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Sustainable tourism assessment

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# Peace Through Commerce: Tourism and Development in Eritrea



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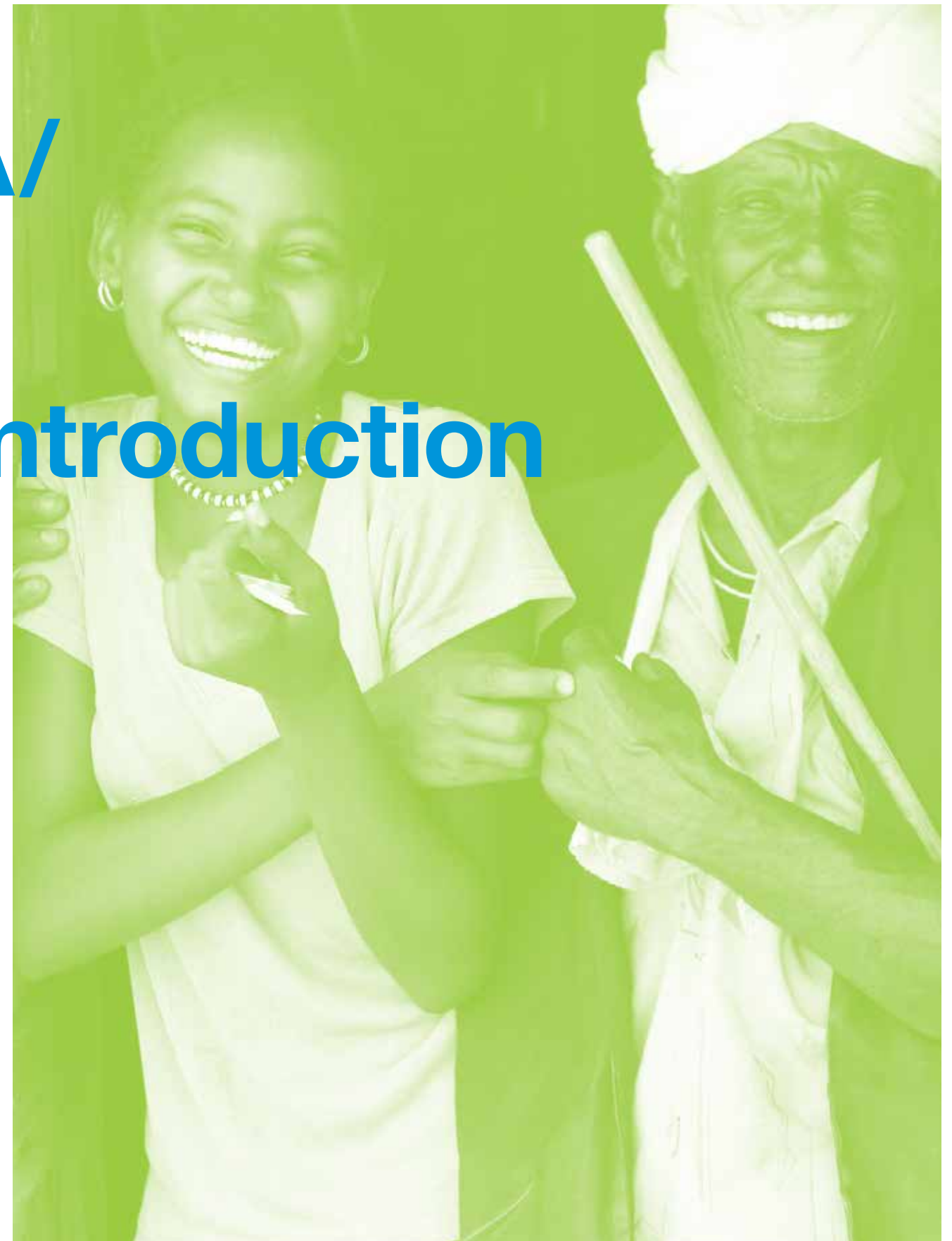
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# A/ Introduction





# A1

## Foreword

Tourism is increasingly becoming recognized as one of the assets towards promoting diversified economic growth and contributing to poverty alleviation efforts, particularly for developing countries. In 2015 alone, the UNWTO also registered that 1,186 million international tourists generated \$1,260 billion in the consumption of entertainment, food and drink, accommodation, shopping and other services<sup>1</sup>. Combined with the travel and transport services utilized by nonresident passengers, tourism exports accounted 1.5 trillion in 2015, approximately \$4 billion/day<sup>2</sup>. Tourism also accounted for 1 in 11 jobs worldwide<sup>1</sup>, and is recognized as a leading sector that promotes women and youth employment.

Many of the natural, cultural and historical assets that are unique to a number of developing countries provide a comparative advantage within the global tourism industry, and are clearly a source of potential revenue for emerging economies. This comparative advantage has increasingly become recognized as one of the potential assets for developing countries to diversify and grow their economies, as well as improve the quality of life for the poorest and most vulnerable segments of their communities. In recognition of the industry's potential to contribute to diversified economic growth, tourism specific targets were formally included in the 2015-2030 Sustainable Development Goals (SDGs). The United Nations has also designated 2017 as the International Year for Sustainable Tourism for Development.

### 2017: The International Year for Sustainable Tourism Development

In the 70th General Assembly of the United Nations, 2017 was designated as the International Year of Sustainable Tourism Development through the adoption of resolution 70/193.

The designation the industry as an International Year highlights the capacity of tourism to contribute towards the global sustainable development agenda. Additionally, tourism is recognized as an area where policy makers, public sector actors, businesses and tourists can actively engage in the promotion of sustainable practices that can positively contribute to an improved quality of life for communities in developing countries. With the designation of tourism as an International Year in 2017, the UN has recognized:

“The important role of sustainable tourism as a positive instrument towards the eradication of poverty, the protection of the environment, the improvement of quality of life and the economic empowerment of women and youth and its contribution to the three dimensions of sustainable development, especially in developing countries. (UN Resolution 70/193, 2015)”



Despite these significant opportunities in the tourism sector, the use and prioritization of the industry as an asset towards economic development is limited, particularly in Africa. Tourism in Africa is under-performing, with 59%<sup>3</sup> of the countries in the Sub-Saharan Africa region demonstrating market failures in their tourism sectors. As tourism is both dependent and impactful on array of economic sub-sectors, a concerted investment (both regulatory and financial) is necessary to ensure the success of the industry in Sub-Saharan Africa.

However, the economic and social importance of the tourism industry is widely underappreciated. There is a limited understanding and/or prioritization amongst policy makers in the region of the potential for tourism development in their countries, and how to achieve “destination readiness”. Given the multiple challenges and competing priorities in the areas of poverty, health, security and stability, tourism is an industry that faces challenges in convincing policy makers of its value as a tool for broader economic development in the Sub-Saharan Africa region.

Eritrea is amongst the list of countries in Sub-Saharan Africa that have yet to fully develop and optimize their tourism industries, though numerous reports have identified the sector as one of the country’s potential development assets. Eritrea’s rich cultural heritage, varied topography and strategic geographic location along the Red Sea are specifically identified as opportunities for tourism development. Eritrea’s coastal Massawa city and the nearby Dahlak Archipelago are areas endowed with natural deep water ports, early-Islamic history, Ottoman and Egyptian architecture, a medley cultural assets and virgin marine resources spread across 200+ islands, that position these two destinations as key tourism hubs in the country. However, very little research has been conducted to identify the potential of sustainable tourism development as a strategy to contribute to local economic growth and poverty alleviation efforts in these destinations.

This study conducted a community and visitorbased assessment in Massawa and the Dahlak Archipelago to measure the tourism potential of these two destinations, and provide key data towards evaluating the capacity of the industry as an asset that contributes to sustainable development.



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## A2 About this report

This study addresses the lack of context specific research in assessing the potential of the tourism sector as a viable tool for diversified economic growth and broader sustainable development in Eritrea. This assessment conducts a resident and visitor-based destination specific analysis in two key coastal destinations in Eritrea, Massawa and the Dahlak Archipelago, to determine the perceived value of the tourism industry as a sustainable development strategy that can improve the quality of life of local communities and competitively attract tourists.

However, it is key to note that the aim of the research is not to assess the potential of tourism as an economic panacea for communities in the target destinations and Eritrea as a whole. The research aims to explore the potential of pursuing sustainable tourism as one of many opportunities that can contribute to diversified economic growth in Eritrea’s Massawa and Dahlak Archipelago.

### Why Massawa and the Dahlak Archipelago?

Currently, Eritrea’s tourism and heritage promotion is focused on Eritrea’s capital city, Asmara, through multiple analyses and an extensive dossier submitted to UNESCO that has resulted in the inscription of the city’s unique modernist architecture as a part of the list of World Heritage Sites. However fewer studies have focused on the tourism and heritage potential Massawa and the Dahlak Archipelago, which are destinations that offer Eritrea’s main beach tourism products, and represent distinct architectural styles and historical junctures in the country’s history.

Eritrea’s coastal Massawa city and the nearby Dahlak Archipelago are areas endowed with natural deep water ports, early-Islamic history, Ottoman and Egyptian architecture, independence memorials, a medley cultural assets and virgin marine resources spread across 200+ islands that position these two destinations as key tourism hubs in the country. Identifying, promoting and investing in the diversified tourism products that Massawa and the Dahlak Archipelago offer, is a key strategy that can increase the overall competitiveness of Eritrea as a tourist destination.

Furthermore, the research notes that the historic core of Eritrea’s Massawa city has experienced extensive damage during the war for independence. Existing literature and best practices demonstrate that cultural promotion and tourism led economic development are mutually reinforcing elements of heritage rehabilitation efforts in historic cities. The potential for tourism to play a central role in the structural and economic rehabilitation of Massawa city’s historic core, is a compelling validation to explore the sector’s viability as a sustainable development strategy for the target destinations.

### Methodology Overview

The research adapts the Tourism Assessment Process (TAP) developed by George Washington University and Conservation International to conduct the destination assessment of Massawa and the Dahlak Archipelago. The TAP methodology is a process that is used to determine destination potential and identify risks as well as opportunities of pursuing tourism as a sustainable development strategy.

As part of the TAP methodology, the research conducted 472 resident and 223 visitor surveys in the target destinations, and 16 key informant interviews with tourism stakeholders in 2016. Data from the sampled 400 respondents in Massawa was based on a representative proportional to population size sampling framework, with a confidence level interval of 95% and a standard deviation of 5%. Due seasonal migrations of communities from the Dahlak Archipelago, the research conducted a smaller purposeful sample size of 72 available community members that had



migrated to Massawa during the data collection period. In addition to the resident surveys, 16 key informant interviews were conducted with tourism stakeholders at the destination and national level. The 223 visitor surveys were administered to local, international and diaspora visitors in Massawa, as the destination also serves as the primary transit point for tourism in the Dahlak Archipelago. All data collection tools and processes were pretested and reviewed with local and international subject matter experts to ensure their validity and reliability.

#### Acknowledgements

The research presented is the work of diaspora driven initiatives to contribute towards sustainable development in Eritrea and enhance the role of diaspora communities in addressing global challenges.

The research would like to acknowledge the support provided from the Eritrean Ministry of Tourism and Culture, Northern Red Sea Regional Administration and Ministry of Marine Resources for their technical assistance and encouraging partnerships with the diaspora to address development challenges in the country.

The findings presented in the study also required the multiple inputs and technical guidance from a number of experts in the tourism sector and stakeholders in Eritrea's national development. The research would like to acknowledge the support provided by the faculty and staff at Royal Roads University's Humanitarian Studies Department and George Washington University's International Institute of Tourism Studies.

Solimar International also provided technical input towards the design and analysis of the assessment based on international best practices and standards of tourism research. Solimar International is a specialist tourism development and marketing firm that focuses on promoting integrated solutions that create jobs, build businesses, protect ecosystems and celebrate and preserve local culture. Solimar focuses on enhancing destinations and inspiring travelers to visit them through tourism products and destination development, building partnerships within destination and with international supporters and market destinations to connect people to unique destinations around the world.

The research would specifically like to acknowledge the efforts and dedication of the field data collection team in Massawa, who undertook data collection by administering over 700 surveys.



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## A3 Summary of key findings

### Massawa and Dahlak are ranked by both visitors and residents as destinations with a high potential for sustainable tourism development

- When visitors were asked to rank the tourism potential of the assessed areas, 87.7% ranked Massawa and 65.6% ranked Dahlak as destinations with some-high potential
- Visitors ranked the natural coastal and marine heritage as well as the historical and architectural sites as the top two tourism assets in the target destinations
- Tourist safety and security at the national and destination level were highly ranked
  - 98.1% of visitors ranked tourist safety and security in Eritrea as good-very good
  - 98.2% of visitors ranked tourist safety and security in Massawa as good-very good
  - 72.2% of visitors ranked tourist safety and security in Dahlak as good-very good
- Local residents also highly ranked destination tourism potential, heritage assets and tourist safety and security
  - 92.9% of residents from Massawa and 100% residents from Dahlak ranked their areas as an area with some-to high potential for tourism development
  - 99.7% of residents from Massawa and 98.6% of residents from Dahlak ranked tourist safety and security in Eritrea as good-very good
  - 99.5% of residents from Massawa and 100% of residents from Dahlak ranked tourist safety and security in Massawa as good-very good
  - 91.7% of residents from Massawa and 100% of residents from Dahlak ranked tourist safety and security in Dahlak as good-very good

### Visitors report a significant need to upgrade tourism promotion efforts, infrastructure and facilities as the biggest challenges facing the development of Massawa as a tourist destination

- Visitors ranked the biggest challenges to growing tourism in Massawa were Marketing (68.5%); Lack of Quality Hotels and Resorts (55.9%) and the lack of recreational activities (56.8%)
- When asked to freely respond to the question “what would you consider the most important areas that need improvements in Massawa?”, the following themes were most frequently cited:
  - 1 / Infrastructure (Electricity, Water, Transport, Communication); 2 / Quality of Hotels;
  - 3 / Rehabilitation of Historical Places; 4 / Improvement of recreational areas and 5 / Accessibility of boats to go to the Islands
- International visitors and tourism service providers noted challenges in the areas of visa accessibility and obtaining visitor permits more than local and diaspora tourists

### Local communities are very supportive of tourism development in their areas

- 98.9% of residents from Massawa and 98.6% of residents from Dahlak supported an increase of tourism development in their destinations
- 93.1% of residents from Massawa and 91.7% of residents from Dahlak, agree-strongly agree with the sentiment that tourism can help their communities develop in the right direction
- 95.9% of residents from Massawa and 97.2% of residents from Dahlak feel that community participation is extremely important in any tourism development initiatives in the target destinations
- However many local residents (60.6% Massawa; 86.1% Dahlak) acknowledged that one of the major risks in tourism development is the potential damage local cultural heritage
  - The majority of interviewed stakeholders expressed socio-cultural concerns such as increased criminal activities, prostitution, drug use, child exploitation and harmful social impacts that could increase with the advent of tourism in their areas
  - Throughout the survey, residents from Dahlak were significantly more concerned with the potential negative socio-cultural impacts of tourism development in their area than residents from Massawa

### Tourism development is positively viewed by communities as a significant economic development asset that can generate employment opportunities and revitalize the local economy

- The majority of residents from Massawa and Dahlak identify employment (91.4%; 90.3%) and economic development (68.3%; 59.7%) as the two biggest advantages to tourism development in their areas
- 93.8% of residents from Massawa and 97.2% of residents from Dahlak expressed that they or members of their households would want to be employed in the tourism sector
  - However, 52.9% of residents from Dahlak reported that they are against the employment of female members of their household in the tourism sector, due to religious and cultural concerns
- 83.3% of residents from Massawa and 47.2% of residents from Dahlak agree-strongly agree that tourism can provide benefits to the poor in their communities
- 95% of residents from Massawa and 100% of residents from Dahlak agree-strongly agree that tourism can help promote investments in other areas of the economy (fisheries, agriculture, infrastructure etc.)
- However, the current level of tourism is providing very limited economic benefits to communities in Massawa and the Dahlak Archipelago
  - 60.1% of residents from Massawa and 56.9% of residents from Dahlak report that the tourism industry has none-low contribution to their household incomes
  - 52.7% of residents from Massawa and 57% of residents from Dahlak report none-low community economic benefit from tourism at the current level
  - Employment generation from the tourism industry was reported at none-low in Dahlak (58.3%), while respondents in Massawa (54.8%) largely noted moderate to high generation of jobs
- Despite the limited economic contributions at the current nascent level of tourism development, 83% of residents in Massawa and 93% of residents in Dahlak agree-strongly agree that tourism contributes to economic development in their areas
- Furthermore, 87.2% of residents in Massawa and 97.2% of residents in Dahlak agree-strongly agree that if tourism increases in their areas, it has a strong potential to contribute to their household incomes



