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MADAGASCAR
Tourism Sector Review:

Unlocking the tourism potential of an unpolished gem

July 2013

WORLD BANK GROUP

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List of Acronyms and Abbreviations

AM	Air Madagascar
AAVM	Madagascar Association of Travel Agents
ACM	Madagascar Civil Aviation Authority
APMF	Madagascar Ports Authority
COI	Indian Ocean Commission
ESSVA	Ecole Supérieure Spécialisée du Vakinankaratra
EU	European Union
FHORM	Madagascar Federation of Hotels and Restaurants
FTTSA	Fair Trade Tourism Southern Africa
GDP	Gross Domestic Product
GDS	Global Distribution System
GO TO Madagascar	Groupement des Opérateurs Touristiques de Madagascar
IFC	International Finance Corporation
INSTAT	Madagascar Institute of Statistics
INTH	National Institute of Tourism and Hospitality
IVTB	Mauritius Institute for Vocational Training Board (IVTB)
LCC	Low Cost Carrier
MAP	Madagascar Action Plan
MGA	Malagasy Ariary
MICE	Meetings, Incentives, Conferences, and Events
MITD	Mauritius Institute of Training and Development
MNP	Madagascar National Parks
MT	Ministry of Tourism
NGO	Non-Governmental Organization
ONTM	Madagascar National Tourism Office
ORT	Regional Tourism Offices
PEMANDU	Performance Management and Deliver Unit
STA	Seychelles Tourism Academy
TOP	Association of Inbound Tour Operators
TMP	Tourism Master Plan
TTCI	Travel and Tourism Competitiveness Index
TTI	Tourism Training Institute
UNEP	United Nations Environmental Programme
UNWTO	World Tourism Organization
VFR	Visiting Friends and Relatives
VIO	Vanilla Islands Organization
WEF	World Economic Forum
WTTC	World Travel & Tourism Council

Overview

The island nation of Madagascar has a treasure trove of tourism assets, ranging from wildlife viewing to beach tourism to cultural encounters. Yet despite its undeniable tourism potential, its growth has been severely stunted by years of political instability and lack of action on necessary policy reforms and initiatives. While there is much that needs to be done for Madagascar to fulfill its potential in tourism, if adequately addressed, tourism can undoubtedly become a significant contributor to the country's economic revival.

SECTION 1
Introduction to the Madagascar Study

1.1 Background

1. The island nation of Madagascar offers tourists a tremendous diversity of activities: wildlife viewing, scuba diving, scenic hikes, beach tourism, adventure sports, and cultural encounters. This diversity is reflected in the very high average length of stay (21 days) and return rates (40%) among leisure tourists[1]. Yet perhaps Madagascar's most compelling draw for tourists is its distinctiveness. It is famed for astounding biodiversity that includes 93 species of the endemic lemur, 236 species of birds (over 100 endemic), 346 species of reptiles (90% endemic), and over 12,000 species of plants (over 90% endemic)[2]. Madagascar also offers an entirely unique culture—manifested in the island's lauded cuisine, crafts, and architecture – that reflects strong Indo-Malay, African, European, and Chinese influences. As such, Madagascar has a strong appeal for experienced travelers seeking new experiences. It is also makes for an attractive combination with beach-oriented vacations to other Indian Ocean islands as well as game safaris offered in Southern and Eastern Africa.

2. Yet despite Madagascar's undeniable tourism potential, its growth has been severely stunted by political instability. The most recent incident, and one of the most damaging, has been the political unrest that emerged in March 2009. After years of strong growth, international tourist arrivals plummeted 57% in 2009, from 375,010 to 162,697. Since then, however, the sector has displayed impressive resilience. Arrivals have grown by an annual average of 16.3% over the last three years, despite the lack of resolution to the crisis and economic slowdown in Madagascar's principal source markets[3]. This is testament to Madagascar's enduring appeal, as well the sector's ability to adapt to challenging conditions.

3. While there is still a fair degree of political uncertainty, elections have been set for the second half of 2013. If the election process is successful, tourism stakeholders feel that the resulting stability could lead towards strong sector growth. Anecdotal evidence suggests that there is a fair amount of pent up demand, among both international investors as well as tourists that had been deterred by the political crisis.

[1] ONTM (2012) *Réalisation des Enquêtes Visiteurs aux Frontières "Secteur Tourisme": Etude et Analyse des Résultats*, Study conducted by FTHM Conseils and commissioned by ONTM and the World Bank financed Integrated Growth Poles Project, August 2012.
[2] Wildlife Conservation Society (2013) *Where We Work: Madagascar http://www.wcs.org/where-we-work/africa/madagascar.aspx*
[3] Ministere du Tourisme (2013) *Statistiques du Tourisme 2012*, Antananarivo.

4. To tap into this demand, Madagascar's government will need to quickly address some major challenges to the sector. These challenges, described in greater detail in this study, include high price and low reliability of air access; poor road network; policy framework gaps; limitations in tourism infrastructure; and inconsistent quality standards. If adequately addressed, tourism can undoubtedly become a significant contributor to an economic revival, through generating additional income and employment across the country's broad regional and socio-economic spectrum.

5. Following is a snapshot of Madagascar's tourism sector in 2011:

TABLE 1: SNAPSHOT OF MADAGASCAR'S TOURISM SECTOR

Measures	Amount
Number of Visitors	255,942 (2012)
Median Expenditure per Visitor	US$3,250 (2012)
Average Length of Stay	21 days (2012)
Direct Contribution to GDP	US$299 million, 5.4% of Madagascar total (2011)
Total Contribution to GDP	US$1.37 billion,14.9% of Madagascar total (2011)
Direct Contribution to Employment	197,500 or 4.3% of Madagascar total (2011)
Total Contribution to Employment	577,000 (12.5% of Madagascar total (2011)

Sources: Ministry of Tourism (2012b), ONTM (2012), WTTC (2012)

1.2 Objective of the Review

6. This review of the Madagascar tourism sector has been conducted as part of a larger Indian Ocean regional tourism integration study. Similar reports have been prepared for the three other countries considered in this study: Mauritius, Comoros, and Seychelles. Each review provides a concise sector analysis that incorporates an up-to-date overview of the country's tourism performance, highlights some of the sector's key challenges, and provides a select set of recommendations for addressing such challenges. The Madagascar tourism sector review was completed through a combination of desk research and a rapid assessment mission to the country to meet with tourism stakeholders from the private sector, public sector and donor community (see Annex 1 for a full list of stakeholders consulted).

7. The four sector reviews serve as the foundation for a final policy note that addresses tourism at the regional level. The principal objective of the synthesis is to highlight opportunities to strengthen the countries' tourism sectors through regional integration initiatives.

