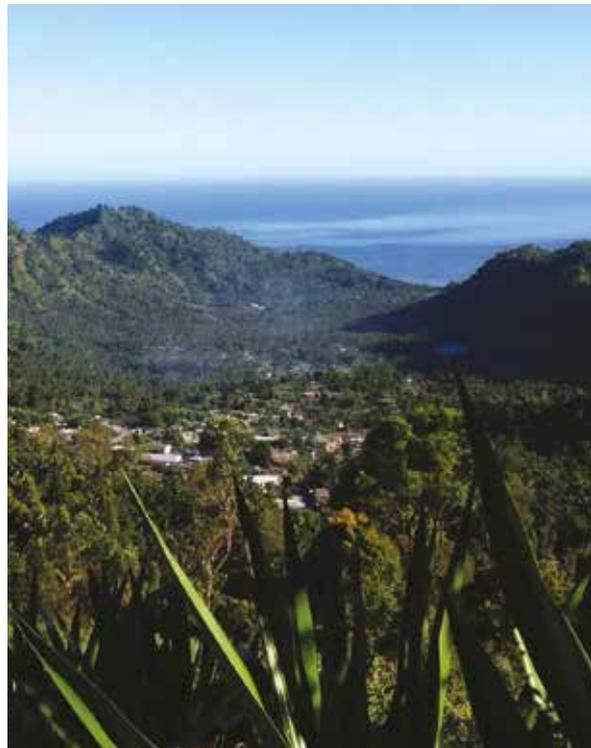




Secure Fisheries
Secure Futures



COMOROS ECO-TOURISM EVALUATION & SUPPORT PROGRAMME

May - December 2013



INDIAN OCEAN
COMMISSION



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Comoros ecotourism evaluation &
support programme

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- The *Association des Professionnels du Tourisme d'Anjouan* (APTA);
- The *Association des Guides Touristiques des Comores* (AGTC);
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- The Ulanga Association;
- The AIDE Association;
- The SmartFish programme team.

Executive summary

Tourism is too often quoted as an alternative source of income for communities. In the Comoros, as for all destinations regardless of their level of development, tourism obeys certain market rules: a destination to be viable commercially, economically and socially requires commitments and contributions from a wide range of stakeholders at both national and international levels.

The Comoros as a destination is still exploring the very early stage of its life cycle and the annual volume of tourists is minimal compared to other Indian Ocean islands (only 22,000 arrivals in 2012 and 60% of these were visiting friends and relatives. However, this can be advantageous and present the Comoros as a new destination that may surprise even the most experienced travellers.

The Comoros tourism supply exists even if it is limited. It is essentially based on an exceptional natural and cultural heritage, but its development as a product has yet to be achieved: main sites are not fully prepared to accommodate visitors appropriately and services do not always meet minimum standards and prices are not competitive compared to neighbouring destinations such as Madagascar or Zanzibar.

Fishermen and their communities are part of the tourism value chain but only to a limited extent: tourist numbers remain insufficient and as tourism activities are seasonal this does not allow for permanent occupations. However, some products have the opportunity to grow in quality and volume: seven products were selected for specific support from the SmartFish programme that aims to provide alternative income for coastline communities. These products directly involve fishermen or other community members, such as women or individuals who trained to become eco-guides for hiking tours.

Of the seven products identified, three are worth mentioning as possible models for ecotourism in the Comoros:

- Turtle watching on Itsamia (Moheli) provided that the condition of accommodation is improved;
- Observation of Livingstone Bats near the villages of Wallah 1 and Wallah 2 (Moheli) provided that the trails are rehabilitated and maintained;
- Partnership with existing hotels for the development of activities benefiting women and their associations such as therapeutic massage centres or craft shops within the hotel property or nearby.

However, the prerequisite is the implementation of a marketing policy and a management system to increase the flow of tourists. Comoros, as a destination, has the opportunity to successfully come back on to the international market if it can differentiate itself from its Indian Ocean competitors (Mayotte, Reunion, Madagascar, Zanzibar) and if it is able to increase its visibility through a good branding and positioning policy. Niche markets corresponding to the existing tourism supply intended for hikers, nature lovers or travellers looking for off-the-beaten-track destinations can then be targeted.

The SmartFish programme has defined a programme that supports the development of ecotourism in the Comoros by: strengthening the capacity of fishermen so that they can work permanently in the tourism sector; and assisting the Tourism Office in its role as a management structure responsible for destination management and charged with getting the Comoros back on the international tourism map. Experience in Madagascar showed that this is possible with leadership of efficient incoming agencies.

Résumé exécutif

Le tourisme est trop souvent cité comme pouvant représenter une source alternative de revenus pour les communautés villageoises. Aux Comores comme dans toutes les destinations, quel que soit le niveau de développement, le tourisme obéit aux règles du marché et requiert la mobilisation et la contribution d'une série d'acteurs au niveau national mais aussi international pour que la destination soit viable, commercialement, économiquement et socialement.

La Destination Comores se trouve encore au stade d'exploration de son cycle de vie et le volume annuel d'arrivées de touristes reste minime par rapport aux autres îles de l'Océan Indien (22.000 arrivées en 2012 dont 60% de voyages affinitaires). Ce retard peut cependant être un avantage car les Comores restent une destination inédite susceptible de surprendre les voyageurs les plus avertis.

L'offre touristique des Comores existe même si elle est limitée. Il se base essentiellement sur un patrimoine naturel et culturel riches, mais dont le développement en tant que produit touristique reste encore à faire: les sites ne sont pas aménagés pour accueillir des visiteurs ou les services proposés n'ont pas la qualité requise face à des prix peu compétitifs par rapport à la concurrence régionale de Madagascar et de Zanzibar.

Les communautés de pêcheurs participent à la chaîne de valeur tourisme mais de façon limitée car les volumes de touristes restent insuffisants et saisonnières pour que les activités d'excursions deviennent permanentes. Certains produits ont cependant la possibilité de se développer en qualité et en volume: sept produits ont été ainsi sélectionnés pour faire l'objet d'un appui spécifique par le programme SmartFish avec pour objectif d'apporter des sources alternatives de revenus pour les communautés vivant sur le littoral. Ils peuvent impliquer directement les pêcheurs ou d'autres membres des communautés comme les femmes ou les individus reconvertis en eco-guides sur les zones terrestres.

Parmi ces sept produits, trois méritent d'être soulignés comme susceptibles de devenir des modèles en matière d'écotourisme aux Comores:

- l'observation des tortues sur Itsamia (Mohéli) à condition que l'hébergement s'améliore;
- l'observation des chauve-souris Livingstone à proximité des villages de Wallah 1 et Wallah 2 (Mohéli) à condition que les pistes de randonnée soient réhabilitées et entretenues;
- le partenariat avec les hôtels existants pour le développement d'activités bénéficiant aux femmes ou leurs associations comme les centres de massage thérapeutiques ou les boutiques d'artisanat dans la propriété des hôtels ou à proximité.

Mais la condition préalable reste la mise en place d'une politique et d'un système marketing permettant d'accroître le flux de touristes aux Comores.

Dans le contexte actuel du tourisme international, la destination Comores a la possibilité de revenir sur le marché si elle arrive à se différencier de ses concurrents de l'Océan Indien (Mayotte, Réunion, Madagascar, Zanzibar) et à accroître sa visibilité à travers un "branding" et un positionnement appropriés qui lui permettront de cibler des marchés de niche correspondant à l'offre existante comme les randonneurs, les amoureux de la nature ou tout simplement les voyageurs en quête de destinations en dehors des sentiers battus.

Le programme SmartFish soutient le développement de l'écotourisme aux Comores à travers le renforcement des capacités des pêcheurs susceptibles de se reconverter de façon permanente dans le tourisme et à travers un appui à l'Office du Tourisme en tant que structure en charge de la gestion de la destination et en charge du retour des Comores sur la scène du tourisme internationale. L'expérience de Madagascar a montré que c'est possible avec des réceptifs actifs.

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Acronyms and abbreviations

ACT	<i>Association Comorienne du Tourisme</i>
ADSEI	<i>Association pour le Développement Socio Economique d'Itsamia</i>
ADSN	<i>Association pour le Développement Social de Nioumachoua</i>
AFD	<i>Agence Française de Développement</i>
AGTC	<i>Association des Guides Touristiques des Comores</i>
AIDE	<i>Association d'Intervention pour le Développement et l'Environnement</i>
APG	<i>Association pour la Protection du Gombessa</i>
APTA	<i>Association Professionnelle du Tourisme d'Anjouan</i>
B&B	Bed & Breakfast
DMO	Destination Management Organization
DNTH	<i>Direction Nationale du Tourisme et de l'Hôtellerie</i>
EU	European Union
FADC	<i>Fonds d'Appui au Développement Communautaire</i>
FB	Full Board
FTP	Financial and Technical Partners
IOC	Indian Ocean Commission
LoA	Letter of Agreement
MEM	<i>Maison de l'Ecotourisme de Mohéli</i>
MOSC	<i>Maison des Organisations de la Société Civile</i>
NGO	Non Governmental Organization
ONTC	Office National du Tourisme des Comores
UNDP	United Nations Development Programme
TO	Tour Operator
VIO	Vanilla Island Organization
WCS	Wildlife Conservation Society
WTM	World Travel Market

1. Background

In its Growth Strategy for Poverty Reduction, the Comoros Union Government has identified tourism as a priority sector to foster economic and social development and to contribute to the environment conservation.

The SmartFish Programme aims to contribute to an increased level of social, economic and environmental development and deeper regional integration in the Eastern-Southern Africa and Indian Ocean Region (ESA-IO) through improved capacities for the sustainable management of marine resources.

Within the framework of SmartFish Result 5, Output 5M3.2 supports livelihoods diversification and resilience in selected fishing communities and Activity 5M3.2.1 selected projects support diversification initiatives and improved resilience in fishing communities. The programme plans to carry out ecotourism promotion and support activities in the Comoros islands in order to provide fisher communities with viable sources of income as alternatives to fisheries, in coherence with Government policies.

Box 1: Comoros tourism key facts & figures

- 1991 & 2001: opening and closing of the Galawa Resort Hotel in Mitsamiouli (Ngazidja);
- 1998 is the reference year with 27,500 arrivals (40 percent from South Africa);
- 2012: 22,800 arrivals including 30 percent tourists (business and leisure) which represents only 7,000 people per year (3,000 leisure tourists), insufficient to ensure existing hotel profitability;
- Comoros main source markets: Mayotte (23 percent), France (15 percent), Reunion (8 percent), Mauritius (6 percent), Madagascar (5 percent), other African countries (12 percent), Gulf countries (11 percent). The Indian Ocean area represents 42 percent of the total market;
- Duration of average stay (2011): 7 days;
- Average expenses per person: EUR 900;
- Accommodation capacity: 52 hotels, 503 rooms across the three islands; average room rate is EUR 45;
- Tourism formal employment: 500 jobs (ratio job/room is 0.9 compared to Indian Ocean countries which stands at 2). Existing labour force lacks qualifications according to hotel owners and tourism agencies;
- 5 Protected Areas or Conservation Zones for a total surface of 85.000 Ha;
- Expected anchor hotel investment after agreement signature in 2010 between the Government and Katara Hospitality for a 150-room hotel.