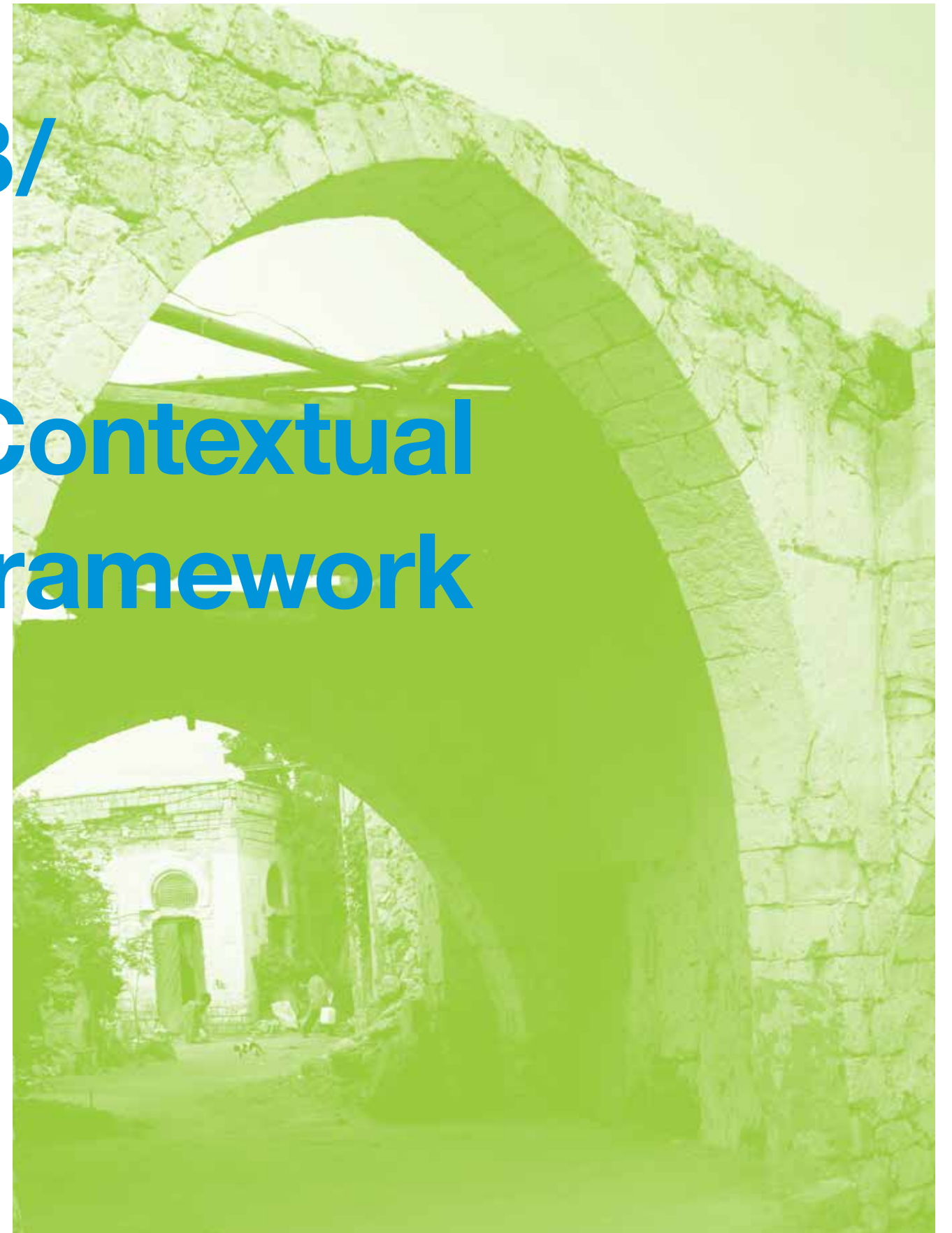
### Tourism is positively viewed as an asset towards promoting natural and cultural heritage conservation

- 93.3% of residents from Massawa and 72.3% of residents from Dahlak agree-strongly agree that tourism can play a constructive role in promoting the conservation of natural and cultural heritage sites in their areas
- 54.3% of residents from Massawa and 95.8% of residents from Dahlak felt that heritage sites in their communities are in significant need of rehabilitation and development
  - 76.5% of visitors also reported that heritage sites need significant rehabilitation
- However, residents in Dahlak expressed more of a concern regarding the risk of tourism development on the environment than residents from Massawa
  - 58.3% of residents from Dahlak anticipated a negative impact of tourism on the environment in Dahlak

### Opportunities for Sustainable Tourism Development:

- 47% of visitors identified eco-tourism as the biggest opportunity for tourism development
  - Development of port facilities and proximity to European, Middle Eastern and African markets were also cited as significant opportunities for tourism development
- The target destinations demonstrate a capacity to develop a year round tourism strategy by combining local and diaspora visitation practices with international tourism trends
  - 71.3% of local visitors and 76.1% of diaspora visitors identified visitation rates during the summer, which is seasonally the hottest and least comfortable period to visit the destinations
  - International trends in tourist travel find that winter-sun tourism during the colder months (November-March) in the Northern hemisphere is a key market opportunity; this coincides the optimal months for sun, sand and sea tourism in Massawa and the Dahlak Archipelago
- Conservation of historical and architectural sites are key areas that can substantially increase tourism development in Massawa and the Dahlak Islands, while simultaneously improving the quality of life for local communities and promoting national heritage awareness
- Many tourism stakeholders feel that tourism development at the national and destination level can help improve the perception and understanding of Eritrea in the global consciousness

# B/ Contextual framework





## B1 Why tourism?

Tourism is increasingly becoming recognized as one of the key assets that can contribute towards promoting diversified economic growth in many developing countries.

The travel and tourism industry represents 10% of the global GDP, encompassing 7% of the world's exports at a total value of \$1.5 trillion in 2015 alone<sup>4</sup>. Over the past four years, growth in the tourism industry has consistently outperformed world trade averages, with the sector currently ranking as the third largest worldwide export. The tourism sector is also considered to be one of the largest job creators, supporting one in eleven jobs worldwide. International tourism is expected to grow to 1.5 billion tourists by 2030, with emerging economies and destinations expected to attain 57% of the international tourist market share<sup>1</sup>.

In 2015, 45% of tourism travel was aimed at destinations in developing countries<sup>1</sup>. A number of studies have confirmed that the industry is a major contributor to local employment, foreign currency earnings and local economic development in these destinations. In many developing countries, tourism ranks as the highest performing export sector and has become an essential component for trade diversification. Despite an underdeveloped industrial sector, the tourism industry is able to capitalize on a less degraded environment and unique cultural heritage to increase a destination's attractiveness and market the export of a developing country's tourist goods and services.

Africa has more than doubled the number of international tourist arrivals from 26 million in 2000 to 56 million in 2014, with 36 billion in international tourism receipts that totaled 7% of the continent's exports<sup>4</sup>. Similarly, employment in the tourism sector has increased to represent 8.1% of all jobs in the region in 2015<sup>4</sup>. Specifically, tourism has been recorded to positively impact the following areas in many of the developing economies in Africa:

### **Foreign Currency Earnings**

For many developing countries, the tourism industry is a key source of foreign currency earnings. A number of developing countries in Africa operate on a trade deficit, as the need for imports often exceeds their exports, which further constrains the ability for developing nations to stimulate economic growth over the long term. Since all debts must be paid in a foreign currency, there is a significant importance attached to maximizing foreign exchange earnings in developing countries from their export industries.

The international tourism sector is acknowledged as one of the top export earners in Africa. Rwanda's international tourism exports have consistently become the top foreign exchange earner, registering \$319 million<sup>1</sup> (2015) in international tourism receipts and outpacing the country's previous top agricultural based exports (coffee and tea). Similar trends are reported elsewhere in East Africa, where tourism is a top foreign exchange earner in Uganda that contributed \$1.3 billion<sup>1</sup> in revenues (2014), and outpacing foreign currency earnings from gold exports in Tanzania by generating over 2 billion<sup>1</sup> (2015) in tourism receipts.



The critical importance of tourism in foreign exchange earnings are not unique to Africa nor developing countries. An example of the tourism sector's effects on trade balances can be seen in their impact on the Cypriot economy in the 1980s, where the sector encompassed 40% of the country's exports, and was able to substantially contribute to balancing the Cyprus' trade balance until the mid-1990s<sup>5</sup>.

### Employment

The tourism sector is characterized as a highly human capital intensive industry, and is a significant generator of employment in both national and global economies. In 2015, the tourism industry contributed to 283 million jobs which accounted for 9.5% of all formal global employment<sup>14</sup>. The need for both skilled and unskilled labor in the tourism sector has resulted in positive gains towards reducing unemployment and poverty rates through the creation of jobs that can be accessed by a wide range of the work force. In Zambia, a study by the Natural Resources Consultative Forum found that an investment of \$250,000 USD in the tourism sector generated 182 formal full-time jobs; in contrast, this finding is approximately 40% higher than similar investments in the agricultural sector and more than 50% in the mining sector<sup>6</sup>.

A higher proportion of women and youth are also noted to benefit from employment in the tourism sector. Tourism employment for women in Africa is amongst the few sectors where women are highly engaged and equally paid. Across the region, women hold 31% of all formal employment positions in the tourism industry, compared to 21% in other sectors<sup>7</sup>. Studies also demonstrate that the travel and tourism industry also employs a higher proportion of youth when compared to the labor market as a whole. These characteristics of higher youth and women's employment in the tourism industry also positively contribute to reducing migration flows, political stability, household resilience and countering violent extremism.

### Multiplier and Dynamic Economic Effects

The economic impacts of tourism are not solely constrained to the tourist industry; instead they affect a wide range of local production, service delivery and employment subsets of the economy. Tourism activities are recognized for generating demand in non-tourism related industries, which in turn promotes the development of locally owned small and medium enterprises (SMEs) and fosters backward economic linkages to labor intensive production services. In developing countries, these multiplier effects have a significant capacity to yield pro-poor economic dividends, in which low-income producers in a wide range of sectors are able to benefit from the increase in the demand for production that is generated by the tourism industry.

Tourism development in Africa has also demonstrated the capacity to encourage private sector reform and promote both foreign and domestic investment in emerging economies. Furthermore tourism based investments in infrastructure, human resource capacity building and inter-sectorial linkages have resulted in a dynamic impact that benefits the broader economy. These multiplier and dynamic characteristics of tourism development, in which indirect and induced revenues circulate within the economy to benefit the larger community, are noted by economists amongst the most significant pathways that poor and marginalized communities benefit from the tourist industry.

### Economic Valuation of Cultural and Natural Heritage Conservation

The tourism industry also has a positive impact in promoting natural, historical and cultural heritage conservation. By converting heritage sites into productive economic assets, the tourism industry financially contributes to their maintenance and preservation, as well as providing economic incentives for local communities to actively participate in conservation efforts. Conservation and rehabilitation of historic medinas in Morocco have yielded positive urban development impacts within their built environment. In many of the examples of heritage rehabilitation in Africa, tourism emerges as a key motivating industry that promotes conservation efforts which can yield tangible economic dividends through increased tourist revenues.

### Soft-Power Economic and Political Diplomacy

Successful tourism development has the capacity to encourage positive perceptions of target destinations, which can result in both economic and political dividends. In terms of attracting Foreign Direct Investment (FDI), the image of a country is an important characteristic in either encouraging or deterring business investments in the target location. Many developing countries, particularly within the African continent, suffer from outdated and/or inaccurate global perceptions of political strife, natural disasters, disease and overall instability, which deters investors and further limits broader economic development. In this aspect, tourism is a platform in which governments can actively promote positive branding of their countries as both a tourist destination and an investment opportunity.

A number of African countries which were mired in conflict and instability, such as South Africa, Rwanda, Uganda and Mozambique, have successfully developed a tourism industry that has become a positive branding asset. These countries have shown how successful tourism has contributed to shifting global perceptions of the destinations, boosts investor confidence and becomes a key asset that promotes diversified economic growth.

Eco-tourism has also emerged as key niche sub-sector in the tourism industry that actively promotes the conservation of natural heritage sites. Eco-tourism in Rwanda's Volcanoes National Park has significantly contributed to conservation efforts of the country's endangered mountain gorillas and the park's vast forest ecosystems. A revenue sharing framework with surrounding communities in the park has also resulted in the investment of \$1.83 million (2005-2014) of the park's tourism revenues into 360 community-based projects that include infrastructure rehabilitation, SME development, water and sanitation initiatives and agricultural activities for local residents.<sup>8</sup>





# B2 Sustainable tourism for development

While the tourism sector has a high potential for promoting diversified economic growth, concurrently there are also a number of risks that are associated with the development of the industry. These include negative spillover effects from the tourism industry that have been detrimental to the local environment, livelihoods and community welfare. A number of studies on the impacts of unregulated mass tourism development have confirmed that the advent of the tourism industry does not automatically result in positive dividends for local communities, ecosystems and heritage sites, and can significantly damage the cultural and natural resources of the target destination.

In recognition of these realities, Sustainable Tourism has emerged as a pathway towards tourism development that “takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, and environment and host communities”<sup>9</sup>. According to the United Nations’ World Tourism Association (UNWTO), sustainable tourism development is a continuous process that works to advance a competitive industry that should:

- 1 Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- 2 Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- 3 Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.



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## Tourism and the Sustainable Development Goals

Within this framework of sustainability, tourism was formally included as part of the ambitious 2015-2030 Sustainable Development Goals (SDGs). While tourism is a cross cutting theme that can directly or indirectly contribute to the attainment of all 17 SDGs and their associated 169 targets, the potential of the industry’s contribution is specifically detailed in the attainment of targets under goals 8, 12 and 14<sup>10</sup>:

SDG	Associated Tourism Sector Target
SDG 8: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all	Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products
SDG 12: Ensure sustainable consumption and production patterns	Target 12.b Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products
SDG14: Conserve and sustainably use the oceans, seas and marine resources for sustainable development	Target 14.7 By 2030 increase the economic benefits to Small Island Developing States (SIDs) and Least Developed Countries (LDCs) from the sustainable use of marine resources, including through the sustainable management of fisheries, aquaculture and tourism



Eritrea’s Massawa and Dahlak Archipelago





## B3 Country profile: Eritrea

Eritrea is located in the Horn of Africa, bordered by the Sudan in the north and west, Ethiopia in the south, Djibouti in the south-east and the Red Sea extending across 1,212 kilometers of the country's entire eastern border. Eritrea is known as a land of contrasts, with a diverse range of cooler highland escarpments, arid lowlands, humid coastal plains and desert islands all converging within the 122,000 square kilometers that is home to an estimated 3.5 million people.<sup>11</sup>

While the country is one of Africa's newest nations, Eritrea is steeped in rich history that is reflected in the culture of its people, ancient heritage and a medley of architectural styles. Eritrea is home to a number of indigenous civilizations, including the notable pre-Axumite and Axumite history that is shared with northern Ethiopia. Eritrea's strategic position along the Red Sea has also resulted in the successive colonization of various parts of the country for centuries. The northern coastal areas were controlled by Ottomans and later Egyptians, as well as incursions from South Arabian communities. Eritrea was declared as Italy's first African colony in 1890. Following Italy's defeat at the end of World War II in 1941, Britain took over the administration of Eritrea during which much of the country's infrastructure was dismantled for to benefit the development British territories in Africa, Asia and the Middle East.

In 1952 the United Nations federated the Eritrea with Ethiopia, in which Emperor Haile Selassie subsequently fully annexed Eritrea as one of Ethiopia's provinces. This led to the Eritrean struggle for self-determination from 1961 to 1991. Eritrea formally gained its freedom in 1993 under a UN supervised referendum, in which 99.8% of the voters chose independence. Tensions between Ethiopia and Eritrea remain to this day, following a 1998-2000 border war in which parts of Eritrean territory are still under Ethiopian occupation.