SECTION 2
Overview to the Madagascar Tourism Sector

2.1 Contribution to the Economy

8. While the tourism sector continues to suffer from the political crisis, it is still an important contributor to the country's economy (see Table 2). In terms of GDP, 5.4% can be directly attributed to tourism. This figure rises to 14.9% when factoring in indirect and induced impacts. The tourism sector

employs 4.3% of the country's workforce. When considering jobs indirectly supported by the industry, the figure increases to 12.5%[4].

TABLE 2: TOURISM'S IMPORTANCE TO THE MADAGASCAR ECONOMY (2011) [5]

Economic Indicator	Amount	Percentage of Madagascar Total	Global Ranking (Relative Contribution)
Direct contribution to GDP	1,095 billion MGA (US$ 299 million)	5.4%	**52 (of 181)**
Total contribution to GDP	3,005 billion MGA (US$ 1.37 billion)	14.9%	**46**
Direct contribution to Employment	197,500	4.3%	**67**
Total contribution to cmployment	577,000	12.5%	**54**
Visitor exports	1,397 billion MGA (US$ 637 million)	26.6%	**37**
Capital investment	590.4 billion MGA (US$ 269 million)	15.5%	**26**

Source: WTTC (2012)

9. In terms of international tourism receipts, the Central Bank of Madagascar estimates the country earned MGA 614.18 billion (US$ 280 million) in 2012[6].

2.2 Tourism Sector Performance

ARRIVALS

10. Tourism to Madagascar has been deeply affected by several bouts of political instability over the past decade (see Figure 1). The post-electoral political crisis in 2002, which resulted in severe transportation disruptions, caused international arrivals to drop 64% (from 170,208 in 2001 to 61,674 in 2002)[7]. Afterwards, tourism numbers recovered quickly and soared to a peak of 375,010 in 2008. Yet the political crisis in 2009 caused international arrivals to drop 57% to 162,697. Since then, the industry has demonstrated its resilience once again, with an impressive average annual growth rate of 16.3% over the following three years. Nevertheless, the 255,942 international arrivals figure for 2012 is still far lower than the corresponding figure from 2008.

[4] WTTC (2012) *Travel & Tourism Economic Impact 2012: Madagascar*, WTTC, London.
[5] It should be noted that this data comes from the World Travel and Tourism Council and are different from official government figures.
[6] Ministère du Tourisme (2012b) *Statistiques Tourisme Madagascar 1999 à 2012*, Antananarivo.
[7] Ministere du Tourisme (2011b) *Statistiques du Tourisme 2010*, Antananarivo.

FIGURE 1: INTERNATIONAL TOURISM ARRIVALS (2000-2012)

Source: Ministry of Tourism (2013), Ministry of Tourism (2011)

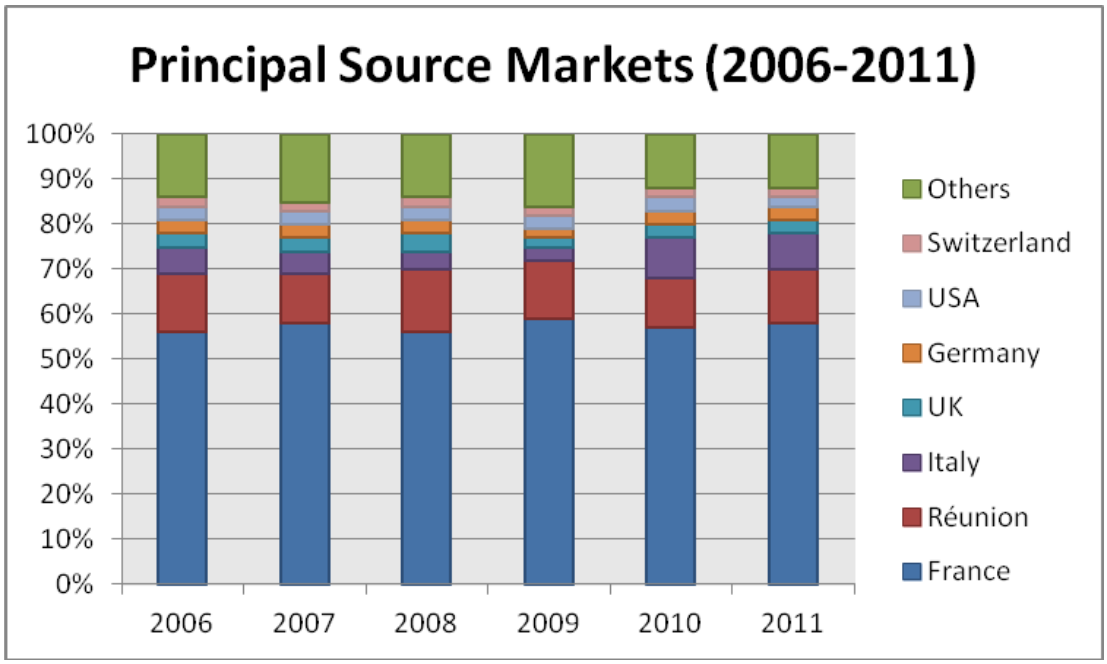
11. In terms of source markets, France has always been dominant. In 2006, it was responsible for 56% of all international arrivals (see Figure 2)[8]. This figure has diverged little in the past five years, as the French market represented 58% of arrivals in 2011. If Réunion[9] is included, the French market accounted for 69% of arrivals in 2006 and 70% in 2011. The next most important source markets in 2011 were Italy (8%), Germany (3%), and UK (3%)[10]. Their figures also remained largely unchanged over the past five years. Overall, source market data point to a notable lack of market diversification.

12. According to a 2012 visitor survey conducted by FTHM Conseils, 53% of tourists come for leisure purposes, 19% for business, and 28% to visit friends or relatives (VFR). The average length of stay for leisure tourists is 21 days – exceptionally high by international standards. The corresponding figure is 19 days for those coming for weddings and or honeymoons, 24 days for business (which is surprisingly high), and 24 days for VFR[11]. Despite global trends towards shorter lengths of stay, these figures have changed little from the time the two previous visitor surveys were conducted. In 2000 and

[8] It should be noted that official Ministry of Tourism source market data contains some flaws. Most notably, it does not incorporate international arrivals from charter flights to Nosy Be. As such, the Italian market is under-represented in these figures.
[9] While tourists from France and Réunion are counted separately, Réunion is an overseas department of France and therefore its inhabitants have French citizenship.
[10] Ministère du Tourisme (2012a) *Statistiques du Tourisme 2011*, Antananarivo.
[11] ONTM (2012) *Réalisation des Enquêtes Visiteurs aux Frontières "Secteur Tourisme": Etude et Analyse des Résultats*, Study conducted by FTHM Conseils and commissioned by the World Bank Growth Poles Project, August 2012.

