird blinds, viewing platforms, and river-based tours and activities.

Development of other visitor experiences should also be explored, including guided kayak and canoeing trips, medical plant tours (a blend of nature and culture), etc. There are numerous examples from other tropical rainforest destinations, including the Amazon Basin, Central America, and closer to home, Ghana and Cote d'Ivoire.

**Local Communities** – Most of the PAs and PPAs under study are surrounded by indigenous communities that could offer unique, authentic cultural experiences that are increasingly in demand by international travelers. While most of these communities would welcome the potential income to be derived from tourism, they need training, sensitization, and investment to exploit it.

Opportunities include development of village tours, food preparation, other forms of cultural expression (dance, music), community-owned lodges and homestays, training and employment of community guides, school visits, hands-on learning experiences (cooking, weaving, wildlife tracking, artisans in action, etc.), and handcrafts production and sales. There are several successful programs that can be modeled, in Africa and elsewhere, to guide the planning and development process, including models that are directly linked to community-based conservation initiatives. Examples are provided in Appendix A.

## Access

Liberia is well positioned, geographically, to penetrate the world's largest outbound travel market, Western Europe, and better positioned than most African destinations to the U.S. market. Most major European capitals are 2,500 to 3,500 miles away, and in or adjacent to the same time zones.

The challenge is lack of direct, frequent, or affordable air service. The country currently has only one nonstop flight from Europe to Monrovia, and most flights are expensive, due to a lack of demand, which is impacted to some meaningful degree by current aviation and immigration policy. Changes to the tourism policy framework are one of the most cost-effective ways to stimulate tourism-related investment and demand (which are closely linked), signal to the tourism industry that the country is "open for business," and lay a foundation for future growth.

Internal access, particularly to the country's most unique and most interesting attractions – its national parks, protected areas (existing and proposed), and traditional cultures – is more challenging, in terms of required investment, but more amenable to public and private sector intervention.

Given the compact size of the country, road improvements would appear to be the most logical approach to improving internal access. Current road conditions make travel to most of the country's national parks and PPAs unrealistic for all but the most adventurous travelers, particularly in the rainy season, which for parks and PPAs in the south can last 7 months or more per year.



Challenges include the significant costs of major road construction and the time required to build new roads. Building paved-road access to these parks and PPAs will require millions of dollars of public investment and likely a decade or more to complete.

A much lower cost and faster alternative is development of domestic aviation, which by most accounts was relatively well developed in the 1980's, including an airstrip bordering Sapo National Park.

For Gola National Park, the primary challenge is access to sites and attractions within the park. It is crisscrossed by streams and rivers that need to be bridged, in selected areas, to facilitate access and visitor service development, and trails that need to be built to create opportunities for hiking, wildlife tracking, birdwatching, and other tourism-related activities.

For most other national parks, reserves, and PPAs, both external and internal access presents even more significant challenges.

Less directly, the other major "access" constraint is current immigration policy, and the ways that policy is currently enforced. The issuance of visas on arrival and tourist visas are both issues that need to be addressed in the short term and have been identified by the Weah administration as important near-term objectives. The issue of numerous internal immigration checks, (e.g., from Monrovia to Sapo NP), should also be addressed.

## Visitor Services

Lack of visitor services is an equally important obstacle to development. Liberia's two most accessible national parks, Gola and Sapo, currently have no visitor services to speak of, apart from a handful of trained guides employed by FDA.

Accommodations is the most obvious visitor-service shortfall. Sapo does have very basic services – raised platforms and tents, near the entrance to the park, developed and managed by FFI – but they are designed primarily for field researchers, and not easily accessible to tourists. Gola has no accommodations facilities that could be identified.

Investment in international-standard accommodations and food and beverage services would ideally be carried out by private sector investors. While one local investor has been identified that is willing to invest in Gola NP (and potentially Sapo as well), and was able to participate in fieldwork and identify a potential site, there is significant work to be done to help offset costs and mitigate risks for this type of greenfield investment, including addressing internal access constraints (in the case of Gola, bridges over streams and rivers), and the policy environment (lack of a concessions policy, access to credit, etc.), discussed in more detail in the action plan section of this report.

### Market Awareness

Liberia is essentially unknown as a tourist destination, domestically, regionally, and internationally. No financial resources are currently being devoted toward destination promotion, the country has no official tourism website, and virtually no one in the international travel trade has any sense of the Liberia tourism offer.



While it could be reasonably argued that given the country's current state of tourism readiness that it makes little sense to devote resources to destination promotion now, it must be a core component of future tourism development efforts, to help generate demand for visitor services to be developed and support public and private sector investment. Action plans for a pilot marketing and promotion program are detailed in the action planning section of this report.



# MARKETS AND MARKETING

## Global Tourism Trends

There are dozens of major travel trends that can be highlighted and a variety of ways to categorize and attempt to quantify them. The market trends that Liberia is best positioned to exploit in the short-to-medium term include:

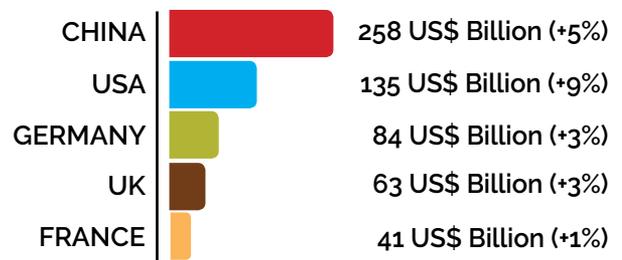
- Geographic shifts
- A continuing shift from developed to emerging and “undiscovered” destinations
- Growth of the Experience Economy and Experiential Travel
- Growth of the Sustainable/Responsible/Green Travel Market

### Geographic Source Market Trends

As highlighted in the chart to the right, the most significant geographic outbound travel market trends include:

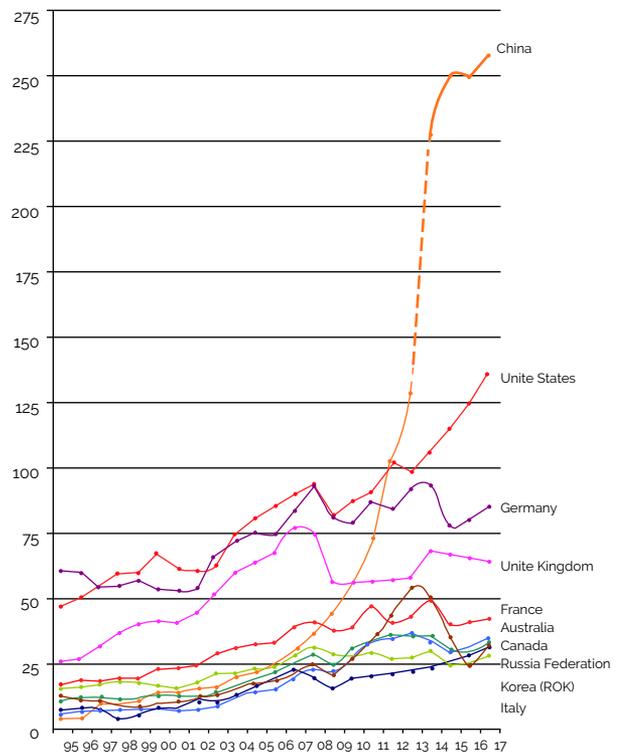
- The continued growth in Asian outbound markets, and in particular, China
- Accelerating growth in international travel spending from North America
- Relatively flat growth from major markets in Europe, and increases in short haul vs. long haul travel (71% of EU resident trips were within the EU in 2017), based upon sluggish economic growth, declines in the value of the euro and pound, and concerns over health and safety (i.e., terrorism), which have been the dominant trends in Europe over the past five years, but are now be subsiding, and in some cases reversing.
- Germany would appear to be an important potential target, given the level of international travel spending (double that of France) and current low levels of market penetration. The major challenges include lack of awareness of Liberia, airlift, and health-related concerns. Germans also tend to have a higher level of interest in “off-the-beaten path” destinations and authentic cultural experiences than other European markets.
- Italy is the only major European market

## World's top tourism spenders 2017



## Travel Demand from Major Outbound Markets, 1995-2017

World and regions: Outbound Tourism International Tourism Expenditure (US\$ billion)

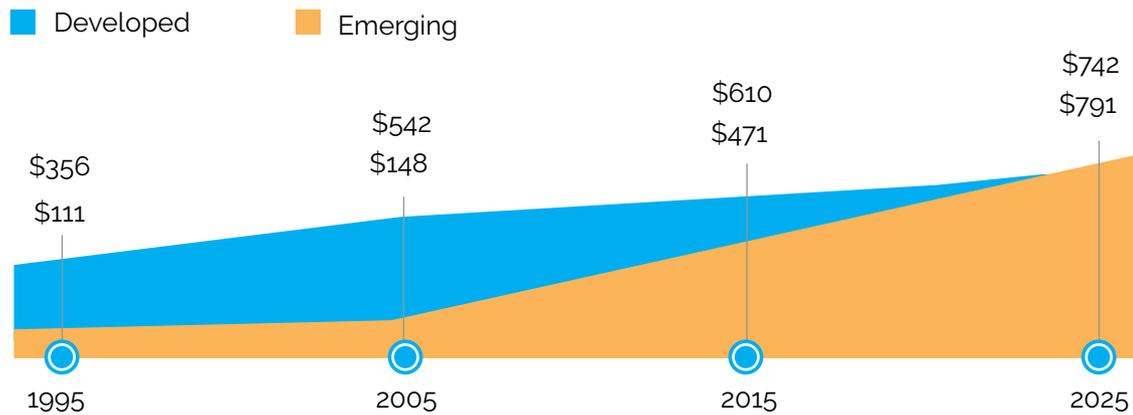


Source: World Tourism Organization (UNWTO)®

exhibiting sustained travel spending growth since 2010.

- Europe continues, as a region, to be the largest source of international travel spending<sup>4</sup>, and likely the most important medium-term target, regionally, based on airlift, time zones, travel distance, and language.

<sup>4</sup> Although 65% of all international travel spending by EU residents was within the EU. UNWTO, “European Tourism Trends,” 2017.



**Outbound travel spending (in 2015 USD billions)**

Source: Visa International

Another approach to identifying potential target markets is to look at projections of visitor spending growth. Projections by Visa International identify many of the same markets listed above, and several that are relatively new to sub-Saharan Africa, including China, Russia, Hong Kong, Singapore, Brazil, and South Korea, which are growing at a much more rapid pace than current primary source markets.

Key takeaways and potential market opportunities to be explored include:

- China –This is a large and rapidly growing market, with a rapidly growing Adventure Travel segment, discussed in more detail below. (Longer term).
- The U.S. market, which is second fastest growing international market, with obvious cultural and historical links to Liberia, including the Liberian Diaspora.
- Germany, Scandinavia, and Italy should also be viewed as medium-term potential growth markets.

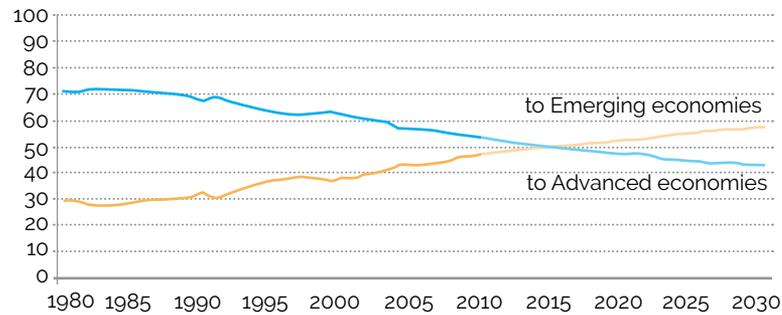
In 1995, roughly three out of every four dollars spent on international travel were in destinations in industrialized countries. Today close to half of all travel spending is being captured by emerging markets and is projected to exceed 50 percent by 2025.

The trend in visitor arrivals is even more pronounced, with more than half of total international tourists now traveling to emerging markets. This is being driven by several factors, including the rapid growth and declining cost of international air travel, the growing interest in new and “undiscovered” destinations, overcrowding or “over-tourism” in many traditional vacation destinations, an increased interest in nature, the environment, and traditional cultures, and rapid economic growth and growing levels of disposable income and travel demand in Southeast Asia, India, Russia, Brazil, and other world regions.

While impossible to quantify, the rise of the “Experience Economy” and growing demand for experiential travel is well established and is a trend that should present significant opportunities for tourism development in Liberia. Broadly defined, travelers looking for authentic, “undiscovered” destinations, and to immerse themselves in local culture, nature, and adventure (i.e., site doing vs. sightseeing). While it encompasses more traditional wildlife, outdoor recreation, and adventure travel markets, it also includes growing interest in authentic cultural interactions, learning experiences (e.g., homestays, learning local handcrafts and cooking traditions, etc.), “living like a local,” and making positive contributions to places visited.

### Inbound tourism, advanced and emerging economies

International Tourist Arrivals, share, %



Source: World Tourism Organization (UNWTO)®

According to a 2018 survey<sup>5</sup> of U.S. travelers commissioned by American Express, "For 2018, we see U.S. travelers expanding personal and global boundaries when they travel. We noted an increased interest in cultural discovery, personal connections, and inspiring destinations."

Highlights from the survey included:

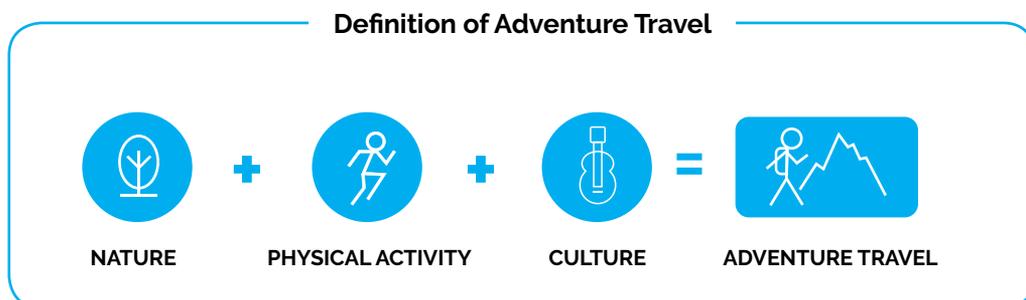
- A 44 percent increase in international bookings
- More than 25 percent of respondents cited learning about history, art and culture, across the globe, as their most important travel goals for 2018
- 72 percent said that they enjoy learning about different cultures
- 15 percent had traveled in the last year to experience new cultures and customs, and 20 percent (up 5 percent from 2017) plan to do the same in 2018
- 57 percent of those surveyed set 'exploring

a new destination that they've never seen before' as their most important travel goal for 2018

- 43 percent cited finding a local culinary spot in a hip neighborhood as the most exciting dining experience while traveling
- 49 percent prefer trips with adventure and excitement
- 57 percent of those surveyed seek to interact with locals when traveling
- 57 percent want to stay with a local while traveling
- 21 percent say that the most desired surprise and delight while on vacation is a unique activity planned by a local expert

Subsets of the Experiential Travel market that have clear development potential include:

**Adventure Travel** –According to the Adventure Travel Trade Association (ATTA), an organization of more than 1,000 tour operators and other travel professionals, adventure travel consists of:



<sup>5</sup> Conducted by RTi Research, 2018 Tourism Outlook: The Exploration of Today's Modern Traveler, a public opinion survey conducted from June 9-23, 2017. The survey's findings were based on responses from a sampling of 2,000 U.S. consumers who had traveled in the past twelve months.

Based upon that broad definition, Adventure Travel is a very large and rapidly growing market, but hard data on market size is relatively thin. According to an ATTA study conducted in 2013, the adventure travel market is growing at a compound annual rate of 21% and can currently be valued at \$683 billion (2017).

From a study conducted on behalf of the International Finance Corporation and the Papua New Guinea Tourism Promotion Authority, (2017), the global Soft Adventure Travel market (hiking, kayaking, rafting, backpacking, viewing nature/ecotourism, birdwatching, and diving) spent \$470 billion on travel, and \$453 billion on cultural tourism (2016).

### Growth of Sustainable/ Responsible/Green Travel

Another megatrend driving global travel demand is the increasing importance of and focus on Sustainable Travel (also referred to as or including "responsible" and "green" travel). While it is impossible to quantify, the market is large and growing rapidly, particularly among younger demographic groups. Given Liberia's environmental resources, threatened biodiversity, and level of development (in both economic and in tourism terms), and with the right kinds of development planning, investment promotion, and marketing, it is well positioned to capitalize on this trend.

In recognition of the growing importance of sustainable travel, UNWTO proclaimed 2017 "the Year of Sustainable Development for Tourism," and, in collaboration with a variety of global organizations, focused a variety of programs around the following themes:

Consumers also appear to increasingly be focused on sustainability when traveling. Booking.com conducts a large, global survey each year focused on interest in Sustainable Travel. Findings from the 2018 survey (12,000 respondents from 12 major outbound markets) include:

- 87% want to travel sustainably, and nearly four in 10 (39%) confirm that they often or always manage to do so.
- For 46% travelers, 'sustainable travel' means staying in eco-friendly or green accommodations, topping the list of what people think of when hearing the term. The top reasons travelers give for choosing eco-friendly lodging is to help reduce environmental impact (40%), with 34% seeking a locally relevant experience, and 33% wanting to feel good about an accommodation choice.
- 68% of travelers intend to stay in an eco-accommodation in 2018, up from 65% in 2017 and 62% in 2016. Additionally, the percentage of travelers who have not considered eco-friendly stays because they were unaware of their existence continues to decline, was at 31% in 2018, compared to 39% in 2017.
- When it comes to what inspires people to travel more sustainably, travel itself is the biggest motivator. 60% indicated that they found the impressive natural sights visited on past travels as their inspiration to travel more sustainably, while more than half (54%) said seeing the visible impact that tourism can have on destinations serves as their inspiration.
- While perceived extra cost remains the



**INCLUSIVE AND SUSTAINABLE ECONOMIC GROWTH**



**SOCIAL INCLUSIVENESS, EMPLOYMENT AND POVERTY REDUCTION**



**RESOURCE EFFICIENCY, ENVIRONMENTAL PROTECTION AND CLIMATE CHANGE**



**CULTURAL VALUES, DIVERSITY AND HERITAGE**



**MUTUAL UNDERSTANDING, PEACE AND SECURITY**

| Sustainable vacation activities that add to vacation enjoyment                                     | Percentage of global travelers who do this |
|--|--|
| Buying locally made products instead of mass-produced tourist souvenirs                            | 53%  |
| Being adventurous and using public transport instead of taxi                                       | 52%  |
| Going out of the way to find a local restaurant that only uses local ingredients                   | 41%  |
| Skipping tourist highlights in favor of less busy and often more rewarding sights                  | 40%  |
| Opting for a unique place to stay that also a certified eco-accommodation over a traditional hotel | 30%  |

Source: Sustainable Travel Report, 2018, Booking.com

barrier for travelers wanting to travel more sustainably, two thirds (67%) of travelers would be willing to spend at least 5% more on their travel to ensure it was as low impact on the environment as possible. Indian travelers claim to be the most willing, with nearly a third (32%) declaring that they would pay 15% or more, followed by Brazilians (21%) and Chinese (18%).

- The research also indicates that a lack of information and a lack of credible certification poses a significant obstacle to sustainable travel (32%), particularly in India, China and Japan where travelers cited this as even more of a barrier than extra cost.
- As sustainable travel intentions grow, travelers are looking for ways to more easily fulfil these ambitions. 40% said that online booking sites offering a sustainable or eco-friendly filter option would help, while 32% continue to call for an international standard for identifying eco-friendly accommodations.

Potential takeaways include opportunities that can be explored to focus on sustainable, eco-friendly approaches to development in targeted landscapes, and improve market positioning, through:

- Development or adoption of certification programs (Green Globe, Blue Flag, etc.)
- As a component of the investment promotion and facilitation process, technical assistance for the use of more renewable energy strategies, particularly given the cost of electricity in Liberia and the challenges to extending the grid into protected areas.
- More focus on integration of community benefits and engagement, and community-based enterprise development in the destination planning process.
- Opportunities to develop voluntourism and educational travel programs, community-based tourism programs, training and technical assistance, and marketing programs focused on sustainable travel, potentially in partnership with conservation NGOs working in each targeted landscape.

All these major market trends can be used as important differentiators (competitive advantages) in product and visitor service development, destination positioning, and marketing and promotion strategy development and implementation, discussed below.

## Pilot Target Markets

Based upon the foregoing analysis of Liberia's primary tourism assets, the competitive context, and existing visitor services, it is recommended that pilot market development efforts be focused on the following segments:

### Expat Market

According to the Bureau of Immigration there are a total of 4,308 "aliens" living in Liberia, with 3,502 employed by NGO's and other entities and 806 self-employed. There is also a large Lebanese (4,000 individuals) and Indian (estimated 3,000) community in the country. Most of these foreign nationals are business owners with the disposal income to spend on leisure travel.

The rationale for focusing initially on expats includes:

- They are already in the country, and often look for weekend escapes out of the capital and longer trips to explore the interior
- They understand and are more adapted to access and visitor service constraints
- They can provide insights into the needs and preferences of their home-country markets and provide feedback on efforts to develop high quality visitor services

### Domestic Market

While it is difficult to quantify, we estimate, from recent census data, that there are 50,000-70,000 Liberian households, living primarily in Monrovia, that have the disposable income for leisure travel.

### Diaspora Market

According to the Liberian Diaspora Engagement Program, managed by the Ministry of Foreign Affairs, it is estimated that approximately 500,000 Liberian citizens are currently living abroad, or roughly 10 percent of the total population.

According to estimates in the National Diaspora Engagement Policy, about 43% of Liberian Diaspora (213,204 individuals) are living in the US, 36% in ECOWAS member states, 16% in Europe, and 5% elsewhere.

### Birding Market

The birdwatching market would appear to have significant near-term development potential, based upon the country's asset base and market characteristics.

Birdwatching is among the fastest growing global tourism niches. In North America, some 3 million people travel each year specifically to observe birds—and those that do travel average 13 days per year away from home for birdwatching. In 2009, the US Forest Service found that bird-viewing and photography is "the most steadily growing [recreational] activity in the United States." In Europe as well birdwatching is an increasingly popular travel motivator, led by the UK, Sweden, Denmark, France and the Netherlands.<sup>6</sup>

Birdwatchers are a particularly valuable market for emerging destinations because birdwatchers, like backpackers, are often among the first travelers to open new destinations to international markets. For committed birdwatchers, the quality of the birdwatching has priority over the quality of tourist services, and they are willing to stay in relatively basic accommodations if they offer easy access to areas with high birding potential.<sup>7</sup> Tented camps and rustic lodges are examples of accommodation styles that are popular with dedicated birdwatchers that do not require large capital investments.