Approximately 80% of Eritrea's population is dependent on rain fed agriculture and pastoralism.<sup>11</sup> Eritrea is also noted to have extensive mineral resources, with a number of mining opportunities currently under development. The Red Sea is also noted to offer significant opportunities for Eritrea to expand its fisheries and tourism industries.

## B4 Situational analysis of tourism in Eritrea

Eritrea's tourism scene is a hidden gem in Africa. As a tourism destination, the country offers an array of rich historical, architectural, cultural and natural heritage sites that have rarely been visited by international travelers. Eritrea's collection of modernist architectural structures have recently been nominated for world heritage status, the country is also endowed with stunning geographical features such as the rugged highland escarpments, pristine beaches scattered across 354 islands and a 1,212 km<sup>12</sup> coastline, otherworldly volcanic flows in the Danakil depression and a number of intriguing historical and religious sites.

However tourism in Eritrea is still at a nascent stage of development. Since Eritrea's independence in 1993, tourism was identified as a key development industry as part of the country's post-war reconstruction efforts. In 1999 a comprehensive National Tourism Development Plan from 2000-2020 was finalized as a guiding framework for Eritrea's Ministry of Tourism and Culture to substantially grow the sector, with the aim of reaching 1 million tourist arrivals by 2020. However, the border war between Ethiopia and Eritrea from 1998-2000 and following regional tensions severely hampered the development of a sizable tourism industry.

Since this period tourism has remained a nascent sector in Eritrea's economy, with tourist receipts estimated at contributing to less than 1% of the national GDP<sup>15</sup>. The United Nations Economic Commission on Africa (UNECA) notes that while Eritrea has significant potential as a tourism destination, the intermittent border tensions with Ethiopia remain a significant threat to the development of the country's tourism sector<sup>13</sup>. Despite the security risks posed by the border tensions, the vast majority of residents (Massawa 92.9%; Dahlak 95.8%) and visitors (85.9%) sampled in the study noted that there exists a very high level of safety and security for tourists in the country.

Eritrea also shares a number of common constraints in regulatory policy, accessibility, marketing and infrastructural challenges that inhibit the development of the tourism industry in many countries in Sub-Saharan Africa. These tourism constraints in Eritrea and the broader Sub-Saharan African region have subsequently resulted in market failures in the tourism sector; with only 8 countries in the region currently benefitting from highly successful tourism industries. Notwithstanding these challenges, a comparative analysis of secondary data demonstrates that Eritrea's tourism sector is still considered nascent, even when compared to many of its regional counterparts in Sub-Saharan Africa.

Within the context of international tourism trends in the East African region, Eritrea has a very minor share of the regional tourism market. Data obtained from the Ministry of Tourism and Culture shows a 4% average increase from 2011- 2015 in international arrivals to Eritrea, with a historical trend of overseas Eritreans comprising the majority of visitors:

### International visitors to Eritrea

Nationality	2011	2012	2013	2014	2015
Overseas Eritreans	75,789	90,538	104,247	88,376	91,202
Africa	21,623	30,518	30,607	26,827	25,810
Americas	1,314	1,059	774	466	386
Asia	1,953	1,851	1,404	1,125	1,417
Europe	5,134	3,951	3,130	1,376	1,885
Middle East	955	793	705	241	838
Oceania	322	214	253	207	151
<b>Total arrivals</b>	<b>107,090</b>	<b>128,924</b>	<b>141,120</b>	<b>118,618</b>	<b>121,689</b>





### Optimistic Future for Eritrea's Tourism Development

Although the Eritrean tourism sector is at a very nascent stage of development, the research finds that residents from Massawa and Dahlak are very optimistic in regards to the future of tourism in Eritrea. Statistically, resident respondents in Massawa (96.7%) and Dahlak (100%) supported an increase in tourism in Eritrea. Local stakeholders also strongly encouraged the prioritization of tourism in Eritrea as part of the national development agenda. Within the parameters of the research, these findings demonstrate that tourism in Eritrea is positively viewed as a valuable industry, and its further development would be welcomed by the local population and stakeholders in Massawa and Dahlak.

Concerted efforts to improve global awareness of tourism and travel in Eritrea are also ongoing and principally focused on the Asmara Heritage Project. In partnership with the Government of Eritrea, the Asmara Heritage Project has recently submitted a bid to the United Nations Educational, Scientific and Cultural Organization's (UNESCO) World Heritage Center to register the significant concentration of modernist Architecture in Eritrea's capital city (Asmara) as a world heritage site. In July 2017, Asmara was recognized as a World Heritage Site from this application. These efforts are also anticipated to increase the visibility and profile of Eritrea as a tourism destination, and facilitate further technical assistance in both heritage conservation and tourism development.

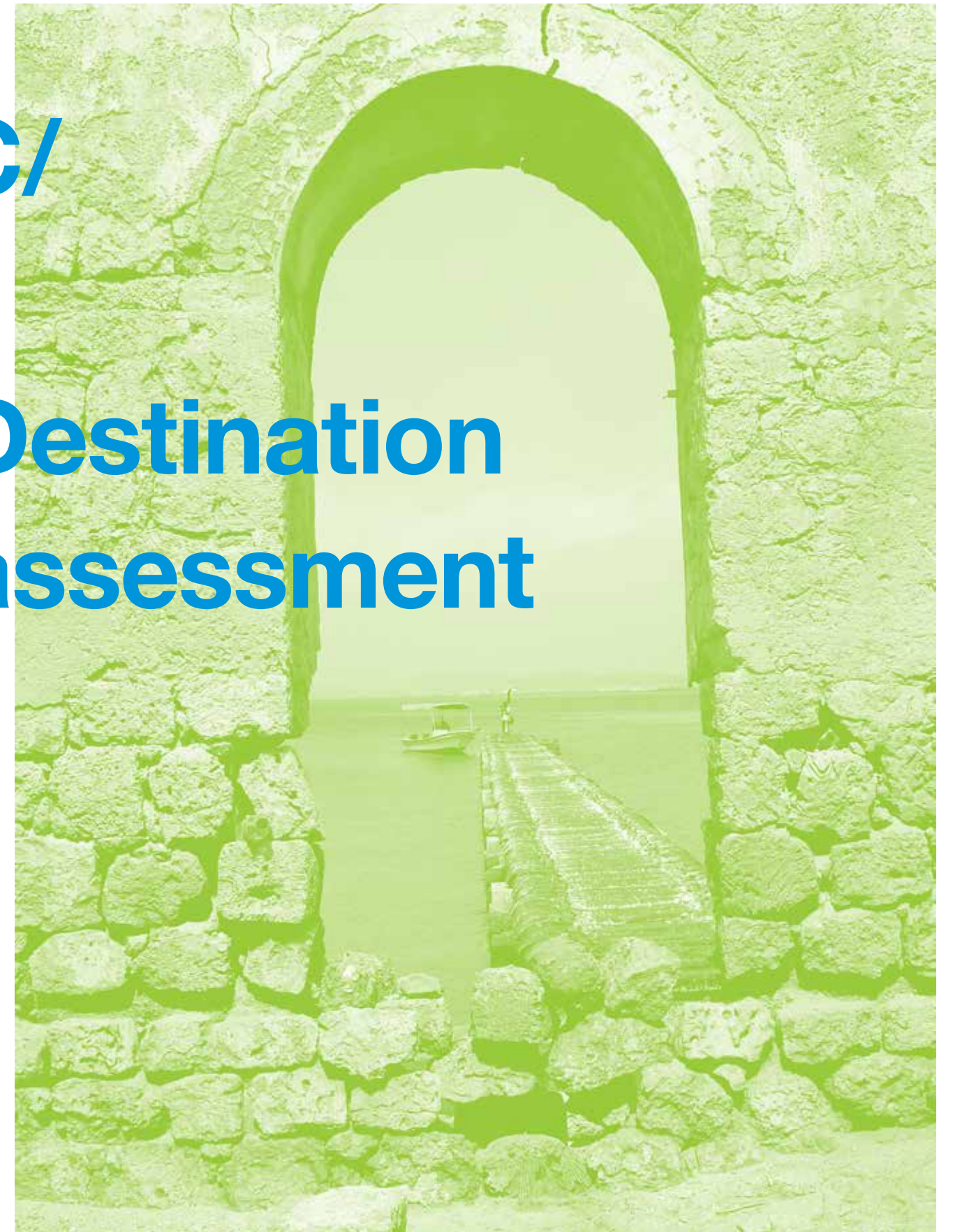
Similar to the significant progress Eritrea demonstrated towards achieving many of its targets under the 2000-2015 MDGs, the Eritrean government has restated its commitment towards meeting the 2015-2030 SDGs for the country. With the inclusion of tourism specific targets in the SDGs, the research also anticipates an increased focus towards creating an enabling environment to optimize the tourism sector in Eritrea as part of the broader global development agenda and national economic framework.

These developments towards heritage promotion and technical cooperation with established international bodies are anticipated to yield positive results for Eritrea's integration in the global tourism economy. The research finds that such developments are particularly seen as advantageous from the sampled stakeholder interviews, where a number of participants indicated that tourism can be an effective vehicle to not only promote sustainable economic development, but also improve the understanding and perception of Eritrea in the global consciousness.



# C/

## Destination assessment







## C1 Destination profile: Massawa

Historic Massawa is one of Eritrea's major cities and key ports located in the Northern Red Sea administrative region, with an estimated population of 37,247 inhabitants residing in Massawa municipality. For centuries Massawa has been at the cross roads of civilizations, with a fusion Ottoman, Egyptian and Italian architecture as well as hosting a mosaic of ethnicities that give testimony to the city's multi-cultural heritage. Massawa is also a historically important religious site in which Islam took its first footsteps in Africa during the first Hijra (migration) - where persecuted Muslims from the Hijaz (present day Saudi Arabia) sought refuge amongst the Christian communities that resided in the area. Nearby Massawa also lies the ancient Axumite port of Adulis, which extensively traded with the ancient world. The surrounding waters of Massawa are also home to rich coral reefs teeming with marine life and a number of shipwrecks. During the liberation of Eritrea, much of Massawa's architectural and historical heritage was extensively damaged in the late 1980's due to bombings by the communist Derg regime in Ethiopia; the destruction is still evident today.

While significantly scarred by the war for independence, Massawa is the primary beach destination for local, diaspora and international tourists in Eritrea. Although there are no major international hotels, the city is has a number of locally owned hotels as well as restaurants serving Eritrean dishes and sea food options.

Owing to a nascent tourism sector, there are a limited number of organized recreational activities in the area. Gurgusom is the main beach area that caters to tourists in Massawa, with a small local diving center offering PADI certified instructional and guided dives. The Northern Red Sea Museum in Massawa contains displays of the region's ancient and contemporary historical artifacts, while the remnants of Massawa's rich architectural heritage can be explored in the old town area of the city. Massawa is also the mainland transit point for tourists traveling to the Dahlak Archipelago.







## C2 Destination profile: The Dahlak Archipelago

Further off the coast of Massawa, lie the 209 islands and atolls that make-up the Dahlak Archipelago. Only a handful of the islands in the Archipelago are recorded have permanent settlements, with an estimated population of 2,700 residents. The islands are composed of shallow coral chains and picturesque seascapes that are composed of pristine beaches, rich marine life and an environmentally unpolluted ecosystem. Parts of the archipelago have been designated as a protected marine reserve that form the Dahlak Marine National Park.

Historically, the islands were the seat of an autonomous sultanate and had previously fallen under the spheres of influence from the Axumite, Ottoman, Egyptian, Italian and Arab incursions into the area. The archeological necropolis on archipelago's largest island, Dahlak Kebir, demonstrates some of the best and earliest examples of Islamic headstones carved in Kufic script in Sub-Saharan Africa. The Island of Nocra is also an important site in Eritrea's contemporary history as the location of Italy's colonial prison camp, where numerous anti-fascist political prisoners from Eritrea and Ethiopia are estimated to have died during their internment.

Tourism in the Dahlak Archipelago is extremely limited, with only 1,078 visitors recorded in 2011. Most international tourists are required to obtain permits from the Ministry of Tourism and Culture to travel to the islands. Hotels and restaurants are nearly non-existent on most of the islands, with a number of tourists arranging camp sites on many of the deserted beaches. Various tour operators work with international tourists to facilitate permits and transportation to the Islands, as well as coordinate diving activities with the dive center in Massawa.







## C3 Destination rankings of Massawa and the Dahlak Archipelago

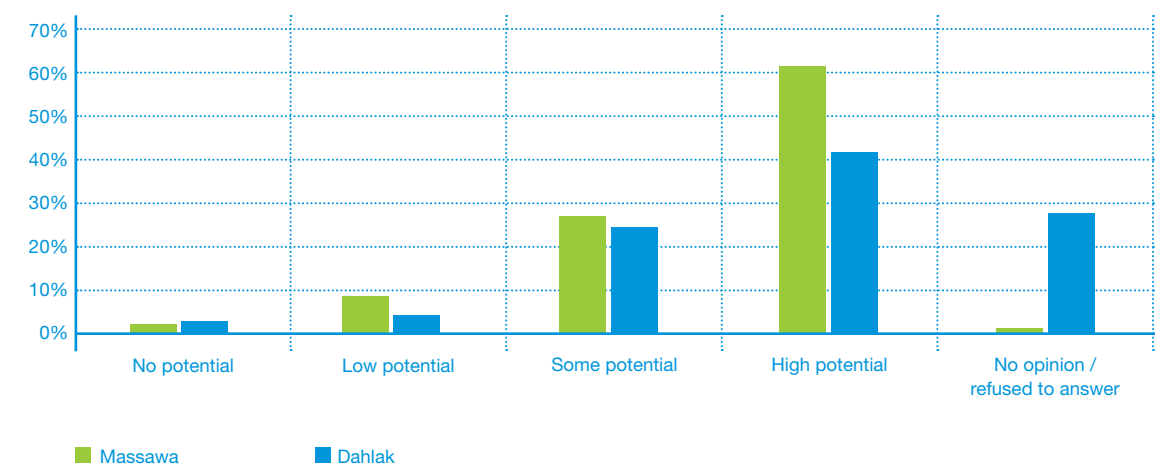
The destination rankings were conducted as part of the assessment to identify the strengths and weaknesses of the tourism industry in Massawa and the Dahlak Archipelago. The destination rankings are important for identifying potential markets, visitor preferences and the local context to both sustainably and competitively develop the tourism sector. These rankings are standard processes in assessing and developing a rationale for determining the value in investing in a destination's tourism industry, especially when contrasted with potential investments in other productive sub-sets of the economy.

### Tourism Potential

Despite an underdeveloped tourism sector, the majority of visitor and resident surveys revealed that both groups identified Massawa and Dahlak as high tourism potential destinations. At the local level, 67% of residents in Massawa ranked their destination as an area for high tourism potential, while 100% of the sampled Dahlak residents ranked the archipelago as a high potential tourism destination. Visitor responses within the combined "some to high potential" rankings for Massawa (87.7%) and Dahlak (65.6%), show that the destinations are endowed with features that have the capacity competitively attract tourists.

A cross tabulation of destination rankings by visitor types showed that international tourists ranked the Massawa more favorably than both diaspora and domestic tourists. International tourists identified "some to high potential" for Massawa (89.3%) and Dahlak (62.9%) as destinations endowed with promising tourism resources. These findings reveal that both Massawa and Dahlak have substantial potential to compete for the international tourist market share through the strategic development of their tourism industries.