2008, visitors stayed an average of 20 and 21 days, respectively[12]. The 2012 survey also reports a median expenditure of 2,500 Euros (US$ 3,250) per visitor[13].

FIGURE 2: PRINCIPAL SOURCE MARKETS (2006-2011)



Source: Ministry of Tourism (2012)

AIR ACCESS

13. Madagascar is currently connected with nine global destinations through flights on Air Madagascar (AM) and foreign carriers (see Table 3). It is reasonably well linked regionally, with regular flights to South Africa, Kenya, and all Indian Ocean Community (COI) members except for Seychelles[14]. Yet it only has two connections to Europe: scheduled service from Antananarivo to Paris/Marseille and charter service from Nosy Be to Milan/Rome. In previous years, AM offered regular flights to Milan and Zurich/Munich but those flights ended as the airline started to experience financial difficulties. Overall, Madagascar can be considered one of the least accessible countries in the world: it has a ranking of 193 (out of 211 countries) in the World Bank's Air Connectivity Index (ACI)[15].

[12] ONTM (2009) *Enquete Visiteurs pour la Filière Tourisme á Madagascar 2008*, Study conducted by ATW Consultants and commissioned by the World Bank Integrated Growth Poles Project, February 2009.

[13] The previous studies did not use the same methodology for counting average spend and therefore direct comparisions cannot be drawn.

[14] It should be noted, however, that regional links are only through Antananarivo, with none to other key tourism destinations in the country.

[15] Arvis, J. and Shepherd, B. (2011) *The Air Connectivity Index: Measuring Integration in the Global Air Transport Network*, Policy Research Working Paper prepared by the World Bank, June 2011.

TABLE 3: INTERNATIONAL FLIGHT DESTINATIONS AND FREQUENCIES

Destinations	Carrier(s)	Frequency
Réunion	Air Madagascar (AM), Air Austral (AA)	20/week[16]
France (Paris & Marseille)	AM, Air France, Corsair	11/week
Mayotte	AM, AA	10/week
South Africa (Johannesburg)	AM, South African Airlink	9/week
Mauritius	AM, Air Mauritius	7/week
Kenya (Nairobi)	Kenya Airways	4/week
Comoros	AM	3/week
Thailand (Bangkok)	AM	3/week
Italy (Milan & Rome)	Air Italy (charter), Neos (charter)	2/week

Source: ACM (2013)

TOURISM PRODUCTS

14. Madagascar offers a wide range of natural and cultural tourism products that tend to appeal to "discovery tourists", who travel in order to gain unique experiences. In the 2012 visitor survey, 64.4% of tourists indicated that they had traveled to at least one national park during their trip. The primary attractions of the national parks are the many endemic species of birds and wildlife. Madagascar also offers a tremendous variety of scenic landscapes within its highlands, rainforests, canyons, and deserts. In fact, 63.7% of survey respondents reported that they had taken hikes or nature walks during their trip. Coastal areas and nearby islands also offer sun and sand tourism (63.6% of tourists report having spent time at the beach) as well as world-class scuba diving. Finally, cultural attractions also form an important part of the tourist experience: 70.4% of tourist frequented craft shops and 24.5% visited museums or historic monuments[17].

ACCOMMODATIONS AND TOURISM SERVICE PROVIDERS

15. In 2003, Madagascar had 768 hotels with a total of 9,325 rooms (see Table 4). Over the last decade, these figures have risen 162% and 120%, respectively. Growth even continued through the political crisis of 2009[18]. Similar to accommodations growth patterns, the number of travel agencies and other tourism service providers has increased 131% over the past decade[19].

[16]Flights to Réunion leave from four cities in Madagascar: Antananarivo, Toamasina, Nosy Be and Diego Suarez.

[17] ONTM (2012) *Réalisation des Enquêtes Visiteurs aux Frontières "Secteur Tourisme": Etude et Analyse des Résultats*, Study conducted by FTHM Conseils and commissioned by the World Bank Growth Poles Project, August 2012.

[18] Ministère du Tourisme (2012b) *Statistiques Tourisme Madagascar 1999 à 2012*, Antananarivo.

[19] Ibid.

TABLE 4: MADAGASCAR ACCOMMODATIONS AND TOURIST SERVICE PROVIDER GROWTH (2003-2012)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	Change from '03-'12
Hotels	768	853	937	1015	1181	1292	1396	1573	1693	2010	162%
Hotel Rooms	9,325	10,230	10,879	11,872	13,340	14,493	16,055	17,612	19,112	20,520	120%
Travel Agencies/ Service Providers	553	589	709	755	825	861	902	967	1019	1280	131%

Source: Ministry of Tourism (2013)

16. It is not possible to track accommodation occupancy rates during this period, as official figures are considered to be inconsistent and unreliable. Also, there are no figures available indicating the percentage of hotels, travel agencies, or other tourism service providers that are foreign owned. In Madagascar, no restrictions are placed on ownership of any type of business within the tourism sector although there are some restrictions involving ownership of land.

CRUISE SHIPS

17. Madagascar has significant cruise potential due to its size, potential multiple ports-of-call and great diversity of attractions accessible from its various ports. These include four major ports, namely Antsiranana (Diego Suarez), Nosy Be[20], Toamasina (Tamatave) and Tolagnaro (Fort Dauphin) that receive large cruise ships. In 2010, there were a total of 36 calls in Madagascar (See Figure 3). This was down significantly from the 67 received in 2008, which can be attributed to both the 2009 political crisis and rise of piracy.

FIGURE 3: CRUISE SHIP CALLS AND NUMBERS OF PASSENGERS (2006-2012) [21]

	2006	2007	2008	2009	2010	2011	2012
Antsiranana (Diego Suarez)	8	6	17	6	11	Not available	Not available
Mahajanga (Majunga)	0	1	8	0	1	Not available	Not available
Maroantsetra	0	0	3	0	1	Not available	Not available
Morondava	0	0	2	0	0	Not available	Not available
Nosy Be	25	26	31	13	13	Not available	10
Toamasina (Tamatave)	Not available	Not available	Not available	Not available	8	7	5
Tolagnaro (Fort Dauphin)	3	0	3	0	0	8	8
Toliara	0	2	3	1	2	2	0
Anakao	Not available	Not available	Not available	Not available	Not available	2	2
Vohémar	0	0	0	1	0	Not available	Not available
Total	**36**	**35**	**67**	**21**	**36**	**19**	**25**

Source: Alter Ego Development (2013)

[20] Nosy Be's port is not able to accommodate some of the larger cruise ships that visit the region.

[21] While various authorities indicate that data from cruise ship arrivals are collected, multiple requests for consolidated data yielded no response. The data above was collected manually from individual sources.