In order to ensure a sustainable exit strategy for the programme through destination marketing and self-sustained businesses, the SmartFish Comoros tourism support project carried out an analysis of the existing ecotourism market in the Comoros, to identify suitable tourism products that could potentially integrate fishermen and to organize a familiarization trip for international and regional ecotourism operators to facilitate market linkages and stimulate demand.

An action plan is to be presented in a validation workshop in Moroni. This will be followed by a specifically tailored capacity building session for selected tourism stakeholders.

2. Activities, assignments and achievements

The first step of the mission focused on the identification of existing tourism products and an analysis of how fishermen would be able to play a more important role in the value chain as effective tourism stakeholders.

The second step consisted of identifying, interviewing and selecting possible local service providers who could assist in the implementation of initial activities of a tourism support programme in the Comoros.

The third step concerned the definition of a short term (one year) communication plan to assist in the destination promotion. The communication plan includes a familiarization trip (Fam Trip) that falls under a fourth step. This trip will take place in early September just before a major travel fair for French speaking markets, Topresa, in Paris.

2.1 Comoros tourism value chain analysis

Hotels and inbound agencies are the structures that know best a country's tourism production together with tourism guides who often act as intermediaries for informal services providers such as fishermen. These structures provided most of the information that was required for the analysis.

Tourism consists of many activities that are linked to each other at both international and local levels: multiple stakeholders are involved in both the public and private sectors. The following figure shows how tourism is structured and gives an indication of value added contributions at each level.

Figure 1: Typical tourism value chain



a) Evaluation of ecotourism products in the Comoros

The Comoros as a destination is still at the very early stage of its development despite past success stories (i.e. Galawa Beach Resort) and there are missing or weak links in the tourism structure that impact the whole industry, which relies on a limited number of firms operating in a very small market with high growth potential.

A total of 13 tourism products were identified after discussions with hotels, incoming agencies and guides. Some of them (4 out of 13, see Table 1) do not involve coastal activities at all and focus on flagship hinterland tourism sites such as Karthala Volcano in Ngazidja or Dzilandze Sacred Lake in Anjouan. In total, only 9 of the products identified were fully eligible.

The following evaluation criteria and related points were defined and all products were assessed accordingly (see Table 2):

- Eligibility (3 points);
- Respect of security standards (3 points);
- Promotion of natural and cultural heritage (3 points);
- Quality of the product and related services (8 points);
- Cost and duration (6 points);
- Community participation and sharing (6 points).

Table 1: Presentation of identified ecotourism products in the Comoros

N°	Description	Base location	Mode of transport	Route	Service provider	Marine Conservation Area
1	Northern coastline tour	Moroni (Ngazidja)	Car or bus	Moroni - Koimbani - Chomoni - Bouni - Ndrudé - Ivouani - Mitsamiouli - Moroni	Hotels / Inbound agencies	Ndrude (1)
2	Historical and scientific tour	Moroni	Car or bus	Moroni - Niombadjou - Mitsoudje - Itsounzou - Chindini - Foubouni - Iconi	Hotels / Inbound agencies / Tourism Office	Coelacanth Zone (1)
3	Sailing boat excursion	Moroni	Yacht	Moroni - Ndrudé - Maloudja - Moroni	Blue Safari / Hotels	Ndrude (1)
4	Moroni sightseeing and Medina visit	Moroni	Car or bus	Market, carved doors, mosqs and museums	Hotels / Ulanga NGO	None, cultural heritage only
5	Karthala Tour	Moroni	4WD car	Moroni - Boboni - Convalescence - Karthala - Moroni	Hotels	None, Karthala Conservation Area is not on the coast
6	Boat trip to islets	Nioumachoua or Wallah 1 & 2 (Mwali)	Boat	Nioumachoua - Kanzoni - Ouénéfou Méa - Nioumachoua	Laka Lodge / ADSN / MDSECOM / ADSCO	Nioumachoua & Wallah (2)
7	Whale and dolphin watching	Moroni, Nioumachoua, Wallah 1 & 2, Itsamia, Mutsamudu, Moya	Boat	Itsamia, Nioumachoua, Wallah 1, Wallah 2 (Mohéli), Chindini (Ngazidja), Moya, Bimbini, Ile de la Selle (Ndzواني)	Laka Lodge / ADSN / ADSEI / MDSECOM / ADSCO	Itsamia, Nioumachoua & Wallah (3), Coelacanth Conservation Zone (1), Bimbini Conservation Zone (1)
8	Traditional and therapeutic massage	Nioumachoua	-	-	Laka Lodge	Nioumachoua (1)
9	Nesting and baby turtle viewing	Itsamia (Mwali), Ndrude (Ngazidja)	Car or bus	Moroni - Ndrudé - Fomboni - Ndrudé - Nioumachoua	ADSEI / Ndrude Community	Itsamia (1), Ndrude (1)
10	Livingstone Bat viewing	Ouallah 1 & Ouallah 2	Trekking	3 hours walk in the forest	MDSECOM / ADSCO	Wallah 1 & 2 (1)
11	Excursion to Bimbini peninsula and Ile de la Selle	Mutsamudu, Moya (Ndzواني)	Car and boat	Mutsamudu - Sima - Bimbini - Ile de la Selle - Mutsamudu	Bimbini fishermen / APTA	Bimbini Conservation Zone (1)
12	Excursion to Dzilandze Sacred Lake	Mutsamudu, Moya (Ndzواني)	Car or bus, and trekking	Mutsamudu - Ouani - Chandra - Dindi - Mchakojou - Mutsamudu	Hotel Al Amal / APTA / Dahari NGO	None, Ntringui Conservation Zone is not on the coast
13	Mutsamudu: medina and citadel visit	Mutsamudu	Car and city walk	Medina, mosq, royal palace and citadel	Hotel Al Amal / APTA	None, cultural heritage only

No coastal activities involved

Table 2: Evaluation of eligible tourism products

N°	Product	Eligibility criteria	Security standards	Tourism heritage promotion	Product quality	Duration and cost / pax	Community share %	Total points (29)
1	Northern coastline tour	3-Jan 1 pt	Good 3 pts	Yes, beaches & turtles: 2 pts	Welcome 2 Transport 1 Guide 1 Facilities 0	One day, EUR 45 6 pts	Barbecue lunch: EUR 6 / pax (13%, 2 pts)	59%
2	Historical and scientific tour	3-Feb 2 pts	Average 2 pts	Yes, Coelacanth: 2 pts	Welcome 1 Transport 1 Guide 1 Facilities 1	1/2 day, EUR 45 4 pts	Coelacanth Center visit: EUR 6 /pax (13%, 2 pts)	55%
3	Sailing boat excursion	3-Jan 1 pt	Good 3 pts	Yes, coastline: 1 pt	Welcome 2 Transport 2 Guide 1 Facilities 1	2 days, EUR 165 6 pts	Meal: EUR 10 /pax (6%, 1 pt)	62%
4	Moroni sightseeing and Medina visit	3-Jan 1 pt	Good 3 pts	Yes, culture: 2 pts	Welcome 0 Transport 2 Guide 2 Facilities 0	1/2 day, EUR 25 4 pts	No fees (0% 0 pt)	48%
5	Karthala Tour	3-Feb 2 pts	Average 2 pts	Yes, volcano: 3 pts	Welcome 0 Transport 1 Guide 1 Facilities 0	2 days, EUR 85 6 pts	Camping fees: EUR 5 (6%, 1 pt)	55%
6	Boat trip to islets	3-Mar 3 pts	Average 2 pts	Yes, coral reefs: 2 pts	Welcome 0 Transport 1 Guide 1 Facilities 0	One day, EUR 15 4 pts	Guide fees: EUR 5 / pax (33%, 4 pts)	62%
7	Whale and dolphin watching	3-Feb 2 pts	Average 2 pts	Yes, whale watching: 2 pts	Welcome 0 Transport 1 Guide 1 Facilities 0	1/2 day, EUR 20 6 pts	Guide fees: EUR 5 / pax (25%, 3 pts)	59%
8	Traditional and therapeutic massage	3-Feb 2 pts	Good 3 pts	Yes, traditions: 1 pt	Welcome 2 Transport 2 Guide 1 Facilities 0	One hour, EUR 8 2 pts	Massage fees: EUR 8/ pax (100%, 6 pts)	66%
9	Nesting and baby turtle viewing	3-Feb 2 pts	Good 3 pts	Yes, turtles and birds: 3 pts	Welcome 2 Transport 1 Guide 2 Facilities 1	One night, EUR 70 6 pts	Guide fees: EUR 5 / pax + meal: EUR 7 / pax (17%, 2 pts)	76%
10	Livingstone bat viewing	3-Feb 2 pts	Average 2 pts	Yes, endemic bats & forest: 3 pts	Welcome 2 Transport 1 Guide 1 Facilities 0	1/2 day, EUR 5 4 pts	Guide fees: EUR 5 / pax (100%, 6 pts)	72%
11	Excursion to Bimbini and the "Ile de la Selle"	3-Jan 1 pt	Bad 1 pt	Yes, coral reefs: 2 pts	Welcome 0 Transport 1 Guide 2 Facilities 0	One day, EUR 30 6 pts	Fishermen boat rental: EUR 15 / pax (50%, 4 pts)	59%
12	Excursion to the Dzilandze Sacred Lake	3-Feb 2 pts	Average 2 pts	Yes, landscape & tradition: 3 pts	Welcome 2 Transport 2 Guide 1 Facilities 0	One day, EUR 25 6 pts	Visit fees: EUR 5 / pax (20%, 3 pts)	72%
13	Mutsamudu: medina and citadel visit	3-Feb 2 pts	Good 3 pts	Yes, historical monuments: 3 pts	Welcome 1 Transport 2 Guide 1 Facilities 2	1/2 day, EUR 15 6 pts	Visit fees: EUR 4 / pax (26%, 3 pts)	79%