Birdwatchers also tend to spend more per day than other market niches. While average spend per day varies depending on the destination, one study found that birdwatchers consistently spend more money than other types of travelers and that global spending on nature based tourism generally is increasing about six times the industry-wide rate.<sup>8</sup> Another survey found that birdwatchers travel internationally an average of once to twice per year but some travel much more frequently.<sup>9</sup>

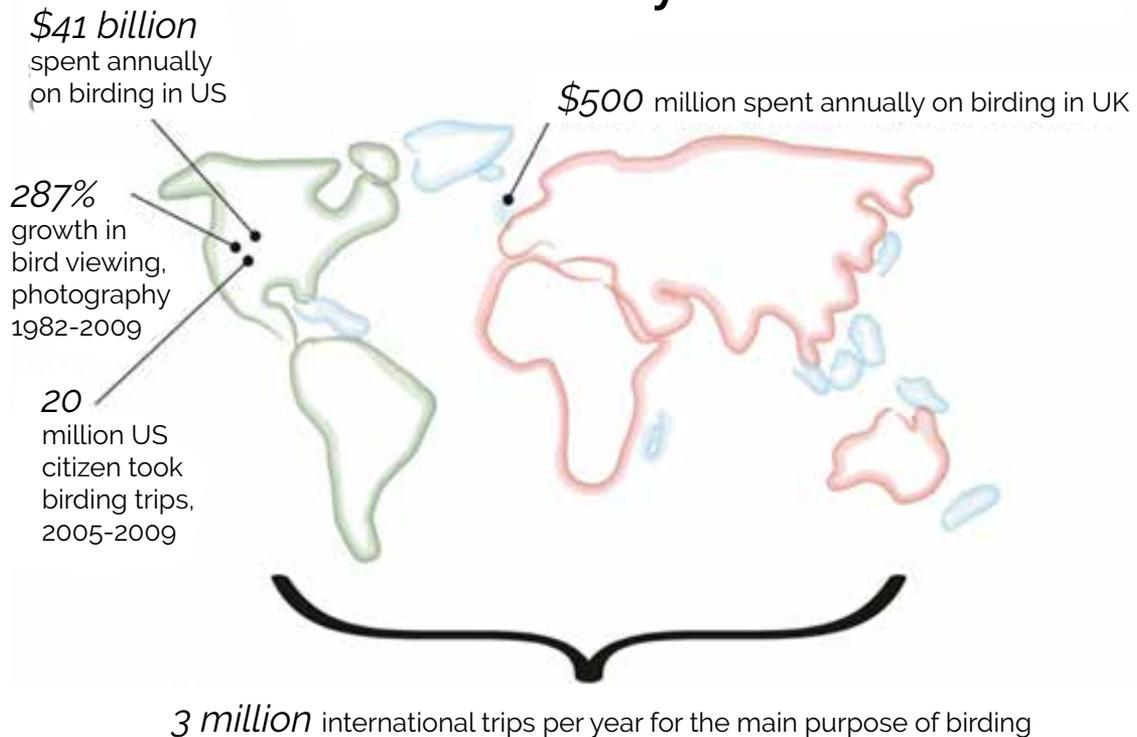
<sup>6</sup> Market Analysis of Bird-Based Tourism, Center for Responsible Travel.

<sup>7</sup> Birdwatching Tourism from Europe, CBI Ministry of Foreign Affairs

<sup>8</sup> Karen Higginbottom, ed. (2004). Wildlife Tourism: Impacts, Management and Planning

<sup>9</sup> Avitourism, Studies and Statistics.

# A Bird's Eye View



Center for Responsible Travel

Birdwatchers can be segmented into three basic groups:

## 1. "Hard Core Birders"

- Highly dedicated and competitive birders, impatient with less skilled birders and crowds
- Will travel long distances to see new or rare birds
- Bring their own equipment
- Not interested in other activities
- Account for about 10% of the birdwatching market

## 2. "Enthusiastic Birders"

- Knowledgeable and nature-lovers in general
- Comfortable in larger groups, travel motivation is as much social as bird-specific
- Interested in other nature and cultural activities
- Satisfied if birds are seen
- Represent approximately 50% of birders

## 3. "Casual Birders"

- Can viewed primarily as ecotourists—combining an interest in birding with nature based activities more generally
- Birding is often an add-on to other activities rather than the specific motivator of travel
- Represents roughly 30% of birders

A 2013 study found that in Europe "an increasing number of bird watchers are travelling to long haul destinations to spot new birds that cannot be seen in their own country or region" and, in addition to the traditional birdwatching destinations, are visiting less traditional countries.<sup>10</sup>

The Birding Market is proposed as a core focus of pilot project development. Specific recommendations for penetrating this market are included in the Action Plan section of this report.

<sup>10</sup> 20 CBI Ministry of Foreign Affairs. (2013). CBI Product Fact Sheet.

**SAVE Market** – The Scientific, Academic, Volunteer and Educational (SAVE) travel market is a large, rapidly growing global market that is well suited to Liberia, both as a pilot and longer-term target market. The primary differentiator between SAVE travel market and other market segments is that primary travel motivations are not leisure oriented, though leisure travel is typically an important component.

This market generates billions of dollars globally each year in travel-related spending on accommodations, food and beverage, guides, activities, researchers, teaching assistants, etc. It also has the potential to deliver a wide range of other benefits, including technical transfer, educational opportunities for Liberian students, support for rural economic development, etc.

It encompasses a broad range of market segments that can be proactively promoted, including:

- University professors and college and post graduate students in a wide range of fields spending several weeks to several months each year conducting research and fieldwork in subjects with significant potential in Liberia including environmental studies, zoology, entomology, herpetology, anthropology, agriculture, public health, economic development, etc.
- Secular and religious volunteer groups that organize and conduct thousands of programs each year focused on education, economic development, and other areas. There is also a subset of this market that is more clearly focused on the linkage between volunteering and tourism, or “Voluntourism.”
- Gap year programs for students that take a year between high school and university (particularly popular in Europe) to learn, experience different cultures, volunteer, and travel.
- Organizations that manage and promote summer programs around the world for high school students, covering a wide range of subjects.
- NGOs and travel companies that organize and promote “citizen science”

travel programs, including Earthwatch, Responsible Travel, and Africa Impact.

Other advantages of this market, particularly for the pilot phase of the plan, include a much less significant focus on the quality of visitor services, longer average lengths of stay, and fairly high levels of spending. There are dozens of organizations, hundreds of universities, and hundreds of thousands of travelers participating in these types of programs each year.

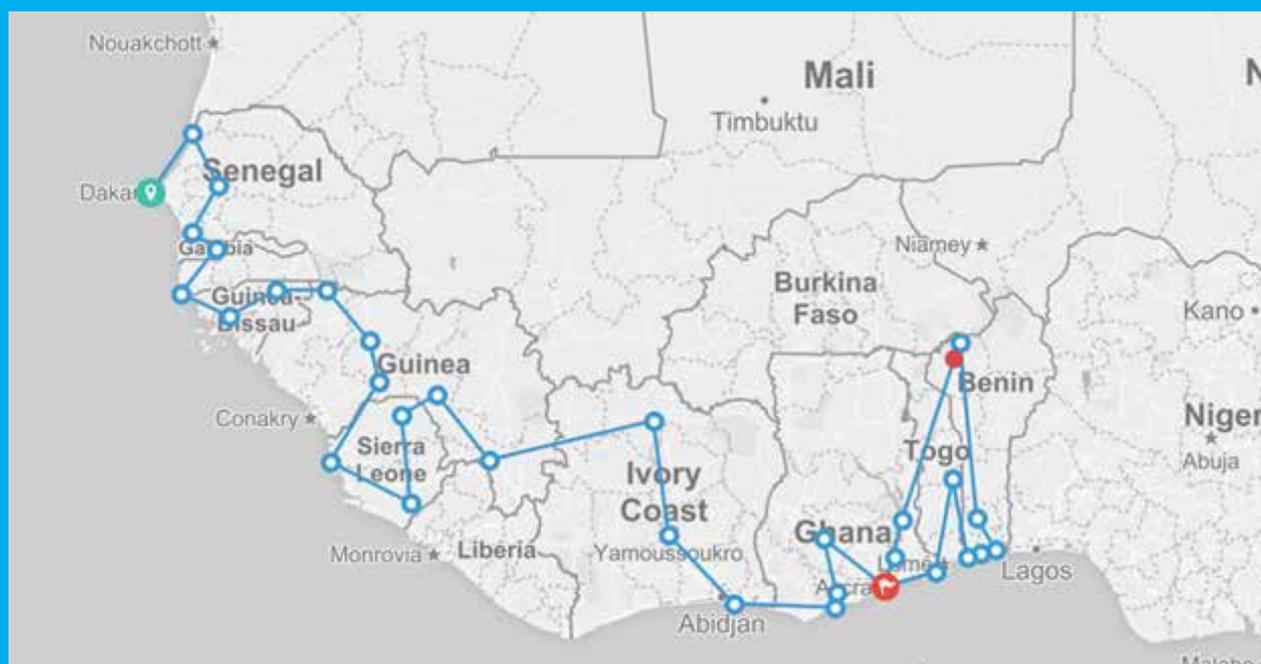
**Adventure Travel Market** – As discussed previously, though difficult to quantify, it is one of the world’s largest international travel markets and generates hundreds of billions of dollars in spending each year.

It can be broken down into a variety of segments, based on age, income level, average daily spend, average trip length, and primary interests or travel motivations, including authentic cultural experiences and level of difficulty or risk (soft to hard adventure, e.g., hiking to mountaineering).

From the results of online research, one of the largest segments of the adventure travel market currently traveling to West Africa appears to be young (between the ages of 18 and 30) traveling primarily over land, on multi-country, multi-week excursions focused on indigenous culture, nature, and wildlife. Relative to most markets they tend to have fairly low levels of daily spending, but they tend to be an important component of the destination development process, as pioneers of new destinations or “early adopters.” There are several operators offering West Africa packages, listed below. Most are currently bypassing Liberia, or only stopping in Monrovia (sample itinerary below).

There are also a few high-end operators that have created and market tours focused primarily on West African culture. For those we were able to interview, primary challenges identified included:

- Lack of convenient and affordable airlift
- An undefined cultural heritage product, compared to competing destinations in the region (e.g., village tours, music and dance troupes, etc.)
- Difficult access into the interior of the country, for culture and nature-based experiences



| Country              | Tourist visa Requirement  | Process   | Fee  | Notes   |
|----------------------|---|---|--|---|
| <b>Gambia</b>        | No visa required for most EU countries. Visa on arrival for US, French and Spanish nationals. | None  | \$0  |   |
| <b>Senegal</b>       | No visa required for UK, US and EU nationals  | None  | \$0  |   |
| <b>Sierra Leone</b>  | E-visa  | Online application, processed in 2-3 days   | \$110 US nationals<br>\$120 EU                 | Can be paid using Paypal or credit card       |
| <b>Côte d'Ivoire</b> | E-visa  | Online application, processed in 2-3 days   | 70 euros                                       | Paid at airport                               |
| <b>Guinea-Bissau</b> | Visa on Arrival for UK, US, and EU nationals  | Online clearance required   | 85 euros, varies by country                    | Paid by credit card                           |
| <b>Benin</b>         | E-Visa  | Online application  | 50 euros                                       | Paid by credit card                           |
| <b>Togo</b>          | E-Visa  | Online application  | 25 euros                                       | Paid by credit card                           |
| <b>Guinea</b>        | Requires application submission to overseas diplomatic mission                                | Cumbersome process (photos, passport valid for at least an additional six months, proof of travel and vaccinations, etc.), 1-5 days processing                    | 70 euros                                       | Can be paid by credit card                    |
| <b>Liberia</b>       | Requires application submission to overseas diplomatic mission                                | Cumbersome process (photos, passport valid for at least an additional six months, proof of travel and vaccinations, etc.). 10 days must be allowed for processing | US\$70 US nationals, 75-100 euros EU nationals | Must be paid via money order or wire transfer |

- A cumbersome visa process
- Lack of visitor services outside the capital
- Beach product underdeveloped and better beaches/visitor services in competing West African destinations

A comparative analysis of the process for obtaining a tourist visa in West Africa, above, helps highlight the challenge this poses to potential travelers.

A number of operators interviewed had little or no first-hand knowledge of Liberia's tourism offer and expressed an interest in participating in future familiarization tours, if organized.

#### Examples of West Africa tours on offer:

Intrepid Travel (US) - <https://www.intrepidtravel.com/uk/guinea/west-africa-overland-113934>

Dragoman Tours (UK) - <https://www.dragoman.com/destinations/details/africa/west-africa>

Crooked Compass (AUS) - <https://www.crooked-compass.com/tour/togo-benin-ghana/>

Explore Worldwide (UK) - <https://www.exploreworldwide.com/holidays/senegal-and-the-gambia>

Overlanding West Africa (UK) - <http://www.overlandwestafrica.com/dakar-to-freetown/>

Geographic Expeditions (US) - <https://www.geoex.com/trips/west-africa-mystical>, <https://www.geoex.com/blog/unexpected-west-africa>

In the second phase of development, after visitor services and experiences in targeted protected areas have been developed, and more broad-based destination promotion efforts can be launched, the **wildlife viewing market**, undoubtedly Sub-Saharan Africa's largest leisure travel segment, can be added to this list.

## Marketing

While supply-driven tourism development strategies focused on access, infrastructure, visitor services, training, and business environment, are critical components of destination development efforts, and a logical first step, when not accompanied or followed by meaningful efforts to stimulate demand, these types of programs typically fall short of objectives.

Global market trends, geographic and demographic market analysis, and market segmentation and branding strategies are all important inputs for stimulating increased demand but are of little value if not integrated into detailed marketing plans that are funded, implemented, and sustained over time.

Despite the skepticism on the part of many governments of the value of destination promotion, particularly in emerging and relatively unknown destinations (where the potential benefits of marketing would tend to be the greatest), and the challenges of impact measurement, marketing works. Fortunately, with the advent of digital marketing tools and techniques, return on investment can now be much more effectively measured, and the case made more clearly.

While there are no case studies of the impacts of destination marketing in emerging markets, there are a number that can be analyzed from industrialized countries (and studies of loss of market share when destination promotion is significantly reduced), including, most recently, the U.S.

For example, while individual U.S. states collectively invest hundreds of millions of dollars in destination marketing each year, the U.S. government had a history of devoting very few resources, until 2013, when the federal and state governments and private sector came together to launch a global marketing campaign, Brand USA, that to date has delivered significant, measurable results.

For 2017, measurements of Return Investment (ROI) of Brand USA marketing activities<sup>11</sup> included, on a US\$155 million investment:

<sup>11</sup> "The Return on Investment of Brand USA Marketing," 2017, Oxford Economics

- Each dollar of Brand USA marketing generated \$27.70 of incremental visitor spending. Including operating overhead, Brand USA achieved an ROI of \$25.00 per dollar invested and generated \$3.9 billion in visitor spending.
- In more rapidly growing outbound markets, spending per visitor drove even stronger returns. In Asia and Latin America, the average ROI was \$46.7 to \$1.
- In more mature, slower growing markets (Europe and Canada), average ROI remained solid, but more modest.
- Incremental visits totaled 1.1 million (based on Oxford Economics estimates).

Over the life of the program (2013-2017), Brand USA has stimulated:

- an incremental 5.4 million visits
- \$17.5 billion in incremental visitor spending
- \$24 in visitor spending for each dollar invested in destination marketing and promotion

- nearly \$4 in federal tax revenues for each dollar of federal expenditures

A more relevant example, South Africa is increasingly recognizing the importance of tourism to the national economy and the value of tourism marketing, through a commitment of more than 2 billion rand (US\$161 million) to tourism development in its 2017 budget. More than half of that amount was committed to marketing and promotion, and includes matching funds for cooperative marketing programs with tour operators in source markets.

From our research and discussions with MICAT, it is clear no government resources are currently being devoted to destination marketing. The first step in enhancing the marketing and promotion of the country should be focused on helping the government understand that 1) destination marketing is an investment, not an expense, 2) that resources need to be committed, and capacity building programs implemented, to ensure those

### Summary Results: Brand USA ROI (FY2017)

| Region                      | Incremental        |                  |                        | ROI         |
|-----------------------------|--------------------|------------------|------------------------|-------------|
|                             | Investment (\$)    | Visitors         | Incremental Spend (\$) |             |
| N America                   | 15,364,407         | 292,327          | 280,728,572            | 18.3        |
| Europe                      | 30,522,644         | 208,915          | 688,526,624            | 22.6        |
| APAC                        | 27,306,504         | 211,059          | 1,202,013,845          | 44.0        |
| LATAM                       | 3,310,259          | 39,281           | 226,534,116            | 68.4        |
| Other/Global Infrastructure | 64,179,769         | 360,352          | 1,493,154,609          | 23.3        |
| <b>Total marketing</b>      | <b>140,683,584</b> | <b>1,111,934</b> | <b>3,890,957,766</b>   | <b>27.7</b> |
| Overhead                    | 14,846,145         |                  |                        |             |
| <b>Total operating</b>      | <b>155,529,729</b> |                  |                        | <b>25.0</b> |
| APAC+LATAM                  | 30,616,764         | 250,340          | 1,428,547,961          | 46.7        |

### Historic Results: Brand USA ROI

| Fiscal Year             | 2013      | 2014     | 2015      | 2016      | 2017      | 5-Yr Average | 5-Yr Total   |
|-------------------------|-----------|----------|-----------|-----------|-----------|--------------|--------------|
| Brand USA budget (mn)   | \$ 99     | \$ 173   | \$ 158    | \$ 147    | \$ 156    | \$ 147       | \$ 733       |
| Spending impact (mn)    | \$ 3,402  | \$ 3,070 | \$ 3,036  | \$ 4,084  | \$ 3,891  | \$ 3,497     | \$ 17,483    |
| Federal tax impact (mn) | \$ 512    | \$ 462   | \$ 457    | \$ 615    | \$ 586    | \$ 527       | \$ 2,634     |
| Visits impact           | 1,143,186 | 903,440  | 1,025,183 | 1,193,893 | 1,111,934 | \$ 1,075,527 | \$ 5,377,637 |
| Spending ROI            | 34.4      | 17.7     | 19.3      | 27.7      | 25.0      |              | 23.9         |
| Tax ROI                 | 5.2       | 2.7      | 2.9       | 4.2       | 3.8       |              | 3.6          |

resources can be effectively deployed, 3) that programs need to be sustained, ideally through a direct funding mechanism, and cooperative marketing programs with the private sector, and 4) that marketing is vital to the success of product and visitor service development.

While marketing programs for each of the two pilot projects would be very valuable, the most critical need is at the national level. For international travelers, a country's image is one of the most critical components of the destination selection process, particularly for less well-known destinations.

A fundamental difference between the tourism sector and other global economic sectors is that governments are directly involved in the competition to attract visitors and visitor spending. While much of destination promotion spending is outsourced, to international marketing companies and advertising agencies, significant government resources in emerging markets are increasingly being devoted to destination marketing, as highlighted in the table below:

| Destination  | Marketing Budget (USD) | Year | Overnite Visitor Arrivals |
|--------------|------------------------|------|---------------------------|
| Mauritius    | \$16.2mn               | 2016 | 1.2mn                     |
| Seychelles   | \$10.9mn               | 2017 | 350,000                   |
| Kenya        | \$43.0mn               | 2016 | 1.1mn                     |
| Vietnam      | \$5.3mn                | 2017 | 12mn                      |
| Indonesia    | \$95.0mn               | 2017 | 14mn                      |
| South Africa | \$85.0mn               | 2017 | 2.7mn <sup>12</sup>       |
| Malaysia     | \$50.3mn               | 2016 | 25.9mn                    |
| Morocco      | \$42.1mn               | 2015 | 10.3mn                    |
| Turkey       | \$50.0mn               | 2015 | 36mn                      |
| Thailand     | \$24.0mn               | 2017 | 35mn                      |

Budgets and staffing in many more well-known and more highly developed destinations (US, Mexico, Australia, Spain, etc.), are considerably higher.

While this plan is not suggesting that Liberia spend millions of dollars on marketing and promotion, some effort need to be made to promote a positive image of the country, and to counteract negative images that linger from civil wars and the Ebola crisis.

What that annual destination promotion budget should be is a complex question that should be derived from development of a detailed marketing plan that defines the appropriate mix of digital, social media, travel trade outreach, trade shows, and other approaches, all of which can be phased in over time. A bottom-up approach should be used that first defines the optimum strategy, and objectives, which will yield an estimated cost. It then becomes a political question, in terms of how much the government is willing to invest, based upon the case that can be made regarding potential return on investment, and the current capacity of marketing organizations to effectively put approved funding to use.

A proposed Pilot Marketing Strategy is discussed and defined in the Action Plan section of this report.

<sup>12</sup> Excludes African arrivals





# ASSESSMENT OF TARGETED LANDSCAPES



The nine targeted landscapes assessed through this project included:

Sapo National Park

Gola National Park

Grebo-Krahn National Park

Lake Piso Multi-Use Reserve

Gbi (Krahn Bassa) PPA

Cestos-Sankwein PPA

Wonegisi PPA

Kpo Mountain PPA

Foya PPA

The assessment is organized into the following components:

Location and overview

Habitat profile

Biodiversity

Biodiversity threats

Species/habitats with high tourism appeal

An assessment matrix that rates and ranks each Landscape based upon a variety of metrics, including, but not limited to:

- Biodiversity
- Iconic Species
- External Access
- Internal Access
- Potential River Access
- Conservation Threats
- Protected Status
- Community Interest
- Current Tourism Potential
- Weighted Score
- Priority Rank

The following presents a summary assessment of the tourism development challenges and opportunities for each targeted landscape, based on fieldwork (where feasible), prior plans and studies, discussions with FDA staff, conservation organizations, tour and hotel operators, and other public and private sector

stakeholders, maps and satellite imagery, and additional primary and secondary research conducted over the course of this assignment.

## Sapo National Park (SNP)

Sapo National Park (SNP) is Located in Sinoe County in South-East Liberia. SNP is Liberia' largest protected area. Named after the local Sapo (or Sao) tribe, the park was gazetted in 1983, originally covering an area of 1308 km<sup>2</sup>. The Sapo National Park Act expanded the size of the park to 1,804 km<sup>2</sup> in 2003. The rationale for the expansion included:

- Some areas outside the park boundary at that time had very important animal and plant species and communities.
- Some of the animals present in the park needed large areas to survive.
- Local communities and the government felt there was economic potential for tourism and research. Benefits included employment for local people as guides, the production and sale of handicrafts, and improvement to roads and other infrastructure.

### Habitat profile

Sapo National Park is a Category II Protected Area under the IUCN Protected Areas classification. It contains the second largest area of primary tropical rain forest in West Africa after Tai National Park in neighboring Côte d'Ivoire. Located in the Upper Guinean forest ecosystem, Sapo consists entirely of important lowland rainforest, including swampy areas, dryland and riparian forests (FFI, 2015 and FDA, 2008). The land cover for the Sapo National Park is largely made up of high canopy forest with canopy densities that is greater than 80%. Approximately 143,046 hectares of the park (92%) is comprised of high canopy forest cover, (Table 9) (LTSI, 2016).



**Table 9: Land cover in Sapo Nature Reserve**

| Land Cover                      | Area (ha) |
|---------------------------------|-----------|
| Forest cover > 80% canopy cover | 143,045   |
| Forest cover 30% - 80%          | 7,757     |
| Forest cover < 30%              | 3,672     |
| Shrub                           | 461       |
| Grassland                       | 2         |
| Bare soil                       | 14        |
| Surface water bodies            | 11        |
| TOTAL                           | 154,965   |
| Turkey                          | \$50.0mn  |
| Thailand                        | \$24.0mn  |

Sapo is the largest Protected Area in Liberia and has a very small human presence with a population density of roughly 0.05 people/ha (LTSI, 2016). It is surrounded by farmland, especially in the southern part of the park. Some of the communities surrounding the park are comprised of local hunters. Hunting is a traditional activity in the forest, and bushmeat is an important source of protein. The most hunted species are rodents cane rat (*Thryonomis swinderanus*), Gambia rat (*Cricetomys sp.*), forest antelopes, (*Cephalophus sp.*, *Tragelaphus sp.*) and diurnal primates (*Cercopithecus sp.*, *Colobus sp.*) (FDA, 2013). The park experienced significant encroachment during the civil war. Removal of these groups occurred in August 2005 (FDA, 2013).

## Biodiversity

### Flora

Forest blocks the size of Sapo NP are rare in the Upper Guinean Forest ecosystem and the park represents an important international reserve of faunal richness (World Bank, 2005). Despite a paucity of published information on the parks faunal diversity it is often stated that Sapo has one of the richest floral diversities in the country and supports many endemic species. Where botanical surveys have taken place, a large number regional endemics and species new to science have been discovered (FFI, 2015).