NATIONAL PARKS

18. In 2012, there were a total of 149,987 visits to national parks (see Table 5). Of these visits, 76.5% were made by foreigners. While there are a total of 52 national parks managed by Madagascar National Parks (MNP)[22], 96% of all visits are to only ten of the parks[23]. These tend to be those that are most accessible from the capital or near other tourism sites/circuits. Over the past five years, national park visitation trends have for the most part mirrored those of international arrivals. A sharp decline was seen in 2009 (49%), followed by a quick resurgence of visits in 2010 and 2011 (88% and 23%, respectively)[24].

TABLE 5: VISITATION TO NATIONAL PARKS – 10 MOST POPULAR AND OVERALL (2008 - 2012)

	2008	2009	2010	2011	2012
Isalo	33,763	14,234	25,667	32,714	33,559
Andasibe	21,342	10,013	18,636	26,094	25,137
Ranomafana	24,542	12,058	18,318	21,775	22,857
Nosy Tanikely	0	0	15,064	21,692	19,101
Ankarana	11,373	6,525	10,682	13,719	13,730
Montagne d'Ambre	17,432	11,746	16,779	14,977	13,447
Bemaraha	8,685	3,599	8,150	10,093	10,767
Ankarafantsika	5,277	3,004	4,193	4,693	4,494
Masoala	2,392	1,481	2,341	3,010	3,479
Andringitra	4,240	1,701	2,738	3,436	3,416
Total visitation to 10 parks	**129,046**	**64,361**	**122,568**	**152,203**	**149,987**
Total visitation to all 52 parks	**135,630**	**68,755**	**129,376**	**159,129**	**156,943**
Visitation to 10 parks/all 52 parks	95%	94%	95%	96%	96%
Overall park visitation growth rate	15%	-49%	88%	23%	-1%

Source: MNP (2013)

2.3 Institutional Framework

PUBLIC AND PARASTATAL INSTITUTIONS

19. The tourism sector is overseen by the Ministry of Tourism (MT), which is mandated to define, implement, and monitor the national tourism development policy. The Madagascar National Tourism Office (ONTM) is a parastatal body created in 2003 to promote tourism to the country. Its board is comprised of members of both the public and private sectors. Roughly two thirds of its budget currently comes from donors while the other third comes from the tourism levy collected by hotels in the country. It in fact shares proceeds from the tourism levy on an equal basis with the Regional Tourism Offices (ORTs), which essentially serve as ONTM's local affiliates. Madagascar's 18 ORTs primarily engage in tourist information provision, destination management activity, and promotion of their region.

[22] There are an additional 40 protected areas in Madagascar. They are managed by NGOs and private entities. As such, they are not included within the statistics provided in this section.
[23] Madagascar National Parks (2013) *2012 National Park Statistics*, Antananarivo.
[24] The small drop in tourists in 2012 has been the subject of debate. Some reasons that have been offered by officials in MNP include the degradation of road access to some parks (Isalo, Ankarana, Montagne d'Ambre), the decline in cruise tourism (Montagne d'Ambre and Tsimanampetsotse), and increased cost of domestic flights. Visitation figures may also be subject to collection or reporting errors.

20. Another important parastatal body is Madagascar National Parks (MNP), which was created in 1990 to manage the country's network of 52 national parks. Since its inception, MNP has received considerable financial support from a variety of donor organizations[25]. The revenue it generates through park entry fees and limited services only covers around 20% of its operating costs. Finally, the National Tourism and Hospitality Institute (INTH) was created in 1991 as an independent public institution under joint supervision of the Ministries of Tourism and Education. It currently has 350 students enrolled in its diploma and certificate programs offered in the areas of hospitality, catering, and sustainable tourism. It had received support from various donor organizations in the past.

PRIVATE SECTOR ASSOCIATIONS

21. A number of national-level private sector associations have been created to represent the interests of their members. The Madagascar Federation of Hotels and Restaurants (FHORM), with over 350 members, is the largest tourism sector association. Created in 2003, it represents an estimated 40% of the country's hotels and 60% of the country's bed supply. The Association of Inbound Tour Operators (TOP) was created in 1991 and now represents over 60 Madagascar-based tour operators. The Madagascar Association of Travel Agents (AAVM), established in 1981, is the oldest of the associations. It has over 40 members, the vast majority of which being based in Antananarivo. The Federation of Guide Associations was created in 1999 and represents over 140 national and local tour guides[26].

22. In addition to the sector-specific associations, there is one cross-cutting association that represents both accommodations and tour operators: the Madagascar Association of Tourism Operators (otherwise known as GO TO Madagascar). It was formed in 2002 with a small group of businesses in order to undertake more integrated tourism sector activities. It has actively marketed the sector abroad, advocated for the sector within Madagascar, and is now helping create a sustainable tourism label[27] for the country in collaboration with Fair Trade Tourism South Africa (FTTSA).

2.4 Participation in Regional Integration Initiatives

23. Madagascar is one of the participating members of the Vanilla Islands Organization (VIO) initiative, which will likely be officially launched in June 2013. The other participating members are Seychelles, Mauritius, Comoros, Mayotte, and Réunion. VIO aims to raise the profile of the region as well as encourage more multi-country visits. Some of its priority activities will be joint trade fair representation, production of print and electronic promotional materials, advocacy for better air connectivity among its members, and the promotion of cruise tourism to the region.

24. Most tourism stakeholders see several benefits of VIO participation. First, it can be a useful vehicle for reaching emerging markets where ONTM has little presence. Second, VIO could help stimulate the potentially lucrative cruise tourism market. Third, promotion of multi-country visits could help Madagascar tap into new visitor streams—especially tourists currently only visiting Mauritius.

[25] This includes a World Bank-supported conservation project that is set to end December 2014.

[26] Alter Ego Development (2011) *Tourism in Madagascar: Diagnosis and Recommendations*, Study prepared for JICA (Madagascar Office), November 2011.

[27] Sustainable tourism labels and certification programs have the objective of encouraging consumers to support businesses or destinations that ensure sustainable use of natural resources and have strong relationships with local communities. While most of the earlier programs were focused on accommodations, they have since expanded to tour operators, transport providers, and other members of the tourism service value chain.

Nevertheless, Madagascar has shown some reluctance to join regional tourism integration efforts in the past. This can in part be attributed to the belief by manythat its culture, tourism offerings, and priority markets are largely different from the region's small island nations. Additionally, the 2009 political crisis has weakened some of the linkages with other countries in the region.

25. Before the crisis there had been a number of bilateral tourism initiatives between Madagascar and other Indian Ocean countries. These include student and trainer exchanges between INTH and the then-Mauritius Institute for Vocational Training Board (IVTB) [28]; training courses delivered to ORTs by instructors from La Renaissance Hotel School in Réunion; code share agreements with Air Mauritius and Air Austral (Réunion); and technical assistance from Madagascar to Comoros in air handling management. In 2011, the EU-financed Pro€Invest project supported a series of four workshops to exchange tourism development experiences and to create a network of tourism intermediary organizations in the four islands. These initiatives, although successful in attracting short-term engagement, did not lead to specific similar long-term engagement.