Ecotourism products selected by SmartFish

Good ecotourism products but not eligible

b) Evaluation of main hotels

Table 3: List of main hotels in the Comoros

Hotel name / opening date	Location	Staff	Capacity / services	Activities	Rates EUR (2013)	Observations
Cristal Itsandra Beach Hotel, 4* (1984)	Moroni	99 local, 4 expat.	36 rooms, restaurant, lounge bar, night club,	Diving, excursions in Ngazidja and Moheli	Public: 235 – 361 B&B T.O.: 135 – 220 B&B	Good location, business tourism, reference hotel
Retaj Moroni Resort, 3* (1984)	Moroni	94 local, 4 expat.	60 rooms, restaurant, bar, pizzeria, conference rooms	Moroni, full day tour Tropical forest tour	Public: 110 - 150 B&B T.O.: 90 – 110 B&B	Good location, business tourism, good service,
Les Arcades (1998)	Moroni	20 local, 1 expat.	22 rooms, restaurant, conference room, fitness room	Cabaret, excursions (local guide) and Safari Blue (boat)	Public: 57 B&B	Good location, ongoing refurbishing and new management 2012
Karthala International Hotel (2010)	Mvouni	n.a.	28 rooms, restaurant, conference room	Excursion list	Not available	Business tourism, recently upgraded
Villa Jessica	Moroni	n.a.	6 rooms	Car rental, excursions on request	Public: 59 - 69 B&B	Business and independent travellers, good services
Jardin de la Paix (2004)	Moroni	16	15 rooms, restaurant	Inhouse incoming agency (Ylang Tours)	Public: 30 – 60 B&B	Good location, good ratio price / quality
Le Relais de Singani (1984)	Fomboni	n.a.	20 rooms, restaurant, conference room	Beach activities	Public: 35 – 40 B&B	Upgrading required, no maintenance
Laka Lodge, 2* (1997)	Nioumachoi	14	8 bungalows, restaurant	Trekking , boat excursions, game fishing	Public: 50 - 60 FB T.O.: 10 to 20%	Excellent location, good ratio quality / price
Les Abou	Bandar El Salam	n.a.	15 bungalows, restaurant, conference room	Car and bus rental	Public: 50 B&B	Business tourism
Choini Bungalows (2011)	Nioumachoi	3	3 bungalows, restaurant, conference room	Excursions: islets, diving club	Public: 20 B&B	Good location, diving club
La Grande Plaine	Djoiezi	n.a.	7 rooms, restaurant, conference room	Car and bus rental, excursions	Public: 50 B&B	Business tourism
Al Amal (1983)	Mutsamudu	43 local, 2 expat.	22 rooms, restaurant, conference room	Activities subcontracted with guides	Public: 73 B&B T.O.: 65 B&B	Business tourism Excellent location
Mapongée Palace Hôtel ***, (2012)	Mutsamudu	10	14 rooms, restaurant, conference rooms	Car and boat rental	Public: 75 B&B	Bad ratio quality/price, no maintenance
Johanna Livingstone	Mutsamudu	18	44 rooms, 2 restaurants, 2 conference rooms	Car rental	Public: 76 B&B	Bad location and service, business tourism
Moya Beach Hotel	Moya	6	9 bungalows, restaurant	Boat excursions, whale watching	Public: 15 B&B	Excellent service, good location, leisure tourism

c) Tourism products gap analysis

Table 4: Gap analysis of selected tourism products

N°	Product	Production	Rates	Selling points	Promotion	Positioning	Conclusions
1	Northern coastline tour:	Camp sites do not comply with eco standards: Chomoni, Bouni / Limited community participation: food provision and pirogue excursion	Rates are only available on request	Tour Operator package / main hotels and incoming agencies	Limited promotion / no updated guide books	Beach tourism and turtle viewing only from November to February / Hawksbill turtles, Eretmochelys imbricata	Improve accommodation and picnic facilities to optimize impacts on communities / Focus promotion of product description and practical information
2	Boat trip to Moheli Marine Park islets:	Bad road access to Nioumachoua / No anchoring buoys and park information signs on the islets / No picnic or camping facilities on islets like Ouénéfou / Limited knowledge of guides (snorkeling and diving sites)	No information about rates (except for Laka Lodge) and about MEM commission	Maison de l'Ecotourisme: poor communication with service providers and ineffective commission system	MEM website: to be updated / Limited communication means for MEM: telephone & internet connexion	Beach and nature based tourism (birds, manta rays, coral reefs, etc.)	Create a marine map of the Moheli Marine Park with all the best diving and snorkeling spots / Lease a site on Ouénéfou islet for camping and picnic area development for excursionists
3	Whale and dolphin watching:	List of trained fishermen not available / No information center except in Nioumachoua (Maison de la Baleine - not fully operational)	No information about rates (except for Laka Lodge) and about MEM commission	Guides or community representatives / Fishermen are informal: no possible agreement with hotels or guides	No detailed information available (who, where, when, how, what) / No informative posters in the hotels (even not at the Coelacanth Center)	Nature based tourism / Whales, Megaptera novaeangliae / Dolphins, Stenella longirostris, Stenella attenuata, Peponocephala electra	Draw up a list of trained fishermen / Create a tourist welcome area in existing facilities or in a new building / Create informative posters about whales and dolphins
4	Traditional massages:	No specific massage areas or tables (in the rooms)	Rate is currently according to clients	Reservations done by the hotel	Promotion done by the hotel	Cultural and well being tourism	Possible partnership between Laka Lodge and the Women Association
5	Nesting and baby turtle viewing:	No tourist welcome point (in the turtle house in Itsamia) / Limited accommodation capacity and no camping site	Only guiding fees.	Limited information from hotels (where, best season and hours) / Directly on site	No informative posters and brochures in the hotels (only at the MEM office and on site - nice Kelonia posters) / MEM website	Nature based tourism / Green turtles, Chelonia mydas (all year long) / Hawksbill turtles, Eretmochelys imbricata	Agreement with hotels to have Kelonia and Megaptera posters for tourism promotion / Include information on villages & communities in tourism promotion material
6	Lemur and Livingstone Bat viewing	No tourist information center in the villages / Existing trails are not maintained	Only guiding fees.	Directly on site via community guides	No informative posters and brochures in the hotels	Nature based tourism / Livingstone bats, Pteropus livingstonii / Lemurs, Eulemur mongoz	Develop specific information material for Comoros bats and lemurs (posters and brochures)
7	Excursion to the Bimbini peninsula and the "Ile de la Selle"	No welcome & information center in Bimbini / Fishermen not trained for tourism transport	No formal rates	Directly on site on request / Rarely included in package tour	No information about the site and very limited promotion	Nature based tourism (birds, coral reefs, fishes, etc.)	Draw up a list of trained fishermen in Bimbini / Create a map with best snorkeling spots / Include Bimbini information in guide books

d) Conclusions

It takes more than a nice natural site, the creation of a tourism product or the construction of a hotel to generate tourism revenues or have a profitable business. Like all business activities, the supply needs to meet the demand.

In the Comoros tourism value chain, the existing supply is good enough in terms of quality, however maybe not so good in terms of competitiveness.

In order to improve, the people at the other end of the value chain, those in charge of tourism product management, need to have better access to existing markets, such as business tourists or those visiting friends and relatives, or potential tourists at the level of Tour Operators or independent travellers. For the time being, the Comoros tourism supply at the fisherman level only meets demand occasionally and is therefore not in any position to match its requirements.

The final ranking of ecotourism products that have the most important potential to generate positive economic impacts on fishermen communities are the following (in order of priority):

1. Turtle nesting and viewing, Itsamia Beach (Mwali);
2. Livingstone Bat viewing, Wallah 1 and Wallah 2 (Mwali);
3. Traditional massage activity development in Nioumachoua in partnership with hotels such as Laka Lodge (Mwali);
4. Boat excursions to Moheli Marine Park islets (Mwali) and Safari Blue (sailboat) excursions in partnership with Ndrudé community (Ngazidja);
5. Whale and dolphin watching (3 islands), Northern Tour (Ngazidja), Bimbini and Ile de la Selle excursion (Anjouan).

The Destination Management Organization's (DMO) main priority remains increasing the volume of tourists to reach a minimum critical mass and to generate enough revenue for all stakeholders. For the time being, fishermen see tourism as an activity that cannot generate permanent income. In many cases, tourism revenues are paid directly to community associations: individuals work as volunteers and do not receive any direct financial reward.

In the short term, the selected ecotourism products have to be managed in such a way that they can address issues that are directly linked to basic operational and commercial tasks. The main gaps are listed as follows:

- No compliance with basic tourism standards: site signage, respect of hygiene and security rules, guest information, environmental respect;
- No clear information about rates (and visit fees) and financial conditions (commissions, payment methods) for intermediaries such as guides or hotels;
- No clear information and communication about the product (description, cost, phone number, name of person in charge) to be in a position to work with potential partners such as hotels or inbound agencies;
- No integration in the tourism business community though membership in existing associations and registration in professional directories;
- Limited marketing capacities to target and access independent travellers.

Fisher communities will have to change their tourism operating systems: permanent product managers within communities need to be selected and appointed. They would be able to invest in training and capacity building, facility rehabilitation work and equipment supply. An agreement with communities will be signed for a minimum of two years (delay for investment return) and will include the payment of fees, fixed or a percentage of annual revenue, to the communities. The product manager will then become the formal person in charge, dealing with other tourism stakeholders, such as the DMO, hotels and agencies.

Six hotels (out of 15 that were met) and a few existing inbound agencies already collaborate in the marketing of the above mentioned product but do not necessarily deal directly with the fishermen as individuals. Hotel representatives need to periodically (once a year) experience the product to update existing information, analyze its competitiveness and provide advice for improvements. The two ends of the tourism value chain at the national level have to meet on a regular basis to ensure global coherence.

2.2 SmartFish ecotourism support activities

The programme took into account needs at the level of fisher communities but also at the level of the National Tourism Office in its role as the Destination Management Organization (DMO).

a) Presentation of the SmartFish tourism programme

Timeline: October 2013 to March 2014

Goal: Development and promotion of nature based tourism in the Comoros

Outcome: Increased number of tourists on site and increased number of fishermen share in the value chain

Intervention sites (6): Itsamia, Nioumachoua & islets, Wallah 1 & Wallah 2, Bimbini & Ile de la Selle, Ndrudé Community Reserve

Table 5: SmartFish Ecotourism Action Plan

Activity	Outcome	Activities	Beneficiaries	Budget (USD)
1. Welcome and information services	Better guest information on site and communication with hotels	1.1. Rehabilitation of welcome units	Itsamia, Nioumachoua, Bimbini, Itsounzou, Ndrudé	21
		1.2. Training: marketing capacity, site management		5.34
2. Fishermen capacity building and support	Formal partnership with hotels and inbound agencies	2.1. Fishermen evaluation and capacity building 2.2. Provision of equipment for boat excursions	Nioumachoua, Wallah 2, Wallah 1, Bimbini, Ndrudé	12.26
3. Upgrading of excursion sites and tourism facilities	Better service quality and revenue generation	3.1. Picnic area and tent shelters development	Itsamia, Ouénéfou, Ile de la Selle, Ndrudé	11.2
4. Handicraft selling points and massage centres	Direct tourism impact on women in the community	4.1. Development of handicraft selling points 4.2. Partnership for the development of massage centres	Wallah 1, Nioumachoua	5.3
5. Assistance to promotion plan implementation	Better visibility of tourism products and fishermen as service providers	5.1. Branding and promotion material production (brochures, posters, directory and website)	National and Regional Tourism Offices	2.64
		5.2. E-marketing capacity building		7

The total budget is US \$64.740 (more details are available in Annex B). SmartFish support is highlighted in blue for a total amount of USD 20,240 (management fees not included).

b) Selection of a Local Service Provider

A list of possible associations was available for review before the first mission. Discussions with other donors did not identify any other associations. Meetings were organized with the NGOs and associations given in Table 6.