### Fauna

#### Mammals

Sapo NP supports approximately 125 mammalian species, including a number of threatened mammals, such as the African Golden Cat (*Caracal aurata*), Drill (*Mandrillus leucophaeus*), Gola Malimbe (*Malimbus ballmanni*), and Liberian Mongoose (*Liberiictis kuhni*). The park is also home to the endangered forest elephant, the Giant Forest Hog (*Hylochoerus meinertzhageni*), three species of pangolin and leopards (*Panthera pardus*). Preliminary survey results estimate the elephant's population at 200-300 individuals (FDA 2013). The park also contains the largest pygmy hippopotamus populations in Liberia. The pygmy hippo is Liberia's national symbol and an endangered species with legal protection in Liberia under the Wildlife and National Park Act of 1988 and the revised Wildlife and Protected Areas Management Law of 2016. This species is unique to West Africa and is thought to number less than 3,000 individuals (FDA 2013). Seven species of duikers (locally called "deer") are found in the Park; including the vulnerable Jentink's Duiker and zebra Duiker, bay Duikers (*Cephalophus dorsalis*) and Maxwell's Duikers.

Sapo NP also has large primate populations distributed over seven different species, including the endangered Diana monkey (*Cercopithecus diana*), the Upper Guinea red colobus monkey, the black and white Colobus (*Colobus polycomos*) and the western chimpanzee (FDA 2013). Prior to the formal designation of Sapo NP in 1983 there had been no systematic study of chimpanzee populations in Liberia. Since then, various surveys have confirmed the existence of the chimpanzee, concentrated primarily in the Park's central and western areas, with estimates of the population ranging from 500 to 1,640 individuals.

The Park is estimated to support 20-25 percent of the national chimpanzee population (N Goran et al., 2010 and Tweh et al., 2014) – from Elizabeth Greengras, 2015). The culture of the local Sapo people includes a reverence for the chimpanzees and, a taboo against their hunting (FDA 2013).

## Birds

Sapo National Park is home to 590 species of birds, including a number of threatened species, such as the White-breasted Guineafowl and White-necked Rockfowl. The park is also home to the African Fish Eagle, African Grey Parrot, Great Blue Turaco, Speckle-throated Otter, water chevrotain, bee-eaters, egrets, hornbills, kingfishers, rollers, and sunbirds (FFI, 2010). In 2001 BirdLife International recognized Sapo NP as one of Liberia's nine Important Bird Areas (FDA, 2013).

## Amphibians and reptiles

Sapo NP is also home to 74 reptiles and amphibians (FDA, 2013). Kofron, 1992 established the presence of slender snouted and dwarf crocodiles in Sinoe River in Sapo, but their population declined over time due to illegal hunting for their skins - particularly the Dwarf crocodile – for leather goods (Conservation News and Kofron, 1992).

## Biodiversity threats

### Subsistence hunting, fishing and farming

Slash and burn agriculture and hunting for subsistence have a long history in Sapo NP. Farming destroys significant forest areas, leading to soil exhaustion and erosion. This threat is especially pronounced from the NP's south-eastern to south-western boundaries. In the post-war era, this has been exacerbated by increasing pressure in these areas from a growing population.

In March 2005, an estimated 5,000 people lived inside the park, according to the United Nations Mission in Liberia. Although efforts were undertaken to remove the illegal squatters, the park was not completely emptied until late August-early September 2005 (FFI, 2015). This human presence within the park and pressure from external communities created significant hunting pressures. Hunting and fishing deplete wildlife populations but answer local needs for protein and income in areas of limited livelihood options and widespread poverty (Greengrass, 2015). Bushmeat hunting for subsistence is further driven by natural resource exploitation in Sapo NP, such as mining, and industrial-scale agribusiness outside the park (FDA, 2013).

## Commercial hunting and fishing

There were illegal commercial hunting camps in the Parks vicinity during the time of the Sapo invasion that have been cleared by law enforcement patrols that have intensified around the Park. The target species, as documented by Greengrass, 2015; are primates, duikers, rodents, pangolins, birds, pygmy hippopotamus, water chevrotain (*Hyemoschus aquaticus*), bush pig and bushbuck. Duikers, other ungulates and primates reportedly contribute to 97% of hunted animals. The main destination for commercially harvested bushmeat (approximately half of all carcasses) is urban centres within Liberia, especially Monrovia. There is also some demand for chimpanzee body parts for traditional medicines as well as trading of chimpanzees at the international level (Greengrass, 2015). The pygmy hippopotamus is another animal that is hunted for its meat, in combination with habitat degradation it is likely that this pressure has resulted in significant population declines, however, a lack of a baseline population size or published results from monitoring efforts make the extent of the impact on this species hard to determine.

Increased economic development around the park including the establishment of road networks, and improvements in transportation links increases accessibility of the forest and transportability of harvested meat that puts increasing pressure on wildlife (Greengrass, 2015).

### Timber extraction

There is little formal information on the extent of logging in Sapo NP, though multiple anecdotal reports of logging do exist. These are associated with opening the area for farming and hunting, the presence of illegal squatters in the park and, potentially, illegal commercial logging for timber (World Bank, 2005).

### Collection of specific plant species

Collection of Non-Timber Forest Products (NTFP) is not well regulated and may cause damage and disturbance in the Park. The primary NTFP whose collection potentially threatens the Park is rattan, a vine collected mostly for weaving (World Bank, 2005).

### Artisanal mining

Artisanal mining of gold takes place around Sapo NP. Gold was discovered in the 1990s and the number of artisanal miners was as high as 18,000 in 2010. By October 2010, most were thought to have left the park voluntarily after an intensive awareness raising campaign by the government of Liberia (FFI, 2015). However, artisanal gold miners returned after 2013. Conflicts between FDA rangers and miners has been reported and in April 2017 led to the murder of two rangers and injury to four others (The Guardian, 2017).

Alluvial and artisanal gold mining inside the Park leads to forest loss, stream and groundwater pollution as well as illegal hunting and agriculture. Habitat destruction from illegal alluvial gold mining has been described as the greatest threat to pygmy hippopotamus within Sapo NP (Collen, 2011).

### Commercial mining

In addition to artisanal gold mining one large commercial mining camp is reported to be operating in the park (USAID, 2018).

Local residents around Sapo NP have few options but to farm, hunt or mine unless they emigrate or work for a logging operation, although very few jobs reportedly go to local residents. Very little secure, on-going development support has been provided to encourage local residents to turn from damaging economic activities. Park management has not contributed much the local economy, and local communities have not benefited much from the Park and do not see benefits of collaborating. The Park excludes residents from economic activities inside it, while providing benefits to only a limited number of local inhabitants (FDA, 2013).

### Institutional barriers to conservation

- Institutional capacity is currently too weak within government agencies to enforce laws and regulations effectively. This has multiple interacting drivers including a persistent lack of financial and human resources due to past political turmoil, the effects of timber sanctions, and undertrained manpower.
- Low levels of involvement by stakeholders around the NP have been attributed to the absence of structures and processes

for their participation and to inadequate skills within NP to encourage meaningful participation. This has the effect of making local communities resist and resent the NP rather than support it and seek ways to benefit from it. Furthermore, the actors influencing the Park do not cooperate, communicate or agree on common priorities, so that misinformation and conflict frequently spoil collaboration.

- *Weak Policy Coordination:* Policies relating to mining, forest management, infrastructure, agriculture and other sectors are not integrated with conservation objectives or each other, threatening the long-term integrity of the NP and its surrounding areas.
- *Misinformation & lack of awareness and education:* Local residents and private operators and others influencing the Park are insufficiently aware of the values of the Park and the consequences of their actions on it.
- *Limited data on existing resources within the SNP*

### On-going conservation activities and interventions

The Forestry Development Authority (FDA) is the sole government agency responsible for managing forest resources in Liberia, including protected areas, such as Sapo NP. A draft 5-year management plan covering 2011 to 2016 was prepared but has so far not been validated due to contentions over the new boundary harmonization and demarcations within the western and northeastern blocks extending the area covered by the NP. This management plan is currently under review pending validation.





Through support from USAID, FFI has been supporting conservation activities in the Park. FFI's goal is to establish a sustainable institutional baseline consisting of Park management structures, processes and training facilities that together will serve as a platform for expanding protected area management to other sites in Liberia and for external conservationists who wish to support conservation in Liberia (FDA, 2013).

### **Species/habitats with high tourism appeal**

**Habitats:** There are many natural saltlick sites in Sapo NP (FDA 2013), which would provide good wildlife viewing points. There is good, pristine wilderness and the rolling forests of Sapo NP are also attractive. There is also an opportunity to allow canoeing to a limited extent, along the Sinoe River (FDA, 2013). However, there are also tourism challenges.

1. Most tourists want to see large mammals, but these are scarce and very difficult to see in the closed canopy rainforest ecosystem of Sapo NP
2. The climate is humid and hot
3. Access is difficult, as you have to walk long distances to get into the Park
4. Visitors are likely to get wet, even in the "dry" season

**Species:** It has an extremely rich biodiversity, with many plants and animals that are of high conservation value; some of these species found in the Park are endemic to Liberia or the Upper Guinea Forest ecosystem. The Park contains the largest pygmy hippopotamus

populations in Liberia (FDA 2013). There are also numerous individuals of other charismatic species including forest elephant, Bongo, Leopard, Black-and-white Colobus, White-naped Mangabey, chimpanzee, Diana Monkey, and White-breasted Guinea fowl.

## **Gola National Park**

Gola Forest National Park is characterized by extensive rolling hills cloaked in evergreen and semi-deciduous forest divided into three blocks – Gola North, Central and South. In total Gola Forest covers 97,975 hectares and is located in Gbapolu and Grand Cape Mount Counties (FDA, 2008). It is a seasonal moist evergreen and semi-deciduous forest and lies between the Gola Rainforest National Park in Sierra Leone and Kpelle National Forest in Liberia (Hoke et al 2007).

Local forest communities around Gola National Park are very remote and therefore highly dependent on natural resources. Subsistence agriculture is the predominant local livelihood and satellite imagery shows the park as an 'island of green' in a largely agricultural landscape.

## **Biodiversity**

Gola National Park is home to significant biological diversity including 27 species of conservation concern and 81 species endemic to the upper Guinean ecoregion (Hoke et al 2007).

## Flora

This forest is one of the largest remaining intact areas of seasonal dense moist evergreen and semi-deciduous forests in West Africa. Of the 899 species of plant that are known to occur in the park, 232 are tree species. The most common family is identified as Leguminosae, with common species such as *Cynometra leonensis* and *Brachystegia leonensis*. However, the most dominant tree species is *Heritiera utilis* (*Sterculiaceae*) (Klop et al 2008).

A rapid biological assessment of this forest by Hoke et al 2007 identified a total of 200 plant species of which 53 (27%) are endemic to Upper Guinea, including three species endemic to Liberia (*Cephaelis micheliae*, *Trichoscypha linderi* and *Sericanthe adamii*). A large liana, *Zanthoxylum psammophilum*, not previously recorded west of eastern Côte d'Ivoire, constituted a new record for Liberia. A *Rhaphiostylis* species likely to be new to science was also discovered. Three saprophytic plant species without chlorophyll were found next to each other at one location. These are not commonly seen and it is rare to see multiple species in such close proximity.

IUCN classification for plants is incomplete. Nonetheless, at least 21 threatened species listed by IUCN have been recorded in Gola, including one, *Tieghemella heckelii*, that is classified as Endangered and 20 classified as Vulnerable (IUCN 2012). Poorter et al. (2004) classified 278 woody plants in the Upper Guinea forests as rare or threatened based on extent of distribution and threats from human exploitation. Of these, 67 have been recorded in the park (<https://www.golarainforest.org/the-forest>)



## Fauna

Gola Forest National Park biodiversity is high as part of the Upper Guinea Forest Hotspot (FDA 2008). It is comprised of charismatic fauna including forest elephant and pigmy hippopotamus and a diverse range of other vertebrate and invertebrate species.

### Mammals

A robust mammalian inventory of Gola has not been undertaken. A rapid biological assessment of Gola Forest NP forest by Hoke et al 2007 noted 33 mammals, including the rarely reported Western Palm Squirrel (*Epixerus ebii*) and the vulnerable, *Rhinolophus hillorum*, which has a restricted distribution and is known from only a few specimens.

Research by the Royal Society for protection of Birds covering the transboundary Gola Park (Sierra Leone and Liberia) between 2010 and 2013 recorded the presence of 109 mammal species, including 11 primates, 31 bats, 31 rodents and shrews, and 17 large mammals such as antelopes, felids and hogs (Hillers, 2013).

Encouragingly, an overview of the mammals in the EU funded GolaMA funded project area, which is adjacent to the national park and does not have any legal protection identified 49 species of mammal. This forest is home to healthy populations of several species of endemic primates including the Upper Guinean Red Colobus, the Western Pied Colobus and the Diana Monkey. Several species of ungulates that are known to occur in the project zone are endemic to the Upper Guinea forests, such as the elusive Jentink's Duiker and the smaller Zebra Duiker.

The Critically Endangered Western chimpanzee is relatively widespread throughout Gola Forest NP. The estimated total population of about 200 individuals in the project zone compares favourably to other West African forests and has remained stable through the last decade. The Endangered pygmy hippopotamus and the African Forest Elephant occur in multiple areas, most notably along the Mano/Moro River.

### Birds

The rapid biological assessment of this forest by Hoke et al (2007) found 145 bird species including six UpperGuinea Forest endemics and 14 species of conservation concern. Including *Malimbus ballmanni* (Gola Malimbe),

listed by IUCN as endangered. In total 327 species have been recorded on Gola Forest NP, amongst the highest for a locality in the Upper Guinean Forests.

Gola Forest National Park is listed as an Important Bird Area and holds a high proportion of the threatened and endemic species of the region and a good representation of Guinea-Congolian forest biome species. The birds that occur in the forest and surrounding areas include flagship species such as White-necked Picathartes, Rufous Fishing-Owl, White-breasted Guinea fowl and Gola Malimbe.

### Amphibians and reptiles

Many of the amphibians recorded from the area are forest specialists restricted to the Upper Guinea Forest zone. The rapid biological assessment of this forest by Hoke et al (2007) recorded 30 amphibians and 9 reptiles, including 1 Endangered, 2 Vulnerable and 6 Near Threatened amphibian species. Gola Forest is one of the two known sites in Liberia for the globally vulnerable (VU) Allen's goliath frog (*Conraua alleni*) (FDA, 2008).

Research by the Royal Society for protection of Birds covering the transboundary Gora Park (Sierra Leone and Liberia) identified 19 reptiles and 35 amphibian species of which 13 amphibians, and four reptiles were of global conservation concern (Hillers, 2013). With limited study effort new amphibian species (*Phrynobatrachus spp*) and range expansions *Amietophrynus taiensis* are still being discovered.

### Other species

Taxonomically limited studies of Gola Forest NPs insect diversity have identified 145 species of damsel and dragonflies in the studied areas. Dragonflies and damselflies are of global conservation concern (Hillers, 2013 & Hoke et al, 2007).

### Biodiversity Threats

Assessments of the threats to biodiversity within Gola Forest NP are extremely limited and reports are principally anecdotal in nature.

### Extractive use of biodiversity and mineral resources

Hole et al, (2007) report subsistence hunting and logging as the key threats to Gola Forest National Park. Hole et al (2007) also report the

occurrence of illegal small-scale diamond and gold mining inside the forest.

### Ongoing conservation activities and interventions

Current conservation initiatives in the region of Gola Forest NP include a EU-funded project, GolaMA which covers 40,000 ha of the Gola National Forest outside the National Park and in effect forms a corridor linking the Gola Forest National Park, the Foya National Forest and the Gola Rainforest National Park in Sierra Leone.

GolaMA aims to:

- Establish Community Forest Management Agreements (CFMAs) and financial sustainability business plans
- Ensure forest communities are benefiting from new, sustainable, alternative income generating activities under CFMAs while contributing to forest protection
- Reduce bushmeat hunting/trading of protected species in the project area
- Establish self regulated sustainable artisanal mining practices
- Determine the potential of carbon trading to provide sustained finance.

### Species/habitats with high tourism appeal

**Habitats:** Gola National Park has a number of attractive habitats including gallery forest, swamp forest and areas with the vast *Terminalia superba* tree. Gola Forest is also endowed with significant faunal richness of tourism interest including endemic amphibians, forest elephants, pygmy hippos, chimpanzees and an impressive number and variety of bird species.



## Grebo-Krahn National Park

Grebo National Forest was created in 1960 and was gazetted as a National Park in 2018 and covers 260,326 hectares (UNEP-WCMC 2006a). It is a wet evergreen forest situated in the southeast of the country in River Gee County. It is contiguous with the Forêt Classée du Cavally and very close to Tai National Park, both of which are located in neighboring Côte d'Ivoire. Grebo-Krahn is separated from Tai National Park by a narrow strip of dense human settlement and farming on the Ivorian side of the border (Hoke et al, 2007). The dense forest of Grebo-Krahn is bordered by two major rivers, the Cavalla and Dube (FDA 2008).

### Biodiversity

220 plant species have been recorded in Grebo-Krahn, of which 37 (17%) are endemic to the Upper Guinean eco-region (Hoke et al, 2007). The catalogue includes a new country record for Liberia (*Elytraria ivorensis*).

A rapid faunal assessment conducted in Grebo National forest identified a total of 300 insect, amphibian, reptile, bird and mammal species (Table 1).

**Table 1 A summary of species identified in a rapid biological assessment in Grebo National Forest. Adapted from Hoke et al, 2007**

| Taxa          | Grebo |
|---------------|-------|
| Odonates      | 63    |
| Amphibians    | 30    |
| Reptiles      | 6     |
| Birds         | 156   |
| Bats          | 12    |
| Small Mammals | 5     |
| Large mammals | 28    |

### Mammals

28 of the large mammals identified in the survey (50%) are classified as being of conservation concern (Hoke et al, 2007). Primates were regularly noted during the survey including Olive Colobus (*Procolobus verus*) and Western chimpanzee. The presence of red river hog (*Potamochoerus porcus*) was also recorded. Grebo is also a priority site for the endangered Liberian mongoose (*Liberiictis kuhni*) for which presence has only been recorded in Sapo NP and Grebo National Forest. Of the Liberian PAs surveyed by Hoke et al, 2007 Grebo National Forest also contains the highest density for the endangered Diana monkey (*Cercopithecus diana*).

### Birds

Ten of the 156 bird species recorded by Hoke et al, (2007) are of global conservation concern, with five Vulnerable and five Near Threatened species. Nine bird species are Upper Guinea endemics. Additionally, a number of rare and poorly known species were observed including Spot-breasted Ibis *Bostrychia rara*, Congo Serpent Eagle *Urotriorchis spectabilis* and Blue-headed Bee-eater *Merops muelleri*. It has also been designated as an Important Bird Area (IBA).

### Other vertebrates

The same rapid biological assessment identified 30 species of amphibians, 6 species of reptiles and identified 63 Odonates (Hoke et al, 2007). Among the endangered amphibians were *Amnirana occidentalis* and *Phrynobatrachus annulatus*. Grebo National Forest is also one of only two sites in Liberia where the vulnerable (VU) Allen's Goliath Frog (*Conraua allenii*) has been recorded (FDA, 2008).

### Biodiversity threats

Anecdotally it is reported that logging, artisanal gold mining and hunting are the primary threats to Grebo-Krahn, however data on the spatial and temporal scales with which these activities take places is not available. (Hoke et al, 2007)

## Lake Piso Multi-Use Reserve

Lake Piso, the largest lake in Liberia, is located in Gawulu-Tombe District in Grand Mount County about 72km west of Monrovia. It has a surface area of 128 km<sup>2</sup> and 58 km of coastline. Lake Piso was designated as a Multiple-Use Protected Area (MUPP), covering about 97,159 ha. It is situated on the Atlantic coast and extends in the NW - SE direction from the Mano River at Liberia's border with Sierra Leone to the Po River between Bomi and Montserrado Counties (FFI, 2015). The lake is used for artisanal fishing for commercial purposes. Robertsport, a small town on the lakeshore, is the center of commerce for lake and marine fishing (Kofron, C. P. 2018).

### Habitat profile

Lake Piso is an open coastal lagoon with an ecosystem composition unique within Liberia: coastal vegetation, mountain forests, mangroves, swamps, brackish water, freshwater systems and island habitats (Table 1); FDA, 2008). It is the largest such inlet on the Liberian coast, surrounded by forested hillsides, including one of the few remaining tropical rainforest patches in the region. This remnant patch of rain forest survives on the nearby Cape Mount. Elsewhere young secondary forest surrounds the lake (Kofron, C. P. 2018).

The lake is fed by several creeks and rivers; the latter drain a series of swamps above the lagoon, the lower ones of which are tidal and support mangrove habitat. Other mangrove swamps occur behind the dune ridge on the west side of the lake mouth and at other creek mouths within the PA. A series of small lakes with swampy margins occur on the

sandy-forested spit that separates the lake from the sea (USAID, 2008).

### Lake Piso MUR biodiversity

#### Fauna

##### Mammals

Species of globally important conservation status are present with the Lake Piso MUR. These include the Western chimpanzee with populations of the endangered Upper Guinea red colobus monkey (*Piliocolobus badius*), Sooty mangabey, and Mona monkey also present. Forest buffalo (*Syncerus caffer nanus*) have been reported in the communities of Sowe Beach and Tallah. Maxwell's duiker (*Cephalophus maxwellii*), black duiker, yellow-backed duiker and Ogilby's duiker have also been reported from within the MUR (FFI, 2010).

The Vulnerable African manatee (*Trichechus senegalensis*) has also been reported to visit the lake when breeding in the Moffa River, especially in the dry season (FFI, 2010).

##### Birds

Known as a conservation hotspot in the Upper Guinea Rainforest Lake Piso MUR has also been designated as an important bird area (IBA) and a wetland of international importance (RAMSAR site; FFI, 2015). These designations arise from the importance of Lake Piso as a site for feeding, roosting and migratory stop overs for large numbers of shore and sea birds. The shores and sand dunes of the lake are particularly attractive to waders and herons during the dry season. Resident bird species include copper-tailed glossy starlings,

**Table 2 Lake Piso habitat profile**

| Vegetation description              | Area (hectares) | % of PA land cover | Number of patches |
|-------------------------------------|-----------------|--------------------|-------------------|
| Water                               | 14,430          | 15%                | 16                |
| Mangroves and swamps                | 7,791           | 8%                 | 23                |
| Dense closed and open forest        | 11,034          | 12%                | 2,516             |
| Fallow land, cropland, cleared land | 62,900          | 65%                | 3,387             |
| Other (sand and oil palm)           | 1,005           | 1%                 | 506               |
| <b>TOTALS</b>                       | <b>97,159</b>   | <b>100%</b>        | <b>6,448</b>      |

rufus-winged illadopsis, African pied hornbill, double-spurred francolin, pied crows and the spur-winged goose. Migratory birds from Europe, which are common during the dry season include the African White-crested Bittern (*Tigrionis leucolophus*), Red-thighed Sparrowhawk (*Accipiter erythropus*), Blue-headed Wood Dove (*Turtur brehmeri*), Yellow-billed Turaco (*Tauraco macrorhynchus*), Black-throated Coucal (*Centropus leucogaster*), Black Bee-eater (*Merops gularis*), Piping Hornbill (*Ceratogymna fistulator*), Speckled Tinkerbird (*Pogoniulus scolopaceus*), Red-rumped Tinkerbird (*P. atroflavus*), Yellow-throated Tinkerbird (*P. subsulphureus*), Yellow-spotted Barbet (*Buccanodon duchaillui*) and Hairy-breasted Barbet (*Tricholaema hirsute*).