SECTION 3
Key Issues

3.1 Policy and Planning

26. The most recent Tourism Master Plan (TMP) was created by MT in 2004[29]. In the short term (1-2 years), the plan emphasizes improvements in quality and sustainability in the country's principal tourism destinations. The medium (3-5 years) to long-term (6-10 years) goals focus on the development of larger "tourism axes" through product diversification and improved transport infrastructure. To achieve this vision, the plan calls for strong investment promotion efforts, including the creation of attractive tax incentives. The 2007 Madagascar Action Plan (MAP) by the IMF identifies tourism as a priority development sector, setting goals of 500,000 international arrivals and receipts of US$750 million by 2012[30]. Implementation of both plans has been limited, particularly after the political crisis as there have been multiple changes at the helm of the Ministry of Tourism[31].

PRINCIPAL CHALLENGES

TDP is Outdated

27. The TMP was written nearly a decade ago within a very different global tourism context. While some of the issues that the TMP highlights are still relevant today, others must be reconsidered in light of important global trends such as the global economic realignment, major shocks within the air transport sector, emergence of new technologies, and the increasing importance of sustainability practices. Further, Malagasy political institutions and policy frameworks have seen important changes since 2004 which need to be reflected.

[28] Since 2009, IVTB has been renamed to the Mauritius Institute of Training and Development (MITD).
[29] GATO AG (2004), *Madagascar Tourism Master Plan*, Plan commissioned by the Madagascar Ministère du Tourisme, Antananarivo.
[30] Republic of Madagascar (2007) *Madagascar Action Plan 2007-2012*, February 2007, Antananarivo.
[31] There have been 11 Ministers of Tourism since 2002.

Lack of Coordination with Other Government Bodies with a Role in Tourism Sector

28. Tourism is a complex industry that cuts across many different sectors. International best practice dictates that a highly integrated approach is required for effective sector stewardship and economic impact. In Madagascar, no formal structures currently exist to facilitate coordination across Ministries. A National Committee for Tourism Development was created in 1991 for this purpose but never became operational[32]. The TMP also called for the formation of an Inter-Ministerial Tourism Committee, but this also never materialized.

Country Still Largely Unprepared for Cruise Tourism

29. As piracy in the Indian Ocean has waned and efforts to improve the situation in Somalia, VIO has ambitious plans for attracting increasing numbers of cruise tourists. Madagascar is seen as an important player for regional cruise tourism, given the great diversity of attractions accessible from its various ports (i.e., Fort Dauphin, Tuléar, Diego Suarez, Tamatave, Nosy Be, and Ile Sainte Marie).

30. Yet the country is not sufficiently prepared for cruise tourism, which requires a clear strategic framework by the relevant government bodies in order to maximize economic impacts while minimizing environmental and social impacts. One problem is limited port infrastructure, which limits the number and size of vessels that can visit. In the 2013 Travel and Tourism Competitiveness Index (TTCI), the World Economic Forum (WEF) ranks Madagascar at a low 121 (of 140) in port infrastructure. Other gaps include poor roads leading from ports to key tourism attractions, limited opportunities for local businesses to offer services to cruise passengers, and a lack of environmental regulations for cruise ships (the WEF TTCI ranks Madagascar even lower at 130 in "stringency of environmental regulation")[33]. Additionally, while all ports have immigration offices present, visa processing[34] at these offices is often slow and inefficient. This serves as a deterrent for cruise ship passengers with limited time on shore.

Slow and Incomplete Statistics Collection Hampers Market Intelligence

31. Tourism statistics are critical for policy makers and businesses to understand tourism sector performance and emerging trends. Most fundamental is reliable immigration data indicating the number of international tourism arrivals. Efforts to collect such data in Madagascar have apparently been fraught with error[35]. Furthermore, rather than being tabulated and reported in real-time, they are only sent to the Ministry of Tourism after a delay of several months.

32. Visitor surveys are also critical for understanding the profile of tourists, as well as their behaviors, expenditures, and level of satisfaction. A comprehensive visitor survey was undertaken in 2012 but after a four-year hiatus[36]. Furthermore, results from the 2012 survey were somewhat

[32] Alter Ego Development (2011) *Tourism in Madagascar: Diagnosis and Recommendations*, Study prepared for JICA (Madagascar Office), November 2011.
[33] WEF (2013) *Travel &Tourism Competitiveness Index Country Profiles: Madagascar*, WEF, Geneva.
[34] It should be noted that visas have been free of cost since 2010.
[35] This includes technological failures, as well as neglecting to collect proper statistics at border posts other than Antananarivo (particularly problematic for non-scheduled charter flights).
[36] The previous survey had been conducted in 2000, meaning eight years passed without conducting any visitor surveys.

skewed as questionnaires were only administered during high season months (July/August)[37]. Best practice dictates that surveys should be administered during both high and low seasons. Other statistical gaps emerge from inadequate collection of hotel occupancy rates and cruise ship arrivals data. This limits ability to effectively track sector performance and impacts widely valued to inform business and policy decisions.

3.2 Human Resource Development

33. Formal jobs in Madagascar's tourism sector tend to be highly sought-after among locals as they pay relatively well[38] and provide opportunities for international exposure. Youth, who make up a large portion of the tourism workforce, find the latter particularly attractive. Women face few gender-related barriers to enter into the sector and are therefore well-represented in the tourism sector. As with many developing countries, most rank-and-file tourism workers are locals while management-level positions in foreign-owned tourism businesses are dominated by foreigners, in particular French, Italians, South Africans and increasingly, Mauritians.

34. Over the past decade, demand for workers has grown nearly as fast as the increase in tourism and hospitality businesses[39]. The increased demand has led to reasonably high wages in the sector, estimated at 40% above the national average[40]. This has in turn contributed to enrollment increases at tourism training institutes (TTIs). As INTH selects only one out of every eight applicants, it is not surprising that a number of private TTIs have opened in Antananarivo in recent years. Outside of Antananarivo, there are private TTIs in Nosy Be[41], Antsirabe, and Majunga. Additionally, the European Union (EU) is now investing in a TTI in Antananarivo in which 250 marginalized youth per year will learn basic hospitality skills and practice them in the school's operational hotel[42].