Most associations in the Comoros work as executive agencies for development projects: their financial reports are geared towards financial and technical partners rather than the members.

AIDE was able to send the required information and documents on time. Ulanga was a good candidate but was not able to provide financial statements as the association did not have many activities over the past two years. The other applicants did not comply with the criteria (years of experience) or did not have an operational team structure.

Table 6: Presentation of associations and NGOs interviewed

	AIDE	Ulanga	ACGT	ACT	Comores Vision
Date of creation	Nov-97	Mar-91	Dec-12	Jun-95	Mar-10
Members	28	n.a.	28: Grande Comore (12), Mohéli (7), Anjouan (8) and Mayotte (1)	21 : Grande Comore (16), Mohéli (1), Anjouan (4)	n.a.
Objective	Environmental protection	Conservation and environmental education	Defend tourism guides interests and define a capacity building program	Representation of tourism private sector	Tourism promotion and social marketing
Activities	Environment consulting, training, assistance to development project	Quarterly newsletter «Les Nouvelles de l'Environnement » since 1993 Archives about the natural and cultural heritage	Develop a guide network	Tourism promotion Training program	Promotion material: brochures, films Guide training program
Main partners or references	IOC, Moheli Marine Park, WWF, E.U., FADC, PCD	Centre de recherche océanographique de Mayotte	National Tourism Office	Capdev, Pro€Invest, UNDP	UNDP
Details	Zaharani Moindjié +269 339 38 91 aidecomores@gmail.com	Ahmed Ouledi +269 333 65 08 aouledi@gmail.com	Omar Toiouil +269 333 38 29 comotour@yahoo.fr	Nafissa Mlanao +269 333 38 87 act.ilescomores@yahoo.fr	Mohamed Saïd Hassane + 269 338 31 15 comoresvision@yahoo.fr
Comments	Mostly focused on environmental issues. Limited tourism experience	Interesting combination of environment and tourism experience.	Newly created association with national network	Newly elected executive team. Ongoing restructuring	Well integrated in the other associations (AIDE, ACT and AGTC)

c) Letter of Agreement (LoA) definition

AIDE's mission was to focus on three main activities: the collection of information for tourism promotion material, the supervision of the Fam. Trip and organization of the tourism workshop.

Table 7: Local service provider mission description

Activities	Tasks	Deliverables
Preparation and supervision of the Fam. Trip, 02-09 September, 8 participants, 7 nights and 8 days	<ul style="list-style-type: none"> • Coordination with tourism offices and associations in each island • Negotiation with tourism partners • Media relations • Logistic management and follow up of site visit 	<ul style="list-style-type: none"> • Participant presence list and evaluation sheet • Photo portfolio and press review • Financial and technical reporting
Organization of the ecotourism workshop & training, 10-11 September, 35 participants, Venue: Cristal Itsandra	<ul style="list-style-type: none"> • Coordination with Tourism Ministry • Finalization of participant list • Agenda management • Procurement (venue, and services) • Media relations • Participant management • Workshop follow up 	<ul style="list-style-type: none"> • Participant presence list and evaluation sheet • Workshop minutes • Photo portfolio and press review • Procurement and financial report
Data collection and information updating <ul style="list-style-type: none"> • Brochures • Website • Posters 	<ul style="list-style-type: none"> • Coordination with Tourism Regional Offices • Identification of information sources • Data collection, validation and processing 	<ul style="list-style-type: none"> • Updated and exhaustive list of tourism stakeholders • Brochure content finalized with regional offices • Formal tourism fact sheets

The Letter of Agreement was signed on 06 August but the mission started a week earlier with data collection for promotional material.

2.3 Destination communication plan

A destination communication plan derives from the marketing and management plan that is jointly implemented by Destination Management Organizations (DMO) such as the Tourism Board or Offices.

In the case of Comoros, the National Tourism Office (ONTC) was formally created in late 2012 and is still working on team building in premises that were financed and built by a Chinese Cooperation in 2011.

a) Destination vision and communication objectives

A tourism stakeholder workshop was organized by the Government in February 2013 and defined the Comoros destination vision and communication objectives for the coming three years as follows:

Vision

In 2015, Comoros is the new Indian Ocean destination, known for its unique nature and landscapes represented by the Karthala Volcano, the Livingstone Bat and the Nioumachoua islets, its cultural heritage, and the gentle hospitality of its people.

Communication objective

Effective come back on the regional and international tourism map

Outputs

Increased notoriety and visibility in travel media (press and magazines, blogs, etc.), the Internet and in tourism brochures intended for targeted markets.

Outcomes

- 5 positive articles about the destination;
- A more important presence in international and regional Tour Operators brochures: more products and more brochures (5 new);
- Positive image of the destination.

Market targets

- French speaking countries (including proximity source markets such as Mayotte and Reunion for short stays)
- Experienced travellers, independent or not, nature lovers, adventure tourists (backpackers, hikers, divers) from Europe, South Africa, Asia and North America.

b) Tourism marketing positioning analysis

Since the international financial crisis, competition on the international tourism market has increased even if the volume of international travel has also increased. To remain competitive, many destinations such as Mauritius and the Maldives have reduced their rates in order to attract a larger number of tourists.

This positioning analysis is based on a comparative analysis with 10 neighbouring or similar destinations, original and/or unknown, in Africa and Asia working with the same markets: France for the Indian Ocean, Europe, North America and emerging source markets such as China, Brazil, Australia and South Africa.

Table 8: Comoros destination positioning analysis

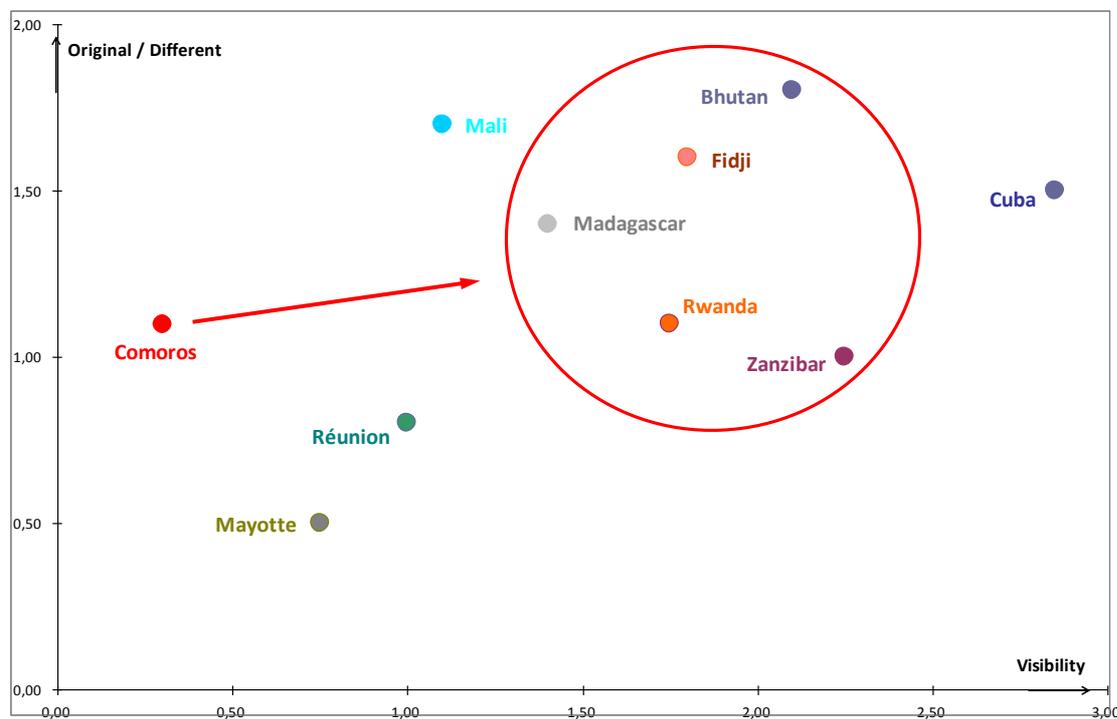
	Arrivals (2012)	Growth %	Main attractions	Market positioning
Comoros	22,771	30%	Biodiversity, cultural heritage	France (incl. Mayotte & Reunion) New & original destination <i>'Undiscovered Beauty'</i>
Bhutan	105,407	64%	Culture and buddhism, nature & trekking	Japan, USA, China, Thailand Cultural tourism <i>'Happiness is a place'</i>
Fiji	660,590	-2%	333 tropical islands, beach resort & water sports	Australia, New Zealand, USA, Ecotourism <i>'Where happiness finds you'</i>
Madagascar	255,942	14%	Landscape & biodiversity, nature & discovery	France & Réunion, Italy, Nature based tourism
Mauritius	965,441	0.08%	Beach resort: sun & sand, shopping	France & Réunion, UK High end beach tourism <i>'It's a pleasure'</i>
Mayotte	45,800	-5%	Discovery, diving & game fishing	France & Réunion VFR, business tourism <i>'L'île au lagon'</i>
Reunion	446,500	-5.20%	Trekking & game fishing, volcano	France, Mauritius Nature based tourism <i>'Un voyage d'émotions'</i>
Zanzibar	168,223	-4%	Beach resort, diving Culture & history	Italy, UK, South Africa Beach tourism
Mali (2011)	160,000	-5.30%	History & culture (heritage sites), trekking (Sahara)	France, USA, Canada, Belgium Tourisme découverte <i>'Une Afrique Authentique'</i>
Rwanda	161,186	1%	Mountain gorillas, Congo Nile trail, National Parks, volcanoes, etc.	USA, India, UK, Belgium Nature based tourism <i>'The land of a thousand hills'</i>
Cuba	2,838,000	4.50%	Sun and beach, cultural tourism	Canada, Argentina, Russia, Beach resort tourism <i>'Auténtica Cuba'</i>

The selected positioning axis is related to the destination **originality** and **visibility** as indicated in Figure 2 below.

The reference countries for the Comoros as a destination are the following:

- Bhutan: very small and unique and focused on cultivating its specialities;
- Rwanda: very small but with an extraordinary image based on its natural heritage (gorillas, lakes and volcanoes) and its historical background (1994 genocide);
- Zanzibar: very small but with a great image built by international Tour Operators on traditional beach tourism combined with history and culture.