Visitor Ranking of tourism potential in Massawa and Dahlak



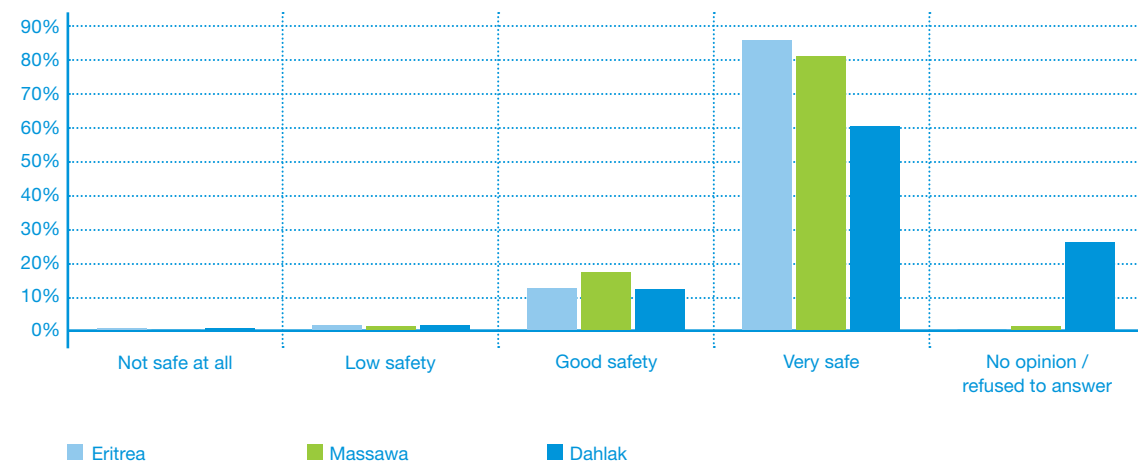


The natural coastal and marine heritage of the destinations were identified by both visitors (68.7%) and residents (Massawa 67.2%; Dahlak 91.7%) as the most significant tourism assets. Historical and architectural heritage were ranked as the second highest tourism assets in the destinations by visitors (50%) and residents (Massawa 54.1%; Dahlak 83.3%). These findings were further substantiated by visitor practices in the destinations, in which tourist respondents cited beach activities and water sports as the main activity in Massawa (75.8%) and Dahlak (65.5%); historical and architectural site visits were cited as second highest in both destinations.

**Tourist Safety and Security**

Safety and security at the national level is highly ranked, with visitors (85.9%) and residents (Massawa 92.9%, Dahlak 95.8%) identifying Eritrea as very safe for tourists. This was also similarly reflected at the destination level, with visitors identifying Massawa (81.4%) and Dahlak (60.2%) as areas that are very safe for tourist travel. The research finds that visitor and resident responses also contrast many of the travel advisories that recommend limiting all non-essential travel to Eritrea. With destination security recognized as a critical factor that influences international travel, particularly within the African continent, these rankings demonstrate that tourist safety is an asset that can make travel to Massawa, Dahlak and Eritrea as a whole, an attractive option that can be effectively leveraged to promote tourism development.

**Visitor ranking of destination safety**



**Tourism Development Opportunity Rankings**

**Eco-tourism**, based on the natural coastal environment and sea life, was ranked by visitors as the biggest opportunity to growing tourism in Massawa. These findings correlate with the tourism asset rankings by visitors and residents, which identify the destinations' natural coastal and marine resources as the most competitive advantage. Trends in global nature-based travel are reported to have increased and present a significant opportunity for specialized eco-tourism travel packages and activities to be developed in the target destinations. Furthermore, eco-tourism development has a demonstrated capacity to significantly contribute to improved conservation of natural heritage sites, and highly correlates with both national and global agendas to promote the sustainable utilization of natural resources.

**Port-Based Business Tourism**, was cited as the second highest opportunity for tourism development observed by visitors; residents also frequently cited the significant potential that boosting port based activities would have on the tourism industry and broader economy. Currently only 9.1% of visitors identified business as their primary reason for visiting Massawa.

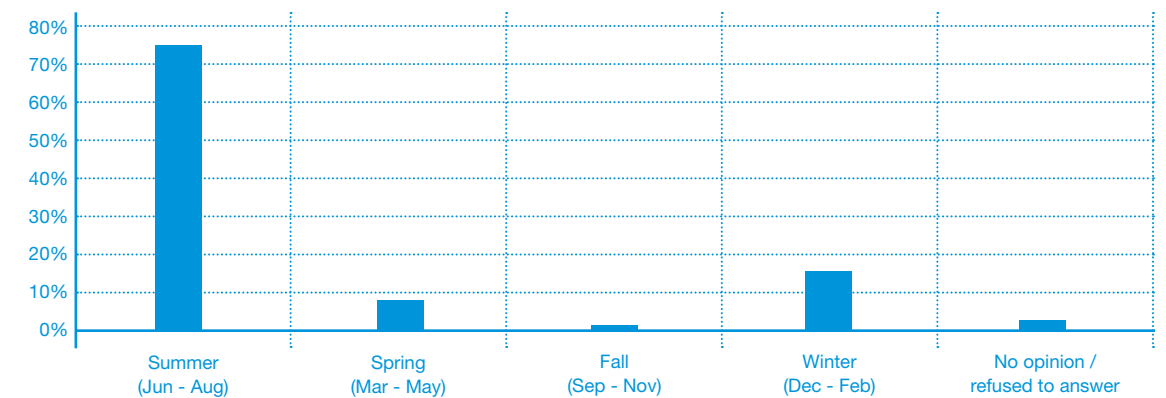
Massawa is home to Eritrea's main port, a designated free-trade zone as well as a recently established international airport. While the utilization of these strategic trade centers is modest, increasing trade through these areas can have a mutually beneficial relationship with the tourism industry. However, these developments will need to be carefully managed, as excessive port development near historical and/or natural heritage sites can reduce the attractiveness of Massawa as a tourist destination.

**Proximity to European, Middle Eastern and African markets**, were also frequently cited as a significant opportunity for tourism development in the area. While international tourism in Eritrea is largely composed of inbound overseas Eritreans (diaspora), the geographic location of the county and the wealth of tourism assets provide an opportunity to substantially expand its base of international arrivals.

Visitor practices and discussions with tour operators indicate that the Eritrean diaspora largely visit Massawa during the months of June-August, due to the extended summer holidays, which is considered as the peak tourist season. This period falls during a time of year that would normally be considered as a low season for tourism in Massawa and the Dahlak Archipelago, as average summer temperatures exceed 90 degrees Fahrenheit, compared to the more temperate months from November-May (currently considered the low tourist season).

Pursuing a "Winter-Sun" strategy, in which the destinations target international tourists from colder climates during the Northern Hemisphere's winter months, can increase visitation rates during the low tourist season in Massawa and the Dahlak archipelago. This strategy can also be adopted to mitigate the negative economic implications associated with the seasonality of the tourism industry. The research finds that the assessed destinations have the capacity to take advantage of the seasonality of Eritrean diaspora tourism and trends in international travel markets to develop a year-round tourism strategy.

**Visitor response: Other than today, when visiting Massawa, which season do you usually visit?**



### Tourism Development Challenges

**Infrastructure** is frequently cited by visitors in the free response sections of the survey and interviews with tourist service providers as an area that needs significant improvement. Infrastructure needs were cross cutting in various sectors, including transport, communication (internet and telephone), electricity, sanitation and lodging facilities were frequently identified as needing substantial improvement.

Within this theme, two patterns were identified in which infrastructure challenges would impact the tourism industry. The first theme was the impact of infrastructure challenges negatively affecting visitor experiences;

“The level of infrastructure may not meet some of the expectations of international tourists, particularly if they are paying a significant amount in costs to travel to the country from abroad.”

— Tourism Stakeholder Interview

The second area in which participants felt that infrastructure challenges negatively impact the development of a tourism industry was their effect on the carrying capacity of the destinations. Carrying capacity is defined as “the maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic, socio-cultural environment and an unacceptable decrease in the quality of visitors' satisfaction”.<sup>16</sup> This sentiment is captured particularly during interviews with a tourism service providers in Massawa:

“...if 2000 visitors came to Massawa at the same time; we would be faced with a difficulty to accommodate so many tourists.”

— Tourism Stakeholder Interview

**Marketing and Internet Presence** is a recurring theme in participant responses and was cited by visitors as the biggest challenge to tourism development. The weakness in promoting Eritrea and the target destinations as a tourism destination was also recurring theme that was identified in the analysis of interviews with tourism service providers and local stakeholders. Despite the wealth of attractions in Massawa and Dahlak, as well as the country as a whole, the primary and secondary data gathered from the research show that Eritrea is not very visible at the global and regional level as a tourism destination.

The research also noted that Eritrea's tourism has a very limited visibility on online platforms. With industry trends indicating that the majority of tourism transactions and itinerary preparations are conducted online, this is a significant weakness in the marketing of Eritrea's tourism industry. This finding is also supported by visitor practices, in which 83.5% of visitors indicated that information on the arrangement of travel itineraries to Massawa were obtained via word of mouth (family and friends). With the exception of travel agents, tourism service providers in the hospitality and restaurant sectors also reported a lack of visibility in promoting their businesses through online mediums, and instead relied on word of mouth to attract customers. Additionally, many of the respondents also felt that the limited availability of internet and technical capacity in the ICT sector had a causal relationship with the lack of online presence of Eritrea's tourism industry.

For tourism service providers, the research also included additional questions to assess if online reservations and payment systems were utilized by their businesses. All respondents noted that they did not utilize such systems due to the lack of human resource technical capacity and infrastructural capacity (internet systems). These characteristics can restrict the earning potential of tourism service providers, as many international tourists utilize online and credit card services as the primary methods of payment.

**Lack of Quality Hotels** is identified by visitors as one of the main obstacles to promoting the development of a tourism industry in Massawa. These sentiments were also frequently repeated in the free response section of the visitor survey, where participants cited improving the quality of hotels as an important area that needs improvement in Massawa. A number of visitors also noted a need for improving the human resource capacity in the hospitality sector and the broader tourism industry.

**Tourism Supply Chain Management** is an area that tourism service providers, particularly in the hospitality and restaurant sectors, identified as an area in need of significant improvement. Challenges regarding the tourism supply chain were specific to food and beverage constraints in the industry.

When probed for potential solutions to the identified problems, a number of respondents noted the need to prioritize the tourism industry as an area of growth to ensure that there are effective management of the supply chains needed for the industry. Technical assistance and improved management systems were an area for increased investment that were noted by participants to address the challenges in the tourism supply chain. A secondary pattern that emerged from the solutions oriented discussions was a perceived causal relationship between the low level of tourism development in the country and limited management capacities, which results in a lack of efficiency and quality of the tourism supply chains and services.

**Accessibility** is an area identified during interviews with both tourism service providers and non-service oriented stakeholders as a challenge that limits the development of the tourism industry. The visa restrictions and excessive permit requirements for visiting Eritrea and travel outside the capital were the defining characteristics that were cited by respondents. In the visitor survey, the research found that international tourists reported visa/permit challenges more frequently than local and diaspora tourists, as an obstacle to tourism development.

Participants noted that these regulations have a negative impact on both the traveler's experience and on the tourist service provider. At the tourist level, respondents noted that tourists can be discouraged from traveling to Eritrea due to a number of restrictions on their accessibility to heritage sites and mobility outside the capital:

Foreign visitors always complain about the unclear security process when they plan to move from place to place within the country. They are obligated to pass through many processes even to book a hotel in their destination. Hence they are discouraged to come to Eritrea.

— Tourism Stakeholder Interview

From the perspective of the service provider, respondents cited challenges in arranging the visits for larger tour groups and hotel reservations, which can result in the cancellation of travel plans to Eritrea.

**Lack of Recreational Activities** in Massawa is also identified by visitors as a significant shortcoming to tourism development in the area. Beyond the main Gurgusom Beach area, there are limited recreational activities that are targeted at the tourism industry. Despite the wealth of natural and historical attractions, the research found that there are limited organized activities and established spaces to engage tourists. A number of activities often have to be pre-arranged with a travel guide in the capital city (Asmara) prior to arrival in Massawa, as information and accessibility to participate in recreational activities as an independent traveler is not readily available. Lack of recreational and tourism activities in a destination often discourages visitors from extending the number of days spent in a target destination, thereby limiting revenues earned from tourists.



## C4 Community perceptions towards tourism development

Resident attitude surveys and tourism stakeholder interviews were administered to gain an understanding of community perceptions to tourism development in Massawa and the Dahlak Archipelago. The information gathered in this section is key to determining the receptivity of local communities to potential tourism development in their areas. Case studies in emerging destinations have demonstrated that understanding the perceptions and opinions of local residents are crucial to ensuring the development of a sustainable tourism industry.

The research finds that the majority of residents in Massawa and Dahlak are considerably supportive towards tourism development. An overwhelming majority of the respondents in Massawa (96.7%) and Dahlak (98.6%) felt that tourism should increase in their destinations. Residents were also extremely favorable to the overall development of tourism at the national level in Eritrea. Residents also reported that the arrival of tourists in their destinations do not have negative impacts on their lives (Massawa 74.4%; Dahlak 87.5%). A significant majority of residents in Massawa (93.1%) and Dahlak (91.7%) agree-strongly agree with the sentiment that tourism can help their community develop in the right direction. Many of the residents (95.9% Massawa; 95.6% Dahlak) also feel that community participation is extremely important in any tourism development initiatives in the target destinations.

While there is strong local support for tourism, both the resident attitude surveys and interviews with tourism stakeholders demonstrated that there are a number of concerns with the advent of the tourism industry. In Massawa, residents cited that the biggest disadvantage to tourism development would be the potential impact on driving up the cost of goods and services in the area for local communities. Residents from Dahlak expressed a negative inclination towards mass tourism, with the potential for overcrowding of tourists cited as the biggest disadvantage towards tourism development.

A common theme that emerges amongst the communities of Massawa, Dahlak and local tourism stakeholders is the potential for tourism development to negatively impact local social structures. Many local residents (60.6% Massawa; 86.1% Dahlak) acknowledged the risk in tourism development to potentially damage local cultural heritage;

“We have strong religious and cultural values in our community, and while we welcome tourists they do not always respect these values.”

— Tourism Stakeholder Interview

Respondents (59.6% Massawa; 52.8% Dahlak) anticipated that a growth in international tourism would also result in an increase in the frequency of socially harmful and illegal/criminal activities in the target destinations. Local stakeholders particularly highlighted prostitution, theft and drug use as undesirable characteristics that are associated with the development of the tourism industry. These overwhelmingly societal based perceptions of the envisioned negative impacts from the development of the industry, emphasize the need for participatory planning initiatives to develop sustainable tourism in Massawa and the Dahlak Archipelago.

Interviews with tourism stakeholders also revealed that when respondents were requested to describe the potential benefits of the tourism sector beyond the direct economic gains, engagement with the wider global community was frequently cited. Participants largely associated the benefits of global engagement with the development of international tourism; a smaller number also acknowledged that engaging with local tourists from different regions in Eritrea as positive development towards promoting social cohesion efforts in the country. A significant number of the respondents also elaborated on the potential for tourism to improve the understanding and perception of Eritrea. Within this context, many of the respondents reported that they felt that there are a number of inaccurate perceptions of the realities in Eritrea, in which tourism can play a constructive role in correcting:

“People are always talking about the safety of our country, but if you walk in the middle of the night, you can walk safely without any question. These tourists can defend Eritrea against many of the inaccurate things spoken about the country. They can see with their own eyes what is practically happening in our country.”

— Tourism Stakeholder Interview

These findings correlate with global tourism trends in peacebuilding efforts, in which the industry is recognized as one of the most prominent avenues that encourages cultural exchange and understanding between different societies.





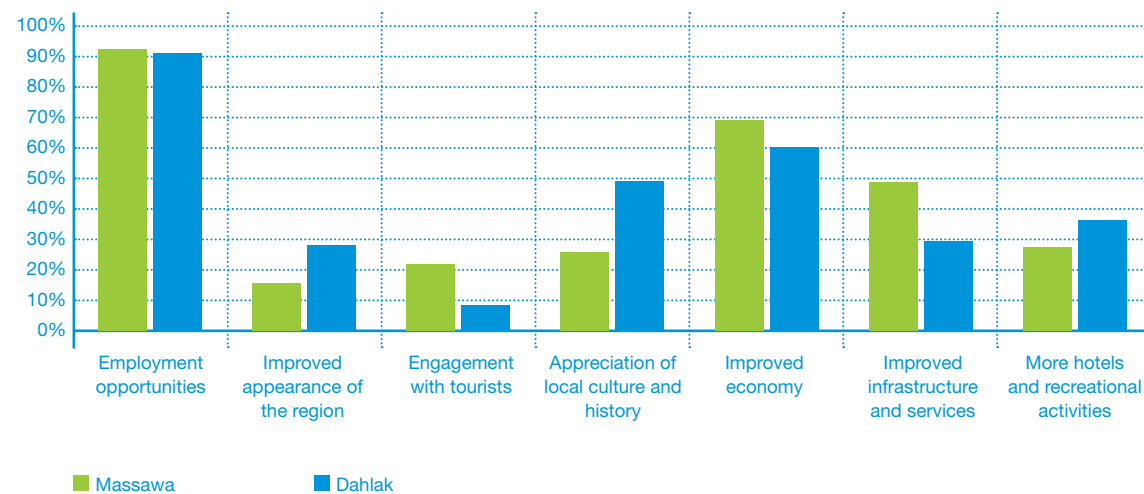
# C5 Tourism and economic development



At the current nascent level of tourism development in Eritrea, economic impacts of the industry on the livelihoods of residents in Massawa and the Dahlak Archipelago was similarly limited. Residents in Massawa (60.1%) and Dahlak (56.9%) report that the tourism sector's contribution to their household income is little to none at its present level. Perceptions on economic benefits from the tourism industry at the community level was largely reported at none to low (Massawa 52.7%; Dahlak 56.9%). Employment generation from the tourism industry was reported at none-low in Dahlak (58.3%), while respondents in Massawa (54.8%) largely noted moderate to high generation of jobs.