### Other vertebrates

Lake Piso is also an important site for reptiles with Slender-snouted crocodile (*Mecistops cataphractus*) present within the lake (FDA, 2017). The lake also used to be home to a population of Nile Crocodiles however anecdotal reports indicate that these have largely been exterminated from the lake and remnant numbers are not known (Kofron, 2018). Four endangered species of marine turtle are present within the Lake Piso MUR; Olive Ridley (*Lepidochelys olivacea*), Leatherback (*Dermochelys coriacea*), Green (*Chelonia mydas*) and Hawksbill (*Eretmochelys imbricata*). The sand banks, lake shore and costal beaches of Lake Piso MUR represent an important breeding site for these reptilian species, whilst the swap and mangrove systems act as nursery sites.

Lake Piso MUR, like many estuarine and mangrove systems is both an important spawning ground and nursery for fish species (World Bank, 2005). Critically endangered Saw fishes (*Pristidae spp*) are located within the MUR (Dulvy et al., 2014) however the knowledge of saw fishes in Lake Piso among local fishers was shown to be low (FFI, 2010, Leeney, 2014).

### Biodiversity threats

Ten years ago the FDA identified the following priority threats to Lake Piso MUR and the species it supports

- Unregulated hunting and fishing
- Increased arming and establishment of settlements in hilly areas

- High human population (urban and rural) and close to Monrovia
- Possible port development
- Strong pressure for other land uses (i.e. farming, human settlements)
- Possible land tenure conflicts

## Extractive use of biodiversity

### Subsistence hunting and fishing

Lake Piso is a Multiple Resource Use Reserve where hunting and fishing are allowed. Residents of the reserve may hunt and catch common, unprotected species, subject to certain conditions. Hunting or fishing permits must be obtained from the FDA. Similarly, shotguns, nets, fishing hooks and vessel may only be used if licensed. Species that it is permitted to hunt include cane rat, ground hog, red river hog and porcupine. Permission is only given to hunt other large, unprotected species (e.g. bushbuck) on special occasions. According to FDA, there is no sport hunting or fishing allowed within the Lake Piso Multiple Use Area (FDA 2017).

There is no evidence on the extent of compliance with hunting or fishing restrictions nor the state's capacity to monitor for breaches of the rules regarding species off take and breaching quotas.

### Commercial mining

Commercial extractive industries in the area include those involved in dredging for minerals, sand mining and offshore oil drilling. (USAID, 2008). Mineral deposits in the lake represent an attractive prospect for commercial mining. Initial attempts to grant concession agreements for mining were prevented in 2008, but the potential to exploit the lake is still high (5th CBD Report). Sand mining leads to the erosion of dune systems and modification of water flows potentially removing the breeding sites for the areas reptiles as has been seen with the Indian Gharial (*Gavialis gangeticus*).

### Socio-cultural barriers and opportunities

A stakeholder's prioritization of three PAs (Lake Piso, Gola and Wonegizi) comprising 12 biological, socio-economic and cultural values considered Lake Piso as the highest priority site based on its elevated levels of data availability, stakeholder involvement, funding availability,



population density, land use potential, security level and management capacity (FDA, 2008).

The connection between local communities and their land and biodiversity is reflected in the governance and practices of the MUR. Several centuries of settlement and use have built connections between Gola and Vai peoples and the land. These connections create a 'Cultural Landscape.' The people have unique knowledge of the area's biodiversity, natural resources and history, and have adapted practices and institutions to the area (FDA, 2017). Crocodiles are of cultural significance to the Sambolah clan of the Vai people. They are also totems for the Bombojah community (FDA, 2017).

### **Species/habitats with high tourism appeal**

There are several species and habitats with high tourism potential in Lake Piso MUR. The areas rich biological diversity includes species of significant tourist interest especially migratory bird species, marine turtles, hippos, manatees and primates. The areas habitats, especially coastal, riparian, island and dune system are also a considerable draw. FFI report that the lakelets, lagoons, rivers and creeks found in the area create considerable scenic beauty with the Lakelets and lagoons particularly common in the southeast of the lake (FFI, 2015). Whilst unspecified in nature the 2008 FDA report notes that unregulated tourism may become a threat in the area.

## **Gbi (Krahn Bassa National Forest) PPA**

A baseline study conducted within the KBNF (WCF and FDA, 2017) made 2,958 observations of wildlife. Signs of large mammals were found throughout the survey area and there were observations of almost all large mammals listed in Liberia as critically endangered, endangered and vulnerable. Signs of ten primate species were discovered, including the critically endangered Western chimpanzee, eight species of monkey and one nocturnal galago species. Signs of monkeys and bovid species were low compared to other PAs in southeast Liberia. Low rates of sightings can arise either as a result of low population densities, or elusive behaviour. Chimpanzee densities were estimated at 0.151 weaned chimpanzees per km<sup>2</sup> with a total estimated population of 531 individuals (range: 321 to 1028 individuals).

This population is roughly double that of Grebo-Krahn NP (247 individuals in 2015) and half that of Sapo NP (1,079 individuals in 2009). An unexpectedly high density of forest elephant signs was also encountered (1.07 signs/km). Since Sapo National Park was thought to be the last stronghold for elephant populations in Liberia, it is encouraging to see the potential for a notable presence of elephants within KBNF. The same survey also reported encountering many signs of hunting activity. Encounter rates of all human activities were higher (5.29 signs/km) than in both Sapo and Grebo-Krahn National Parks (1.27 and 3.91 signs/km respectively). Additional threats were observed such as potential logging, which would require further investigation and urgent conservation action.

## Fauna

A baseline study conducted within the KBNF (WCF and FDA, 2017) shows the number of species observed within KBNF for each class of animal (Table 8)

**Table 8: The number of species observed within KBNF for each class of animal.**

| Class                         | Number of Species |
|-------------------------------|-------------------|
| Mammals (Mammalia)            | 39                |
| Birds (Aves)                  | 13                |
| Reptiles (Reptilia)           | 5                 |
| Snails and Slugs (Gastropods) | 1                 |
| <b>TOTAL</b>                  | <b>58</b>         |

Specific surveys of plants/trees; amphibians; birds; and insects, should also be conducted to further understand KBNFs flora and fauna communities and to identify key micro level sites for conservation action. An elephant survey could also be conducted in the rainy season, to provide a large enough sample to calculate an elephant population estimate in KBNF.

## Biodiversity threats and recommended actions

Given the current status of KBNF recommendations from WCF and FDA (2017) are focused on securing the sites capacity to provide protection for vulnerable species and to address the paucity of baseline data which inhibits monitoring and evaluation of conservation effort.

### Extractive use of biodiversity

#### Subsistence hunting and fishing

According to the WCF and FDA (2017) report, the majority of inhabitants in and around KBNF are farmers who hunt as secondary economic activity. Nearly two thirds of the interviewees took part in some form of hunting with an average effort of 10.32 days a month. The majority (76.80%) of hunting undertaken inside the Krahn-Bassa PPA utilised traps (79.18%). The principal driver for hunting was financial gain. In contrast farming was undertaken for personal and family food supplies.

Currently, there exists no regulations on the use of trapping as a means of hunting in Liberia, and this should be rectified as soon as possible. Trapping is an unselective means of hunting that does not differentiate between protected and game species. Trapping can kill more than legal quotas and can often lead to waste as hunters may place hundreds of traps at a time and not have enough time to check them all.

#### Timber extraction

There is strong anecdotal evidence of illegal logging taking place within Krahn-Bassa PPA(WCF and FDA, 2018), though data on its spatial and temporal scales is not available. It is recommended that as the Eco-Timber block-lines discovered in Sinoe County in KBNF appear to be located in an area not allocated for commercial forestry their status should be clarified. The legality of this potential deforestation and its implications on KBNF is a priority action. It has also been noted by WCF and the FDA (2018) that the activities of the Liberia Hardwood Corporation (LHC) should be monitored. LHC has been awarded a contract to log timber along the ITI highway in KBNF. Since this is in the heart of KBNF, FDA and its partners should monitor the logging to ensure it is being done responsibly, with minimal impact on a future PA.

#### Administrative recommendations (WCF and FDA, 2018)

- Complete further in-depth analysis to produce an evidence-based model of potential boundary lines, to be sure to present the best scenarios on what a future protected area could look like.
- Evaluate and review management plan for Neezonie community forest to ensure biodiversity is prioritized.
- Begin awareness-raising with communities in and around KBNF. As KBNF has been unmanaged for many years, it is important to begin raising awareness about conservation (e.g. protected species, hunting rules, importance of forest cover, etc.) in local communities and to engage them from the outset to be sure they are involved in each step of creating and managing the protected area. Results of these baseline surveys could also then be shared with the communities.
- Conduct participatory community mapping with local communities to better understand how communities use the land in the region.

- Increase FDA presence in and around KBNF. To be sure that KBNF retains its current conservation potential, FDA should assign staff and rangers to KBNF, to begin liaising with local communities but to also deter the use of traps and to cut traps.
- Set-up a management or advisory committee for KBNF. KBNF has an unclear status at the moment, a management or advisory committee should be established to ensure that the KBNF forest is represented and management decisions are taken in a collaborative manner. Moreover, due to the many different land-use activities in the region (farming, oil palm plantations, mining, logging, community forests, etc.), it is essential that a committee is made aware of such things and how it may affect the future of KBNF.
- Ensure that KBNF forms part of Liberia's Protected Area Network. Though it has been agreed on and validated by stakeholders that the conservation potential of KBNF should be evaluated, it is of the utmost importance that FDA clearly communicates on the intentions for KBNF. This could be done through an internal memo or a report that is shared with all technical and financial donors, ensuring the KBNF management forms part of FDA's strategy and annual work plans.

### Ecotourism potential of the PAs biodiversity

Of the PA's considered in this study KBNF appear to be amongst the best sites for the endangered (EN) Upper Guinea red colobus monkey and the vulnerable (VU) pygmy hippopotamus.

## Cestos-Sankwein PPA

Cestos-Senkwein proposed protected area (PPA) covers 80,348 ha (FDA, 2008). It is located in Sinoe and River Cess Counties and straddles the Senkwein River, an Important Bird Area (IBA). The PPA shares boundaries with two Commercial Forestry Areas (Shani River and Buto River), and with the Sayon Town Community Forest (FDA, 2008). It has 30 kilometers of coastline and incorporates estuary systems for three major rivers (Senkwehn, Balu, and Buto) (FDA, 2008).

The Senkwein area is an Important Bird Area (IBA). A survey of the forests of the middle Cestos and Senkwein Rivers in early 1999 found dozens of endangered bird species, some thought extinct or whose range had not been established before in Liberia (World Bank, 2005). The endangered (EN) Gola Malimbe (*Malimbus ballmanni*), only known from 3 sites across Liberia, occurs here.

The PA anecdotally has the highest density of the vulnerable (VU) Jentink's Duiker and high densities of the endangered (EN) Upper Guinea red colobus monkey (*Procolobus badius*) (FDA, 2008).

### Biodiversity threats

Locally groups of timber harvesters with chainsaws have been reported operating in forests with easy road access and move the sawn planks to the roadside, where they are collected by trucks owned or rented by timber merchants (Figure 8).

## Wonegisi PPA

The Wonegisi (also spelled Wonegizi) PPA covers 137,427 hectares. It is located in Lofa County. This area features the Wologesi Mountain Range and Wonegisi Mountains, within two separate large blocks of largely uninhabited closed dense forest with rich biodiversity. The area includes important portions of the upper Lofa, Lawa, and Gbaye River watersheds (FDA, 2008).

Wonegisi was identified as a priority area for legal protection under the Protected Area Network Action Plan in 2008, ranking as highest priority in terms of species diversity, threat level, species vulnerability, connectivity potential and irreplaceability. However, inadequate funding and prioritization of other areas for gazettement has meant that, to date, Wonegisi PPA remains legally unprotected from hunting, mining, logging and farming and is not under any active management (FFI and SADS, 2013). Wonegizi hosts numerous sacred forest sites, reserved for rites and rituals, under local protection (FFI and SADS, 2013).

The Wonegisi proposed protected area has a population of 40,000 people distributed in 16 major towns and 47 satellite villages (Kpadehyea et al, 2015). Ziama Clan communities live within and immediately around the Wonegisi proposed protected area that have ancestral claim to the land. The Ziama clan is made of the Lorma and Mandingo tribes. Most of these communities are found within Zorzor Statutory District, in Lofa County. The Ziama Clan extends into Guinea, creating an opportunity for transboundary management between Liberia and Guinea. Currently, the communities have organized a community forestry management board (CFMB) known as the Ziama Forest Management Committee (ZCFMC) and a farming cooperative, Ziama Farmers' Cooperative Society (ZFCS), that seeks to, among other things, maximize the use of the forest and increase agricultural productivity and profitability (FFI and SADS, 2013).

The communities in and around Wonegisi are extremely poor and highly forest dependent (FFI and SADS, 2013). Most of these communities are involved in farming and hunting. Eight Ziama communities are located inside the proposed protected area or its approximate, estimated, buffer zone. These

villages are largely dependent upon the forest and who identify themselves as being the principle forest users and owners. An additional three communities do not farm in Wonegisi but they have access for hunting and collection of Non-timber forest products (NTFPs). Hunters rely less on farming and use money they collect from selling bushmeat to buy staples, and other meat, like chicken.

### Wonegisi biodiversity

Biodiversity baseline studies undertaken by FFI in 2013 present the area as being a high Conservation Value Forest – HCVF. It is also an Important Bird Area (IBA). Those surveys demonstrated the presence of numerous keystone, threatened or endangered species such as western chimpanzees, forest elephants, pygmy hippo and picathartes (*Picathartes gymnocephalus*) (FFI and SADS, 2013).

#### Flora

Primarily semi-deciduous, Wonegisi constitutes one of West Africa's last intact transitions from lowland rainforest to semi-montane *Parinari*-dominated forest at altitude. The lowland forest type is dominated by trees such as *Terminalia*, *Lophira*, *Pycnanthus*, *Albizia*, *Samanea*, and *Cryptosepalum* species. The forest rises up to an altitude of approximately 1,400m. In the semi-montane areas *Parinari* and *Ourtea spp.* dominate and are stunted and short above 1,000 m. The existing high forest is probably either secondary forest which has reached climax condition or secondary forest which is still undergoing succession towards mature high forest cover (Conservation International, 2011 as documented in FFI and SADS, 2013).

#### Fauna

##### Mammals

The forest (PPA) is part of a trans-boundary forest complex with the Guinean Ziama Biosphere Reserve and home to pygmy hippo, primates such as Diana monkey (*Cercopithecus diana*), West African chimpanzee and Upper Guinea red colobus monkey, Jentik's duiker (*Cephalophus jentinki*), forest elephants in addition to important populations of other vulnerable species such as Leighton's Linsan (FFI and SADS, 2013).

## Bird

The Wonegizi proposed protected area is an Important Bird Area (IBA) (FFI and SADS, 2013). It is one of two sites in Liberia that contain the vulnerable (VU) Nimba flycatcher (*Melaenornis annamarulae*) and the white-necked rock fowl (*Picathartes gymnocephalus*) (FDA, 2008). Other important species include the green-tailed bristlebill (*Bleda eximia*) and yellow-bearded greenbull (*Criniger olivaceus*).

## Amphibians and reptiles

Wonegizi is an important site for the endangered (EN) amphibian (*Phrynobatrachus annulatus*). It is also the only known site in Liberia for the vulnerable (VU) amphibian (*Phrynobatrachus villiersii*) (FDA, 2008).

## Biodiversity threats

### Extractive use of biodiversity

#### Subsistence farming, hunting fishing and farming

The primary cause of forest loss in Wonegizi is localised shifting agriculture for subsistence farming (FFI and SADS, 2013). This is associated with population increases arising from the return of refugees over the last 5 years (5th CBD Report) According to the 2008 census, the population of Lofa County increased by 39% since the last census in 1984 (FDA – 2008). Wonegizi's forest areas are the primary source of agricultural land building material, firewood and dietary protein (fish and bushmeat) (FFI and SADS, 2013).

#### Commercial hunting and fishing

Anecdotal reports of commercial hunting and pet trading have been reported from Wonegizi (FDA, 2008 and 5th CBD Report).

#### Timber extraction

Large-scale commercial logging operations are not reported from this area. The forest was also largely unaffected by the fourteen-year civil war in which many rural people fled the fighting to take refuge outside of the country. However, as Liberia has emerged from conflict, threats to these forests, including illegal and quasi-legal logging and others have increased (FFI and SADS, 2013).

## Collection of specific plant species

The threat of unregulated collection of Non-Timber Forest products (NTFPs) has also been reported from the area (FFI and SADS, 2013).

### Extractive use of non-living resources

#### Commercial mining

Limited information is available regarding extractive industries in or around Wonegizi. There are reports of regional mining prospecting for iron ore with the possibility of the extension of the Wologizi deposit which may entailing the possible erosion and contamination of local water bodies (5th CBD report and FFI and SADS, 2013).

#### Ongoing Conservation activities and interventions

Fauna & Flora International (FFI), together with its local implementing partner Skills & Agricultural Development Services (SADS), and with the support of the Forest Development Authority, are implementing a REDD+ program in the area. The Wonegizi Community REDD+ Pilot Project is a 5-year community-based approach to establish and co-manage the Wonegizi protected area implemented by FFI from 2016. The projects goal is to ensure the long-term conservation of Wonegizi forest and its biodiversity and ecosystem services, through empowering local people in rural communities to fulfil their rightful roles in sustainably managing forest resources, to improve their livelihoods. The project core activities are to:

- Providing sustainable livelihood options to target communities in and around Wonegizi Proposed Protected Areas;
- Sensitising communities on the benefits of sustainable forest use and the need and value of sustainable hunting practices, including the protection of endangered and protected species; and
- Reducing impact of subsistence agriculture on the forest (e.g. by introducing high yield variety crops, improving efficiency of farming systems and promoting agro forestry over slash and burn).

The REDD+ Project is working with twenty villages that include the eight villages inside the proposed protected area and three others around the forest (PPA).

## Ecotourism potential of the protected area

**Habitats:** The main features of this area are the Wologezi Mountain range and Wonegizi Mountains, within two separate large blocks of largely uninhabited closed dense forest with rich biodiversity (FDA 2008). It acts as a corridor into Guinea and offers transboundary conservation of nature opportunities. Wonegisi's ecotourism potential is supported by the important species, culture, and scenery that the forest offers (FDA 2008). The area includes Liberia's highest peak, Mt Wutevi (1,424m) (Kpadehyea et al, 2015).

**Species:** Wonegisi is recognized internationally as key biodiversity conservation hotspot and is home to flagship species such as western chimpanzees and other primates, forest elephant and pygmy hippopotamus. It is also an IBA with one of few records of the White-necked rock-fowl (FDA 2008). A stakeholder's prioritization of three protected area as that considered 12 criteria comprised of biological and social economic/cultural values ranked Wonegisi, Gola and Lake Piso as high priority sites (FDA, 2008).

## Kpo Mountain PPA

Kpo Mountain was proposed as a National Park in 2003 (Protected planet, 2014-2018). Its extent covers an area of 837.09 km<sup>2</sup> including the Kpo Mountain range, Bulubala Mountain, an important section of the Ba Creek watershed and surrounding closed dense lowland forest which connects these otherwise steep and relatively narrow mountain ranges (FDA 2008.)

### Biodiversity

#### Mammals

A study led in the Sime Darby Concession area in Gbarpolu County, which includes parts of the Kpo Mountains estimated a mammal community of 65 species within the study area (Bene et al, 2013). At the international level 15 species (47%) are of conservation concern according to IUCN Red List of Threatened Species. These species include two vulnerable species of Artiodactyla (Zebra and Jentink's duikers), one Vulnerable Primate (Diana monkey) and one Vulnerable Proboscidea (forest elephant). A further five species are Near Threatened (NT): The tree pangolin, the

Sooty mangabey and Olive colobus monkeys and two carnivores, the Leopard and African palm civet. Despite the relative brevity of this survey many species of conservation concern were reportedly found in appreciable numbers, among which were three primates (*Cercocebus atysatys*, *Cercopithecus Diana* and *Procolobus verus*) and six other large mammal species (*Cephalophus jentinki*, *C. niger*, *C. silvicultor*, *C. dorsalis*, *C. maxwelli* and *Panthera pardus*). The survey did not record the presence of chimpanzees however all the associated interviews with hunters that were carried out as part of the study did record mentions of chimpanzee presence (Bene et al, 2013).

## Foya PPA

Foya was proposed as a National Park bordering Sierra Leone and Guinea in 2003 (Protected planet, 2014-2018). Foya is the largest of the proposed protected areas covering 1,646.28 km<sup>2</sup> of the northwestern highlands; including the southwest extension of the Wonegizi Mountains, the headwaters of the Mano River, watersheds of Njagohun Creek, Pinga Creek, Mehembu Creek, Manome Creek, Gebeya River, Morro River, Boblulu Creek, Bo Creek, and approximately 40 kilometers of Lofa River frontage (FDA, 2008). Foya district in Lofa County is the meeting point of significant trade routes between Liberia, Sierra Leone and Guinea.

Foya is anecdotally reported as an important area for the vulnerable (VU) zebra duiker (FDA, 2008).

A draft quantitative assessment and priority ranking is presented on the following page, followed by a discussion of the methodology used, for review and discussion by relevant stakeholders (FDA, conservation organizations, etc.).



| Targeted Landscape (weighting) | Biodiversity | Iconic Species (x2) | External Access (x 2.5) | Internal Access (x 1.5) | Potential River Access (x 1.5) | Conservation Threats | Protected Status (x 2) | Community Interest | Short-term Tourism Potential | Total Score (rounded) | Rank |
|--------------------------------|--------------|---------------------|-------------------------|-------------------------|--------------------------------|----------------------|------------------------|--------------------|------------------------------|-----------------------|------|
| Sapo NP                        | 9            | 9                   | 5                       | 4                       | 8                              | -7                   | 10                     | 8                  | 8                            | 85                    | 3    |
| Gola NP                        | 9            | 9                   | 8                       | 5                       | 8                              | -6                   | 10                     | 8                  | 9                            | 97                    | 1    |
| Grebo-Krahn NP                 | 9            | 9                   | 2                       | 4                       | 4                              | -6                   | 10                     | 8                  | 5                            | 71                    | 5    |
| Lake Piso MUR                  | 5            | 7                   | 9                       | 8                       | 7                              | -6                   | 5                      | 9                  | 9                            | 87                    | 2    |
| Gbi PPA                        | 9            | 9                   | 5                       | 4                       | 6                              | -7                   | 0                      | 8                  | 7                            | 62                    | 4    |
| Cestos-Sankwein PPA            | 4            | 4                   | 7                       | 7                       | 9                              | -8                   | 0                      | *                  | 6                            | 51                    | 6    |
| Wonegisi PPA                   | 8            | 7                   | 4                       | 4                       | 5                              | -7                   | 0                      | *                  | 3                            | 41                    | 7    |
| Kpo Mountain PPA               | 4            | 4                   | 3                       | 5                       | 3                              | -5                   | 0                      | *                  | 3                            | 30                    | 9    |
| Foya PPA                       | 4            | 4                   | 3                       | 4                       | 6                              | -5                   | 0                      | *                  | 3                            | 31                    | 8    |

## **Factors influencing scores and rankings (scale of 1 to 10):**

**Biodiversity** – Raw biodiversity on a relative basis (relative to other targeted landscapes) in terms of numbers of plant, animal, and insect species, to the degree that it can be defined through review and analysis of prior studies. The less information available, the less useful these rankings, e.g., biodiversity assessments for some PPAs is based more on a geographic analysis of flora and fauna, climatic zones, etc., vs. previous field surveys, which are in most cases very limited or have not been conducted.