Figure 2: Comoros destination market positioning



Positioning strategy

To reach its objectives, the Comoros destination communication should focus on **product differentiation**, especially with regards to other Indian Ocean destinations, and on **increased visibility on the international market**.

Comoros destination branding

The new brand logo gives an idea of a new and different place, beautiful, lively, natural and colorful.



Communication themes

Four main themes were identified to represent the Comoros tourism assets. Related slogans in French and English and formal seals were defined per theme.

1. Nature & Biodiversity: Vivez la Nature / Feel the Nature;
2. Places and Discovery: Un Monde à Explorer / A World to Explore;
3. People & traditions: Sourires & Respect / Smiles & Respect;
4. Culture & History: Histoires Inédites / New Stories to Tell;

Three reference photos per theme are to be selected and included in a portfolio.

Different material will be produced according to each theme and the related photos: posters and postcards.

c) Comoros destination communication plan

The communication plan is based on the conclusions of the tourism stakeholder workshop that took place in February 2013 and on the National Tourism Office action plan. The total estimated budget for three years is US \$750.000.

SmartFish supported activities are highlighted in blue in line with its objectives in terms of impacts on community fishers' livelihoods.

Table 9: Comoros destination communication plan

N°	Activities	Objective	Calendar	Partners / beneficiaries
1	Destination branding: visual identity (logo) and slogan	Recognized brand	Last semester 2013	National Tourism Office / DMO
2	Destination sponsorship: famous national or international artists or reference people / companies	Positive image	Last quarter 2013	National Tourism Office /DMO
3	Promotion material production: Portfolio of 60 photos Promotion film (long and short versions) Sales manual and professional directory Website and related social networks Brochures (electronic and hard copy versions)	Clear and precise marketing information (product description) for international tourism professionals	Late 2013 / early 2014	National Tourism Office / DMO Regional Tourism Offices / Hotels and inbound agencies / Service providers (including fishermen)
4	Tourism e-marketing development and promotion: Website hosting and referencing Tourism stakeholder E-marketing capacity building	Internet visibility and marketing (40% of sales)	First semester 2014	
5	"Pull" actions: Familiarization Trip with market targets Press Trip with specialized travel medias Partnership facilitation program	Positive image and match making with international TO and agencies	2013 and 2014	
6	"Push" actions: participation to international professional travel fairs in partnership with the Vanilla Islands Organization (VIO) Topresa (Paris) in September 2013/14 WTM (London) in November 2013/14 ITB (Berlin) in March 2014 Indaba (Durban) in May 2014 ITM (Antananarivo) in May 2014	Positive image Professional information Market intelligence	2013 and 2014	Comoros National Tourism Office / hotels and inbound agencies

2.4 Familiarization trip to the Comoros, 02 - 09 September

A familiarization trip (Fam. Trip) or an educational tour (Eductour) is an operation aimed at bringing in international tourism stakeholders (Tour Operators, travel agencies, communication agencies, travel media) to a destination so they are able to market or talk about it based on real experience and not just theoretical information.

A Fam. Trip is one of the best methods to show the different aspects of a destination such as the culture and historical aspects that give classical locations such as beaches or mountains a different dimension. It is also an opportunity for Tour Operators to update their country database, to visit new hotels or assess new products, but more importantly to meet potential partners amongst local tourism stakeholders.

A Fam. Trip can be a mix of Tour Operators (TO) and journalists: it can be specifically tailored to certain types of TO according to their source or segment markets or can be solely for travel journalists who would focus more on existing activities, tourism sites and cultural and social issues, that could be used as material for articles.

The proposed Fam. Trip would be the first ever trip of this kind organized in the Comoros.

a) Identification and selection of participants

Four different criteria were defined to identify potential participants:

- Source markets: Indian Ocean, Southern Africa, France and Europe;
- Marketing experience in the Indian Ocean or Eastern Africa;
- Niche markets: nature based, adventure, cultural or beach and sun tourism;
- Agreement with the cost sharing principle: long haul air tickets and US \$300 contribution.

An invitation letter was sent in June to an initial list of 30 international and regional tourism stakeholders (see Table 11). With a 17 percent response rate, a first group of 10 participants emerged at the end of July. A final list of 8 participants was drawn up in mid-August (see Table 12).

Three participants dropped out for the following reasons:

- A one-week Fam. Trip in the Comoros was too long (Alizoa - Réunion);
- A Fam. Trip to Reunion was organized at the same time (Pulse Africa - South Africa);
- The agreement with the airline company for the international air ticket was not reached (Atelier des Voyages - France).

True Blue Travel asked for a specialized surf journalist to come with their representative to take photos and shoot film while he was surfing. SmartFish agreed after the journalist's references were checked.

The Fam. Trip was organized on a cost-sharing basis between the following partners:

- Participants would pay for their international air tickets and provide US \$300 as their contribution;
- National tourism stakeholders would provide free services: hotels in Moroni were responsive, as well as guides who worked pro bono;
- The National Tourism Department would facilitate immigration and custom formalities (VIP room and courtesy visas);
- The National Tourism Board would work closely with AIDE to coordinate activities;
- The SmartFish programme agreed to finance uncovered costs: regional and domestic air tickets, other transport costs, welcome kits, etc.

Table 10: List of potential participants for the familiarization trip

	Contact	Company	Activity	Location	Email
1	Frédérique Ribeaucourt	Acabao	Tour Operator	Paris, France	contact@acabao.com
2	Patrick de Biasi	Alizoa Voyages	Réceptif	St Gilles les Bains, Réunion	pdebiasi@alizoavoyages.com
3	Aymeric Labiche	Ateliers du Voyage / Kuoni	Tour Operator	Paris, France	aymeric.labiche@atlv.fr
4	Céline Boscher-Lalanne	Baobab Tour	Réceptif	Mamoudzou, Mayotte	contact@baobabtour.fr
5	Emmanuel Laurent	Comptoir Corail	Réceptif	St Gilles les Bains, Réunion	comptoircorail@orange.fr
6	Nathalie Bazard	Escapades	Réceptif	Nosy Be, Madagascar	nathalie@escapades.mg
7	Rémy Vanhoolant	Evasion sans Frontière	Réceptif	Diégo Suarez, Madagascar	esfdiego.direct@moov.mg
8	Emilie Filou	Free lance journalist	Travel Book	London, United Kingdom	filouemilie@yahoo.com
9	Gavin's Clemente-Ruiz	Guide du Routard	Travel Book	Paris, France	gavins@routard.com
10	Moreo Marzarotto	Haraka Viaggi & Vacanze	Tour Operator	Vicenza, Italy	moreno@zanzibarvacanze.it
11	Rocco Lastella	Harmattan	Tour Operator	Venezia, Italy	rocco@harmattan.it
12	Xavier de Rohan Chabot	Huwans Clubaventure	Tour Operator	Marseille, France	info@huwans-clubaventure.fr
13	Irina Slesar	Impala Travel	Tour Operator	Kiev, Ukrain	irina.s@kiev.ampalatravel.com
14	Garth Jenman	Jenman Safaris	Tour Operator	Capetown, South Africa	info@jenmansafaris.com
15	Tim Greening	Ke Adventure Travel	Tour Operator	London, United Kingdom	info@keadventure.com
16	Lanto Razafimahatratra	Kijana Tours	Réceptif	Antananarivo, Madagascar	kijana@moov.mg
17	Olivier Cirendini	Lonely Planet (French version)	Travel Book	Paris, France	cirendini@wanadoo.fr
18	Olivia Rasoamanarivo	Madagascar Airtours	Réceptif	Antananarivo, Madagascar	dg@madagascar-airtours.com
19	Geneviève Larcher	Madavoile	Réceptif	Nosy Be , Madagascar	info@madavoile.com
20	Mathilde Hory	Mayotte Vacances	Réceptif	Mamoudzou, Mayotte	mayotte-vacances@wanadoo.fr
21	Tommy Girard	Nomade Aventure/VDM	Tour Operator	Paris, France	acapestan@vdm.com
22	Mary Law-Hune	Papangue Tours	Réceptif	Ste Clotilde, Réunion	contact@papanguetours.com
23	Sandy Wood	Pulse Africa	Tour Operator	Johannesburg, South Africa	info@pulseafrica.com
24	Derek Schuurman	Rainbow Tours	Tour Operator	London, United Kingdom	info@rainbowtours.co.uk
25	Natacha Chanfi	Terre d'Azur	Réceptif	Pamandzi, Mayotte	agenceterredazur.mayotte@yahoo.
26	Greg Bertish	True Blue Travel Adventures	Tour Operator	Capetown, South Africa	info@truebluetravel.co.za
27	Baian Sfar Taleb	TUI France (Nouvelles Frontières)	Tour Operator	Paris, France	bsfar@tuifrance.com
28	Ljeta Putane	Vanilla Travel	Tour Operator	Riga, Latvia	ljeta@vanillatravel.lv
29	Vidette Jorge	Ylang Travel	Tour Operator	Durban, South Africa	info@ylangtravels.co.za
30	Nivo Ravelojaona	Za Tour	Réceptif	Antananarivo, Madagascar	ravelojaona.zatour@iris.mg
Participated	Interested but not available	Not interested			

Table 11: Final list of participants for the familiarization trip

Name / Details	Function	Company / media	Creation	Main markets / targets	Covered destinations	Potential Comorian partners
Conn Bertish	Freelance advertiser	Quirk 101	-	South African magazines and international websites	Surf magazines and blogs	Comoros Tourism Board
Emilie Filou +44 77 79 268 559	Freelance journalist	BBC Travel, Lonely Planet, The Guardian, The Independant	-	Magazines and newspaper: UK, Australia, USA	French speaking Africa, Madagascar	Comoros Tourism Board, Dahari NGO
Greg Bertish +27 82 454 03 98	Managing Director	True Blue Travel Adventures	1998	Surfers, kites, SUP riders, honeymooners South Africa, World	South Africa, Madagascar, Zanzibar, Mozambique, Indonesia, Maldives	Comoros Tourism Board Blue Safari, Moya Beach Hotel
Lanto Razafimahatratra + 261 3311 000 96	Manager	Kijàna Tours	2006	Adventure & hiking Italy, France, UK	Madagascar, Comoros, Mayotte	Tourism guide association, Laka Lodge, ADSEI, Karthala Tours
Ljeta Putane +371 26 59 44 10	Sales & Marketing Manager	Vanilla Travel	1995	Latvia and Baltic countries, Russia, Ukraine	Tanzania, South Africa, Madagascar, Sri Lanka, India (Andaman islands)	Moroni Retaj
Olivia Rasoamanarivo +261 3465 241 92	Managing Director	Madagascar Airtours	1968	Cruise, nature based USA, UK, Japan, China, Singapore	Madagascar and Indian Ocean	Comoros Tourism Board AB Aviation, Laka Lodge, Chams Tour
Rémy Vanhoolant +261 3211 003 96	Director Northern Area	Evasion sans Frontière / Océane Aventure	1993	Discovery & seniors Europe: France, Italy, Belgium, UK, etc. South Africa, Australia	Madagascar	Tourism guide association Les Arcades Hotel, Cristal Itsandra Beach, Jad & Jawa Lodge, Chams Tour
Tommy Girard +33 1 46 33 79 24	Director Africa & Islands	Nomade Aventure / Voyageurs du Monde Group	1975	Adventure, hiking France & French speaking countries (Belgium, Switzerland)	Africa: Benin, Burkina Faso, Ghana, South Africa, Botswana, Ethiopia, etc. Islands: Madagascar, Maldives, New Caledonia	Tourism guide association Moroni Retaj, Blue Safari

b) Familiarization trip agenda

It was acknowledged that one week was quite long for a Fam. Trip but it was not possible to design a shorter agenda that would be able to take in the three islands. Some important tourism assets such as the Karthala Volcano (Ngazidja, two days) or the Livingstone Bat conservation zone in the Moheli Marine Park (4 hour excursion) were left as optional as they would take additional time.