Despite these limited contributions to the livelihoods and economic development of local communities, the research finds that tourism is highly valued industry in the target destinations. The vast majority of residents (87.2% Massawa; 97.2% Dahlak) noted that if tourism increases in the target destinations, it would result in a positive economic benefit to their households. Employment (91.4% Massawa; 90.3% Dahlak) and economic growth (68.3% Massawa; 59.7% Dahlak) were the primary advantages that local communities associated with the development of the tourism sector. Respondents in Massawa (93.8%) and Dahlak (97.2%) overwhelmingly reported that either they and/or members of their households would like to be engaged through direct employment opportunities in the tourism industry.

Rankings of perceived community benefits from tourism



Despite these positive findings, the research also notes that there are challenges towards ensuring the equitable participation of diverse stakeholders within the tourism economy. The participation of women in obtaining employment within the tourism value chain, particularly in Dahlak, was reported (52.9%) as against cultural and religious norms. This was reported at a substantially smaller level in Massawa municipality (5.7%), with similar reasons of culture and religion cited as the primary barriers to women's participation. The research demonstrates a significant divide in resident perspectives between the urban (Massawa) and rural (Dahlak) communities on women's employment in the tourism sector. However, perceptions on the questionable moral perspective of employment in the tourism industry, particularly in relation to prostitution and illicit activities, were identified as cross cutting themes that were evident in both communities. These perceptions may hinder the safe and equitable participation of women in the tourism workforce. The research finds that community level gender sensitization and the development of culturally appropriate spaces to ensure the equitable participation of women in the tourism workforce, particularly in Dahlak, will most likely need to accompany future investments towards building a sustainable tourism industry.

While direct employment from the tourism industry dominated the perceived benefits of the tourism sector, tourism stakeholders demonstrated an awareness of the sector's multiplier benefits and positive spillover effects that can contribute to the overall economic development of the region. Stakeholders specifically identified the dynamic impacts of tourism development, whereby upgraded infrastructure and services associated with the industry's development would also benefit local communities and further motivate economic growth in the target destinations. Based on the findings, the research notes that local stakeholders also embrace the development of the tourism sector due to its multi-tiered economic and social benefits.

Findings from the research noted that many of the interviewed stakeholders and residents (83.3% Massawa; 47.2% Dahlak) anticipated that improvements in the tourism sector would also benefit the poor. However the majority of participants either could not specifically identify in which ways the poor could benefit from tourism development, or identified with a trickledown effect that would be proportional to their contribution in the tourism sector;

"I believe all people, the poor, rich, educated and uneducated, according to their input, benefit from tourism development. They can all play a part from cleaning up to management based on their ability and skill"

— Tourism Stakeholder Interview

Previous studies on the distributional effects of tourism have demonstrated that the poor do not automatically nor proportionally benefit from a growth in the tourism sector. Studies on poverty in both Human Security and Human Development frameworks also acknowledge that the poor are often not equitable participants in purely market driven economic growth models in the majority of industries. Correspondingly, the research finds that communities and tourism stakeholders within the target destinations do not acknowledge nor recognize barriers to equitable participation of the poor in the tourism value chain. To ensure that the benefits of tourism are equitably distributed to poorer segments of the community, concerted pro-poor policies and initiatives, led by the local and national government actors, will most likely need to accompany the development of a sustainable tourism industry in the target destinations.





## C6 Tourism and the conservation of cultural and natural heritage

As part of the sustainable tourism assessment process, the research also assessed the perspectives of residents, visitors and local stakeholders on the potential impacts of tourism on cultural and natural heritage conservation in Massawa and the Dahlak Archipelago. In the assessment of tourism impacts on natural and cultural heritage, the research finds significant divergence on the perceptions towards the risks of tourism between communities in Massawa and the Dahlak Archipelago. Regarding the impact of tourism on the environment, 66.8% residents in Massawa anticipated a neutral to positive effect, while 58.3% of residents in Dahlak anticipated a negative environmental impact. These responses are also reflective of local livelihoods in the target destinations, where communities in the Dahlak Archipelago are significantly more dependent on the well-being of coastal and marine environments and therefore display a higher perception and concern of environmental risk.



Similarly, communities in Massawa and the Dahlak Archipelago exhibited a divergence in their opinions on the impact of tourism on local culture and heritage. Communities from Massawa (57.5%) anticipated a positive impact from tourism on the local culture heritage, while residents from the Dahlak Archipelago (65.3%) expected a negative impact. Local tourism stakeholders from the Dahlak Archipelago acknowledged the more conservative nature of communities on the islands, in which many felt mass tourism development would infringe on their cultural values. This also correlates with resident responses from Dahlak, which acknowledged overcrowding as the biggest drawback from tourism development in the area.

Despite these divergences, both communities in Massawa (93.3%) and Dahlak (72.3%) felt that tourism can play a constructive role in promoting the conservation of natural and cultural heritage in the target destinations. Both groups (54.3% Massawa; 95.8% Dahlak) also expressed that heritage sites in their communities are in significant need of rehabilitation and development. With local historical and architectural heritage ranked as one of the main tourism assets in the destinations, rehabilitation and development of these sites can positively contribute to enhancing the tourism competitiveness and earning potential of Massawa and Dahlak. This can also positively impact local awareness of heritage sites, as a significant number of the residents (49.3% Massawa; 70.8% Dahlak) reported their visitation rates to museums and local heritage sites as none-low.

At the community level, the research found that local residents value and understand environmental conservation efforts in their areas. In the target destinations the majority of residents (62.9% Massawa; 63.9% Dahlak) expressed an awareness of natural heritage conservation in their communities. Furthermore, communities (62.6% Massawa; 79.2% Dahlak) reported a low level of public waste disposal in the streets and surrounding marine environment. As residents in both Dahlak and Massawa demonstrate a positive inclination towards natural heritage conservation, the development of a specialized eco-tourism sub-sector can have mutually reinforcing benefit to enhancing and capitalizing on these positive community based attributes in the target destinations.





# D/ Recommendations and conclusion







## D1 Recommendations

Based on the findings from the study, Eritrea's Massawa and Dahlak Archipelago demonstrate a strong comparative advantage in their potential to develop a vibrant and sustainable tourism industry. The destinations are characterized by valuable natural, historical and cultural heritage assets that increase their attractiveness as areas endowed with the potential for tourism development. This is further enhanced by visitors who rank the destinations as high potential tourist sites and local communities that demonstrate a positive inclination towards tourism led economic development.

However, tourism in the target destinations and the broader Eritrean economy is significantly underdeveloped. The sector demonstrates a lack of conducive policy and regulatory framework to facilitate the development of an industry that capitalizes on the tourism potential of Massawa and the Dahlak Archipelago. Key issues in the areas of accessibility, international market presence, infrastructure, private sector investment and human resource management needs that are specific to the industry necessitate concerted attention; as the development of a more vibrant tourism sector is hampered by a confluence of these key challenges. The vast majority of natural and cultural resources that could expand the development of a dynamic tourism industry and significantly contribute to the local and national economy, remain under-utilized.

The research also finds that residents have an expectation that tourism development in their areas should have a substantial economic benefit in their communities. Therefore developing a sustainable tourism industry that enhances the economic well-being of the residents, respects local culture and does not result in the degradation of marine and coastal ecosystems, will be critical to maintaining the sector's positive receptivity by local communities.

Based on the findings presented in the study and a comparative analysis of literature on tourism development, the following recommendations are presented to promote the development of a sustainable tourism industry in Massawa and the Dahlak Archipelago:

### **Examine Sustainable Tourism Policy Development from Case-Study Experiences**

As tourism is a global phenomenon, there are a number of learning opportunities and case-studies that Eritrea can analyze to inform the development of its policies to establish a sustainable tourism economic sector. However tourism development based on Western models do not adequately provide the needed contextual framework for Eritrea; instead South-South learning opportunities from countries with similar economic profiles and challenges can provide a more applicable framework.



Within the African continent, tourism development in both Rwanda and Uganda provides an opportunity to observe the successes of various strategies targeted at creating an enabling policy environment to enhance tourism development as an asset towards economic growth. Tourism development in Egypt's Sharm-El Sheikh and Jordan's Aqaba provide an opportunity for lessons learned on coastal tourism development along the Red Sea and challenges associated with maintaining destination security. Globally, Myanmar and Cuba can also provide an observable framework on the opportunities and challenges for countries opening-up their tourism sector for further integration in the world economy. These case-studies provide an important opportunity for Eritrea to enhance the benefits and mitigate the risks identified in tourism development in the context of an emerging destination.

#### Improve International Tourism Accessibility

The research finds that international tourist accessibility to Eritrea is a significant challenge that limits the growth of the tourism industry. This is a particularly critical area that constrains the development of the tourism sector, as inbound international tourists are recognized as one of the largest revenue generators in the tourism industry.

While the Eritrean Government has worked to develop partnerships with international carriers to significantly expand the availability of flights to Eritrea, obtaining tourist visas and permits remains a challenge that limit international travelers. Industry research has demonstrated that excessive administrative processes for tourist visas and permits in Sub-Saharan Africa significantly affect the development of tourism, as tour operators and independent travelers are often deterred from planning travel to the target destination. The research also recognizes the need for many countries in North America and Europe to update their travel advisories on tourism in Eritrea, as the overwhelming majority of visitor experiences in the target destinations contrast with many of the advisories that recommend that perspective tourists avoid all non-essential travel to the entirety of the country.

The research recommends exploring strategies that can ease access for international arrivals to Eritrea in a process that is also balanced with overall national priorities. In this respect, streamlining visa and permit requirements can have a positive effect on improving international tourist accessibility. One strategy to undertake this streamlined approach is to publicize and provide clear information for potential visitors on entry/exit requirements, as well as reducing wait times for visa processing. Identification of key regional and international source markets for tourists and developing a visa on arrival process for independent travel and/or through partnerships with local certified tour operators, can help incentivize the development of international tourist arrivals to Eritrea.

Additionally, creating a "tourist circuit" visa and permit system that provides international visitors with access to designated tourism sites in the country can reduce the administrative and logistical burden associated with accessibility. Participatory discussions with local tour operators and technical experts to identify constraints and opportunities towards improving accessibility can provide key insights towards establishing a more streamlined process that incentivizes international tourism development in the country.



#### Increase Heritage Restoration and Protection Efforts in Massawa and Dahlak

Historical heritage sites in Massawa and Dahlak are identified amongst the top tourism assets. However the vast majority of residents and visitors noted the need for significant rehabilitation of heritage sites in the target destinations. From the multiple perspectives of national heritage promotion, conservation and tourism development, successful urban restoration efforts (similar to the Asmara Heritage Project) should also be explored in Massawa. Enhancing the conservation of historical sites in the Dahlak Archipelago is also an identified need, as many of the sites on the islands suffer from natural/environmental degradation, theft of Kufic inscribed headstones and a lack of concerted preservation efforts.

These conservation initiatives can have multiple short-term and long-term impacts in generating local employment opportunities, improving national heritage awareness, tourism attractiveness and positively contributing to the standards of living in Massawa's urban environment. Integrating these efforts within a sustainable tourism strategy that aims to increase revenues earned by the industry, can ensure that heritage conservation is also economically productive and maintained over the long-term.



#### Ensure Equitable Participation in the Tourism Value Chain

A key finding from the research is that the development of a tourism sector in the target destinations will not automatically yield equitable benefits for women and the poor. Particularly in Dahlak and potentially the surrounding rural areas near Massawa, the research finds that the equitable participation of women in the tourism workforce will need to be concertedly addressed through the development of culturally appropriate working spaces, production value chains and community sensitization efforts.

Tourism development in the target destinations also needs a proactive regulatory framework that focuses on the equitable distribution of the industry's benefits amongst the poorer, marginalized and vulnerable segments of society. Identification of pro-poor models of tourism development, in which the poor can both directly and indirectly benefit from the industry, will be key to developing a sustainable tourism sector in Massawa and Dahlak. Mainstreaming pro-poor tourism development as part of a comprehensive tourism framework also compliments the Eritrean government's policies and priorities to ensuring that economic benefits are equitably distributed across various segments of the country's socio-economic groups.

#### Increase Tourism Technical Assistance Support and Partnerships

The development of a sustainable tourism economy will necessitate partnerships and technical assistance engagement with a variety of global actors across a broad spectrum of fields to maximize the sustainability and efficiency of the industry in Eritrea. Technical assistance also meets an identified need in the research, as multiple stakeholders and residents reflected on the need to enhance the capacity of tourism management systems at all levels in Eritrea's Massawa and Dahlak Archipelago. Technical assistance development is a cross cutting theme in the proposed recommendations and can enhance initiatives in tourism based conservation, policy, infrastructure, marketing and investment efforts.



### Promote Investments in Tourism Infrastructure Development

The research finds that weaknesses in destination infrastructure negatively impact visitor experiences and the tourism carrying capacity in Massawa and the Dahlak Archipelago. Investments in infrastructure development will not only benefit tourism development in the area, but will also positively impact the local quality of life as well as enhancing business development and trade in the target destinations.

Public-private partnerships in hotel development and tourism facilities are an emerging area of infrastructure financing opportunity that have increased in the African region. Regionally, Jordan's Aqaba Special Economic Zone on the Red Sea provides an opportunity for observable lessons learned on incentivizing infrastructure development in Massawa's free-trade economic zone that also complements the tourism industry. Infrastructure development partnerships in the tourism sector can also facilitate broader investment cooperation in other areas of the local and national economy. Additionally, the development of modern tourism infrastructure facilities can enable Massawa and Dahlak access to the lucrative Meetings Incentives, Conferences, and Events (MICE) tourism sub-sector that have, until recently, provided a substantial benefit for Egypt's coastal Red Sea tourism hub, Sharm El Sheikh.



### Encourage Private Sector Development in the Tourism Value Chain

Promoting and increasing the level of private sector involvement will be critical to expanding the level of available tourism services in the target destinations as well as maximizing the industry's benefits to local communities. Support for Eritrean Small and Medium Enterprises (SME) in the tourism sector may provide a platform to encourage equitable economic growth. Additionally providing financing and support to local tourism SME outfitters to increase the number of activities in the target destinations, such as provision of water sport activities (canoes, paddle boarding, jet skis, diving, snorkeling etc.) and guided tours (historical tours, rental bikes, hiking etc.), can address the identified need to increase recreational options in the target destinations and enhance tourist expenditures on local businesses. As the tourism industry is widely acknowledged as a labor intensive sector and highly interlinked to broader segments of the local economy, supporting SME growth can substantially benefit local communities.

A key aspect to optimizing the benefits from the tourism industry is to strengthen the linkages between the sector and local production chains. Identifying and enhancing local production along the tourism value chain ensures that the industry's benefits are largely directed towards the local economy by boosting the local procurement of goods and services. A number of tourism scholars identify that the Sub-Saharan Africa region often experiences high leakages of revenues from the tourism industry, as there is not enough emphasis on supporting local production chains. This often forces tourism businesses to import the necessary goods and services, which results in a leakage of potential revenues out of the local economy and diminishes the export earning capacity of the sector. Studies have shown that the Sub-Saharan Africa region suffers from the highest tourism leakage rates in the world, in which the ratio of revenues leaking out of the local economy is nearly equal to the direct benefits generated by the sector. To mitigate these trends in Sub-Saharan Africa's leakage rates and maximize tourism benefits to the local population, strengthening and promoting the local private sector along the tourism value chain will be critical to optimizing the economic benefits generated from the development of a sustainable industry in the target regions and Eritrea as a whole.