**Iconic Species** – Species that potential visitors would be most interested in seeing or tracking, including primates, pigmy hippos, duikers, manatees, rare or endemic bird species, etc., in terms of variety, estimated populations (where available), and level of difficulty in seeing and/or tracking them (e.g., the dense rainforests of Sapo and Grebo Krahn vs. the less densely forested areas in Gola), and plans for habituating primate groups (to date the only plans identified for primate habituation are in Gbi).

**External Access** – At present, and as a function primarily of road access (both travel distance and road conditions, particularly in the rainy season). If domestic air service can be launched these scores could potentially change significantly. For example, there are operating airfields (that receive air service on an as-requested basis, booked well in advance, through MAF Int'l) in close to somewhat close proximity to Wonegisi PPA, Grebo-Krahn NP, and Sapo NP.

**Internal Access** – As most parks and protected areas currently have very few or no marked trails, this is more of an assessment of the density of forest growth and the difficulty in navigating paths created by hunters, e.g., forest cover in the south tends to be more dense than those in the north.

**River Access** – Based on visual analysis of maps, satellite images, discussions with park management, and visual inspection, where feasible. For example, there appear to be significant opportunities to develop river or estuary-based access and recreational opportunities in Sapo, Lake Piso, Gola, Foya, and Grebo-Krahn. While some may disagree

with the potential importance and viability of river-based tourism near these parks and PPAs, in our experience river based transport and activities are a critical component of the visitor experience in dense tropical forest environments, and we believe the same type of potential is feasible in selected locations.

**Conservation Threats** – More of a rough gauge or estimation of populations living within PPAs or adjacent to PAs, based on prior studies, maps of population centers, prevalence of hunting, artisanal mining, and logging and pit sawing, based on review of prior studies and location (maps) of mining and logging concessions. This is a highly speculative exercise and in need of further refinement, if deemed relevant or useful.

**Protected Status** – Based simply on official designations and the levels of protection they imply, e.g., national park, which implies a very high level of protection, multi-use reserve, which implies fairly minimal protection, but some degree of planning and oversight, and proposed protected area, which, according to conservation organizations, provides no concrete protections.

**Community Interest** – In tourism development, based almost exclusively on discussions with conservation organizations working in each area and our own observations and interactions. No scores were estimated for PPAs not visited and in which no conservation organization is currently working.

**Short-term Tourism Potential** – A qualitative aggregation and weighting of all the variables included in the matrix, from a short-term tourism development perspective.

**Total Score** – Weighted sum of all scores.

**Rank** – An attempt to assess tourism development potential on a relative basis, in the short to medium term, including factors not accounted for in the matrix, or that are skewed based on a single metric. Does not necessarily reflect ranking by total score (e.g., relative rankings of Gbi PPA/Krahn-Bass NP, which is primarily a function of Gbi's lack of protected status, which is reportedly in the process of being addressed).



## PROPOSED PILOT PROJECTS

Two Pilot Projects are proposed for Phase One of the STP, a Northern and Southern Tourism Circuit. The rationale for a circuit-based approach includes:

- Provides a more realistic framework for how international travelers from major source markets (North America, Europe, and Asia), visit sub-Saharan Africa. Most are not going to undertake the journey to Liberia to visit a single National Park. They will likely want a full Liberia experience that includes culture, history, and varied landscapes (forests, beaches, etc.), and activities.
- Lays out a strategy for development and marketing of individual targeted landscapes, (e.g., Sapo and Gola National Parks), which have development potential, within the domestic and expat market, as standalone destinations.
- Works to address, in a targeted way, the full range of challenges that will need to be worked through for sustainable tourism development on a national basis, including external and internal access, business and investment environment, etc.

Both pilot circuits are designed and presented as travel itineraries, to reflect how they could be presented and marketed to international travelers, highlight the types of activities and experiences in demand by a significant segment of the international travel market, and to provide stakeholders with a vision for how the country might be promoted.

Both circuits would begin and end in Monrovia, the country's transport hub, population center, and home to domestic and expat markets, and include activities and attractions within the Monrovia area. There are also a range of tourism-related challenges to be addressed in developing Monrovia as the country's tourism hub and as a stop on these circuits, e.g., improvements to Providence Island, a site of significant historical importance that today is underdeveloped and under-interpreted.

## Monrovia and Vicinity

(courtesy of West Travel Management)

There are a variety of excursions and activities that can currently be pursued or developed, including:

### Monrovia Historical Tour

Embark on a historical journey through the capital of Africa's first independent Republic, Monrovia. Formally known as "the city of Christ" or Christopolis, this little city holds a tremendous amount of antiquity. Nestled in Monrovia's highest point, Ducor Hill is Liberia's first defense facility, Fort Norris, the country's first lighthouse, a monument honoring our first president, Joseph Jenkins Roberts, and the remnants of Liberia's first five-star hotel (the first in West Africa). Treat yourself to a full walk through of the Providence Baptist Church, a sacred place which was built in the early 1800's by returning Americo-Liberians.



### The Firestone Rubber Plantation

Enjoy a ride through the world's largest rubber plantation. Having been a part of Liberia since 1926, The Firestone Rubber Plantation is filled with rich history to be revealed to you through live commentary during your tour. At the tours end head over to The Firestone Club

House Restaurant. This quaint eatery is the perfect place to enjoy local and international cuisine, and also offers a gorgeous view of the plantations 9-hole golf course.



### Chimpanzee island boat tour

Take a voyage to Marshall City surrounded by various lagoons, and a cove where three rivers converge and flow into the Atlantic Ocean is the Chimpanzee Island, a place where over 60 chimps call home. Take a glimpse into their world from a safe distance as they roam free on the island's edge. Bring them offerings of banana and sugar cane, and watch as they harmlessly extend their gratitude in you doing so. The route to Chimpanzee Island lies on the Farmington River. Gain the knowledge of traditional hospitality and customs from the local fisherman, and partake in some fishing action as they share with you some of their vintage techniques.



### Traditional cooking class

Enjoy an authentic Liberian experience through the art of traditional cooking. Gain the chance to see a live demonstration of how some of the country's most delicious meals are prepared. Learn everything from what ingredients are used and why, to the various cooking tools that help make these meals come to life. Vegetarian options are available if requested.

### The African Village Experience

Travel through the Liberian countryside for a true African village experience like no other. The Bai T. Moore village, rooted in Bomi County, is home to one of Liberia's most prominent writers. Get whisked away by a unique look into village life, and become in tune with the rich history and cultural heritage of these beautiful people. Gain a chance to enjoy the selected readings of Moore's poetry as well as his famous Liberian Romeo and Juliet inspired



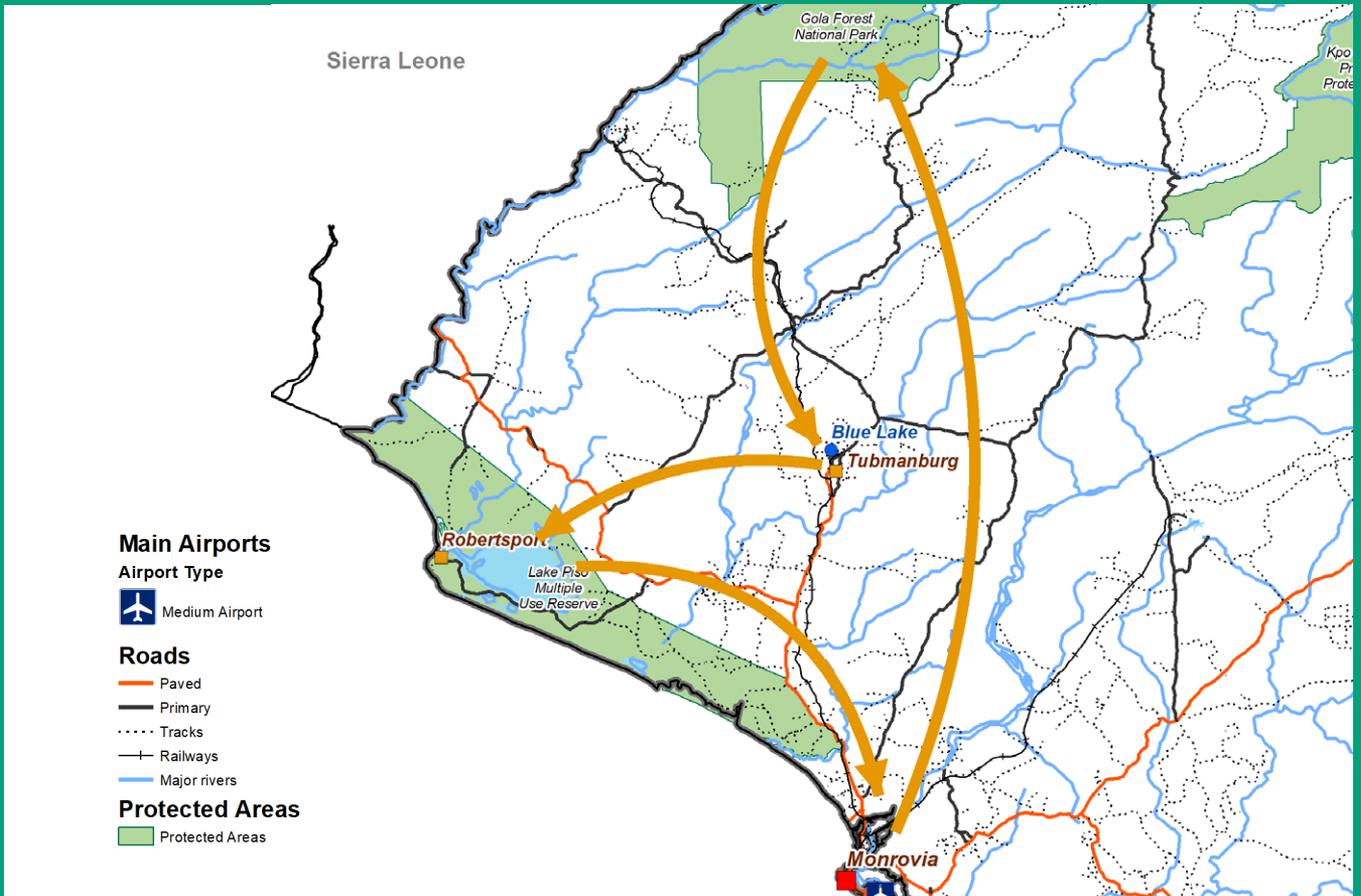
story, *Murder in the Cassava Patch*. Your tour will end with a one-of-a-kind cultural dance and drum performance. A memory that is sure to last a lifetime.

### Fishing Tour

Set sail at dawn watching the gorgeous sun rise above the Atlantic Ocean for an all-day fishing excursion. You will be given the chance to experience the dance of the dolphins as they jump and dive to their own unique rhythm. Seated comfortably in a spacious boat with a sheltered cabin, private toilet, and opened sunning area take your chance at catching a variety of fish including Marlins, Mahi Mahi or "Devil Fish" as the locals call it, and Yellow Tail Tuna just to name a few. Come and experience adventure tourism at its best.



# Northern Circuit



## Day 1-2

Monrovia (see previous page)

## Day 2

Drive from Monrovia to Gola NP

**Alternate access:** Fly from Spriggs Payne Airport to airfield near Gola NP (existing airfield to be rehabilitated or new one developed).

**Accommodations:** Gola Rainforest Lodge (to be developed). Alternative accommodations for backpackers on a budget – community lodge or homestay program, which can be developed through grants and technical assistance programs/training.

## Days 3-7

Potential activities and attractions to be developed:

- **Wildlife tracking** – Pigmy hippos, forest elephants, diana, red colobus monkeys, chimpanzees, etc. – local community guides (alternative livelihoods for hunters)



- **Interpretive walks/hikes** – Medicinal plants, insects, flowers, butterflies, etc. – trained local community guides



- **Birding tours** – trained local community guides



- **Village Experiences** – meeting village elders, community welcoming ceremony, cooking, music, dance, handcrafts, visits to local schools, etc. – local village guides. Lunch or dinner prepared by community (with some training in food safety).
- **Manmade Attractions** – Canopy walks, canopy towers, zip lines, bird blinds
- **River-based activities** – River cruises, kayaking, fishing, birding tours by boat, etc., multi-day park tours combining canoe trips, hiking trails, guides, campsites, etc.



- **Multi-day hikes within the park** – for wildlife tracking, birding, etc., potentially including community managed campsites/huts, meals



- **Scientific, academic, volunteer programs** – e.g., biomonitoring volunteer experiences, university training programs, etc.

## Days 8

Drive from Gola NP to Tubmanburg, lunch, afternoon activities around the lake (hiking, biking, boating, etc.). Late afternoon, drive from Tubmanburg to Lake Piso Reserve, hotel check-in.

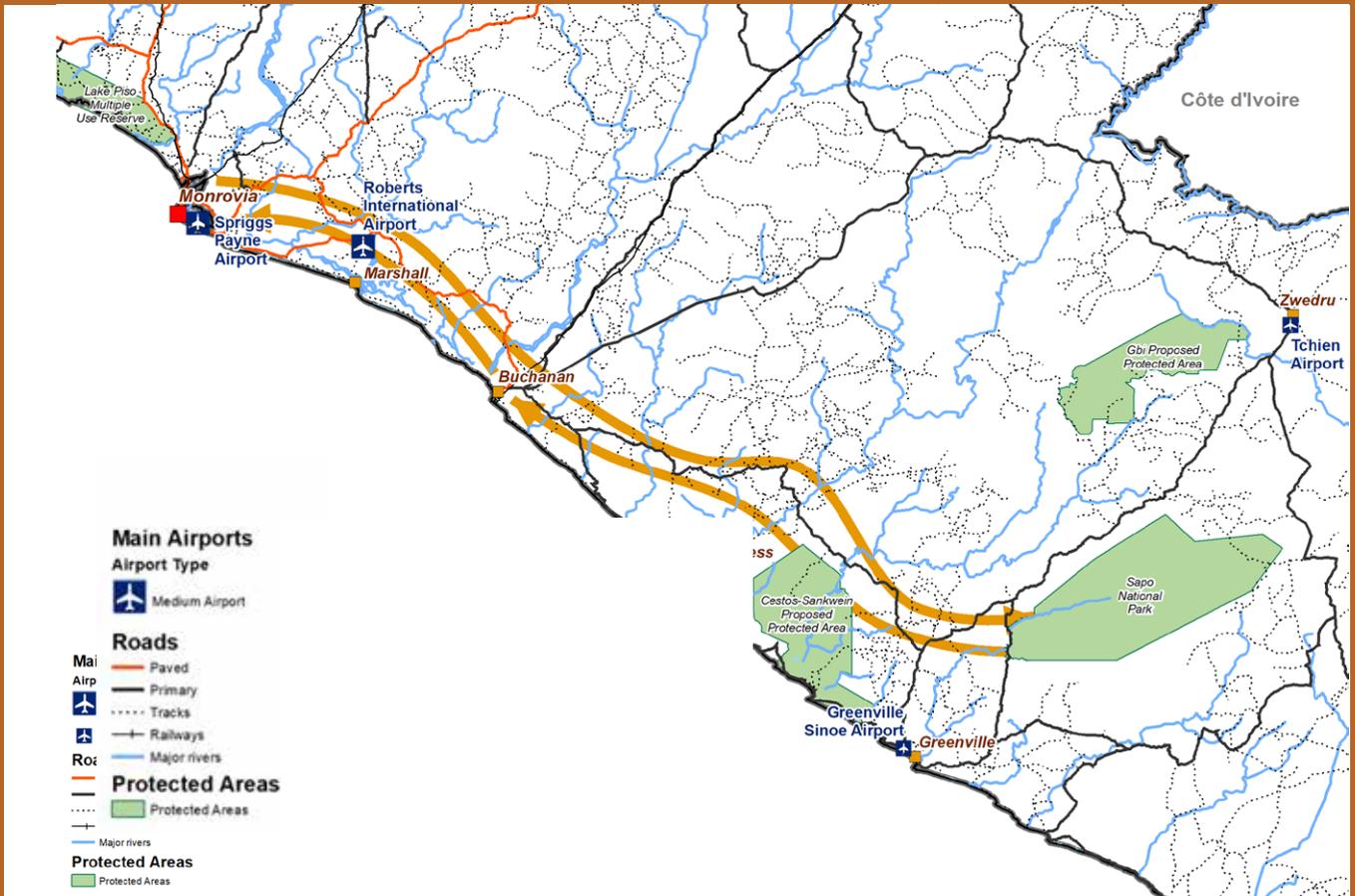
## Day 9

Activities in and around Lake Piso (fishing, boating, birdwatching, wildlife tours, community tours, etc.). Overnight in Lake Piso, for second day of activities, or return drive to Monrovia.

For illustrative purposes: A variety of different itineraries could be developed along this circuit, including shorter or longer stays in Gola and Lake Piso (e.g., 7 or 12 day circuits), and Tubmanburg could alternatively be visited on the way to Gola, instead of the way back. Gola and Lake Piso could also be developed as standalone destinations, for short breaks for residents and expats looking for weekend escapes or long weekend excursions, once visitor services are in place.

For Phase II, a two-country park experience could be developed in Gola NP (Liberia and Sierra Leone sides), as described in the Action Plan section of this report.

# Southern Circuit



## Day 1-2

Monrovia (see previous page)

## Day 2

Drive from Monrovia to Sapo National Park, via the coast road, through Buchanan and Greenville.

**Alternate access:** Fly from Spriggs Payne Airport to airfield near Sapo NP (to be developed). Approximate flying time estimated 40 min.

**Accommodations:** Sapo EcoLodge (to be developed). Alternative accommodations for backpackers on a budget – community lodge

or homestay program, which can be developed through grants and technical assistance programs/training.

## Days 3-7

Potential activities and attractions to be developed

- **Wildlife tracking** – Pigmy hippos, forest elephants, diana, red colobus monkeys, chimpanzees, etc. – local community guides (alternative livelihoods for hunters)
- **Interpretive walks/hikes** – Medicinal plants, insects, flowers, butterflies, etc. – trained local community guides
- **Birding tours** – trained local community guides



- **Village Experiences** – meeting village elders, community welcoming ceremony, cooking, music, dance, handcrafts, visits to local schools, etc. – local village guides. Lunch or dinner prepared by community (with some training in food safety).
- **Manmade Attractions** – Canopy walks, canopy towers, zip lines, bird blinds, etc.
- **River-based activities** – River cruises, kayaking, fishing, birding tours by boat, etc., multi-day park tours combining canoe trips, hiking trails, guides, campsites, etc.
- **Multi-day hikes within the park** – for wildlife tracking, birding, etc., potentially including community managed campsites/huts, meals
- **Scientific, academic, volunteer programs** – e.g., biomonitoring volunteer experiences, university training programs, etc.

### Days 8

Drive from Sapo NP to Cestos Sankwein PPA (if visitor or guide services can be developed), continue on to Buchanan.

### Day 9-12

Activities in and around beaches in Buchanan. Drive back to Monrovia.

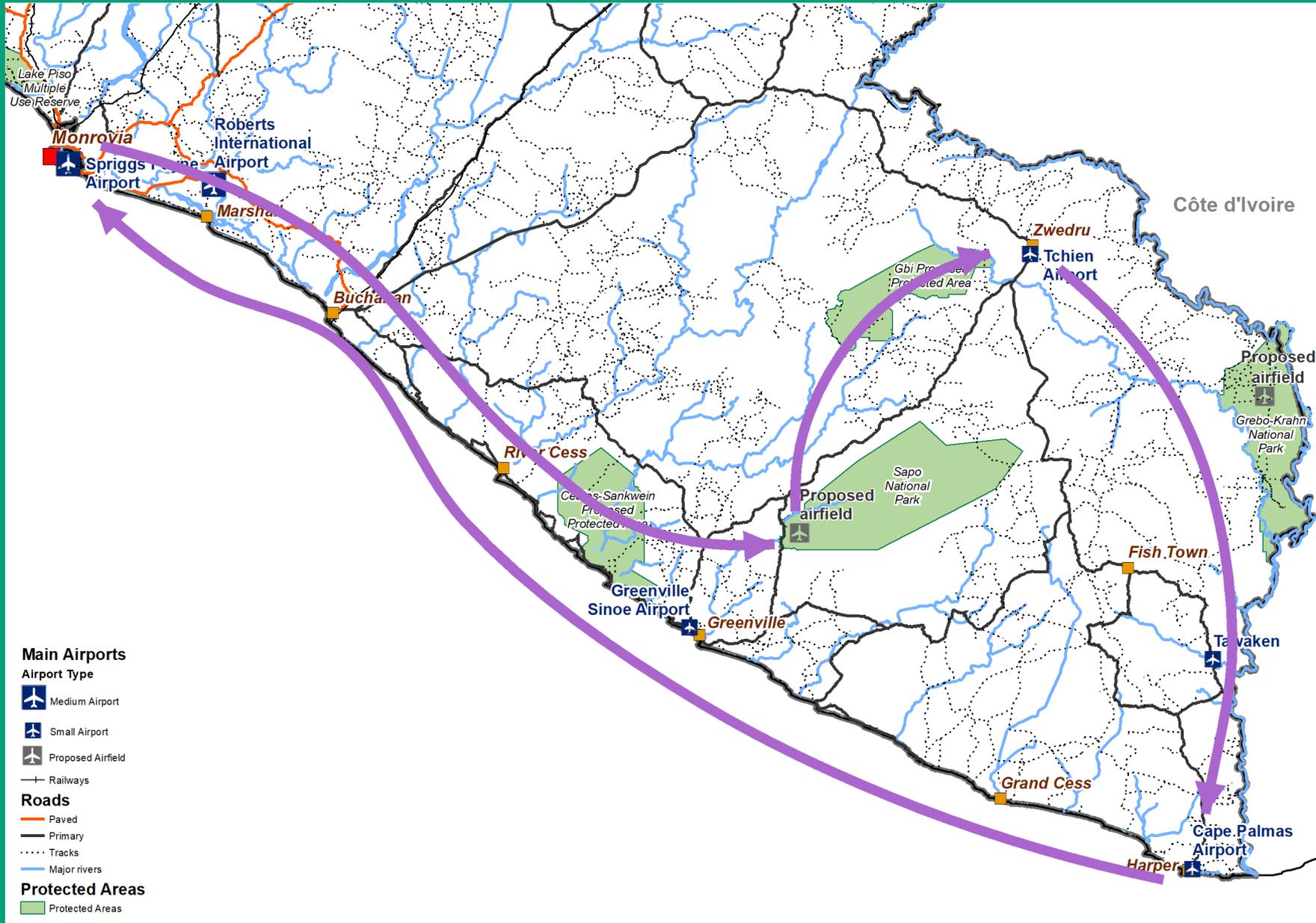
For illustrative purposes. Without an aviation option, this is proposed only as a dry season circuit, given current road conditions during the rainy season.

A variety of different itineraries could be developed along this circuit, including shorter or longer stays in Sapo NP and Buchanan, or Greenville (e.g., 7- or 12-day circuits). Sapo could also be developed as a standalone destination, for short breaks for residents and expats looking for weekend escapes or long weekend excursions, if an air service can be developed.