The final agenda was finalized with the Tourism Guide Association and the Tourism Office and was reviewed by the regional tourism departments to ensure it was feasible.

Table 12: Familiarization trip schedule and local partners

Islands	Nagzidja	Mwali	Ndzuani
Duration	3 nights (day 1, 2 and 7)	2 nights (day 3 and 4)	2 nights (day 5 and 6)
Partners: hotels and services providers	Moroni Retaj Hotel Cristal Itsandra Beach Les Arcades Karthala International Comores Tours Association des Guides	Maison de l'Ecotourisme Auberge Les Abou ADSEI	Chams Tours Karama Hôtel
Hotels & restaurants	Jardin de la Paix Jad & Jawa Lodge	Laka Lodge Bungalows Wallah 2 Bungalows Wallah 1	Mapongée Palace Hotel Hôtel Al Amal Moya Beach Hôtel Hôtel le Papillon
Sites / activities	Iconi village & medina Chomoni, Bouni, Ndrudé Dragon Chain, Lac Salé, Trou du Prophète Galawa and Maloudja	Fomboni Itsamia & Boudouni Lake Nioumachoua & islets Wallah 1 & Wallah 2	Mutsamudu medina Dzialandze sacred lake Bambao, Domoni Bimbini and Ile de la Selle
Meetings	National Tourism Dpt Office National du Tourisme	Regional Tourism Dept. Maison de l'Ecotourisme Maison de la Tortue	Regional Tourism Dept. APTA, Dahari NGO, Association Jeunes & Patrimoine

c) Fam. Trip feedback

An evaluation form was given to the participants and a debriefing meeting was held at the end of the last day to prepare the conclusions that were to be delivered during the tourism stakeholders national workshop two days later.

General organization

- The schedule was too heavy for the limited time available and taking into account all the official meetings: the timings were never respected and there were many delays due to air transport and sea conditions. Logistics are a real challenge in the Comoros;
- The schedule was very focused on Tour Operators (hotel visits and meetings) and not appropriate for journalists who were looking for more contact with the population and its living environment;
- The welcome is excellent everywhere and the famed hospitality was confirmed;
- Transport buses were good in Ngazidja and Anjouan but very bad in Mohéli;

- More time for activities is required: diving, trekking (volcano), Livingstone Bat viewing, etc.;
- Excellent ambiance within the participant group: very diverse interests and good exchanges.

Outputs

- Positive global impression about the destination and different image;
- Good contact with potential partners and donors;
- Important photo portfolio and information database for destination promotion.

Destination assessment

Package tours must cover the three islands as they present different aspects of the same destination. The islands are complementary but island hopping must be facilitated (formalities) and improved (domestic flights and boat transfers). It would be difficult to combine the Comoros with other neighbouring destinations (Mayotte, Reunion or Madagascar) because of various logistical challenges.

Destination weaknesses:

- The product is not competitive when compared to neighbouring islands (Madagascar, Zanzibar): the quality of services is poor, supply is limited and expensive (accommodation, food and air transport). Backpackers would be hesitant due to the high cost of air tickets;
- The industry is not structured: missing links such as effective incoming agencies that would work on tourism production and manage risks (high), many informal stakeholders;
- Infrastructures: outdated hotels, poor roads;
- Low level of qualification of staff and guides.

Destination strengths:

- Natural heritage: landscape (volcano, Marine Park, mountains, lakes) and biodiversity;
- Unique, original, safe and nice people;
- Multiple activities: trekking, beach, whale watching, turtle viewing, cultural visits (medina, monuments, etc.).

Best products / sites: Trou du Prophète (Ngazidja), Itsamia and turtle nesting (Mwali), Traditional dances in Nioumachoua (Mwali), Dzilandze Lake excursion (Nzuani).

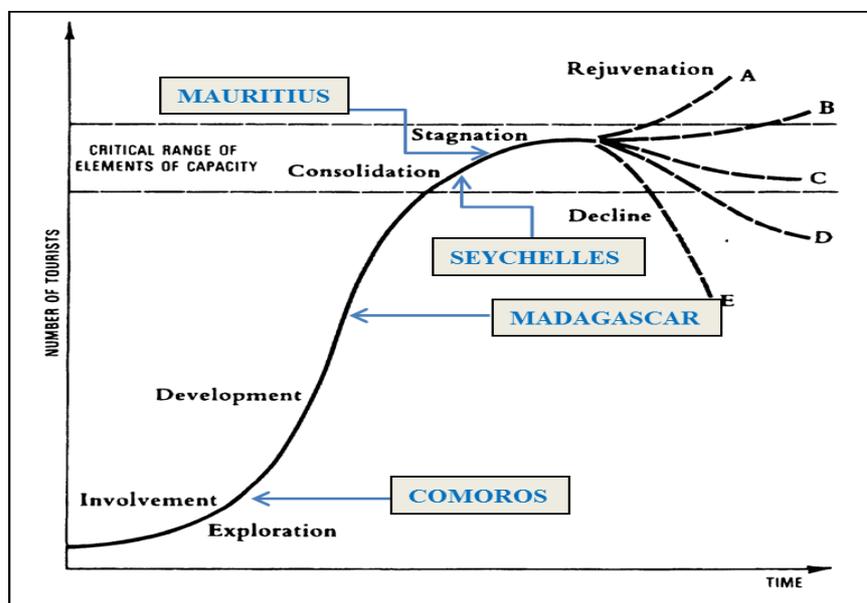
Global recommendations from FamTrip participants

- Organize specific trips for travel journalists instead of combining them with TOs and limit the number of official meetings in future Fam. Trips;
- Invite famous reporters to make a documentary in the Comoros, i.e. Nicolas Hulot, Yann Arthus-Bertrand or David Attenborough;
- Request the organization of famous events: trail races, sports events, fashion shows, etc.;
- Improve the tourism site management system: beach (cleaning), conservation zones and Marine Park (interpretation centres), trails (maintenance);
- Implement training programmes for tourism workers: cooks, drivers, skippers, guides, hotel staff, etc. and coaching programmes for stakeholders;
- Develop a network of hiking trails on each island (along the coast) and in the Marine Park;
- Promote the development of new activities: scuba diving, kayak rental, game fishing, etc.;
- Promote investment in boutique hotels (15 to 20 rooms) or small guest houses (8 to 12 rooms) to upgrade available accommodation;
- Develop agro-tourism products linked to ylang ylang, vanilla or cloves;
Confirm in actions that tourism development is a priority for the Government by implementing and supporting different programmes as above.

2.5 Study tour in Madagascar 30 November to 05 December

The Comoros are in the early stage of its tourism development, in the exploration phase of the destination life cycle, as indicated in the graph below, taken from a World Bank report of the about possible regional integration in terms of tourism in the Indian Ocean. The report also provides an update of tourism in four islands: Comoros, Madagascar, Seychelles and Mauritius.

Figure 3: Four countries mapped according to the tourism destination life cycle



Despite the difference between the size of the two countries, Madagascar is the closest destination to Comoros geographically and also in terms of development, and the two countries also have a historical and cultural proximity. A study tour has been scheduled to allow Comoros tourism stakeholders to meet their colleagues in Madagascar to share experiences and moreover to see how fishermen and fishing villages have become service providers in the tourism sector.

a) Study tour itinerary

Three Malagasy agencies were asked to provide a technical and financial proposal (see summary of proposals in Annex E) taking into account the objectives of the SmartFish programme to highlight alternative income generating activities for fishermen.

Evasion Sans Frontière's (ESF) proposal was selected: it focused on the Northern part of Madagascar between Antsiranana (Diego Suarez) and Nosy Be, with a variety of sites and activities, from resort areas to National Parks including Marine Reserves and meetings with artists and artisans. Their proposal also offered different modes of transport such as Air Madagascar flights, 4x4 vehicles and others such as a dhow. It also included fishing villages such as Ramena or Nosy Komba which have completely metamorphosized through tourism.

b) Identification and selection of study tour participants

The aim of the study tour was to see how various components of the tourism value chain in Northern Madagascar work together, including the Regional Tourism Offices that are in charge of both site management and destination promotion. It was therefore important that the same components of Comoros tourism participate in this study tour: all activities were therefore represented including tourism offices and fishing communities, Ndrudé (Njazidja), Bimbini (Anjouan) and Nioumachoua (Mohéli).

The potential participants who were approached to be part of the study tour agreed with enthusiasm and committed to report back to the supervisory authorities and their colleagues. Most participants were partners in the Fam. Trip that was held in September and / or attended the workshop presentation of the Ecotourism Support Plan in the same month, with the exception of M. Issoufa Saindou, President of the Mohéli Union of Fishermen, based in Nioumachoua.

The group was well informed about the issues that were discussed during the study tour and most participants considered it a logical continuation of SmartFish programme activities for tourism support in 2013. Representatives from each island committed to define projects involving all elements of the tourism value chain on their island, from hotels to service providers, for product development and management impacting fishing communities.

Table 13: Final list of Study Tour participants

Location / coverage	Tourism Dept. / Office	Hotels	Incoming agencies	Guides	Fisher communities
National	Sitti Zene Amouza Ms. Hissane Guy			Omar Toiouil	
Ngazidja (Grande Comore)	Aminata Kaambi	Omar Mouhssine			Ahmed Toybou
Ndzواني (Anjouan)	Badroudine Kassim	Ankili Mahamoud	Mohamed Chamsiddine	Patrice Keldi	Nadjim Houmadi
Mwali (Mohéli)	Madi Toiouilou Daan-Ouni Msoili	Tourki Hamada			Issoufa Saindou

A week before the start of the study tour, the National Director of Tourism and Hospitality (DNTH), Ms. Sitti Attoumani announced her replacement by one of her assistants, Ms. Sitti Zene Amouza. A total of 15 tourism stakeholders from the Comoros participated in the study tour in Northern Madagascar representing the 3 Comoros islands and all activities (see detailed list in Appendix F)

c) The study tour

The study tour took place from 30 November to 07 December; the initial dates were changed due to administrative issues.