### Integration of Social Protection Mechanisms in the Tourism Sector

A significant concern that residents expressed with the advent of tourism in their area was the negative impact on socio-cultural lifestyles in Massawa and the Dahlak Archipelago. Integrating tourism development within the societal norms and customs of the destinations will need a concerted effort and regulatory framework, to ensure communities remain safe and welcoming of tourists in their area. Specific interventions in the areas of mitigating prostitution, drug use, crime, exploitation of minors and other illicit activities are key areas of concern identified by residents.

### Enhance the Online Visibility of Eritrea's Tourism Sector

Marketing of Massawa and Dahlak was identified as a key challenge to developing a sustainable and vibrant tourism industry. Similarly stakeholders identified that online business promotion and transactions were almost non-existent for many of the tourism service providers in Eritrea, with the majority of visitors identifying word of mouth (family and friends) as the primary source of tourist related information. As studies have demonstrated that the majority of tourism transactions and itinerary development are conducted online, it will be critical for the destinations to enhance their online visibility. Technical support with local banking institutions and discussions with the private sector will need to be coordinated to identify opportunities to improve online and international transactional capacity for tourism service providers.

While internet infrastructure and IT human resources are noted to be limited in the country, the development of an Eritrea tourism promotion and information website that is managed in coordination with Eritrea's large diaspora populations and embassies abroad could offer an initial start to promoting the country's tourism online. Enhancing the visibility of Eritrea and the target destinations' online presence not only improves international tourism information, but can provide a platform to advertise local tourist businesses online and increase visitor expenditures.

### Develop a Year-Round Tourism Strategy in Massawa and Dahlak

The research finds that Massawa and Dahlak have the potential to become year-round tourism destinations by combining diaspora visitation trends with a "Winter Sun" strategy to attract international tourists during the colder seasons in the Northern Hemisphere. Visitors have also identified geographical proximity to Europe (in addition to the Middle East and Africa) as a significant market advantage to developing a tourism industry in the target destinations. This strategy can offer a significant opportunity for Eritrea to increase international tourism arrivals and mitigate the negative economic impacts of seasonality that are associated with the industry.

### Establish Eco-Tourism Enterprise Models

The research found that a significant percentage of the residents, particularly in the Dahlak Archipelago, anticipated environmental degradation with the advancement of tourism in their areas and expressed substantial concern with overcrowding from tourists and negative cultural impacts. In recognition of these concerns, eco-tourism can play a role in promoting sustainable tourism development that also enhances environmental conservation efforts in the destination. From the perspective of tourist demand and destination competitiveness, sampled visitors identified eco-tourism as the largest opportunity for tourism development. A number of successful eco-tourism models have been implemented across the Sub-Saharan Africa region, and provide a framework for incorporating tourism development that is sensitive to the local environment and surrounding communities. Furthermore, eco-tourism development can provide additional resources to the development and maintenance of the Dahlak Marine Reserve through the establishment of a system of park fees and services.





#### Recommendations for Further Research and Tourism Assessments

While the primary focus of this research was a community based approach aimed at exploring the potential of developing a sustainable tourism industry in Massawa and the Dahlak Archipelago, the research acknowledges the need for measuring of the direct and indirect economic impacts of the tourism sector. It is important to note that as investments in the tourism sector increase, measuring the impact and revenue distribution channels will be important to enhancing equitable access to benefits from the industry. Future research should also focus on data driven advocacy to promote the development of a sustainable tourism sector in Eritrea, as well as an industry that is responsive to trends in the tourist market.







## D2 Conclusion

The overall potential for Eritrea to develop a sustainable tourism industry in Massawa and the Dahlak Archipelago is substantial. The findings from the research demonstrate that the destinations are not only endowed with significant natural and cultural heritage sites that are rated as high potential tourism assets, but also communities which have responded with a positive inclination towards tourism led economic growth. Resident and local stakeholders identify an increase in the tourism industry with positive gains in employment generation, development of the service sector, infrastructure and improved social welfare benefits. Visitors rank Massawa and the Dahlak Archipelago as high potential destinations that are endowed with attractive natural and cultural assets that are appealing to tourist travel markets. Furthermore, tourism is perceived by local stakeholders as an industry that can positively contribute to improving the understanding and image of Eritrea within the global consciousness.

However the research also finds that the development of a sustainable tourism sector in Massawa and the Dahlak Archipelago necessitates a concerted effort from a diverse network of national and international stakeholders to develop an enabling environment that promotes the emergence of a successful and vibrant industry. Furthermore, global experiences in tourism development that encompasses fragile cultural and natural heritage assets highlight the need for careful planning and oversight.

It is critical to note that tourism alone is not an economic panacea that can address all the needs of the communities in the target destinations and needs to be integrated within a broader economic development framework. Efforts to rapidly expand the tourism sector to compete with international tourist hubs will most likely result in negative environmental and social impacts at the expense of local communities. Sustainable tourism in Massawa and Dahlak will need to be nurtured through the implementation of small-medium scale pilot efforts, which can be later expanded on, and an enabling regulatory framework that encourages the development of a more dynamic industry. While tourism development can provide significant economic benefits, proactive planning of policy and regulatory frameworks will be necessary to ensuring the equitable participation of local communities and enhancing the competitiveness of the target destinations. Utilizing benchmarks and best practices in tourism development, Eritrea can mitigate risks and optimize the benefits from the sector by promoting the emergence of a sustainable industry that is measured by tangible social success indicators (e.g. poverty alleviation, employment generation, conservation etc.).

As a developing country, it is critical that Eritrea optimizes the sustainable use of its assets to broaden and diversify opportunities for economic growth and improve the quality of life for its citizens. In this respect, sustainable tourism is a significant yet under-utilized opportunity that can contribute to Eritrea's national development goals to promote economic growth, alleviate poverty and encourage the conservation of natural and cultural resources. However it is also important to recognize that tourism is a highly competitive global industry in which a confluence of factors impact the success of a destination, beyond the availability of attractive natural and historical assets. Understanding and implementing necessary reforms, investments and initiatives needed to incentivize the development of sustainable and vibrant tourism sector will be critical to the success of the assessed destinations.

If carefully and effectively managed, the research concludes that Eritrea's Massawa and the Dahlak Archipelago demonstrate a significant capacity to develop and market sustainable tourism products that are capable of delivering positive environmental, social and monetary benefits at both the local and national levels.



## A Community-Based Eco-tourism Enterprise

A Community-Based Eco-tourism Enterprise is an eco-tourism model where the local community has significant control in the development and management of tourism businesses, and where a significant proportion of the benefits remain within the community.

Community-based eco-tourism stresses the legal rights and responsibilities of the community over land, resources and development within a model of environmental conservation. This principle is also applied to community rights over tourism by prioritizing local residents as one of the key stakeholders in influencing, participating and benefiting from the development of activities that generate income from eco-tourism in their destination.

A key component of community-based eco-tourism enterprise development is its feature as a business model that promotes public-private partnerships. Private enterprise investment, market suitability, capacity to generate profits and commercial management are also priorities that determine the sustainability and effectiveness of community-based eco-tourism enterprise development.



## D3 Opportunity Profile

### Community-Based Eco-tourism Enterprise Development in the Dahlak Archipelago

Global trends in visitor travel indicate that the eco-tourism sub-sector is currently an area of growth in the sustainable tourism industry. Responsible travel and conservation awareness amongst a new generation of tourists have resulted in a substantial increase in visitors seeking niche eco-tourism experiences worldwide. The eco-tourism sub-sector is a specialized tourism product which is defined as the responsible travel to natural areas that conserves the environment and sustains the well-being of local people. Through a combination of tourism revenues and social awareness generated by eco-tourism, the sector plays an important role in protecting and conserving both biodiversity and cultural heritage.

Although eco-tourism has a proven capacity to contribute to environmental sustainability efforts while improving local livelihoods, its economic impact is limited to enclaves where tourism and conservation agendas align. As such the economic impacts of eco-tourism are smaller in scale, highly localized and the approach cannot be readily applied to all segments of the tourism industry. Despite these limitations, exploring community-based eco-tourism enterprise development provides a unique opportunity to pilot the development of sustainable tourism initiatives, particularly in the Dahlak Archipelago.

In terms of market orientation, eco-tourism was identified by visitors as the most significant opportunity for sustainable tourism development in the target destination. Furthermore, the natural coastal and marine resources were ranked by visitors as the most attractive tourism asset in the destinations. This strong interest from international, diaspora and domestic visitors in nature-based activities in the target destinations highlights the value of pursuing eco-tourism opportunities in the tourism economy of the Dahlak Archipelago.

From the perspective of the local community interests, ecotourism development is particularly an area for substantial consideration for tourism development in the Dahlak Archipelago. The research finds that communities from the Dahlak islands significantly expressed concern with the environmental risks posed by tourism development as well as overcrowding by visitors as the largest drawback associated with the industry. However, community stakeholders in the Dahlak Archipelago also expressed a desire to expand economic prospects beyond the limited activities in artisanal fishing, animal husbandry and small-scale trade sectors that exist on the islands. Ecotourism promotion in the Dahlak Archipelago is a niche industry that can be developed as a pilot initiative which embodies sustainable tourism principles, diversifies the local economy, responds to local concerns and can be further expanded through the sector's integration in Eritrea's broader economic development agenda.





At the medium-large scale levels of enterprise development, the establishment of community-based eco-tourism lodges in select islands can provide a significant value added to the destination by addressing the lack for tourist accommodations and facilities on the Dahlak Archipelago. The development of community-based eco-tourism lodges have particularly become successful in Namibia, which has both competitively and sustainably attracted high value international tourism markets. These lodges have been effectively integrated with the broader tourism frame work in Namibia, and have helped generate local employment opportunities, promote conservation efforts and helped enhance community revenues and economic growth. In many of these models, eco-tourism lodges and

conservancies were developed through joint venture partnerships between local communities and experienced private sector tourism developers. These joint ventures have resulted in mutually beneficial relationships that combines sustainable land use and wildlife management that is supported by significant private sector expertise in eco-tourism development, while substantially integrating local communities in the administration, decision making and profit-sharing processes of the enterprise. One of the critical success factors noted to enabling the development of a successful community-based eco-tourism joint venture partnerships is the role of active government legislation, facilitation, engagement and monitoring that supported the development of mutually beneficial eco-tourism enterprises.

### Namibia's Successful Joint Ventures in Community-Based Eco-tourism Enterprise Development

Namibia's community-based eco-tourism models have received international recognition in their ability to contribute to local development by improving both natural resource conservation and community welfare through tourism. Joint venture enterprise partnerships between local communities and private sector investors have particularly delivered an eco-tourism business model that is profitable, environmentally sustainable and contributes to local livelihoods and development.

Damaraland Camp is an example of successful joint venture partnerships in the community-based eco-tourism sub-sector, which has pioneered this business model in Namibia. The camp is a joint venture between a private sector adventure travel company, Wilderness Safaris, and the community-owned Torra Conservancy. In 1996, a joint venture agreement was developed between the two parties to establish the high-end eco-tourism Damaraland Camp in Northwest Namibia.

As part of the joint venture, direct community financial benefits from the camp included 10% of the accommodation earnings, an annual land rental fee and ensuring locally sourced employment opportunities. Economic and financial analysis from 1998-1999 showed that communities received cash transfers from the lodge that equaled to 3 months of wages from employment in the local agricultural sector for each member/resident. The analysis showed that cash earnings from these lodges can be significant in the context of the livelihoods of the rural poor. Additionally there are important non-cash benefits in which the lodge has contributed to human resource capacity building, conservation stewardship, asset transfers, infrastructure development and livelihoods diversification, that have positively impacted the lives of the residents that form the Torra Conservancy. Furthermore, the joint ownership of the lodge enhances community-based institutions and participation in local decision making structures.

In contrast to eco-tourism enterprises that do not require community engagement or implement voluntary and/or in-kind revenue sharing, joint venture partnerships have demonstrated to achieve significantly more in promoting natural resource conservation, local livelihoods, community empowerment and local human resource capacities.

At the small-medium scale level of enterprise development, eco-tourism models focusing on the provision of goods and services that market to tourists are initiatives that can be developed and managed by local communities in both Dahlak and Massawa. Guided nature based trails, handicraft development, biking, home stays and aquatic-based activities (e.g. kayaking, diving, snorkeling, paddle boarding etc.) that are managed by local communities are small-scale eco-tourism enterprise models that can both promote conservation efforts and enhance local livelihoods. Micro-finance opportunities, technical capacity building and local government support will be required to enable communities towards developing SMEs that can effectively and profitably work within the eco-tourism value chain. These initiatives are also meeting an expressed tourist demand, in which the lack of recreational activities were frequently cited by visitors as the biggest challenge to tourism development. SME based eco-tourism service and product development also incentivizes tourists to increase spending and visitation length in the target destinations, thereby resulting in increased tourism revenues that circulates within the local economy.

Based on the findings from the assessment and existing literature, community-based eco-tourism in Dahlak is identified as a sustainable opportunity that can be integrated with other sectors of the rural economy in the destination. Due to the isolated nature of communities in the Dahlak Archipelago, eco-tourism can not only enhance conservation efforts, but also provide an opportunity to promote sustainable livelihoods that can diversify the local economy and also help reduce household income vulnerabilities. However it is important to note that these initiatives are not sustainable as standalone activities, and will need integration within a broader strategy to promote sustainable tourism development at both the destination and national level.





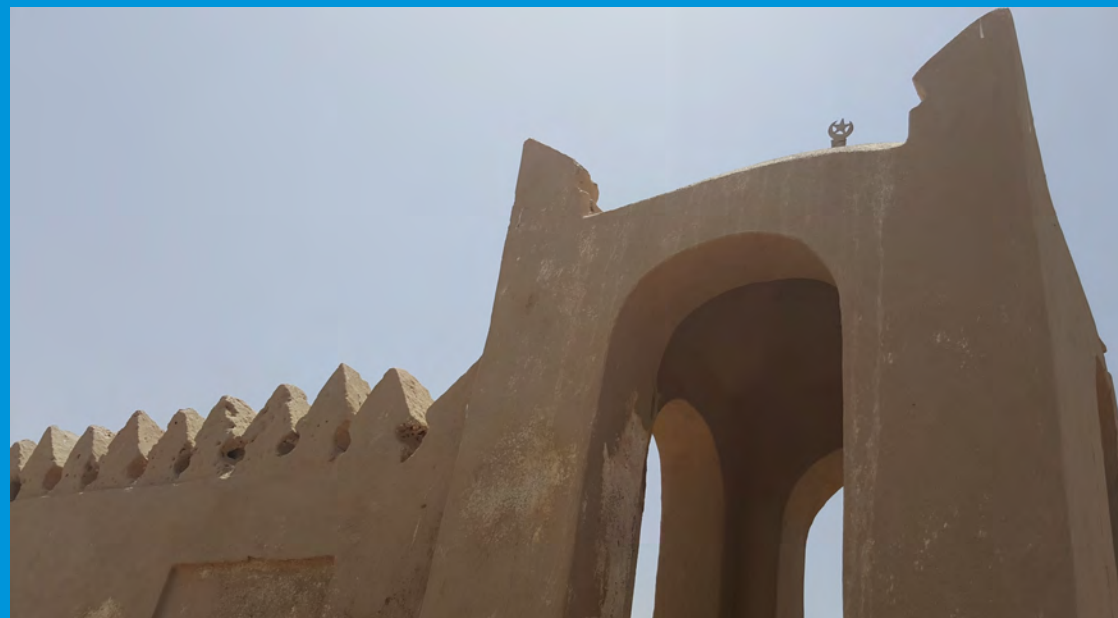


### The history of religious pluralism in Massawa:

The ancient port city of Massawa is considered a melting pot of cultures, religions, architecture and peoples from Africa, Arabia, Europe and Asia. One of the most historically significant periods in Massawa's role as a multicultural crossroads, was during the first Islamic migration from the Hijaz (modern day Saudi Arabia). During this period, Christian communities in the area sheltered successive waves of Muslim refugees who sought protection from religious persecution. Massawa is historically identified as Islam's first point of entry into Africa, with communities in the area tracing back their lineage to some of the earliest Muslim converts. Historian Jonathan Miran Notes:

"This episode, known in Islamic history as the Hijra al-ula (Ar. The first emigration), is viewed by many northeast African Muslims (but more so Eritreans and northern Ethiopians) as the cornerstone of unique cross-Red Sea Islamic relationship. This seminal historical event is proof to the profound attachment of Massawa's Muslims since- according to such rhetoric- they had accepted the Prophet Muhammad's message prior to its establishment in important centers in Islamic heartlands such as Mecca, Damascus, Baghdad, or Cairo."