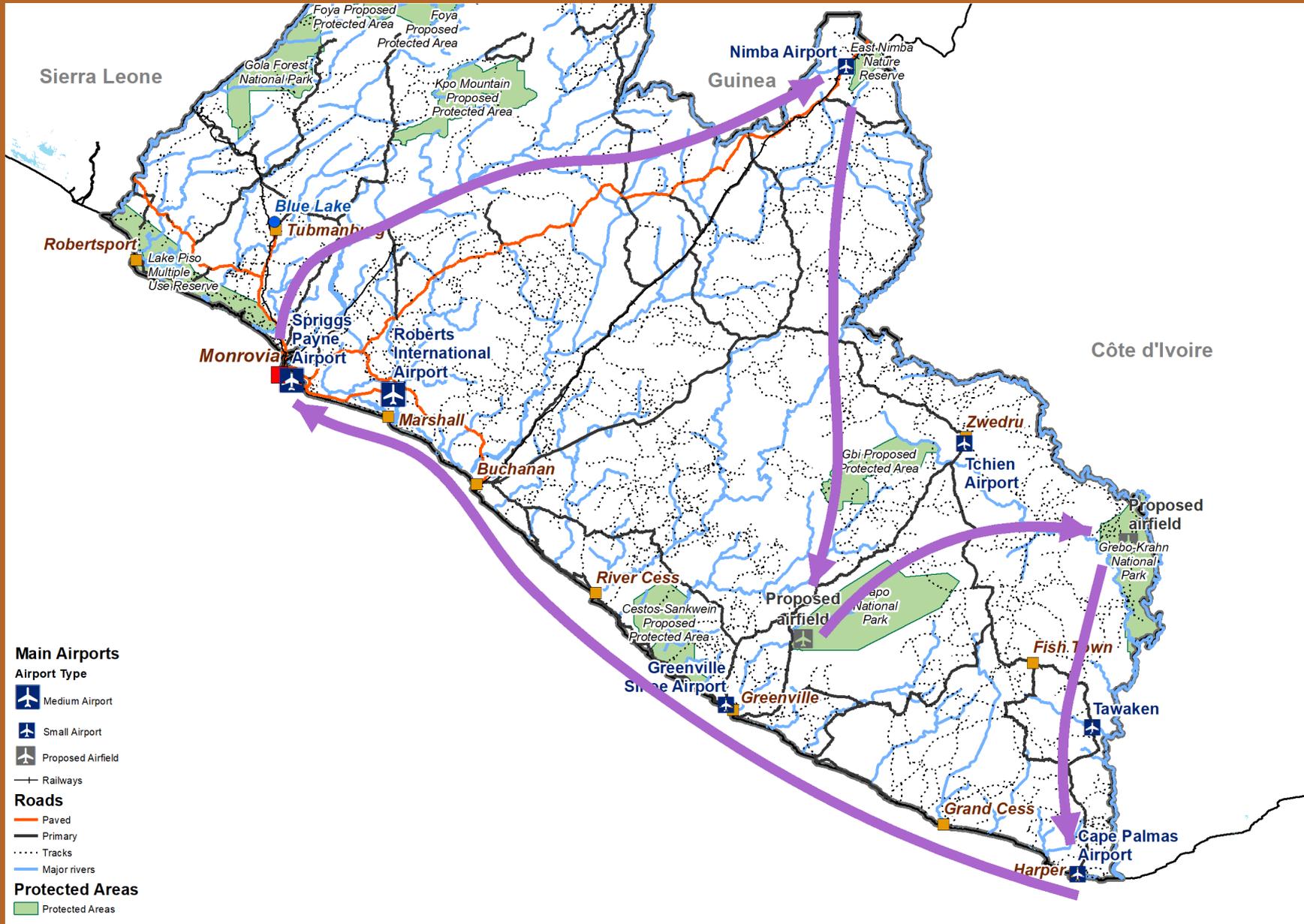


For Phase II, the circuit could include a 2-3 day stay in Gbi (Krahn-Bassa), ideally when a chimpanzee group is habituated and the WCF ecotourism development program is implemented.

# Potential Flight-based Southern Circuit



## Other Potential Flight-based Circuits



## Aviation and Circuit Development

If domestic air service (charter and or regularly scheduled) can be developed, virtually the entire country can be opened for tourism development and a wide variety of circuits can be created, as well as several standalone destinations (Sapo, Grebo-Krahn, Harper, etc.) that can be visited by expats and the domestic market on long weekends and short breaks.

There are several operational airfields that could be utilized, currently serviced by MAF International and other domestic airlines. Liberty Aviation is currently planning to begin weekly flights to several counties, start up daily commuter service, and venture into tour transport in both Liberia and Sierra Leone.

MAF, an NGO, is interested in flying more routes, including to regional destinations, and transporting visitors participating in Voluntourism programs in the country's interior. It also rehabilitates airfields and is currently working to complete Tapeta airfield in Nimba Country.

Two new airfields would need to be developed, near Sapo NP and Grebo-Krahn NP, to maximize the potential of aviation in the short term.

Alternatively, existing airfields in Greenville (Sapo), and Tawaken (Grebo-Krahn), could be utilized to access these parks year-round, combined with access road improvements. Additionally, East Nimba Nature Reserve, which is not included in the list of targeted landscapes, is also an important tourism asset and could be included in more circuits and receive significantly more tourist traffic if there were more flights into the existing airfield.

Challenges identified by aviation companies interviewed included:

- A lack of trained aviation professionals in Liberia. Government scholarships are available for students to attend international aviation schools, but they are not being promoted or fully utilized.
- Lack of sensitization for the need of future aviation leaders in Liberia.
- Need for partnerships with institutions that can assist in acquiring more aircraft (planes and helicopters).
- Need for the government to provide subsidies for the aviation industry as was done in "pre-conflict" Liberia.





## PROPOSED ACTION PLANS



The primary objective of this project was to prepare a plan that is concrete, discrete, and actionable, centered on pilot or demonstration projects that build on the NES.

The primary shortcoming of the NES, and most tourism development plans, is a lack of focus, both in terms of the breadth and criticality of proposed actions, and the mechanics of plan implementation. This is particularly critical in a Greenfield destination like Liberia, which has very limited tourism development experience and few discretionary resources.

To help ensure successful implementation, it is critical, in our view that this plan be:

1. Simple, understandable, and focused exclusively on those actions that are essential to achieving plan objectives and pilot project development
2. Professionally managed, with clear lines of responsibility, and well-defined outcomes
3. Adequately funded, with funding sources defined and budgets allocated at the outset of the implementation process

The proposed approach for achieving these objectives is the creation of a project implementation entity to drive and manage the process, build local support, track results, and adjust along the way. Based upon our experience on similar projects in dozens of emerging destinations, that entity needs to have a defined budget, singular focus, advice and oversight from a group of key stakeholders, and access to the knowledge and expertise required to successfully achieve each strategic objective.

There are several examples globally that can be modeled. Taking components from several, the draft plan proposes the following structure (to be discussed and refined through a proposed stakeholder engagement process) for implementation of the **Sustainable Tourism Plan (STP)**.

### STP Steering Committee

As proposed, the committee would be composed of senior officials from government ministries and agencies (ideally deputy

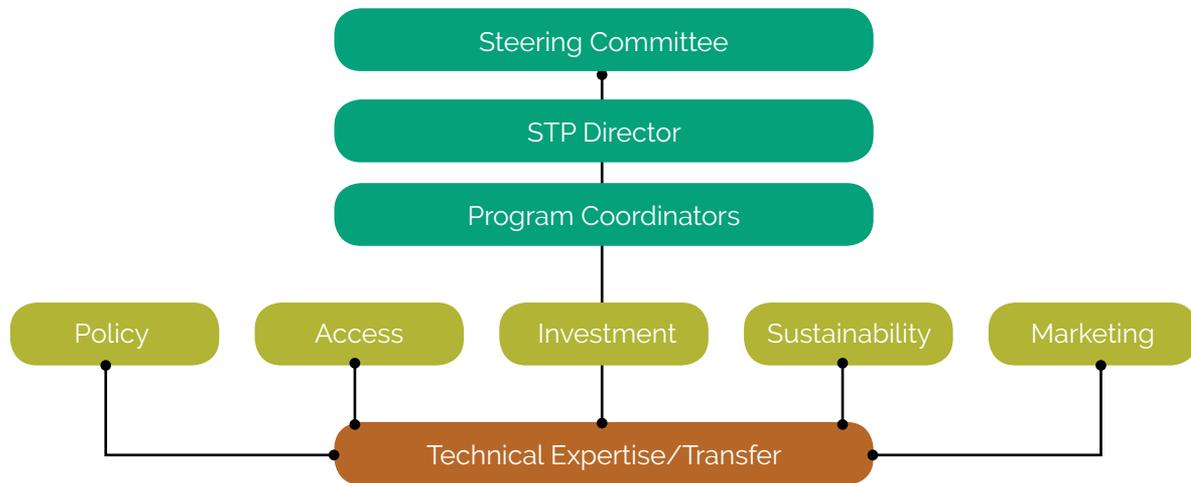
ministers or directors) that have important roles to play in STP implementation, including, but not limited to forestry, finance, tourism, aviation, immigration, public works, culture, and community development; representatives from bilateral and multilateral donor organizations and IFIs (or representatives from a donor coordination committee) willing to support the plan; program directors from conservation NGOs active in the country's Protected Areas; and representatives from the tourism industry, and community organizations (or NGOs that can represent them).

As proposed, the Steering Committee would review and ratify quarterly and annual STP work plans, goals, timelines and organizational roles and responsibilities, and budgets, meet quarterly to review implementation progress, suggest or review proposed modifications to the plan, and champion actions that directly involve their ministry, agency, or organization.

### STP Executive Director (or directorate)

An individual or organization with significant tourism planning experience that understands the Liberia context and can define work plans and budgets, manage day-to-day operations, suggest modifications (to be reviewed and ratified by the Steering Committee) and lead and take responsibility for the implementation process. In more mature tourism destination this role might be played by a Tourism Board or Tourism Cabinet (a ministerial working group composed of ministers and staff from several ministries), with significant private sector inputs. No such body currently exists in Liberia, and it is doubtful that if one would be formed that it would have the capacity, experience, financial resources, or expertise to lead the implementation process, given the lack of public and private-sector tourism experience in the country.

As proposed, that entity would oversee plan implementation during Phase One (36 months is suggested) composed of tourism planning experts, which will likely need to include, at least initially, some international advisors, along with Liberian counterparts to whom technical expertise and experience can be transferred.



### Strategic Objective (SO) Coordinators

Individuals or organizations that would manage implementation of each Strategic Objective and report to the Executive Director. Coordinators could be recruited from a variety of sources, e.g., the lead for the Tourism Policy SO might be a former senior government official, the Infrastructure SO might be led by a former aviation official or executive, the marketing SO an international marketing executive or firm, etc. In short, individuals or organizations with planning and implementation backgrounds and expertise relevant to each strategic objective.

### Tourism Sector Expertise

Where needed, to be contracted and managed by the STP Director and SO Program Coordinators, with oversight from the Steering Committee and/or donors that might be willing to fund specific program components, e.g., the hiring of a specialized website design company, social media marketing experts, tourism landscape planners, firms specialized in community-based tourism development/conservation programs, etc. An alternative approach would be an RFP process to outsource plan implementation, similar to the model used by USAID and other donors to implement programs in Liberia and globally, which would integrate a significant local capacity building/technical transfer component.

The aim of the Draft Action Plan tables presented on the following pages is to lay out a simple, concise, critical path for achieving the Phase I objective of the STP – design and successful development and launch of two proposed pilot projects/circuits. Through that implementation process the plan should simultaneously:

- Create a business and investment environment more conducive to tourism-related investment and product/experience development
- Build the capacity of local organizations, government agencies, businesses, communities, and individuals to implement follow-on tourism development and promotion initiatives
- Generate valuable lessons learned regarding the most effective approaches to tourism development in a Liberia context
- Produce potentially powerful demonstration effects that will stimulate additional investment and development

While layers of detail and complexity can be added, as needed, we believe it essential to begin with a plan that is easy to understand, review, and refine.

## **SO 1. Enhance the Business/ Investment Climate for Tourism Development**

There are number of components of the current GOL policy framework that are either 1) not supportive of or actively impeding tourism industry development (immigration/visas, aviation, duties and taxes), 2) need to be strengthened or streamlined, to improve the business and investment environment (investment incentives, access to credit, permitting, land planning, zoning, enforcement of laws governing activities in protected areas, community-based forest management), or 3) missing from the current framework and need to be defined and instituted to facilitate tourism-related investment and risk taking (e.g., protected areas concessions policies).

The proposed approach, laid out in the table on the following page, is relatively simple in concept but will likely be fairly challenging to implement in a timely manner, given current GOL fiscal priorities, and what would appear to be, to date, a low level of interest in or commitment to tourism industry development.

The impacts of all other proposed activities will be limited if the policy framework is not modified in some meaningful ways, e.g., at least one donor has stated that without specific aviation sector policy reforms it would be very hesitant to support any tourism development initiatives.

One of the potential benefits of successful plan implementation will be the demonstration effects that can be conveyed to the government that will help highlight tourism's potential as a tool for rural economic development and provide a rationale for a more significant commitment of resources to future tourism development programs.

| Strategic Objective   | Action   | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables |   |
|---|--|---------------------------|---|---|---|---|---|---|---|---|----|----|----|--------------------|---|
|   |  | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |                    |   |
| 1.0<br>Enhance<br>Business and<br>Investment<br>Environment | 1.1 - Document current GOL tourism policy framework for each strategic objective – business climate, access, investment, social and environmental sustainability, and marketing and promotion. | x                         |   |   |   |   |   |   |   |   |    |    |    |                    | <b>Deliverable:</b> Report on/ benchmarking of current GOL Tourism-related Policy Framework. Attempting to complete some of that benchmarking now, but several challenges to be overcome in defining the current framework. |
|   | 1.2 – Conduct stakeholder consultations and best practice research to assess the strengths and weaknesses of the current policy framework and impacts on tourism development.                  | x                         | x |   |   |   |   |   |   |   |    |    |    |                    | <b>Deliverable:</b> Analysis of and views on current policy framework.  |
|   | 1.3 – Draft and build consensus around proposed policy changes that support sustainable tourism development.   |                           | x | x |   |   |   |   |   |   |    |    |    |                    | <b>Deliverable:</b> Report on proposed changes to the Policy Framework, including a cost/benefit analysis and impacts on government revenues.   |
|   | 1.4 – Draft regulatory changes and legislation, and the rationale behind them, to be reviewed and approved and/or modified by relevant authorities.  |                           |   | x | x |   |   |   |   |   |    |    |    |                    | <b>Deliverables:</b> Draft of revised regulations, and legislation, where required.   |
|   | 1.5 – In consultation and collaboration with members of the Steering Committee, define and <b>implement a process for fast-tracking regulatory and legislative action.</b>                     |                           |   |   | x | x | x | x |   |   |    |    |    |                    | <b>Deliverable:</b> New Tourism Policy Framework approved/passed and enacted.   |

\* red markers denote implementation phase

## **SO 2. Improve Critical Tourism-related Access and Infrastructure**

As discussed throughout this draft, access to targeted landscapes is one of the most significant obstacles to broad-based sustainable tourism development in Liberia, and relying on road construction as the primary means of improving access will be one of the most expensive and time consuming components of any plan to stimulate international travel demand and increased visitor spending.

Based on available information, distances, road conditions, planning required for major road construction, etc., it will realistically be a decade before there is paved road access from Monrovia/Buchanan to Sapo National Park and points north and east (Krahn Bassa National Forest, Grebo-Krahn NP). While Sapo NP is reachable by road, from Monrovia, in dry season, in 6-10 hours, during the rainy season it is potentially a two to multi-day adventure. Limiting Sapo NP, and other PAs and PPAs, to a 4-5-month season will also significantly limit their potential as component of a rural economic development and conservation strategy.

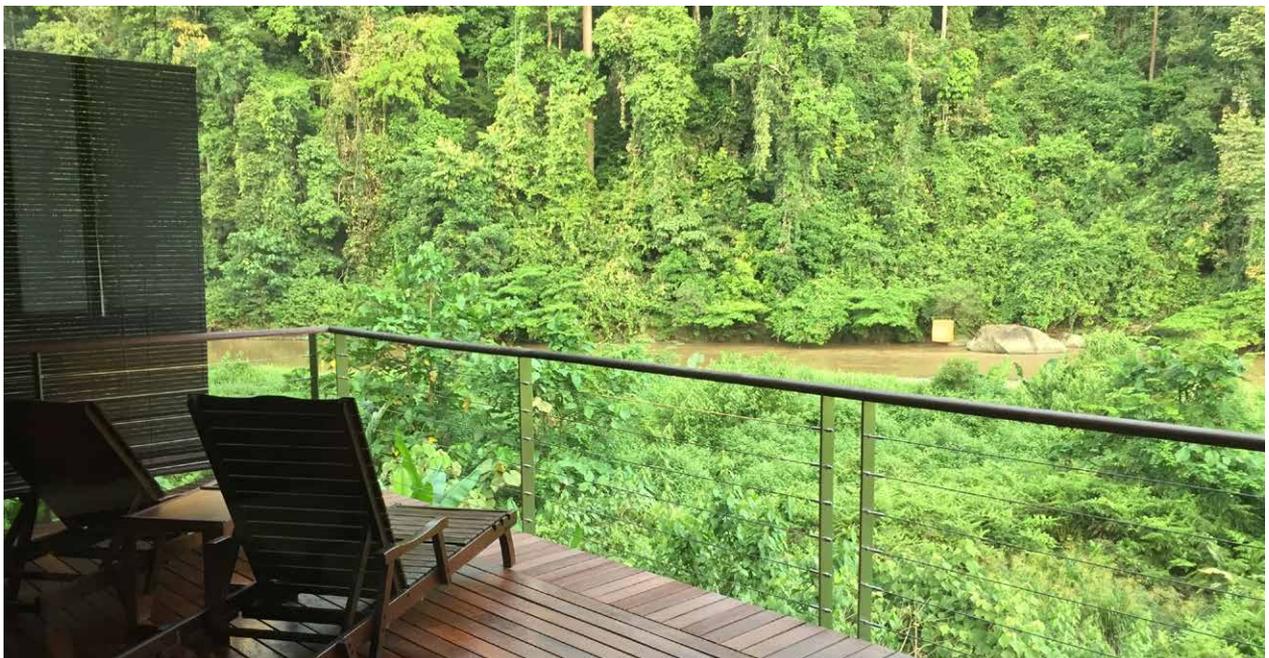
Aviation is the most cost effective and easily implementable solution to the access challenge, for Sapo, Grebo-Krahn, and some proposed protected areas, and circuits that could be developed to connect them.

Expansion of domestic air service will, however, require some pump priming, policy measures aimed at lowering costs and/or reducing investment-related risks, and public-sector investment in aviation infrastructure and visitor services within parks and protected areas.

The other access challenge that can be addressed in the near term, at relatively low cost is access within National Parks. As highlighted in the discussion of the Gola NP circuit, while road access to the park (from Monrovia and Lake Piso) is fairly good, in both the dry and rainy season, access within the park, and to many of its most significant potential visitor attractions, ranges from very challenging to virtually impossible for all but the most adventurous tourists.

Challenges and opportunities include repair of bridges over several river crossings, creating marked hiking trails, assessing and developing the potential of river transport, and improving access roads from the main road to communities that border the park. Longer term (second half of Phase One/Phase Two), connectivity between Sierra Leone and Liberia transborder Peace Park should also be prioritized.

The table on the following page lays out a proposed critical path toward improving access to and within targeted landscapes that are included in pilot circuits to make them viable domestic, expat, and international travel destinations and experiences.



| Strategic Objective   | Action   | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables  |
|---|--|---------------------------|---|---|---|---|---|---|---|---|----|----|----|---|
|   |  | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |   |
| 2.0<br>Improve<br>Critical Tourism-related<br>Access and Infrastructure | 2.1 – Survey and assess condition of bridges and prepare bridge improvement plan and cost estimates for Gola NP, define Phase One plan. <b>Implement bridge Plan.</b>  | x                         | x | x | x | x |   |   |   |   |    |    |    | <b>Deliverables:</b> at 6 months, detailed plan and cost estimates for bridge improvements. At 15 months, completion of bridge improvement plan.  |
|   | 2.2 – Prepare trail development plans for Gola and Sapó NPs, in collaboration with communities, conservation organizations, and product development team. <b>Implement Phase One trail development plan.</b>   | x                         | x | x | x | x | x |   |   |   |    |    |    | <b>Deliverables:</b> At 9 months, detailed plan and cost estimates for trail development in Sapó and Gola NPs. At 18 months, completion of pilot trail development program.                               |
|   | 2.3 – Convene domestic aviation working group to define airfield improvements and other access-related support that will help to stimulate investment and mitigate risks, prepare cost estimates, explore financing options and define Phase One plan. <b>Implement Phase One aviation plan.</b>                             | x                         | x | x | x | x | x | x |   |   |    |    |    | <b>Deliverables:</b> At 9 months, detailed airfield improvement plan and other small scale, targeted access improvements. Over the following 12 months, implement pilot phase of access improvement plan. |
|   | 2.4 – Assess and chart river access and navigability within and near Gola and Sapó NPs, and design circuits/ experiences and types of vessels needed in collaboration with team preparing trail plans and product development specialists. Prepare cost estimates and Phase One Plan. <b>Implement Phase One river plan.</b> |                           | x | x | x | x | x | x | x |   |    |    |    | <b>Deliverables:</b> At 9 months, feasibility study for development of river-based activities and attractions in Gola and Sapó NP. Over the following 12 months, implement phase I of that plan.          |

| Strategic Objective   | Action  | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables   |
|---|---|---------------------------|---|---|---|---|---|---|---|---|----|----|----|--|
|   |   | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |  |
| 2.0<br>Improve<br>Critical Tourism-related<br>Access and Infrastructure | 2.5 – Assess feeder road conditions between the main road and targeted communities (to be defined) included in the Phase One tourism plan in Gola and Sapu NPs, in collaboration with public works, conservation organizations, and communities. Prepare a feeder road improvement plan. <b>Implement Phase One feeder road improvement plan.</b>   | x                         | x | x | x | x | x | x | x |   |    |    |    | <b>Deliverables:</b> At 9 months, feeder road assessment and improvement plan. Over the following 12 months, implementation of phase I plan.   |
|   | 2.6 – Explore cross-border park development challenges, opportunities and mechanisms for creating road and river access between the Liberia and Sierra Leone sides of Gola NP, immigration regulations and procedures, cooperative management agreements, etc., through the transboundary park committees on each side of the border and in collaboration with relevant conservation organizations and communities. <b>Implement Phase One Plan (to be completed in Phase Two).</b> |                           |   |   |   | x | x | x | x | x | x  | x  | x  | <b>Deliverables:</b> At 12 months, cross-border park development plan, for allowing visitors to experience both sides of the park. Over the following 12 months, implementation of phase I plan. |

### **SO 3. Promote Investment in Visitor Services and Experiences**

Increased investment in visitor services, attractions, and activities is the cross-cutting objective of all the interventions proposed in this plan. That investment will, however, need to be proactively promoted. There are significant risks associated with investment in Greenfield tourism destinations, regardless how conducive the investment environment might be.

Proactive steps will also need to be taken to reduce or mitigate that risk, until a sufficient market for visitor services and attractions can be validated, including efforts made to identify and work with potential investors to facilitate the investment process. Other proven approaches that should be explored include pump-priming activities that can help support the initiation of domestic air service (if pursued), financing mechanisms that can provide credit at affordable rates, venture capital willing to provide debt or equity to projects in unproven destinations, and public investment in tourism-related infrastructure and marketing and promotion.

One of the most challenging components of tourism-related investment promotion in a new destination is investment in accommodations, which tend to be capital intensive, have

relatively high fixed operating costs (labor, utilities, training, maintenance, etc.), are expensive to market, and have long stabilization and payback periods. Significant efforts need to be made to help reduce or offset those risks.