A travel agency from Madagascar, Evasion Sans Frontière, was selected to handle the logistical management with the assistance of a Comorian agency, Cadence Travel. The agenda was tight but all planned meetings took place, as it was also an opportunity for Comorian stakeholders to do some networking with Madagascar based tourism stakeholders:

- The Maison de l'Ecotourisme de Mohéli (MEM) agreed to sign a Memorandum of Understanding (MOU) with the Diégo Regional Tourism Office (ORT) for the organization of a Fam. Trip for experience sharing on site management (the ORT manages the Tsingy Rouge and the Mer d'Emeraude sites) and possible combined tours between the two countries;
- In Nosy Be, the ONTC met Roberto Morelli (Kokoa Travel), which represents Costa Croisière in Madagascar. They agreed that Mr Morelli should visit Nagzidja and Anjouan in January to check if they can comply with Costa's requirement for cruise ships;
- The Anjouan Tourism Dept. reported that their Governor was very interested in visiting the North of Madagascar to set up a formal partnership between Anjouan and the Diana Region.

The group also met many Comorians that are based in Madagascar and work in tourism services such as Madagascar National Parks as guides, or hotel and restaurant owners.

Table 14: The study tour agenda

Sites	Antananarivo	From Diego to Ambanja	Nosy Be
Duration	2 nights (day 1 and 7)	4 nights (day 2 to 5)	1 night (day 6)
Hotels and services providers	Hôtel de France Palissandre Hôtel & Spa	Grand Hôtel (Diégo) Ankarana Lodge (Mahamasina) Iharana Bush Camp (Antsaravibe)	Royal Beach Hotel & Spa
Visited hotels & restaurants	Café de la Gare	Royal Sakalava (Sakalava Bay) Le Suarez Hôtel (Ramena) Hôtel Allamanda & La Terrasse des Voyageurs (Diégo)	
Visited sites/ activities	<ul style="list-style-type: none"> Queen's Palace Handicraft market 	<ul style="list-style-type: none"> - Three Bays of Diégo Suarez - Ramena fishermen village - Mer d'Emeraude Marine Reserve - Tsingy Rouge Conservation Zone - Ankarana National Park - Millot Plantation: cocoa and essential oil production 	<ul style="list-style-type: none"> Nosy Komba fishermen village Nosy Tanikely Marine Park
Meetings	<ul style="list-style-type: none"> Analamanga Regional Tourism Office (ORTana) Madagascar National Tourism Office (ONTM) 	<ul style="list-style-type: none"> M. Ali, ex fishermen in Ramena now excursionist to the Mer d'Emeraude Diégo Regional Tourism Office (ORT Diégo) Park management team of the Ankarana National Park 	<ul style="list-style-type: none"> Nosy Be Regional Tourism Office (ORTNB) M. Roberto Morelli (Kokoa Travel), incoming agency of Costa Croisier in Madagascar

d) Study tour feedback

The group was quite surprised to see how organized the Tourism Offices were and how structured tourism activities were in the North of Madagascar: each player knew exactly what they had to do. They were also impressed by the diversity of accommodation units: many were scared when they had to stay in lodges and camps as they were not used to being so close to nature. Participants estimated that Nosy Be was quite developed as a resort tourism destination that is more familiar for them. They were also surprised to see or to hear about animals that are common to Madagascar and do not exist in the Comoros (snakes, crocodiles and pigs) and that insects are not so noisy in the wild. They were also very concerned about the poverty in some rural areas.

The following comments were made during the tour:

- We don't understand why the number of visitors in Madagascar is not higher than it is: why only 255,000 when the country has so much potential?;
- Most hotel owners are foreigners: maybe this is what we should do and recognize that we still have to learn. However, our investment climate is not attractive, even for Comorians;
- The marine guides at the Mer d'Emeraude were very impressive: they prepared the picnic lunch with fish that they just caught in just 40 minutes!
- It is amazing how a typical village (Ampangoriana in Nosy Komba) can become a tourism attraction with very little organization;
- Everything is just more intense in Madagascar: the landscapes, the nature, the music, etc.;
- Maybe we should do more effective conservation on natural sites (through payment of entrance fees) and focus on small details such as handicrafts, or even 2CV cars that do not exist in the Comoros anymore but are designed for tourists in Diégo.

Fourteen participants (out of 15) completed the study tour evaluation form. The overall assessment showed that the participants were satisfied with the organization and content. The group was mostly happy with the meetings and the excursions even if more Business to Business (B2B) meetings could have been organized. The distances between each site were said to be too far.

e) Lessons learned from the study tour

The study tour was useful because the participants were able to identify their priorities and measure the efforts needed in terms of destination management.

Priority 1: Product development and compliance with minimum standards

Comorian tourism products are not up to standard even for backpackers and remain expensive. The example of the picnic lunch in Ndrudé was mentioned again as being too expensive and not competitive compared with Malagasy meals.

Priority 2: Institutional framework and public / private dialogue

Stakeholders from each island still do not agree on how they should work together and on which taxes should finance organizations such as the Tourism Offices and Departments. Even within each island, it is not easy to develop a common vision as dialogue between the public and private sector concerning tourism are non existent (except for Anjouan Island).

Priority 3: Fill in the missing link, effective inbound agencies

Study tour participants realized that tourism skills can be acquired with work experience and regular tourist flows generated by close relationships with inbound agencies that act as permanent assessors. Hotels and tourism service providers mostly rely on them for product marketing and they would just have to focus on their operational tasks.

3. General conclusions and recommendations

The following conclusions were drawn from the gap analysis work and from the Fam. Trip participants' assessment.

As the private sector is the main driver for tourism development, the Comoros will have to work on capacity building of national tourism stakeholders and also on bringing in new reference players with knowledge of the international market and good marketing networks, would work in partnership with local firms to develop new products and strengthen weak links in the value chain.

Table 15: Summary of conclusions and recommendations

Theme	Conclusions	Recommendations
Market access & destination competitiveness	<ul style="list-style-type: none"> Fisher communities have no control on market access and depend on intermediaries (guides, inbound agencies); Costs too high (picnic lunches) or too low (visitor fees): no link with the market situation 	<ul style="list-style-type: none"> Have a marketing capacity building program at fishermen and/or community levels; Define and implement a training program for communities about tourism site management.
Image and communication	<ul style="list-style-type: none"> Information about existing products is not clear and precise : existing trails, duration, level of difficulty, rates, entrance fees, etc.; Destination image not coherent with reality: image deficit and no clear destination positioning 	<ul style="list-style-type: none"> Make an inventory of existing tourism products (including snorkelling/diving sites) and update useful information for the markets; Work on destination branding and positioning
Comoros tourism structure	<ul style="list-style-type: none"> Service providers do not work on a commission system but by subcontracting (non transparent); Stakeholders from the three islands act as if they are different destinations; The DMO will have to focus on value chain integration and bring all stakeholders together to define a clear line for product development 	<ul style="list-style-type: none"> Assist the DMO in stakeholder coordination in the 3 islands; Assist regional tourism offices in developing new products (i.e. coastline hiking trails) with existing hotels, guides and service providers; Include communities and appointed fishermen in the professional tourism directory
Fishermen community integration in the tourism value chain	<ul style="list-style-type: none"> Fishermen work as informal stakeholders and as such are not reliable for international TO and main hotels; Some fishermen were trained as tourism services providers (boat excursion or whale watching) but they were not registered or cannot be identified anymore 	<ul style="list-style-type: none"> Update lists of trained fishermen in the three islands; Evaluate the existing capacity (operational and marketing) to define a custom made programme; Assist communities with the selection of reliable product managers and agree on follow up
Product development with impacts on fishermen communities	<ul style="list-style-type: none"> Fisher communities can generate revenue from other tourism activities than sea or whale watching excursions 	<ul style="list-style-type: none"> Tourism site or activity management: village visits, Ouénéfou islet, coastline excursions, handicraft production,

Competition is strong in the international tourism market and Comoros tourism players will have to work on both vertical and horizontal integration to develop competitive and innovative tourism products and access targeted source markets. Fishermen and fishing communities will play their role and work on gaining recognition as market oriented tourism stakeholders.

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Annex A. Terms of Reference for Consultant

Background

The SmartFish Programme aims to contribute to an increased level of social, economic and environmental development and deeper regional integration in the Eastern-Southern Africa and Indian Ocean Region (ESA-IO) through improved capacities for the sustainable exploitation of marine resources. The programme is funded by the European Union under the 10th European Development Fund and is implemented under the overall responsibility of the Indian Ocean Commission.

Within the framework of SmartFish Result 5, Output 5M3.2 - Support livelihoods diversification and resilience in selected fishing communities; Activity 5M3.2.1 Selected projects supported country project on diversification initiatives and improved resilience in fishing communities; the project is planning to carry out a set of ecotourism promotion and support activities in the Comoros islands in order to provide viable sources of alternative income to the fisheries.

As a preliminary step, in order to ensure the sustainable exit strategy of the project through viable marketing and self-sustained businesses, the project will carry out an ecotourism demand offer study aimed to identify suitable tourist products and organize a familiarization trip for international ecotourism operators to facilitate market linkages and stimulate demand. The study will be presented in a validation workshop and will be accompanied by specifically tailored capacity building activities.

Description of tasks

Under the overall technical supervision of Clotilde Bodiguel, FAO SmartFish CTA, technical support and clearance from John Ryder, Lead Technical Officer – FIPM and under the direct supervision of Davide Signa, SmartFish Fisheries Officer, the consultant will perform the following tasks:

Phase 1: Desk review and field mission (17 days from 15 April to 24 May)

Analysis of existing tourism offers, identification of implementing partners, assessment and selection of tourism products on the three islands:

1. Definition of product selection criteria (service providers and tourism products), methodology and assessment tools/checklist/questionnaires and submission to FAO for technical clearance;
2. Elaboration of a mission plan/calendar;
3. Identification of potential Comorian tourism partners for international tour operators before field mission;
4. Identification of an initial list of at least ten tourism products before field mission;
5. Field mission and product assessment and selection of at least six tourism products for the final list;

6. Evaluation of existing ecotourism offer in the Comoros and gap analysis;
7. Identification of the most suitable implementing partner/service provider for the Letter of Agreement with FAO SmartFish for the organization of the workshop/training, Tour Operator Familiarization Trip (Fam. Trip) and exchange visit/study tour;
8. Discussion and finalization of the above Letter of Agreement with the selected implementing partner/service provider.