PRINCIPAL CHALLENGES

Major Gaps in TTI's Programs

35. While the number of TTIs has increased in past years, private sector representatives feel that few are teaching the students the practical skills that are required by the industry. This is largely seen as a result of curricula that do not match industry needs, instructors with limited industry experience, and poorly-equipped facilities. Additionally, most of the TTIs are based in

[37] ONTM (2012) *Réalisation des Enquêtes Visiteurs aux Frontières "Secteur Tourisme": Etude et Analyse des Résultats*, Study conducted by FTHM Conseils and commissioned by the World Bank Integrated Growth Poles Project, August 2012.
[38] Alter Ego Development estimates that formal jobs in the tourism sector pay about 30-40% higher than the average equivalent job in other sectors.
[39] According to Ministry of Tourism figures, the number of tourism sector workers has grown 96% over the past decade.
[40] Alter Ego Development (2011) *Tourism in Madagascar: Diagnosis and Recommendations*, Study prepared for JICA (Madagascar Office), November 2011.
[41] Founded in 2007, the privately-owned school has been heavily supported through the World Bank Integrated Growth Poles (PIC) project.
[42] The one million Euro project aims to provide employment for youth that have few other alternatives. The year-long courses are being designed with assistance from several French hospitality training schools. The EU project will last for three years, after which it hopes the school will be self-sustaining.

Antananarivo and train students to work in city hotels, whereas a significant percentage of the demand comes from lodges and resorts outside the major cities[43].

36. Another challenge comes from the fact that INTH and some of the other schools are highly donor-dependent. INTH is now struggling to maintain the standard of its programs as most donor support was discontinued following the 2009 political crisis. The Ecole Supérieure Spécialisée du Vakinankaratra (ESSVA), a vocational school with a specialization in ecotourism, has also seen support from a variety of European foundations wane in recent years.

Low Quality of Service in Many Establishments

37. Most workers in the sector have not attended a TTI. The number of schools is still relatively small and most are based in Antananarivo, a city which students are often reluctant to leave after graduation. Despite the limited number of TTI-trained workers, few tourism businesses offer formal in-house training programs. Most are unwilling to invest in such programs, as staff turnover in the industry is very high. Typically on-the-job training is informal, often provided by managers with limited hospitality experience. Managerial skills in the sector are also lacking as most hotel operators have no formal training in the sector. Predictably, this has resulted in unprofessional service provision in many tourism establishments. In past years, some donor-sponsored short-courses have been provided in major tourism destinations around the country. While these were well-received by the industry, they have been held irregularly and were, for the most part, discontinued after 2009.

3.3 Access

38. Difficult access is widely viewed by tourism stakeholders as the most important impediment to tourism growth in Madagascar. AM has faced financial difficulties for years, with their problems intensifying after the 2009 political crisis and the subsequent termination of their management contract with German air transport industry experts[44]. AM was then dealt a major blow in April 2011 when its planes were blacklisted by the EU based upon inadequate plane maintenance procedures. The problem has yet to be resolved. Meanwhile, AM has had to engage in expensive leasing contracts in order to maintain its flights to Paris. AM's problems have affected not only international but also domestic flights, which are extremely important for such a large country whose road network is still largely inadequate or in poor condition.

PRINCIPAL CHALLENGES

Domestic Flights are Very Expensive, Unreliable, and also Deemed "Unsafe"

39. AM has essentially maintained a monopoly on domestic flights. This has allowed it to charge extremely high rates (most flights cost between US$380 and US$560 round trip), which are used to offset losses on international routes. These flights represent an inordinately high proportion of tourists' expenditures and thus reduce the competitiveness of what is an otherwise

[43] In South Africa and several other countries, training centers have been created at eco-lodges or bush camps in order to provide practical training that addresses the specific skill sets needed to effectively operate within this type of setting.

[44] In 2002, Air Madagascar contracted Lufthansa Consulting to manage the airline. The contract was cancelled in 2008, after which Air Madagascar hired individual German consultants to fulfill the contract. Most of the consultants were in fact the same individuals that had been working with Lufthansa Consulting.

reasonably priced destination. Furthermore, domestic flights are often subject to lengthy delays or even cancelled altogether. Malagasy tour operators also report the loss of significant amounts of business from foreign tour operators whose insurance parameters will not allow them to send tourists on flights provided by a blacklisted company.

International Medium to Long-Haul Routes are Limited

40. As an island destination, Madagascar is highly dependent upon air service to bring tourists from key source markets. AM's financial troubles have significantly limited their ability to serve traditional source markets or expand to strategic emerging markets. Furthermore, major international airline companies have not been encouraged to initiate new flights[45]. Indeed, AM in its current state would have a difficult time competing with many foreign carriers. This is due to the high leasing fees it must endure because of its blacklisting, high maintenance and fuel costs for its old fleet of aircraft, and a 35% fuel premium due to delinquency in past fuel contracts. Additionally, AM has a particularly bloated payroll. A 2011 Indian Ocean air access study[46] revealed that while AM carries half as many passengers as Air Austral, its workforce is nearly twice the size[47].

Connectivity to Indian Ocean Destinations Limited by High Prices

41. Many tourists are likely deterred from undertaking multi-country trips by the high costs of regional flights. A 2011 Indian Ocean air access study compared the lowest available costs of various flights within the region to flights of similar distances within Europe and the Caribbean. On average, the Indian Ocean flights cost 613% that of the European flights and 182% of Caribbean flights[48].

Poor Road (and Rail) Network Constrains Circuit Development

42. The 2013 WEF TTCI ranks Madagascar 133 (of 140 countries) in terms of ground transport infrastructure[49]. This is corroborated by tourists, who indicated that poor road conditions were by far the country's greatest weakness in the 2012 visitor survey[50]. Limited road connectivity between tourism clusters is in fact one of the main reasons tourists take expensive and unreliable flights. Much progress was made in the several years leading up to the 2009 political crisis. Since then, few new road projects have been undertaken and existing roads are degrading. Madagascar's rail networks are also in poor shape, yet have strong potential to provide tourists with a compelling experience while transporting them to emerging tourism destinations.

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[45] Airlines such as Emirates and Turkish have reportedly paid official visits in recent years to manifest their interest, but flights have not materialized. It is not entirely clear whether these airlines were not officially granted access or whether they were simply discouraged by the political situation in the country.

[46] Constellation Aviation Consulting (2011) *Air Services in the Indian Ocean Region: A Report to the Indian Ocean Commission*, October 2011.

[47] In 2010, AM carried approximately 500,000 passengers and had a workforce of 1,409. In the same year, Air Austral carried approximately 1 million passengers and had a workforce of 770.

[48] Constellation Aviation Consulting (2011) *Air Services in the Indian Ocean Region: A Report to the Indian Ocean Commission*, October 2011.

[49] WEF (2013) *Travel &Tourism Competitiveness Index Country Profiles: Madagascar*, WEF, Geneva.

[50] ONTM (2012) *Réalisation des Enquêtes Visiteurs aux Frontières "Secteur Tourisme": Etude et Analyse des Résultats*, Study conducted by FTHM Conseils and commissioned by the World Bank Growth Poles Project, August 2012.