As discussed, another critical type of investment needed in destinations like Gola and Sapo NPs, where visitor satisfaction relies to a significant degree on the quality of interpretation (i.e., in a dense rainforest where wildlife is difficult to see), is investment in attractions, activities, and guide training that will enhance interpretation and help to create memorable visitor experiences. Additionally, investments should be made in community tourism and enterprise development, which will add an important cultural component to those visitor experiences and provide a means of ensuring that communities directly benefit from tourism development initiatives within targeted landscapes and opportunities are created through development of alternative, tourism-based livelihoods. This is discussed in more detail in SO 4.

The following table provides recommendations for Phase One investment promotion activities that would help to mitigate those types of risk and create a critical mass of visitor services and attractions sufficient to stimulate follow-on investment.



| Strategic Objective  | Action  | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables  |
|--|---|---------------------------|---|---|---|---|---|---|---|---|----|----|----|---|
|  |   | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |   |
| 3.0 Promote Investment in Visitor Services and Experiences | 3.1 – Conduct stakeholder consultations and prepare a study detailing potential options for development of a tourism project financing facility that could provide non-recourse financing, grants, technical assistance, and/or other mechanisms to help facilitate investment in targeted landscapes. <b>Prepare a stakeholder validated and supported plan and implement.</b> | x                         | x | x | x | x |   |   |   |   |    |    |    | <b>Deliverables:</b> Definition and implementation of tourism financing facility for investment within and near National Parks  |
|  | 3.2 – Identify and profile potential sites for ecolodge development in Sapo and Gola NPs, prepare a market analysis that identifies a variety of potential revenue streams, conduct preliminary site planning and create database of potential investors, focused initially on Liberia and the Diaspora.  | x                         | x | x | x | x |   |   |   |   |    |    |    | <b>Deliverables:</b> Site profiles and investment prospectus for Gola and Sapo NPs. Development of investment promotion plan.   |
|  | 3.3 – Conduct feasibility analysis for development of visitor attractions in Gola and Sapo, including canopy walks and towers, zip lines, river cruises, volunteer biomonitoring programs, etc., in collaboration with park mgmt., communities, conservation orgs. Prepare financing plans for stakeholder supported initiatives. <b>Promote investment.</b>                    |                           |   | x | x | x | x | x |   |   |    |    |    | <b>Deliverables:</b> Feasibility studies for development of tourist attractions and programs.                                   |
|  | 3.4 – Design an investment facilitation process, based on the policy changes proposed and approved through SO1, including streamlining of the investment approval process, providing a package of investment incentives, etc., and improving access to affordable financing (Action 3.1 above).   | x                         | x | x | x | x | x | x | x | x |    |    |    | <b>Deliverables:</b> Definition and implementation of tourism financing facility for investment within and near National Parks. |

| Strategic Objective  | Action   | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables  |
|--|--|---------------------------|---|---|---|---|---|---|---|---|----|----|----|---|
|  |  | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |   |
| 3.0 Promote Investment in Visitor Services and Experiences | 3.5 – Pilot the investment facilitation process, to support investment in and completion of the proposed Ecolodge project in Gola NP, with identified investor, integrated with small-scale infrastructure improvements (SO2), marketing support (SO4), and community-based tourism development and training programs (SO5). |                           |   |   |   | x | x | x | x | x | x  | x  | x  | <b>Deliverables:</b> Investment promotion program defined and piloted.  |
|  | 3.6 – Conduct targeted investor outreach for development of Ecolodge in Sapo NP, using the analysis and tools generated (through completion of Action 3.2). Secure investment commitments for Sapo Ecolodge.   |                           |   |   |   | x | x | x | x | x | x  | x  | x  | <b>Deliverables:</b> Investment commitments secured for lodge development in Sapo NP                                  |
|  | 3.7 – Secure investment/financing for development of pilot visitor attraction in Gola and Sapo, as defined in Action 3.3, potentially with local community organization participation or ownership stake (SO4).  |                           |   |   |   |   |   |   | x | x | x  | x  | x  | <b>Deliverables:</b> Investment/financing commitments secured for pilot attractions development in Gola and Sapo NPs. |

## **SO 4. Ensure Social and Environmental Sustainability Through Community Integration**

The integration of communities in tourism development efforts is critical for sustainability planning and development of unique and authentic visitor experiences. These programs can also be directly linked to community-based conservation initiatives.

The proposed model is Community Tourism Enterprise Development, as highlighted in the examples presented in Appendix A. Other

approaches can also be explored, through the stakeholder consultation process.

Examples of the types of enterprises that could potentially be developed include community-owned lodges or homestay programs, restaurants, guided community walks, medicinal plant tours, wildlife tracking, birding expeditions, expressions of local culture, (handcrafts, music, dance, food), and activities that will require some level of capital investment, e.g., kayak or canoe trips, fishing (where allowed), zip lines, etc., where local communities can potentially have an ownership stake and oversee some or all aspects of attractions management.



| Strategic Objective  | Action  | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables |   |
|--|---|---------------------------|---|---|---|---|---|---|---|---|----|----|----|--------------------|---|
|  |   | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |                    |   |
| 4.0<br>Ensure Sustainability through Community Integration | 4.1 – In collaboration with PADEV and FFI, and the USAID WABICC and LFSP projects, work with communities surrounding Sapo NP to identify potential pilot CTE development opportunities, access issues, and training needs.  | x                         | x | x | x |   |   |   |   |   |    |    |    |                    | <b>Deliverables:</b> Deliverable: Pilot CTE projects identified.  |
|  | 4.2 – Identify required human and financial resources to replicate that process in Gola NP, and work with WCF to implement programs it is now developing to promote community-based tourism in Gbi (Krahn-Bassa National Forest PPA).                                   |                           |   | x | x | x | x | x | x | x |    |    |    |                    | <b>Deliverables:</b> PADEV community consultation process replicated in Gola NP and KBNF. CTE pilot projects identified |
|  | 4.3 – Prepare a study detailing identified opportunities, including pre-feasibility analysis, cost projections and economic dynamics, and proposed training programs.   |                           | x | x | x | x | x | x |   |   |    |    |    |                    | <b>Deliverables:</b> Site profiles and investment prospectus for Gola and Sapo NPs pilot CTE projects.                  |
|  | 4.4 – Define or integrate plans already underway (through WABICC), for development of community-based forest management and conservation initiatives directly tied to tourism, including voluntourism, conservation awareness programs, reforestation initiatives, etc. |                           |   | x | x | x | x | x |   |   |    |    |    |                    | <b>Deliverables:</b> Feasibility studies for development of tourist attractions and programs.                           |
|  | 4.5 – Implement pilot CTE projects in Gola and Sapo NPs, including training, capacity building, product and experience development, and linked conservation initiatives   |                           |   |   |   |   |   |   |   | x | x  | x  | x  | x                  | <b>Deliverable:</b> Pilot CTE projects developed.   |

## **SO 5. Stimulate Tourism Demand Through Marketing, Branding, and Product Development**

As discussed previously, efforts to stimulate investment in visitor services must be matched with initiatives designed to stimulate travel demand. Governments have a critical role to play, in close collaboration with the private sector and conservation community, in helping to create a positive destination image and implement programs aimed at influencing and attracting identified target markets.

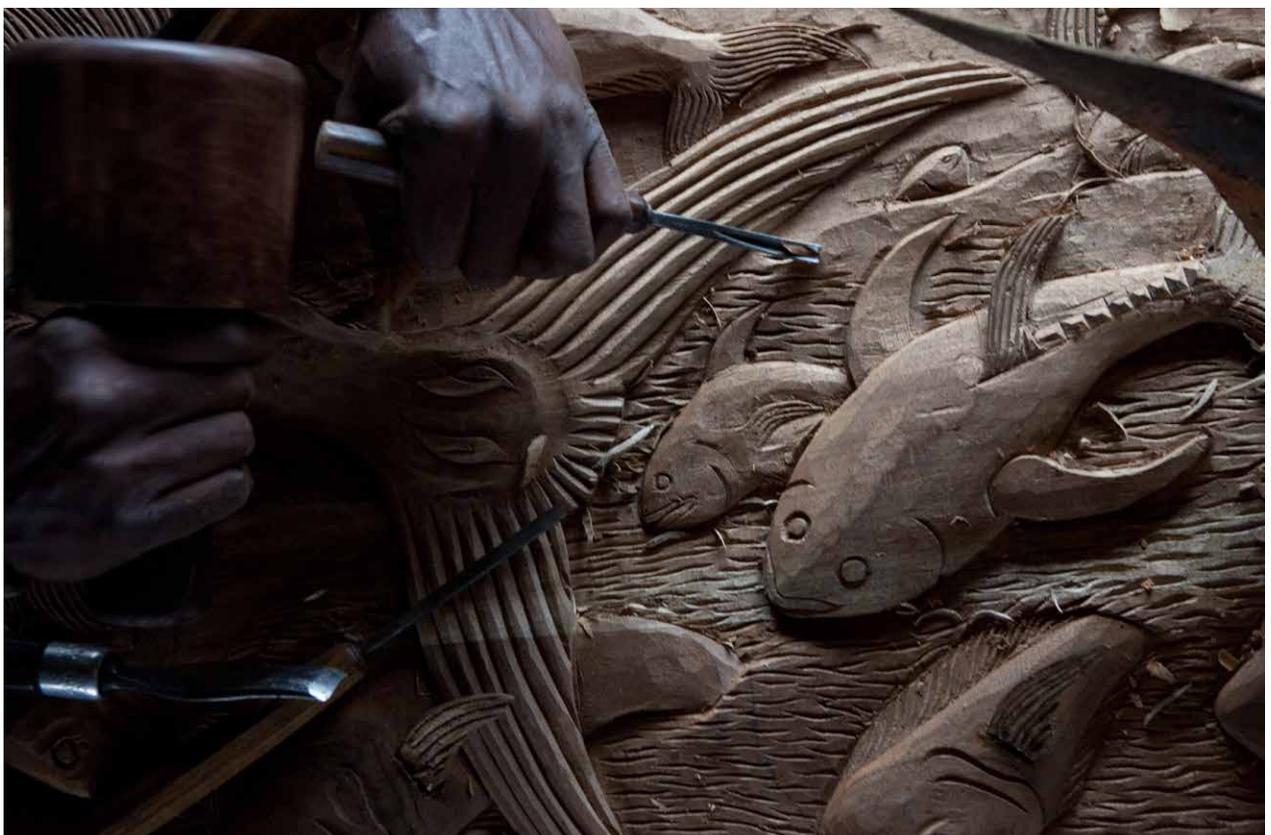
Programs should be designed and implemented in partnership with the Liberia National Tourism Association (LINTA) and other private sector actors, including hotels, tour operators, park managers, and other stakeholders, who should be given incentives and opportunities to actively participate in marketing and promotion campaigns and help establish and promote a consistent Liberia brand and image.

That process should begin with a focused destination promotion effort, by creating a platform to provide information and positive

messaging regarding Liberia travel experiences and facilitate outreach to the domestic and international travel trade. Simultaneously, programs should be designed and implemented to connect directly with potential visitors, through social media and other digital tools and channels, public relations, and other relatively low-cost means.

Time-bound marketing campaigns are opportunities to roll out targeted marketing messages as a strategic push to engage target markets or promote a specific tourism product. Campaigns should be promoted through direct outreach to targeted groups, hyper-targeted social media advertising, and media engagement.

A bottom-up approach is proposed, through defining a national tourism promotion strategy and targeted promotion campaigns, and through that process estimating costs and capacity building needs. Initial programs can be used simultaneously to promote Liberia as a travel destination and provide capacity building and technical assistance services and define longer term funding mechanisms for ongoing destination promotion and marketing.



| Strategic Objective                                 | Action   | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables |   |
|---|--|---------------------------|---|---|---|---|---|---|---|---|----|----|----|--------------------|---|
|   |  | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |                    |   |
| 5.0<br>Generate Demand for Liberian Protected Areas | 5.1 – <b>Work with Tourism Association and MICAT to develop updated marketing strategy and destination branding strategy.</b> Develop destination brand to guide development of marketing tools.   | x                         | x | x |   |   |   |   |   |   |    |    |    |                    | <b>Deliverables:</b> Updated marketing strategy and action plan to promote nature-based tourism. Destination branding strategy. |
|   | 5.2 – <b>Leverage partnerships with tourism private sector.</b> Develop partnership framework to allow private sector partners to invest into cooperative marketing program. Program should have distinct benefits for private sector partners such as exposure through digital marketing channels or participation in international travel trade outreach.  | x                         | x | x |   |   |   |   |   |   |    |    |    |                    | <b>Deliverables:</b> Cooperative marketing partnership strategy.  |
|   | 5.3 – <b>Create digital marketing tools and channels</b> including a website and social media channels. Develop database of images and video for use for digital marketing. Contract copywriter.   | x                         | x | x | x |   |   |   |   |   |    |    |    |                    | <b>Deliverables:</b> Destination website and social media channels. Digital image and video database.                           |
|   | 5.4 – <b>Design and implement tour leader training and incentive program to target local market.</b> There is a meaningful market for Liberia's protected areas in Monrovia. To reach this market, a program should be developed to make it as easy for individuals to organize their friends and families into small groups. Sample itineraries, accommodation/ supplier directories, marketing copy, etc. should be made available via the website for anyone interested in organizing group travel. Incentives should be offered such as reduced/free stays for group leaders. An expenses-paid "familiarization" trip should be offered to embassy social coordinators, targeted individuals working for international NGOs, and others. |                           | x | x | x | x | x |   |   |   |    |    |    |                    | <b>Deliverables:</b> Online leader training program and marketing tools.  |

| Strategic Objective                                 | Action   | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables |  |
|---|--|---------------------------|---|---|---|---|---|---|---|---|----|----|----|--------------------|--|
|   |  | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |                    |  |
| 5.0<br>Generate Demand for Liberian Protected Areas | 5.5 – <b>Implement social media campaign to target niche international markets.</b> Campaigns should primarily be driven through social media channels and could be structured around a “giveaway” i.e. an expenses-paid trip to Liberia, and made easy for target audiences to share with their network of contacts. International campaigns can begin by targeting birdwatchers as this is a market that is relatively easy to reach through a small number of tour operators, media outlets, social media groups, and social clubs. |                           |   | x | x | x | x | x | x | x | x  |    |    |                    | <b>Deliverable:</b> Social Media Campaign Report           |
|   | 5.6 – To generate earned media coverage, one or more <b>press trips should be</b> organized for members of the media from targeted markets. The press trip could be framed around an ongoing social media campaign, to leverage earned media coverage with a clear call to action to participate in the campaign.  |                           |   |   |   |   |   |   |   | x | x  |    | x  |                    | <b>Deliverable:</b> International press trip.              |
|   | 5.7 – <b>Develop digital sales tools and marketing materials</b> and make these available for tour operators on the destination website. This should include a gallery of images, sample itineraries, “top 10 attractions” and similar information, contact databases of accommodations and inbound tour operators.  | x                         | x |   |   |   |   |   |   |   |    |    |    |                    | <b>Deliverable:</b> Travel trade sales and marketing tools |

| Strategic Objective                                 | Action   | Quarter (3-month periods) |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables |  |
|---|--|---------------------------|---|---|---|---|---|---|---|---|----|----|----|--------------------|--|
|   |  | 1                         | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |                    |  |
| 5.0<br>Generate Demand for Liberian Protected Areas | 5.8 – <b>Engage regional tour operators to include Liberia in West Africa itineraries.</b> Develop database of tour operators offering West Africa packages. Engage database to introduce the destination and understand why they do not currently offer it. Work directly with tour operators to develop Liberia packages and/or add Liberia to existing packages.  |                           |   |   |   | x | x | x | x | x | x  |    |    |                    | <b>Deliverable:</b> Database of engaged tour operators. Report on increased number of itineraries including Liberia. |
|   | 5.9 – Introduce Liberia as a destination and develop sales partnerships with outbound tour operators. Liberian tour operators should be supported to <b>participate in regional travel trade events</b> promoting tourism in West Africa. Examples of leading shows in Africa include World Travel Market Africa, Africa Travel Week in South Africa, and Akwaaba African Travel Market in Nigeria.  |                           |   |   |   |   | x | x | x | x | x  | x  | x  |                    | <b>Deliverable:</b> Participation in travel trade events   |
|   | 5.10 - <b>Organize and execute an international familiarization trip</b> for outbound tour operators in source markets. Tour operators are unlikely to sell products they have not experienced themselves. Familiarization trips are expenses-paid trips for tour operators to visit a destination, meet potential partners, and develop their own travel packages. FAM trips should be organized in close partnership with private sector partners to ensure that the right operators are targeted. Expenses should be offset by in-kind contributions from local partners. |                           |   |   |   |   |   |   | x | x | x  | x  |    |                    | <b>Deliverable:</b> Familiarization (Fam) Trip   |

## Pilot Market Development Project

### Birdwatching

In addition to the proposed action plans outlined in the previous section, it is recommended that a 12-month pilot market development initiative also be built into the first phase of plan implementation, as a strategy for jump-starting pilot circuit development initiatives. The proposed pilot market is birdwatching.

### Rationale

As highlighted earlier in the plan, several characteristics of this market make it a promising candidate for near-term development:

- It is a very large and relatively high spending travel market (clients tend to be well educated, with high levels of disposable income), concentrated primarily in North America and Western Europe
- The primary travel motivation is to see birds that can only be seen in a very limited geographic area, e.g., national or regional endemic species
- Travelers tend to have a much higher

tolerance for challenging travel conditions – rough roads, lower quality accommodations and visitor services, etc., than other travel segments

- Primary requirements are birds that international birders want to see, trained guides who can lead birders to them, reasonable access, and basic visitor services
- Trained guides and an expat birding club already working in Liberia, and RSPB and SCNL, which can help lead and facilitate the visitor experience development process

The proposed plan, outlined below, includes five primary components or objectives:

- Travel trade outreach
- Resource mapping
- Training
- Community-based visitor service and experience development
- Marketing

As proposed, these activities would be undertaken in collaboration with **FDA, RSPB, SCNL, LINTA**, and other organizations and providers of specialized technical assistance.



| Strategic Objective      | Action  | Month |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables  |
|--------------------------|---|-------|---|---|---|---|---|---|---|---|----|----|----|---|
|                          |   | 1     | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |   |
| 1. Travel Trade Outreach | 1.1 – Compile database of international birding operators that offer itineraries and packages in Africa   | x     | x | x |   |   |   |   |   |   |    |    |    | <b>Deliverable:</b> Tour Operator database  |
|                          | 1.2 – Conduct targeted outreach by phone, e-mail, and where feasible in-person at international birding fairs, e.g., American Bird Expo, Birdfair (UK), and other internationally focused events.   | x     | x | x | x | x |   |   |   |   |    |    |    | <b>Deliverable:</b> Target list of birding tour operators and organizations that express an interest in exploring Liberia's birding potential. Profiles of targeted visitors            |
|                          | 1.3 – Organize familiarization trip(s) for birding operators willing to travel to Liberia and provide an assessment of birding potential and recommendations for visitor service and experience enhancements.                                       |       | x | x | x | x |   |   |   |   |    |    |    | <b>Deliverable:</b> Birding tour operator familiarization trip(s) by or before the end of month 6.  |
| 2. Resource Mapping      | 2.1 – Compile an inventory of endemic and other bird species that would be of primary interest to international birders and locations where they can most readily be seen, focused on the Monrovia area, Lake Piso, and Gola NP (Northern Circuit). | x     | x | x | x | x |   |   |   |   |    |    |    | <b>Deliverable:</b> Content for an online Liberia Birding Guide and targeted online advertising and social media campaign, in collaboration with RSPB, SCNL, and the expat birding club |
|                          | 2.2 – Identify bird guides in Liberia, young people with a high level of interest in guiding, and any training resources that might be available or than can be augmented/developed.  | x     | x | x | x |   |   |   |   |   |    |    |    | <b>Deliverable:</b> Register of bird guides and pool of potential trainees, with a particular focus on people living in local communities.  |
|                          | 2.3 – Identify and map access points, trails, visitor services, etc. at or near prime birding sites, potential sites for visitor service development (lodging, food, cultural expression, etc.) and gauge community interest in providing services. | x     | x | x | x |   |   |   |   |   |    |    |    | <b>Deliverable:</b> Visitor service and human resource assessment and recommendations for siting and scale of visitor service and training programs required.                           |

| Strategic Objective                           | Action  | Month |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables   |
|---|---|-------|---|---|---|---|---|---|---|---|----|----|----|--|
|   |   | 1     | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |  |
| 2. Resource Mapping                           | 2.4 – As a part of the assessment process outlined in 2.3, and/or action plans included under SO2, identify access challenges and improvements needed, e.g., trails, viewing platforms, bird blinds, feeder road and bridge access within Gola NP, etc.   | x     | x | x | x |   |   |   |   |   |    |    |    | <b>Deliverable:</b> Assessment report identifying access challenges and improvements needed.   |
| 3. Training                                   | 3.1 – In collaboration with tour operators, RSPB, SCNL, and others, define, fund and implement a hands-on bird guide training and certification program.  |       | x | x | x | x | x | x |   |   |    |    |    | <b>Deliverable:</b> Trained birding guides in the three targeted areas.  |
|   | 3.2 – In collaboration with technical assistance providers, design, fund and implement training and assistance programs for Community Tourism Enterprise development and management, e.g., book keeping, accounting, housekeeping, visitor sensitization, food safety, community tour guiding, cultural expression, etc.  | x     | x | x | x | x | x | x | x | x |    |    |    | <b>Deliverable:</b> Training programs delivered in the two targeted landscapes (Lake Piso MUR and Gola NP), and where applicable, communities near prime birding sites within a two-hour drive of Monrovia |
| 4. Visitor Service and Experience Development | 4.1 – In coordination with execution of action plans under SO3, and 2.3 and 2.4 and training programs outlined above, design, fund and implement a plan for visitor service/experience development at targeted birding sites, focused on accommodations (e.g., homestays, community camping sites or lodges), food and beverage facilities, birding trails, viewing platforms, bird blinds, bird tours by boat (rivers and Lake Piso), where feasible, and cultural expression. |       | x | x | x | x | x | x | x | x |    |    |    | <b>Deliverable:</b> At the end of month 9, essential visitor services developed at targeted birding sites and ready to receive visitors.   |

| Strategic Objective | Action  | Month |   |   |   |   |   |   |   |   |    |    |    | Notes/Deliverables  |
|---------------------|---|-------|---|---|---|---|---|---|---|---|----|----|----|---|
|                     |   | 1     | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |   |
|                     | 4.2 – Implement a targeted set of access improvements at birding sites where improvements can be made relatively quickly and affordably, e.g., development of trails and repair to bridges within Gola NP.  |       |   |   | x | x | x | x | x | x | x  |    |    | <b>Deliverable:</b> Access improvements completed at targeted sites   |
|                     | 5.1 – As a subcomponent of/pilot project for marketing initiatives outlined under SO5, design and fund a marketing strategy for the birding market, using the content developed under 2.1 and integrating the visitor services and experiences developed or under development in 4.1 above.   |       |   | x | x | x | x | x |   |   |    |    |    | <b>Deliverable:</b> Pilot Birding marketing plan  |
| 5. Marketing        | 5.2 – Implement pilot phase of marketing plan designed in 5.1 above. Marketing efforts would extend beyond the 12-month pilot phase   |       |   |   |   |   |   |   | x | x | x  | x  | x  | <b>Deliverable:</b> at least three birding tour operators designing and marketing birding packages, a minimum of 10,000 impressions generated through social media and online advertising, at least 10 birding groups taking part in birding tours during year 2. |
|                     | 5.3 – Create an online and printed Liberia Bird Guide and birding website, using the content developed through the pilot project, that can be used as a landing page for social media and online promotion, highlight birds and birding sites, visitor services, guides, itineraries, communities, cultural experiences, etc., and links to local and international birding tour operators. |       |   |   |   |   |   |   |   |   |    |    | x  | x   |





## CONCLUSION AND PROPOSED NEXT STEPS

Liberia's national parks and protected areas have significant tourism development potential. There is, however, virtually no existing base from which to build, and a lack of tourism sector development experience within the public and private sector. There is also a lack of appreciation, at multiple levels, of the potential of tourism to promote sustainable economic development, diversify the economy, and protect and celebrate critical environmental and cultural resources, by giving them value as tourism assets.