Phase 2: Reporting and validation (13 days from 31 May to 28 June)

Elaboration and validation of the plan, workshop/training preparation and facilitation:

1. Elaboration and submission to FAO for technical clearance of an FAO SmartFish ecotourism support plan which will include:
 - findings and recommendations based on the results of the mission, offers and the gap analysis;
 - at least 4 specific priority actions/initiatives targeting MPAs and fishing/coastal communities with work plans and budgets;
 - a draft communication plan for the promotion of ecotourism in the Comoros (familiarization trips, branding ideas, posters, website etc.);
2. Technical preparation and facilitation of:
 - a one-day national validation workshop with all stakeholders (including donors) to present the study/gap analysis results and plan;
 - a two-day ecotourism training course for selected Comorian tourism stakeholders;
3. Close supervision of the service provider for the logistical organization of both the workshop and back-to-back training.

Phase 3: Familiarization trip preparation and supervision (10 days from 03 June to 19 July)

Organization of a one week Fam. Trip to the Comoros in partnership with tourism stakeholders:

1. Elaboration and submission of the final Fam. Trip plan and schedule;
2. Identify and contact airline companies, hotels, inbound agencies, etc. for contributions/sponsorship;
3. Identify and contact Tour Operators (TOs) from Mayotte, Reunion, Madagascar, France, UK, RSA and Italy for participation in the Fam. Trip;
4. Finalization of Fam. Trip programme and participation list;
5. Supervision of Fam. Trip in close collaboration with Comorian stakeholders;
6. Facilitation of three discussions and one-day assessment workshops: Ngazidja, Anjouan & Mohéli.

Phase 4: Remote follow up (5 days in July - August)

Assist with MOU signature between Comorian stakeholders and foreign tourism operators:

1. Follow up contact between Comorian stakeholders and foreign TOs;
2. Assist with the creation of tourism interest groups (associations or other);
3. Assist with the signature of the Memorandum of Understanding (MoU) between TOs and the tourism interest groups;
4. Eventual assistance with the finalization of one additional LoA for SmartFish to support any of the actions proposed in the plan.

Phase 5: Planning and technical facilitation of the exchange visit/study tour (10 days in August - September)

Organization of a one-week visit for selected 12 Comorian stakeholders to selected MPA examples in Madagascar (to be confirmed):

1. Identification, in consultation with FAO and other stakeholders, of the best sites to be visited as best practices;
2. Assist with the selection of Comorian participants;
3. Finalization of the exchange visit plan/calendar;
4. Supervision of the service provider on logistical and organizational aspects;
5. Facilitation of the exchange visit/study/exposure tour.

Phase 6: Final reporting (5 days from 1 - 20 September)

1. Produce a Power Point presentation and a two-page info/policy brief summarizing the main lessons learnt and specific key recommendations for sustainable, market-oriented ecotourism promotion and links to food security, livelihood diversification and fisheries management in Comoros with the possibility for upscale in other countries of the ESAIO Region;
2. Consolidate all documents in a detailed paper/report for publication (at least 30 pages) which includes background of the activities carried out as well as a summary of the major findings/lesson learned from the different activities and final recommendations for future SmartFish and FAO Ecotourism actions, and linkages with fisheries and MPA management and ecotourism interventions in the country.

Annex B. SmartFish ecotourism action plan

Description of item	Unit	Unit cost	No of units	Total Item cost	Sub Total
Activity 1. Assistance to Destination Management Organization					
Activity 1.1 Promotion material finalization					2,640
Transport costs or fuel	Lump sum	300	1	300	
Telecommunications	Lump sum	300	1	300	
Facilitation & coordination meeting costs	Lump sum	300	1	300	
Stationary and photocopies	Lump sum	300	1	300	
Website Conception & hosting	Unit	800	1	800	
AIDE team per diem	Day	80	8	640	
Activity 1.2 Marketing capacity building					7,000
E-tourism training (10 persons per island)					
Trainer fees	Day	250	14	3 500	
International flight	Return ticket	600	1	600	
Domestic flights	Return ticket	150	2	300	
Local transport cost	Day	50	10	500	
Per diem	Day	150	10	1 500	
Participant per diem	Day	15	30	450	
Participant kit	Person	5	30	150	
Activity 1 Total					9,640
Activity 2. Support to fishermen communities					
Activity 2.1. Welcome service management					26,340
Rehabilitation of welcome service units	Unit	3 000	7	21 000	
Training: welcome management	Lump sum	100	7	700	
Fees	Day	150	10	1 500	
Domestic flights	Return ticket	150	2	300	
Transport cost	Day	80	10	800	
Per diem	Day	120	10	1 200	
Training material	Unit	5	42	210	
Participant per diem	Day	15	42	630	
Activity 2.2. Fishermen evaluation for whale & dolphin watching activities					5,840
Evaluators (2 - Ulanga)					
Fees	Lump sum	150	10	1 500	
Domestic flights	Return ticket	150	2	300	
Transport cost	Day	80	14	1 120	
Per diem	Day	150	10	1 500	
Training logistic costs	Lump sum	100	5	500	
Training material	Unit	8	40	320	
Participant per diem	Person / day	15	40	600	
Activity 2.3. Equipment & material supply					6,420
Life jacket	Unit	60	40	2 400	
Radio system	Unit	70	6	420	
Kayak	Unit	600	6	3 600	
Activity 2.4. Picnic area development					11,200
Development of picnic areas (3 tables)	Unit	2 500	4	10 000	
Equipment supply: garbage bin, cleaning tools	Lump sum	300	4	1 200	
Activity 2.5. Handicraft selling points & massage rooms					5,300
Construction of handicraft units (9 m2)	Unit	2 500	1	2 500	
Construction of a massage room with running water	Unit	2 500	1	2 500	
Supply of massage tables & mattress	Unit	300	1	300	
Activity 2 Total					55 100
GRAND TOTAL					64,740

Annex C. List of persons met

Donors

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Annex D. Familiarization trip evaluation form

Debriefing familiarization trip Comoros - September 08 2013

GENERAL ORGANIZATION

1. Did the program meet your expectations?
2. Were the welcome service and logistics management satisfactory?
3. Did you make some interesting contacts? Please provide a list.
4. List 3 points that could be improved/strengthened for future Fam. Trips? (give in order of priority please)

COMOROS DESTINATION ASSESSMENT

1. According to you, is it one destination or three different destinations?
2. Will you present specific Comoros packages or combined packages with some of the following countries: Mayotte, Zanzibar or Madagascar?
3. Your impressions and perceptions of the destination? (according to the source markets you are working on)
4. Your opinion about the Comoros destination positioning?
5. 3 main weaknesses (in priority order please)
6. 3 main strengths (in priority order please)
7. Recommendations for priority issues to be addressed for destination management.

Annex E. Study tour itinerary proposals

	Boogie Pilgrim	Evasion Sans Frontière	Kijana Tours
Tour	Tana – Tuléar – Salary – Tuléar – Anakao – Tana	Tana – Diégo – Ankarana – Ambanja – Nosy Be – Tana	Tana – Antsirabe – Fianarantsoa – Ranohira – Ifaty – Tana
Duration	8 days	8 days	8 days
Transport mode	Tana – Tuléar: flight Tuléar: 4x4 vehicle Tuléar – Anakao: bateau Anakao – Nosy Ve: pirogue	Tana – Diégo: flight Mer d’Emeraude: dhow Diégo – Ankify: 4x4 vehicle Ankify – Nosy Be: speedboat Nosy Be – Tana: flight	Tana – Ifaty: bus for 17 passengers Tuléar – Tana : flight
Program description	Responsible tourism and sea activities	Tourism activity diversity including various types of stakeholders	Experience of the most visited tourism product in Madagascar, the National Road 7 (RN7) from Antananarivo to Tuléar
Protected Areas	Nosy Ve Marine Park	- Ankarana National Park - Nosy Tanikely Marine Park - Mer d'Emeraude Marine Park	- Isalo National Park
Visits and excursions	- Mikea Ecovillage (Salary) - WCS diving center - Sea weeds plantation (Tuléar) - Bel Avenir NGO (Tuléar) - Mangily fishermen village	- Three Bays of Diégo - Ramena fishermen village - Millot plantation (Ambanja): cocoa, essential oils, vanilla - Ampangoriana fishermen village (Nosy Komba)	- Queen Palace (Antananarivo) - Eco Tanana (City promotion) - Antsirabe: thermal cure - Ambositra: handicrafts - Ifaty fishermen village - Bel Avenir NGO (Tuléar)

Annex F. List of study tour participants

N°	Name	Position	Organization	Base	Email
1	Hissane Guy	President	National Tourism Office	Moroni, Ngazidja	presidente.ontcomores@gmail.com
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13	Ahmed Toybou	President	Ndrudé Community Reserve	Ndrudé, Ngazidja	alphonsetoybou@hotmail.fr
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15	Nadjim Houmadi	Member	Bimbini Conservation Zone	Bimbini, Anjouan	iledelaselle@gmail.com

Annex G. Photos

Photo 1: Comoros *Eulemur mongoz*, Ngazidja.



Photo 2: Kids flying kites, Bimbini (Anjouan).



Photo 3: Fishermen, Itsamia (Mwali).



Photo 4: Women working in partnership with Laka Lodge for traditional massages, Nioumachoua (Mwali).



Photo 5: Fam. Trip participants, Retaj Moroni Hotel (Ngazidja).



Photo 6: Turtle and Tommy Girard from Nomade Aventure, Itsamia Beach (Mwali).



Photo 7: Study Tour participants listening to guide explanation in the Ankarana National Park.



Photo 8: Omar Toiouil (Comoros Guide Association) discovering a zebu carriage as transport mode in Ambilobe.



SmartFish is a regional fisheries project managed by the Indian Ocean Commission, funded by the European Union and co-implemented by the Food and Agriculture Organization of the United Nations. SmartFish, which operates in 20 countries throughout the East and Southern Africa - Indian Ocean region, focuses on fisheries governance, management, monitoring, control and surveillance, trade, and food security.

The SmartFish Programme aims to contribute to an increased level of social, economic and environmental development and deeper regional integration in the Eastern-Southern Africa and Indian Ocean Region through improved capacities for the sustainable management of marine resources. Within the framework of this programme selected projects support diversification initiatives and improved resilience in fishing communities.

As part of these initiatives, the programme plans to carry out ecotourism promotion and support activities in the Comoros islands in order to provide fisher communities with viable sources of income as alternatives to fisheries, in coherence with Government policies.

This report provides details of an analysis of the existing ecotourism market in the Comoros that was carried out to identify suitable tourism products that could potentially integrate fisher communities and the results of a familiarization trip for international and regional tourism operators that took place to facilitate market linkages and stimulate demand.



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