3.4 Marketing

43. ONTM, the body charged with promoting tourism to Madagascar, has an annual budget of around 0.9 million Euros (US$ 1.17 million). To put this sum in context, Seychelles (which attracted slightly fewer tourists than Madagascar in 2012) spends approximately US$10 million per year on marketing[51]. ONTM's marketing activities include attending international trade fairs, organizing press and tour operator familiarization trips, and producing promotional materials. It has also engaged agencies in France and Germany to provide PR services. ONTM estimates that roughly 50% of its annual budget goes towards promotion in France and Réunion, its top two source markets. The private sector also helps to promote the country through participation in international trade fairs and other tour operator outreach efforts.

PRINCIPAL CHALLENGES

Poor Diversification of Source Markets

44. As seen in Figure 2, 70% of Madagascar's visitors are French (58% from continental France and 12% from Réunion). After a healthy 8% market share for Italy, the next largest markets of Germany and the UK are only contributing 3% of arrivals. While clear cultural and linguistic ties with France and geographic proximity to Réunion make these logical markets, there is surely room for growth from other countries.

45. As can be seen in Table 6, Germany is the world's largest market in terms of expenditures, with USA in second place and the UK in fourth place[52]. All of these markets have large numbers of nature enthusiasts that would likely be interested in experiencing Madagascar's tremendous biodiversity. Also, Madagascar sees very limited visitation from emerging markets in Asia—although some of these may have limited potential in the short term.

TABLE 6: LARGEST TOURISM SOURCE MARKETS BY INTERNATIONAL EXPENDITURES (2011)

Rank	Country	International Tourism Expenditures (USD)
1	Germany	84.3 billion
2	USA	78.7 billion
3	China	72.6 billion
4	UK	51.0 billion
5	France	44.1 billion

Source: UNWTO (2012)

Branding Efforts Have Had Limited Effectiveness

46. Madagascar, as a destination or a brand, is not well known in the global tourism market. One reason is that it tends to change its brand often—sometimes on an annual basis. This is not long enough for the brand to be absorbed within the market. It is also not cost effective nor is it best practice, as marketing materials must be recreated and reproduced in short intervals. To use a regional comparison, Seychelles has effectively utilized the "Another World" brand since

[51] The World Bank (2013) *Indian Ocean Islands Tourism Sector Review: Seychelles*, Unpublished report forming part of Regional Tourism Integration Study, February 2013.
[52] UNWTO (2011) *UNWTO World Tourism Barometer*, July 2012, UNWTO, Madrid.

2006[53]. This year ONTM is rolling out a new brand, which was produced internally given the lack of funds for employing a professional branding agency. It utilizes the slogan: "Authentic Island a World Apart". It is long by industry standards and some stakeholders do not feel that it reflects the country's comparative advantages. Furthermore, it sounds quite similar to Seychelles's slogan[54].

Limited Knowledge of Madagascar Tourism Options among Indian Ocean Tour Operators

47. Madagascar currently receives a limited number of multi-country tourists whose primary destination is Mauritius or Réunion. Yet Madagascar tourism stakeholders articulate that the number could be much higher. One of the key impediments they cite is a lack of knowledge on the part of inbound tour operators in other Indian Ocean countries regarding tourism options in Madagascar. This could also be due to high costs of air travel between Madagascar and neighboring destinations and the relatively poorer tourism infrastructure in Madagascar compared to neighboring destinations. Each of these contributes to less private sector impetus to improve its knowledge of Madagascar's tourism options.

3.5 Product Development

48. Madagascar possesses an impressive set of natural and cultural assets. Yet in some cases, they have not been sufficiently supported to transform into high-quality tourism products. Madagascar had been making strong progress in a number of product development areas, but many of these efforts experienced setbacks with the 2009 political crisis. For example, accommodations investment promotion efforts have largely been put on hold. A slowdown in donor funding for national park infrastructure, both for conservation and tourism purposes, has created noteworthy gaps. Some initiatives to support the development of community and cultural tourism products have also been discontinued.

PRINCIPAL CHALLENGES

Hotel Supply Does Not Always Match Market Demand

49. While the construction of accommodations has continued since 2009, some important potential investors have been deterred and key gaps remain. One example is the large hotel and conference center that could help Antananarivo tap the lucrative MICE (Meetings, Incentives, Conferences, and Events) business. A management contract was signed with Starwood just before the crisis. It was subsequently cancelled by the Ministry of Land Tenure.

50. The most critical gaps, however, are in tourism sites outside of the capital – particularly in or around some of the more popular national parks. In some areas, there are simply not enough establishments to accommodate high season demand. There is also a question of quality, as some areas lack establishments that could satisfy more demanding market segments. Several attempts had been made by the relevant authorities to address these issues. The Ministry of Tourism, in 1999, defined a list of 22 tourism land reserves for concession (RFTs) across the country. Some missteps in implementation led to a cancellation of the program. Then attempts by the IFC to help promote tourism concessions in protected areas were thwarted by the political crisis in 2009.

[53] African Online News (2010) "Indian Ocean Tourism Cooperation Limping", 10/7/10. http://www.afrol.com/articles/36722

[54] It also sounds similar to a slogan briefly used by Mauritius: "Mauritius, a World Apart from the World".

51. Another constraint to investment in new accommodations is the fact the 2008 Investment Law (the law which allows foreigners to own the land upon which they are building, which is critical for attracting some investors[55]) was passed but never implemented. Costly and unreliable utilities can also deter potential investors. Electricity outside of Antananarivo is extremely expensive[56] and subject to frequent outages. In some cases, it can take years even to get a connection. Many hotel owners are therefore forced to buy generators that run on costly diesel fuel. Many parts of the country also lack reliable phone and internet connections. Resolving these constraints depends upon policymakers' willingness and ability to push through clear policy directives.

Community Tourism Has Had Little Market Penetration

52. There are over 20 community tourism products that have been developed in Madagascar. Yet, very few have had commercial success. In fact, the 2012 visitor survey reveals that only 14.2% of leisure tourists participated in any community tourism activity[57]. Among the reasons for their limited market uptake are poor management capacity, limited marketing efforts, distance from principal tourism circuits, and insufficiently trained workers. Some of these shortcomings occur when community tourism enterprises are initiated through NGO projects with life cycles[58] that are insufficient to reinforce the skills which communities need to be successful.

National Parks Underperforming in Revenue Generation and Services Offered

53. Given that 84.8% of leisure tourists visit national parks during their visit, it is critical that a high-quality experience can be offered. Yet while some parks receive high marks from tourists, ratings for others are significantly lower[59]. In discussing park system limitations, tourism stakeholders most often cite insufficient tourism infrastructure and equipment as well as tourism management capacity gaps. Infrastructure and equipment issues are largely budgetary and perhaps not surprising given diminished donor support after the 2009 political crisis. To make up for the shortfall, MNP stopped donating 50% of the park entrance fees to community projects. Nevertheless, MNP is still only able to cover 20% of its operating costs[60].