None of this is or should be surprising, given the challenges Liberia has had to overcome over the past 30 years. It does point to the need, however, begin on a relatively limited scale, and through a pilot project process, develop local capacity, learn what works, and what doesn't, and adopt and adapt best practices from other destinations that have faced similar challenges.

**Proposed next steps include:**

- A process of more broad-based stakeholder engagement, to build consensus and support for the plan, revise as needed, and finalize a plan that government, industry, conservation organizations, and communities can support
- Define a budget for launching the implementation process, and secure funding for completion of the Phase I Pilot Project, potentially through a pooling of matching funds from donors and government.
- Implement a Request for Proposals (RFP) process from companies and organizations capable of providing the technical assistance required to implement the plan

## **APPENDIX A**

### **Supporting biodiversity conservation and economic growth in Uganda's Albertine Rift region through sustainable tourism**

## **USAID-Uganda**

### **Partners**

US Agency for International Development, U.S. Forest Service, Academy for Educational Development (FHI360), African Wildlife Foundation, International Gorilla Conservation Program, Jane Goodall Institute, Uganda Community Tourism Association (UCOTA), Nature Uganda, Uganda Wildlife Authority, Ministry of Tourism, Trade and Industry, Wildlife Clubs of Uganda, Uganda Tourism Association, Association of Uganda Tour Operators, Uganda Hotel Owners Association

### **Project Duration**

2009-2012

### **Project Description**

Uganda's economy traditionally relies on small-scale agricultural products like coffee, tea, cotton, and grains, while tourism serves as the largest non-traditional export. In the 1960s, Uganda was the main tourist destination in East Africa and it relied heavily on tourism for economic growth. However, during the 1970s and 80s, Uganda's image as a tourist destination was severely damaged by natural resource depletion, an exodus of trained personnel, the destruction of tourism infrastructure, and poaching. With political instability and civil unrest behind it, Uganda is enjoying strong economic growth and making progress toward biodiversity conservation and redevelopment of its national parks. Despite this, the pressure on parks from encroachment and poaching remains high due in part to the lack of financial benefits from the park for its neighboring communities.

With Uganda's wealth of tourism assets—the highest diversity of primates in Africa, a growing list of over one thousand bird species, diverse cultural attractions, and an extraordinary variety of landscapes from savannas to tropical



forests to ice capped mountains—there is significant potential for tourism to contribute to biodiversity conservation, economic growth, employment and poverty reduction. To achieve these goals a comprehensive approach to tourism was needed, one that actively involved stakeholders from all aspects of the tourism and conservation sectors to enhance tourism in and around Uganda’s national parks, strengthen the communities bordering the parks to benefit from tourism and to link activities and attractions to the national and international tourism value chain.

## **Major Activities**

The USAID-STAR program worked with a broad variety of stakeholders in the tourism sector to enhance the tourism products in select national parks, build strong community enterprises linked to the parks and conservation activities and invigorated the tourism sector by connecting tourism businesses from the park level to the national level to international and domestic tourism markets. USAID STAR’s successes have far exceeded the initial expected outcomes of our clients and

much of the success can be attributed to the communications-driven management process used to prioritize project interventions and strategic activities. From the beginning, the program opted not to establish itself as the new “tourism expert on the block,” but as a facilitator of collaboration and a convener of partnerships in support of conservation and tourism. This ethos that all activities should be lead by a local champion and only then supported by the program allowed the program to scale up its results in a relatively short period of time. We achieved this through the following activities:

- Enterprise development, training and workforce development: Increase community revenues and participation in conservation activities through community tourism training, tourism product development, and market linkages.
- Increase revenue and funding for conservation activities: Increase funding for conservation activities through institutional strengthening, fundraising, travel philanthropy and corporate social responsibility programs, and investments in tourism facilities, products and services that generate conservation revenues.

- Increase partnerships and communication in support of conservation and tourism: Enhance conservation and tourism by building partnerships with and between tourism stakeholder groups, working with partners on conservation and tourism sensitization programs, and engaging the media in support of tourism awareness.
- Marketing & Branding for Destinations and Enterprises: Utilizing inventive digital and traditional marketing techniques for better marketing and branding of the national parks, community enterprises, project partners, and the national tourism sector as a whole.

## Results

### Enterprise development, training and workforce development

- Average 27% increase in household income in targeted communities
- Average 16% increase in tourism revenue for targeted existing community tourism enterprises
- Increase of revenue in the first year of operations for new start-up community tourism enterprises equivalent to the average household income of over 15 households in the community.
- 42 Community Tourism Enterprises completed a comprehensive tourism business training program along with 103 supporting organizations.
- Secured business linkages between small tourism enterprises and national tourism operators and accommodation providers.
- Increase revenue and funding for conservation activities
- Increased funding for conservation by \$1.9 million and leveraged support to the program by over \$4 million.
- Enhance the capacity of the Uganda Wildlife Authority, Uganda Community Tourism Association and others to realize greater revenues for them and their stakeholders.
- Increase partnerships and communication in support of conservation and tourism
- Brought together the media, Hollywood celebrities, travel & tourism business, government and conservation groups to launch the 'Friend-a-Gorilla' campaign, generating over \$2 million worth of free international media coverage and strengthening industry partnerships.
- Established Tourism Media Awards, increasing media coverage of tourism and conservation in the country by over 100%.
- Marketing & Branding for Destinations and Enterprises
- Created '**Pearls of Uganda**' an award-winning marketing program and website for community tourism enterprises, that links communities to markets. 120 private sector tourism businesses from Uganda signed up to support the program.
- Promotion of Uganda, through development of the first "Destination Uganda" guide of the country for the tourism trade, creation of the national tourism song "Oh Uganda."
- Destination marketing campaign for Queen Elizabeth National park that increased overall park visitation by 16% and domestic visitation by 23% in one year.
- Creation of Uganda Wildlife Authority Web-portal that boosted visitation to their site by over 200% and increased the number of page views by over 500% with an average visit of about 6 minutes (above industry average).

**Supporting community development and biodiversity conservation in Ethiopia through sustainable tourism development**

**USAID-Ethiopia**

**Partners**

Global Sustainable Tourism Alliance, Frankfurt Zoological Society (FZS), TESFA Community Based Tourism, Ecotourism Association of Ethiopia, SNV, Ethiopian Wildlife and Natural History Society

**Project Duration**

July 2008 – July 2013

**Project Description**

Ethiopia is a nation with a wealth of tourism potential because of its diversity of attractions; however, a negative international image combined with limited tourism facilities hinders the country's ability to reap greater economic benefits from tourism. Additionally, environmental degradation of key natural attractions is a problem because of growing populations in surrounding areas, inadequate protected area management, and expansion of grazing areas, and illegal logging. Together, these issues pose a serious threat to Ethiopia's sustainable development.

The Ethiopia Sustainable Tourism Alliance (ESTA) was a USAID-funded program established to promote biodiversity



conservation and provide communities with alternative livelihoods through the development of sustainable tourism. By working with a variety of local stakeholders (including representatives from the government, private sector, and local community groups), the ESTA will frame the design and planning of sustainable tourism development in these areas for the next five years. This will include a series of activities focused on conservation and ecotourism development, private sector competitiveness, workforce development, and handcraft development, all supported by cross cutting activities that employ various forms of communication and social networking.

## Major Activities

- **Created Community Enterprises:** Created 7 community tourism enterprises utilizing its tailored training tools, which provided jobs and revenue for the communities in the Central and Southern Rift Valley in Ethiopia.
- **Developed brand and website:** Developed
- **Developed marketing and awareness collateral:** The ESTA developed and published valuable marketing and educational collateral aimed at increasing awareness of community tourism and incentivizing the travel trade.
- **Built relationships:** utilizing online tools and traditional communication platforms to establish linkages between stakeholders in community tourism and engage the international travel community.
- **Built capacity:** conducted training workshops and created training materials for ESTA personnel to ensure that they can use the tools and activities necessary to implement community tourism in Ethiopia on an ongoing basis (technical transfer) and continue towards the goal of sustainable development.

a brand **Roots of Ethiopia** for community tourism enterprises and created a website to showcase each community offering that help reverse Ethiopia's negative international image.

## Results

- Creation of 7 community enterprises whose profits helped expand their business and support local livelihoods, while also supporting environmental protection through community conservation initiatives created through the project.
- Development of a website to promote community tourism enterprises and visitor experiences and to serve as a landing page (to track results), for social media and other targeted marketing campaigns
- Development of an investment proposal package for an eco-lodge that led to a \$1 million investment that funded the development of the Bale Ecolodge
- Creation of a Traveler's Philanthropy Program to harness tourist participation that contributes to key conservation and development initiatives.
- Creation of a National Geographic Geotourism MapGuide to promote the natural, cultural, and historical attractions of Ethiopia.
- Improvement of the current tourism and conservation policy environments.

## Providing alternative income opportunities and supporting conservation in Mali's Dogon Country

USAID-Mali

### Partners

GIZ, Cultural Mission of Bandiagara (MCB), SNV Office Malien du Tourisme et de l'Hotelliere (Ministry of Tourism, OMATHO).

### Project Duration

March 2008 – June 2012

## Project Description

The Dogon Country region of Mali is nestled near the edge of the Sahara Desert in Africa's Sahel and stretches the length of the Bandiagara escarpment. It possesses stunning natural beauty and cultural significance; the area, however, also plays host to a population whose economic growth is stunted due to diminishing access to agricultural land and water because of desertification. The result is

increased pressure on the economic viability of the Dogon people, who are at risk of losing their cultural heritage and ancestral lands because of environmental degradation that simultaneously affects the biodiversity of this unique region. Global Sustainable Tourism Alliance helped to diversify the economy of the Dogon people through sustainable tourism by building awareness of Dogon Country as a tourist destination and promoting its many tourism assets while enhancing the capacity of local tourism businesses to service international tourism markets. This has helped to provide the Dogon people with alternative sources of income to their traditional agricultural activities and has allowed them to further develop tourism assets and enterprises on their own for future gains. By providing this alternative livelihood, some of the environmental pressures have been alleviated that are associated with a dominantly agrarian society.

## Major Activities

- **Building capacity:** developed tourism training programs tailored to local needs and capacity. Programs made heavy use of pictures and role-playing educational methods as many local tourism practitioners have low levels of literacy.



- **Developing online tools:** created a website that showcases the region's tourism attractions as well as the communities and their culture. Created and utilized social media accounts to help increase awareness of the region (country), the people and their culture.
- **Incentivizing the Travel Trade:** increased awareness of the region's tourism attractions to a wider audience, including international tourism markets, through the use of online tools and outreach to and coordination with media outlets.

## Results

- Over 200 tourism professionals (accommodation managers, guides, tour operators, etc.) trained in tourism management, customer service, hygiene, and sustainable tourism operations.
- A training curriculum tailored to the local needs for local tourism partners to be able to implement sustainable tourism initiatives beyond the program.
- Pays Dogon destination website in French and English that highlights tourism attractions, activities, and businesses in the region as well as the flora and fauna.
- Greater awareness of Pays Dogon as a tourism destination by increasing media coverage throughout the project. The destination has been written about in multiple print and online media outlets as well as highlighted on French TV, France 24 radio, RFI and on local TV ORTM.
- New links between local tour operators and international tour operators and markets to enhance tourism sales.
- One-on-one technical assistance to small businesses, microenterprises and guides to enhance their businesses and enhance their management abilities.

### Rural Community Tourism Enterprise Development Jamaica

#### Jamaica Social Investment Fund (JSIF)

#### Partners

Government of Jamaica, Jamaica Tourism Board (JTB), Jamaica Product Development Company (JPDco).

#### Project Duration

August 2015 – December 2018

### Project Description

In 2011, a community tourism development technical assistance and small grant program was designed and launched. At the completion of that program in 2015, a new brand identity

"Jamaica Community Experiences" and promotional materials that are able to convey the country's wealth of community-based attractions were developed. The community tourism enterprises (CTEs) that were promoted under this project are groups of rural people with common economic interests (i.e. farmers, fishermen, agro-processors, craft producers) who have organized themselves to carry out business activities across the island. In the development of this new brand, an overall look



and feel, new promotional materials such as videos, brochures, high quality digital images as well as strategic marketing plans and training programs were created.

In 2018, to further the development of the Jamaica Community Experiences brand, business mentoring, sales and marketing management services were provided to eight community-based enterprises. During this phase, a strategic business management and marketing plan for each CTE focused on improving the business's online presence through social media platforms was created. Help was also provided to facilitate bookings of the CTEs through an online reservation system and by establishing partnerships with third party distribution channels.

## Major Activities

- Brand research and product assessments to develop a creative brief for the Jamaican community tourism products

- Brand platform, brand guidelines and communications tools (including a multi-page brochure and four short videos) to articulate and implement Jamaica's community tourism brand promise
- Introduction of the new brand to cluster members and key partners, and capacity building to help them to adopt and apply the brand identity to market community tourism
- Development of abbreviated business plans for each CTE that provided product descriptions, pricing, marketing activities, and sales/distribution channels
- Assistance to each CTE to improve both their printed and online marketing and sales materials and listings
- Development of an online training course that will allow each CTE to understand how to effectively use social media

## Results

- Built awareness of community tourism in Jamaica
- Established and launched the Jamaica Community Experiences Brand in September 2016
- Developed Jamaica's community tourism marketing strategy and positioned Jamaica as a community tourism destination
- Developed effective, low-cost to implement communication tools that Jamaica and the eight CTE's supported by JSIF can use immediately to communicate with and attract the markets, funders and stakeholders including:
  - Four, 45-60 second promotional video showcasing the Jamaica four core themes of community tourism experiences and featuring eight JSIF-supported enterprises
  - Design and content of a multi-page brochure showcasing the Jamaica community tourism experience and featuring the 8 JSIF-supported enterprises
  - Four posters featuring the core community tourism themes
  - High-quality digital images
  - Establishment of Trip Advisor and Facebook accounts for 8 CTEs, including unique Facebook cover images, and designs 20 Facebook ads
  - Developed Jamaica's community tourism marketing strategy and position Jamaica as a community tourism destination
- **An improved online presence**, visibility and use of social media among the CTEs
- Improved integration of community tourism marketing into the overall marketing efforts of the Jamaica Tourism Board
- An established online reservation and payment system to facilitate bookings for community tourism enterprises
- Improved packaging and new sales and distribution channels for the CTEs
- Training and planning for the overall sustainability of the CTEs

## Entrepreneurship and New Product Development in the Tourism Sector Sri Lanka

### The International Finance Corporation

#### Partners

Find My Fare .

#### Project Duration

January 2016 - May 2017

### Project Description

The tourism industry in the Eastern and Northern Provinces of Sri Lanka is emerging. Until now, the priority on developing and expanding tourism in the country has been focused on the Western Coast of Sri Lanka, with minimal attention elsewhere. The Eastern and Northern Coasts of Sri Lanka contain large breaches in tourism policies and face numerous challenges in offering quality services to tourists. For the continued economic growth of the country, Sri Lanka has prioritized becoming a high-quality international destination and attracting more domestic and international

visitors. As tourism continues to increase, Sri Lanka's post-conflict areas can benefit by taking advantage of their country as a sun and sea destination with outstanding world-class cultural and natural attractions. In order to improve policies, services and infrastructure within the tourism industry in the Eastern and Northern Provinces, the project worked to encourage dialogue, diversify the number of tourist attractions, and increase capacity among tourism entrepreneurs.

### Major Activities

- Facilitated public-private dialogue in the focal districts through one-on-one interviews with key destination stakeholders, coupled with public-private stakeholder workshops;
- Designed and carried out a "Tourism Innovation Challenge" to help develop or enhance fifteen tourism products or services to increase the availability of tourism attractions that offer cultural, historic or nature-based tourism products and services in the region;
- Facilitated focused training and skills development to tourism service providers in



districts based on a Small Tourism Enterprise Operations and Management training course and an associated Train-the-Trainers course specifically designed for the project;

- Provided technical assistance to FindMyFare.com and improve market access for targeted areas and MSMEs to promote Sri

Lanka's Eastern and Northern Provinces. On and off-screen SEO's were also conducted to improve the Geotourism Mapguide's ranking in search engines to increase website traffic; and

- Provided basic marketing and sales training to tourism MSMEs in the target regions.

## Results

- 15 new and emerging tourism enterprises receiving in-depth advisory services;
- 15 Business Plans developed
- 51 individuals associated with the 15 enterprises attended training workshops and seminars on a continued basis;
- 534 participants in training workshop and seminars when the trainings were made available to the public (222 of which were women);
- 21 signed pledges from hoteliers and service providers showing their commitment to adopting sustainable tourism best practices and preserving the destination;
- 8,135,159 LKR increase in sales revenue (from the period June 2016 – December 2016) among the 15 enterprises receiving in-depth technical assistance. The monthly average revenue grew by 46% when compared to the baseline data collected in May 2016 upon the start of the technical assistance;
- 2,385 new customers served among the 15 enterprises between the period of June 2016 – December 2016. The monthly average of customers grew by 57% from May through December.
- 96 total jobs supported (with the creation of 45 new jobs) through the growth of the 15 enterprises;
- Development of individual sales sheets to promote the products;
- One enterprise has signed a sales agreement with Walkers Tours, and two more are currently negotiating agreements;
- 2,750,000 LKR of indirect investment by enterprises as a result of investments in the business;
- 9 enterprises registered their businesses in the local council and 6 more are currently in process; and
- 2 enterprises obtained their business registration from the Sri Lanka Tourism Development Authority and 5 more are currently in process.
- Increased visitation and direct booking of tourism accommodations and attractions through the Eastern Sri Lanka Geotourism Mapguide (<http://easternsrilanka.natgeotourism.com>) and a local partnership with Find my Fare.

## Taking a Business Approach to Conservation: A Business Plan and Fundraising Strategy for The Peak Regional Park, Colombia

### Providence Foundation

#### Partners

Coralina.

#### Project Duration

December 2014 – March 2015

### Project Overview

A business plan was developed that outlined a strategy for how tourism can directly support the conservation and management of The Peak Regional Park. The park was seeking innovative ideas to engage local communities, as well as organizations working within the park, to generate a sustainable source of revenue through tourism.

This remote region of Colombia presents a unique set of challenges that must be considered in its development as a tourism destination. There are threats to the conservation of natural resources that must be properly managed. As tourism develops in the region, it must be done carefully and in a way that ensures economic opportunity for local residents. Furthermore, the charm and essence of the communities on the island lies in their authenticity, something that should not be disturbed or “packaged” in a way that misrepresents them or threatens their traditional way of life.

For Peak Regional Park, a tourism development business plan will be created in such a way that it preserves local culture and conserves natural resources while generating income. Utilizing this business approach to conservation leads to increased organization and professionalization through training and assistance in product development, new and improved tourism products that will create jobs and income for the local communities, and increased awareness and support of local residents in protecting the region’s natural and cultural resources as a vital part of their local tourism economy.



## Major Activities

- Conduct a comprehensive **tourism assessment** to develop an understanding of the direct and indirect threats to biodiversity at a site, as well as the existing and potential attractions, market demand, and supporting tourism infrastructure and services.
- Present **business concepts** for generating revenue in support of conservation to generate feedback and validate ideas with local stakeholders.
- Create a full-fledged **business plan** to clearly articulate the demand-driven products available for the park to generate income in support of conservation.
- Develop and present a **fundraising strategy** that can be used to secure additional funding for key activities.

## Results

- A comprehensive understanding of the direct and indirect threats to conservation within The Peak Regional Park.
- Utilization of the park to generate a sustainable form of revenue through tourism that funds conservation and the on-going implementation of the Park Management Plan.
- Collaboration directly with local communities and empowering groups already working within the park to develop new tourism products that improve the overall visitor experience to Providencia.
- Collaboration with existing tourism industry to raise additional funds in support of conservation.
- An implementation plan and fundraising strategy that ensures goals are met and sustained over the long-term.

### Supporting and managing the growth and development of sustainable tourism in the Dominican Republic

#### USAID – Dominican Republic Sustainable Tourism Alliance (DSTA)

##### Partners

Global Sustainable Tourism Alliance (GSTA), Consejo Nacional de Competitividad

##### Project Duration

October 2007 – September 2012

## Project Description

In 1972, the DR had only 1,600 hotel rooms; today it has over 60,000. While the industry has been successful to date, it faces new

challenges brought on by rapid worldwide economic growth and, most importantly, a change in consumer demand towards sustainable tourism. Specifically, the DR needs to find ways to evolve from its antiquated “all-inclusive” model and transform its numerous natural, historical, and cultural tourism assets into a thriving sustainable tourism industry that addresses the DR’s major social, economic and environmental issues, including widespread poverty, slow economic expansion, and environmental degradation.

The purpose of the USAID-Dominican Republic Sustainable Tourism Alliance’s (DSTA) is to increase small and medium business growth in an environmentally sustainable manner through market-driven sustainable tourism development linkage programs, cluster activities, and a reinvention of the tourism offerings on fragile coastal and inland environments. To conserve biodiversity and better manage the country’s natural resource base, the DSTA brought together a world-class team of individuals and institutions from the

public, private, and NGO sectors as well as leading national, regional, and international tourism industry enterprises to address the multi-dimensional aspects of sustainable tourism in the DR.

## Major Activities

- **Developing DMOs:** Moving the clusters developed under USAID's Competitiveness and Policy Program (La Romana-Bayahibe, Jarabacoa, Barahona, Puerto Plata, Altagracia, and Samaná), and the newly-formed clusters in Pedernales, Santo Domingo, and Constanza, towards self-sufficiency and sustainability, transforming them into functioning Destination Management Organizations (DMOs).
- **Building capacity:** Improving environmental management capabilities and stimulating small, medium, and community-based tourism efforts through training in sustainable tourism operations and the development of marketing and sales strategies.
- **Identifying more tourism offerings:** Reinvention of the tourist offerings on fragile coastal and inland environments as well as developing sustainable tourism packages and day trips geared more towards adventure, culture, and nature, not just "sun and sand."
- **Establishing strategic alliances:** Developing and managing strategic alliances and management agreements to facilitate sustainable tourism development and destination stewardship.



## Results

- 9 self-sustained Destination Management Organizations (DMOs) with completed business plans, sales and marketing strategies, and pilot projects.
- 20 small, medium, and community-based tourism enterprises supported with completed business plans, training in tourism operations and with sales and marketing strategies that connect them to international tourism markets.
- Tourism product development and training methodologies developed for the DR and transferred to local actors through a network of cluster mechanisms known as the Dominican Tourism Competitiveness Council to continue supporting the goals of the DSTA.
- Development of "Dominican Treasures", a Sales and Marketing Alliance supported by the consorcio which will provide continued assistance to a number of small and community-based tourism enterprises throughout the country.
- Sustainable tourism packages and day tours developed to collectively change the image of the Dominican Republic as solely a sun and sand destination to a more versatile destination that includes adventure tourism, ecotourism, and cultural and historical tourism.
- Creation of at least 5 strategic alliances and 3 co-management agreements that formalize actions, roles, and responsibilities for destination stewardship by local communities thus promoting economic livelihood and political empowerment.

## **APPENDIX B: Bibliography**

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