While the Hijra is of significant religious importance to Muslim communities, it is also important in highlighting essential principles of religious pluralism between Islam and Christianity in Eritrea. This historical episode is currently exemplified in the religious harmony and coexistence between two of the largest Abrahamic faiths in the country.



## D4 Opportunity Profile

### Promoting Heritage Tourism and Celebrating Religious Coexistence through the Urban Rehabilitation of Historic Massawa

Massawa's historical and architectural sites are endowed with significant potential to enhance sustainable heritage tourism in the area and contribute to local livelihoods and economic development through increased tourist receipts. The unique medley of Ottoman, Egyptian and Italian architectural styles and multi-cultural heritage of the city, are significant assets that can substantially contribute to tourism development in the destination. Furthermore, renovation of these heritage assets in Massawa has the capacity to highlight the cultural identity of the city, which is personified by historic ties of religious pluralism between Islam and Christianity in Eritrean society. Regrettably, present day Massawa retains many of the scars from liberation struggle, where the Ethiopian Derg regime indiscriminately bombed civilian areas and damaged much of the built heritage of the city. Heritage sites in Massawa have also suffered further natural and man-made degradation over the past few decades, which necessitates significant policy reform and financial investment towards commencing urban rehabilitation of the historic core of the city.





### Assessing Massawa through the World Bank's Medina Tourism Potential Index

To assess the prospective return on investment from restoration efforts, the World Bank has developed an index to analyze the potential in which urban rehabilitation and heritage tourism development can lead to tourism led economic growth in historic Medinas (cities) in North Africa and the Middle East.

As Massawa retains many similarities with these historic Medinas, an assessment of the city utilizing the World Bank's criteria can also be correspondingly applied towards the destination. Utilizing the World Bank's index, the research finds that Massawa shows significant potential in which the combination of urban rehabilitation efforts, through a sustainable tourism development framework, can positively impact the local economy.

#### World Bank Criteria

#### Massawa

Significance of Cultural Heritage Assets	Massawa has a number of heritage sites including ancient Ottoman and Egyptian buildings, Italian colonial architecture, WWII shipwrecks, memorials from the Eritrean liberation struggle as well as a culturally diverse community. Additionally, Massawa retains a number of historically important early Islamic sites- such as the Shrine of the Sahaba, Sheikh Hannifi Mosque, and a number of ancient Islamic tombs surrounding the city.
Classification on the UNESCO World Heritage List	Although Massawa has not yet been recognized as a UNESCO World Heritage site, the historical and architectural assets present a considerable opportunity for the city's nomination to the list. The confluence of architectural styles, history and heritage of Islamic-Christian pluralism in the city are particularly relevant in meeting the UNESCO World Heritage criteria for a cultural site that "exhibits an important interchange of human values over a span of time."
Proximity to the Coast, Major Natural Features, or Other Cultural Heritage Sites	Massawa is a coastal city that contains an abundance of natural heritage sites in addition to its rich historical heritage. These characteristics demonstrate an opportunity to capitalize on recreational tourism activities through prospects for eco-tourism, heritage tourism and beach tourism development. The city is also close to a number of archeological sites.
Proximity to Existing Tourism Destinations	Massawa is a short 3 hour drive from Eritrea's capital city Asmara, which is currently under consideration for UNESCO World Heritage status. The city is also the main transit point for tourism to the Dahlak Archipelago.
Accessibility	Massawa is readily accessible by road and sea. The government is also in the process of operationalizing a newly built international airport in Massawa as part of a broader economic free-trade zone strategy.
Accommodation Facilities	Massawa is the main beach tourism destination in Eritrea and hosts a number of local hotels and pensions that provide accommodation for visitors. However there are currently no major international hotel brands.
Organization of Cultural Events	A number of cultural and religious events are organized in Massawa. These events have the potential to be expanded upon through the promotion of the city's rich history.
High-level Handicraft Industry	The handicraft market in Massawa is not as vibrant as the markets in other Eritrean cities. However the city and broader Eritrean handicraft industry has strong artisanal base that can be further expanded into Massawa.

An initial evaluation of Massawa utilizing the World Bank criteria demonstrates that there is significant potential for the city to earn economic dividends from sustainable heritage tourism, which in turn serves as a rationale for an investment of financial and technical resources in the rehabilitation of the city's historic parameter. Additionally, the results from the visitor surveys show that Massawa's historical and architectural heritage are identified as one of the key tourism assets in the region that is attractive and engaging for tourists.

Studies have shown that investing in the heritage rehabilitation and cultural development of historic cities gives poor and marginalized communities within the built environment significant drive towards promoting entrepreneurship and self-reliance initiatives that improve their livelihoods. Investments in the rehabilitation of urban cultural heritage assets have resulted in job creation, improved housing, enhanced quality of public spaces and upgraded public infrastructure and service delivery mechanisms. Furthermore, these revitalized historic areas have increased property values and tax revenues which have positively contributed to resources that help sustain local municipal institutions.

In line with best practices from the rehabilitation of historic medinas, the urban restoration of Massawa needs concerted financial and regulatory efforts that are necessary to address the significant investment required for a lived-in urban environment. Pro-poor regulations and land tenure policies will be critical to ensuring the equitable distribution of benefits that result from urban restoration efforts. In addition to the primary role of the public sector in leading the restoration processes, engaging and supporting the private sector will be critical to successfully implement and sustain these initiatives. Due to the technical nature of urban rehabilitation efforts, partnership development with international institutions that can provide expertise in the renovation of historic cities will also be important.

Evidence from the World Bank's efforts in undertaking economic analyses of successful urban rehabilitation projects in historic medinas have demonstrated the positive impact of such initiatives on improving the quality of life for residents, revitalizing the local economy, and promoting the preservation of heritage assets. Integrating the urban rehabilitation of Massawa within a sustainable heritage tourism framework will be critical to realizing many of these benefits.







## D5 Opportunity Profile

### Winter Sun, Sand and Sea Tourism Development

Data gathered from visitor practices demonstrate that the Massawa and the Dahlak archipelago do not capitalize on their climactic advantage in the winter season, and are not adequately marketed as a “Winter Sun” destination towards international markets. While this is attributable to the overall limited development of the tourism sector in the target destinations and broader Eritrean context, pursuing a Winter Sun destination marketing strategy is key to the long-term sustainability of the sun, sand and sea tourism product in Massawa and the Dahlak Archipelago.

A market analysis of international winter travel demonstrates a significant presence of winter holiday market from tourists in Europe, Russia and North America. In multiple assessments of travel preferences of outbound source markets during winter holidays, the majority of travelers cited a strong preference for sun and beach destinations. This characterization was spread across both the socio-demographic profile and travel budgets of tourists. The Association of British Travel Agents (ABTA) finds that 40% of tourists in the UK that were planning a winter holiday were traveling to a Winter Sun destination in 2013. Similarly travelers from the Russian outbound market significantly traveled to sun and beach destinations during the winter months, where Egypt’s coastal resorts on the Red Sea was one of the major Winter Sun destinations. Furthermore, the research finds tourists visiting Massawa have identified the geographical proximity to European markets, as well as those in the Middle East and broader African region, as a significant opportunity for tourism development.

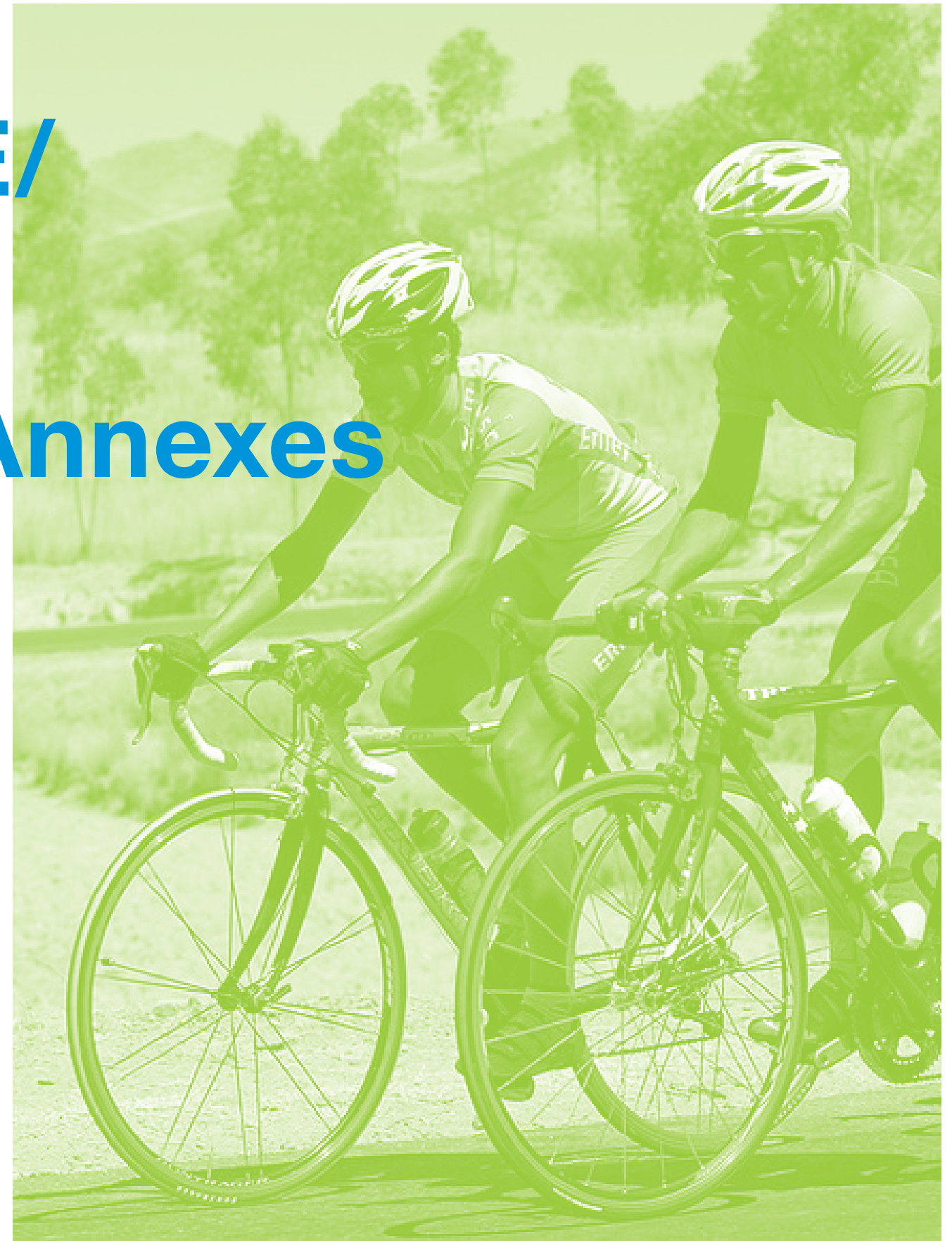
This opportunity for Massawa and the Dahlak Archipelago to capitalize on a Winter Sun destination strategy can address the challenges of seasonality associated with the tourism industry. During the summer months, the destinations receive a significant influx of diaspora/overseas Eritrean tourists that take advantage of the longer school year break to visit Eritrea with family members. Although the summer months are considered the least seasonable period to visit Massawa and the Dahlak Archipelago, data gathered during the research demonstrates that it is the peak season for tourist travel. By adopting a long-term strategy of capturing the Winter Sun market, which is noted as the ideal period to visit the destinations, Massawa and the Dahlak Archipelago can significantly mitigate the challenges of seasonality by combining trends in diaspora and international tourist markets.

This strategy is presented as a long-term opportunity for Massawa and the Dahlak Archipelago, as the destinations do not currently exhibit the capacity to successfully compete at the international level to significantly capture the Winter Sun tourism market. To effectively capture an international market, the destinations will need to significantly invest in upgrading infrastructure, accommodation facilities and recreational activities that meet international standards for beach tourism. Furthermore tourism policies will need to address the challenges of accessibility by exploring mechanisms to facilitate visa free or visa on arrival travel arrangements in coordination with tour operators and/or resort facilities. Investments in these areas can also help capture broader regional travel markets from the Middle East and the emerging African tourist market. Enhancing beach tourism products through a Winter Sun strategy will also help boost culture and heritage products in the target destinations as well as increase revenues from international tourists across multiple destinations in Eritrea.





# E/ Annexes







# E1

## Annex 1: Visitor Respondent Data Tables

### 1. How many times have you visited Massawa?

Only once/First time.....	12.2%
Between 1-3 times.....	12.7%
Between 3-6 times.....	17.2%
Over 6 times.....	57.9%
No opinion or Refused to Answer.....	0%

### 2. Are planning or have you visited the Dahlak Islands?

Yes.....	27.4%
No.....	72.1%
No opinion or refused to answer.....	0.5%

#### 2.1. If *no*, please identify the reasons for opting out of a visit to Dahlak?

Cited as Biggest Reason.....	Limited Time (57.5%)
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#### Frequency of Stated Reasons Below:

Limited Time.....	67.9%
Limited Transport to the Islands.....	41.1%
Not enough activities and sites of interest at Dahlak.....	26.6%
Costs are too high to visit the Dahlak.....	45.3%
Lack of information on activities and transport to Dahlak Islands.....	50.0%
Lack of hotels and infrastructure on Dahlak.....	20.9%
Other (Please specify).....	3.1%

Permits not granted, was the most frequently cited reason under other

#### 2.2. If *yes*, please identify the duration of your stay at the Dahlak Islands:

Day trip/Less than one day.....	40.5%
Overnight-1 night.....	18.9%
2-4 nights.....	35.2%
5 nights or longer.....	5.4%
Refused to Answer.....	0%

\*Data on the free response sections not included



### 2.3. If yes, please identify the three main activities you participated in or planning to participate?

Cited as the Main Activity .....Beach and water sports  
(65.5%)

Frequency of Stated Reasons Below:

Beach activities and water sports .....83.9%  
Diving .....28.6%  
Historical and architectural site visits.....69.6%  
Cultural events .....41.1%  
Restaurant, café and dining .....14.3%  
Resort/Hotel activities .....32.1%  
Other .....1.8%

### 3. Other than today, when visiting Massawa, which season do you usually visit?

Summer (June-September) .....72.9%  
Spring (March-May).....7.8%  
Fall (September-November) .....1.4%  
Winter (December-February) .....15.1%  
No Opinion or Refused to Answer .....2.8%

### 4. What was the main purpose of visiting Massawa?

Business.....9.1%  
Pleasure/Vacation.....85.0%  
Visiting Relatives/Friends in Massawa .....3.6%  
Just Passing Through .....0.5%  
No Opinion or Refused to Answer .....1.8%

### 5. How did you travel to Massawa?

Personal Car.....54.4%  
Bus .....28.2%  
Train.....0.5%  
Rental Car .....12.3%  
Plane .....1.4%  
Boat.....2.3%  
No Opinion or Refused to Answer .....0.9%

### 6. Which category best describes your visits to Massawa.

“When visiting Massawa I am usually visiting...”

Alone .....7.7%  
With Family and Friends.....85.9%  
On Business .....5%  
With a Tour Guide or Group .....1.4%  
Refused to Answer.....0%

### 7. Please identify the three main activities you participated in Massawa?

Cited as Main Activity .....Beach activities and  
water sports  
(75.8%)

Frequency of Stated Reasons Below:

Beach activities and water sports .....88%  
Diving .....17.1%  
Historical and architectural site visits.....64.4%  
Cultural events .....25.9%  
Restaurant, café and dining .....34.7%  
Resort/Hotel activities .....43.5%  
Other .....4.2%

### 8. How did you find most of the information on Massawa and available facilities (lodging, restaurants, activities, heritage sites etc.)?

Internet .....3.2%  
Friends and Family .....83.5%  
Guide books .....2.8%  
Tour Guide/Operator .....1.4%  
Ministry of Tourism .....1.8%  
Trade Fair .....1.8%  
Newspaper magazines, brochures.....4.6%  
Refused to Answer .....0.9%

### 9. Please identify the duration of your stay in Massawa?

Day trip/Less than one day .....0.9%  
Overnight-1 night .....10.9%  
2-4 nights .....69.2%  
5 nights or longer .....19%  
Refused to Answer .....0%

### 10. If you stayed longer than one night please identify the lodging facilities used during your trip in Massawa?

Personal home .....6.8%  
Family and friends .....16.4%  
Hotel .....75.9%  
Other .....0.9%  
Refused to Answer .....0%



**11. Approximately how much money do you and members of your party normally spend during your visits in Massawa? (Including lodging, food, local transport, local activities etc.)**

1,500 ERN or less .....	10%
2,000-5,000 ERN.....	30.3%
5,001-10,000 ERN.....	42.5%
10,000-20,000 ERN.....	11.8%
20,000 ERN or more.....	2.7%
No Opinion or Refused to Answer .....	2.7%

**12. The expenses listed above are usually for how many people? (including yourself)**

1 person .....	22%
2 people .....	31.2%
3-4 people.....	29.8%
5-7 people.....	11.9%
8 people or more.....	3.2%
No Opinion or Refused to Answer .....	1.8%

**13. What do you think of the tourism development potential of Massawa?**

No potential.....	2.3%
Low potential.....	8.6%
Some potential .....	26.8%
High Potential.....	60.9%
No Opinion or Refused to Answer .....	1.4%

**14. What do you think of the tourism development potential of the Dahlak Islands?**

No potential.....	2.8%
Low potential.....	4.2%
Some potential .....	24.2%
High Potential.....	41.4%
No Opinion or Refused to Answer .....	27.4%

**15. Do you feel international tourists are well informed and aware of the tourism in Massawa and Dahlak?**

Not informed at all.....	11.9%
Not very informed.....	18.3%
Somewhat informed .....	52.8%
Very informed .....	10.6%
No Opinion or Refused to Answer .....	6.4%

**16. Tourism can help Massawa and Dahlak develop in the right direction**

Strongly Disagree .....	10.5%
Disagree .....	3.6%
Agree .....	40.9%
Strongly Agree.....	43.2%
No Opinion or Refused to Answer .....	1.8%

**17. In your opinion what are the strongest tourism assets in Massawa?**

Food and Culinary Cuisines .....	Third Highest (46.2%)
History and Architecture.....	Second Highest (50%)
Beaches and Sea Life .....	Highest (68.7%)
Cultural Practices (People, Song, Dance and Music) .....	Fifth Highest (34.3%)
Hotel Resorts and Recreational Activities.....	Fourth Highest (38%)

**18. Do you feel the heritage sites in Massawa area need rehabilitation and development?**

No rehabilitation and development needed .....	2.7%
Minor rehabilitation and development needed.....	4.5%
Moderate rehabilitation and development needed .....	14%
Significant rehabilitation and development needed.....	76.5%
No Opinion or Refused to Answer .....	2.3%

**19. Do you feel the infrastructure (energy, communications, transport, water, etc.) in Massawa adequately meet visitor needs?**

Do not meet the visitor needs at all .....	10.4%
Meet some of the visitor needs.....	32.1%
Meet most of the visitor needs.....	51.1%
Meet all of the visitor needs .....	5.4%
No Opinion or Refused to Answer .....	1%

**20. In your view, what are the three biggest challenges to growing tourism in Massawa?**

Cited as Biggest Challenge.....	Lack of Tourism Marketing (46.6%)
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Frequency of Stated Challenges Below:

Lack of marketing Massawa as a tourism destination .....	68.5%
Visa challenges for international tourists .....	18.8%
Infrastructure challenges.....	35.2%
High costs .....	49.8%
Security and crime .....	1.9%
Lack of quality hotels and resorts .....	55.9%
Lack of recreational activities and events (e.g. tours, restaurants, excursions, diving, water sports etc.) .....	56.8%



### 21. To what level is Eritrea safe for tourists to visit?

Not safe at all .....	0.5%
Low safety .....	1.4%
Good safety.....	12.2%
Very safe.....	85.9%
No Opinion or Refused to Answer .....	0%

### 22. To what level is Massawa safe for tourists to visit?

Not safe at all .....	0%
Low safety .....	1.4%
Good safety.....	16.8%
Very safe.....	81.4%
No Opinion or Refused to Answer .....	0.5%

### 23. To what level is Dahlak safe for tourists to visit?

Not safe at all .....	0.5%
Low safety .....	1.4%
Good safety.....	12%
Very safe.....	60.2%
No Opinion or Refused to Answer .....	25.9%

### 24. In your view, what are the three biggest opportunities to growing tourism in Massawa?

Cited as Biggest Opportunity.....Eco-Tourism (47%)

Frequency of Stated Opportunities Below:

Eco-tourism based on natural coastal environment and sea life .....	72.8%
Port-based business tourism activities .....	59.4%
Heritage tourism based on assets from local culture and history.....	35%
Cruise ships and boat based tourism along the red sea .....	39%
Proximity to European, Middle East and African markets.....	41%
Hotel and Resort businesses .....	30.4%
Recreation activities .....	15.2%

### Annex 2: Resident attitude data tables

# E2

1. What do you think of the tourism potential of Massawa /Dahlak Islands?	Massawa	Dahlak
No potential	0.8%	0%
Low potential	5.6%	0%
Some potential	25.1%	0%
High Potential	67.8%	100%
No Opinion or Refused to Answer	0.8%	0%

2. Tourism can help my community develop in the right direction	Massawa	Dahlak
Strongly Disagree	1%	1.4%
Disagree	5.6%	6.9%
Agree	52.2%	0%
Strongly Agree	40.9%	91.7%
No Opinion or Refused to Answer	0.3%	0%

3. Rate the type of tourists that often come to Massawa/ Dahlak?	Massawa	Dahlak
International/Foreign Tourists	Third Highest (73.1%)	Highest (91%)
Local Eritrean Tourists	Highest (53.7%)	Third Highest (65%)
Diaspora Tourists	Second Highest (57.9%)	Second Highest (63%)

\*Data on the free response sections not included



4. Tourists add problems to my way of life in Massawa/Dahlak	Massawa	Dahlak
Strongly Disagree	34.4%	79.2%
Disagree	40%	8.3%
Agree	19.5%	2.8%
Strongly Agree	5.8%	9.7%
No Opinion or Refused to Answer	0.3%	0%

5. It is important that residents/communities are involved in tourism planning and development	Massawa	Dahlak
Strongly Disagree	1%	1.4%
Disagree	2.5%	0%
Agree	39.3%	5.6%
Strongly Agree	56.6%	91.6%
No Opinion or Refused to Answer	0.5%	1.4%

6. Which statement best reflects your view on the future of tourism in Eritrea?	Massawa	Dahlak
There should be no tourism in Eritrea	0.5%	0%
Tourism should decrease from the current level in Eritrea	0.3%	0%
Tourism level should stay the same as it is now in Eritrea	2%	0%
Tourism should increase in Eritrea	96.9%	100%
No Opinion or Refused to Answer	0.3%	0%

7. Which statement best reflects your view on the future of tourism in Massawa/Dahlak?	Massawa	Dahlak
There should be no tourism in Massawa/Dahlak	0.5%	0%
Tourism should decrease from the current level in Massawa/Dahlak	0.3%	0%
Tourism level should stay the same as it is now in Massawa/Dahlak	2%	0%
Tourism should increase in Massawa/Dahlak	96.9%	98.6%
No Opinion or Refused to Answer	0.3%	1.4%

8. Compared to other industries in Massawa/Dahlak, how important of a role should tourism have in the economy?	Massawa	Dahlak
No role	1%	0%
Minor Role	6.3%	0%
Major Role	51.9%	4.2%
A Dominant Role	40%	95.8%
No Opinion or Refused to Answer	0.8%	0%

9. The tourism industry contributes to economic development in my area	Massawa	Dahlak
Strongly Disagree	2.8%	4.2%
Disagree	13.4%	1.4%
Agree	64.5%	26.3%
Strongly Agree	18.5%	66.7%
No Opinion or Refused to Answer	0.8%	1.4%

10. How does tourism contribute to the income of your family/household?	Massawa	Dahlak
No income contribution	39.1%	25%
Low income contribution	21%	31.9%
Moderate income contribution	28.8%	15.3%
High income contribution	9.8%	26.4%
No Opinion or Refused to Answer	1.3%	1.4%

11. What role/impact does tourism have on your job?	Massawa	Dahlak
No role/impact	41.2%	25%
Low role/impact	18.8%	40%
Moderate role/impact	24.2%	16.7%
High role/impact	15%	18.1%
No Opinion or Refused to Answer	0.8%	0%

12. The tourism industry can help promote investment in other industries in my area (construction, agriculture, mining, fisheries etc.)	Massawa	Dahlak
Strongly Disagree	1.2%	0%
Disagree	3%	0%
Agree	61.2%	9.9%
Strongly Agree	33.8%	90.1%
No Opinion or Refused to Answer	0.8%	0%

13. To what level is tourism generating jobs in your area?	Massawa	Dahlak
No generation of jobs	6.9%	13.9%
Low generation of jobs	37.6%	44.5%
Moderate generation of jobs	40.6%	20.8%
High generation of jobs	14.1%	20.8%
No Opinion or Refused to Answer	0.8%	0%

14. To what level is the local community economically benefitting from tourism in your area?	Massawa	Dahlak
No benefit	5.6%	11.1%
Low benefit	47.1%	45.9%
Moderate benefit	36.1%	19.4%
High benefit	10.7%	23.6%
No Opinion or Refused to Answer	0.5%	100%

15. If tourism increases in Massawa/Dahlak, it can provide economic benefits to my household.	Massawa	Dahlak
Strongly Disagree	6.1%	2.8%
Disagree	5.9%	0%
Agree	52.1%	5.5%
Strongly Agree	35.1%	91.7%
No Opinion or Refused to Answer	0.8%	0%



16. Do you feel poor communities in Massawa/Dahlak are able to benefit from tourism development?	Massawa	Dahlak
Strongly Disagree	5.5%	22.2%
Disagree	9.6%	15.3%
Agree	58.3%	25%
Strongly Agree	25%	22.2%
No Opinion or Refused to Answer	1.6%	11.1%

17. Would you or members in your household want to be employed in the tourism industry?	Massawa	Dahlak
Yes	93.8%	97.2%
No	6.2%	2.8%
No Opinion or Refused to Answer	0.3%	0%

17.1. If Yes, would you be comfortable with women members of your family working in the tourism industry?	Massawa	Dahlak
Yes	93.9%	47.1%
No	5.7%	52.9%

18. What impact do you think tourism has on your economy?	Massawa	Dahlak
Very Negatively Affected	2.6%	4.2%
Somewhat Negatively Affected	2.1%	8.3%
Not Affected	44.6%	13.9%
Somewhat Positively Affected	39.7%	48.6%
Very Positively Affected	11%	22.2%
No Opinion or Refused to Answer	0%	2.8%

19. In your opinion what are the strongest tourism assets in Massawa/Dahlak?	Massawa	Dahlak
Food and Culinary Cuisines	Fourth Highest (30.8%)	Fourth Highest (39.7%)
History and Architecture	Second Highest (54.1%)	Second Highest (83.3%)
Beaches and Sea Life	Highest (67.2%)	Highest (91.7%)
Cultural Practices (Song, Dance and Music)	Fifth Highest (42.7%)	Third Highest (41.2%)
Hotel Resorts and Recreational Activities	Third (42%)	Fifth Highest (57.4%)

20. The tourism industry can help protect the natural and cultural heritage in my area	Massawa	Dahlak
Strongly Disagree	.8%	18.1%
Disagree	4.8%	9.6%
Agree	58.2%	4.2%
Strongly Agree	35.1%	68.1%
No Opinion or Refused to Answer	1.1%	0%

21. To what level is Eritrea safe for tourists to visit?	Massawa	Dahlak
Not safe at all	0%	0%
Low safety	0.3%	0%
Good safety	6.8%	2.8%
Very safe	92.9%	95.8%
No Opinion or Refused to Answer	0%	0%

22. To what level is Massawa safe for tourists to visit?	Massawa	Dahlak
Not safe at all	0%	0%
Low safety	0.5%	0%
Good safety	4.6%	2.8%
Very safe	94.9%	97.2%
No Opinion or Refused to Answer	0%	0%

23. To what level is Dahlak safe for tourists to visit?	Massawa	Dahlak
Not safe at all	0%	0%
Low safety	1.3%	0%
Good safety	8.4%	1.4%
Very safe	83.3%	98.6%
No Opinion or Refused to Answer	7.1%	1.4%

24. Do you feel the heritage sites in your area need rehabilitation and development	Massawa	Dahlak
No rehabilitation needed	4.8%	1.4%
Minor rehabilitation needed	15.5%	1.4%
Moderate rehabilitation needed	25.4%	1.4%
Significant rehabilitation needed	54.3%	95.8%
No Opinion or Refused to Answer	0%	0%

25. What impact do you think tourism has on your cultural and heritage sites	Massawa	Dahlak
Very Negatively Affected	.5%	22.2%
Somewhat Negatively Affected	16.3%	43.1%
Not Affected	24.9%	4.2%
Somewhat Positively Affected	45.3%	8.3%
Very Positively Affected	12.2%	20.8%
No Opinion or Refused to Answer	0.8%	1.4%

26. What impact do you think tourism has on the Environment in Massawa/Dahlak	Massawa	Dahlak
Very Negatively Affected	1.3%	20.8%
Somewhat Negatively Affected	24.6%	37.5%
Not Affected	25.3%	5.6%
Somewhat Positively Affected	41.4%	13.9%
Very Positively Affected	6.6%	20.8%
No Opinion or Refused to Answer	0.8%	1.4%

27. How aware are people in your community on the protection of natural heritage and conservation?	Massawa	Dahlak
Note aware at all	8.7%	27.8%
Not very aware	28.1%	8.3%
Somewhat aware	46.8%	12.5%
Very aware	16.1%	51.4%
No opinion or refused to answer	0.3%	0%



28. How often do you and your household visit museums and heritage sites in Massawa/Dahlak?	Massawa	Dahlak
Not at all	29.1%	50%
Not very much	20.2%	20.8%
A few times	43.6%	27.8%
Often	7.1%	1.4%
No opinion or refused to answer	0%	0%

29. Do people in your community discard waste and trash into the sea and streets?	Massawa	Dahlak
Not at all	34.6%	61.1%
Not very much	28%	18.1%
A few times	30.3%	19.4%
Often	7.1%	1.4%
No opinion or refused to answer	0%	0%

30. In your view, what are the three biggest advantages that an increase in tourism can positively affect communities in Massawa/Dahlak?	Massawa	Dahlak
Cited as Biggest Advantage	Employment (65.6%)	Employment (77.8%)
Frequency of Stated Advantages Below:		
Employment opportunities	91.4%	90.3%
Improved appearance of the region	15.5%	27.8%
Engagement with tourists from other cultures	21.6%	8.3%
Appreciation of local culture and history	25.6%	48.6%
Improved economy	68.3%	59.7%
Improved services and infrastructure	48.2%	29.2%
More hotels and recreational activities	27.2%	36.1%

31. In your view, what are the three biggest disadvantages that an increase in tourism can negatively affect communities in Massawa/Dahlak?	Massawa	Dahlak
Cited as Biggest Advantage	Higher prices for goods and services (35.5%)	Overcrowding by tourists (58.3%)
Frequency of Stated Advantages Below:		
Crowding by Tourists	16.5%	68.1%
Environmental impacts	29%	23.6%
Higher prices for goods and services	66.2%	29.2%
Property and land use impacts	37.5%	8.3%
Increased illegal/criminal activities	59.6%	52.8%
Damage to local culture and heritage	60.6%	86.1%
Overdevelopment without community consultation	14.7%	30.6%



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