[55] There has, however, been a promising development of late. In March 2013, the Government decided to provide hotel investors with tax deductions of up to 55% of investments in construction, equipment, and tourism vehicles. This is in addition to an already existing import tax exemption for renewable energy equipment.
[56] In some areas, electricity costs are five to seven times higher than in Antananarivo.
[57] ONTM (2012) *Réalisation des Enquêtes Visiteurs aux Frontières "Secteur Tourisme": Etude et Analyse des Résultats*, Study conducted by FTHM Conseils and commissioned by the World Bank Growth Poles Project, August 2012.
[58] In some cases, these have been even further hastened by the 2009 political crisis.
[59] ONTM (2012) *Réalisation des Enquêtes Visiteurs aux Frontières "Secteur Tourisme": Etude et Analyse des Résultats*, Study conducted by FTHM Conseils and commissioned by the World Bank Growth Poles Project, August 2012.
[60] MNP's annual budget is approximately US$10 million, with estimated revenue of US$2 million.

SECTION 4
Recommendations[61]

TABLE 7: SHORT, MEDIUM AND LONT-TERM RECOMMENDATIONS

Policy Area	Short-Term	Medium-Term	Long-Term
Policy and Planning	• Review tourism master plan	• Establish an Inter-Ministerial tourism committee • Create a cruise tourism development strategy • Upgrade the tourism statistics collection system	
Human Resource Development	• Create partnerships with international TTIs	• Revive quality label in Madagascar, perhaps through a regional initiative	
Access	• Explore options for restructuring Air Madagascar	• Further liberalize air service • Pursue opportunities to improve intra-regional air connectivity	• Create a list of priority tourism roads (and rail lines) to be considered for future projects
Marketing	• Upgrade marketing efforts in English and German-speaking countries • Work through VIO to expand presence in key emerging markets	• Engage in a more comprehensive branding process • Conduct familiarization trips to acquaint Indian Ocean tour operators with Madagascar	• Develop a marketing and promotion plan for specific markets and tourism products
Product Development and Enhancement	• Reinitiate RFT plan with some market-Based alterations • Launch concessions in National Parks	• Create a National-level community tourism association • Conduct a study to determine tourists' willingness to pay higher park fees • Provide tourism capacity building to MNP staff	

4.1 Policy and Planning

SHORT-TERM

Review Tourism Master Plan

54. A new TMP should be created through a highly consultative process. The document should be accompanied by a detailed operational plan that guides its implementation. It is recommended that the plan be set for a period of five to six years given the dynamic nature of the tourism sector. Before commencing the process, two key questions will need to be answered. The first is whether to simply update the 2004 TMP or to create an entirely new plan. The second

[61] Recommendations are divided into three categories: short term, medium term, and long term. Short term initiatives are those in which implementation should begin within the next year. Medium term initiatives are those whose implementation should begin between one and two years from the current date. Long term initiatives are those that would likely commence after two years, although earlier implementation should not be precluded.

question is whether the TMP should incorporate a comprehensive marketing plan. A marketing strategy is needed and should ideally flow from overall objectives and activities defined by the TMP. Yet the process to elaborate the TMP is often lengthy and the sector may be motivated to forge ahead with a marketing plan more immediately.

MEDIUM-TERM

Establish an Inter-Ministerial Tourism Committee

55. Establishment of such a committee would signal a strong government commitment to developing the tourism sector. Members should include the Ministries of Tourism, Transport, Finance, Environment and Forests, Culture and Heritage, Home Affairs, Public Works, and Education. In order to provide the committee with the buy-in and leadership at the highest levels, it would ideally be convened by the Prime Minister's office. The committee should meet at least twice per year, with substantive work carried out between meetings by technical sub-committees formed for priority issues. Following best practices from countries such as Malaysia, Madagascar may also want to consider creating a Performance Management and Delivery Unit (PEMANDU) that can facilitate and monitor implementation, reporting results directly to the Prime Minister. Ideally, the committee would have a close working relationship with the private sector so as to ensure that their concerns are taken into consideration.

Create a Cruise Tourism Development Strategy

56. Following the example of the South Pacific Tourism Organization, it will be important to develop an Indian Ocean Islands cruise development plan. Once that is complete, individual country strategies should be elaborated. Unplanned cruise tourism in some destinations has had detrimental environmental impacts while providing limited local economic benefits. As such, it will be important to clearly define environmental regulations such as the distance from shore that a cruise ship can discharge waste. The strategy should also address how to develop products and activities in each of the ports so as to provide visitors with a unique experience while generating meaningful income for local businesses. The onshore opportunities must then be effectively marketed to cruise ships and their passengers. The strategy should also identify necessary port, road, and general tourism infrastructure needed to accommodate modern cruise boats with their increasing passenger loads. Finally, the issue of visa facilitation should be considered. A system should be in place to ensure that passengers only need to clear immigration at their first Malagasy port-of-call rather than at every port-of-call.

Upgrade Tourism Statistics Collection System

57. Most critically, a partnership should be formed between governmental agencies that collect statistics relevant to the tourism sector. This should include the Ministry of Tourism, Department of Immigration, Institute of Statistics (INSTAT), Central Bank, Civil Aviation Authority (ACM), and Port Authority (APMF). This could in fact be one of the Inter-Ministerial Tourism Committee's technical sub-committees. This should lead to the timely collection and dissemination of vital industry statistics. It has also been suggested that the Ministry of Tourism should place several workers at key border posts to immediately input and transmit arrivals data. As for visitor surveys, these should be conducted at least once every two

years. Data should be collected both during high and low seasons[62]. Also, a more stringent hotel data collection system should be put in place in order to gather reliable occupancy figures. Finally, cruise and national park visitation data should also be generated regularly.

58. Support for these endeavors could potentially be provided from countries such as Seychelles or Mauritius, which have more advanced tourism statistics systems. In fact, all COI countries would benefit from the sharing of statistics that have been collected following similar methodologies. This practice has been in place for many years among members of the Caribbean Tourism Organization[63] and has proven beneficial.

4.2 Human Resource Development

SHORT-TERM

Create Partnerships with International TTIs

59. Capacity building partnerships may be with well-established schools in Europe. However, there also exist a number of reputable institutions in the Indian Ocean region that can provide valuable capacity building opportunities. In fact, INTH had engaged in a series of highly productive exchanges with three regional TTIs in past years: STA, La Renaissance Hotel School in Réunion, and the Mauritius Institute of Training and Development (MITD)[64]. The exchanges generally involved sending INTH instructors for continued training, as well as technical assistance for curriculum development, training material creation, and program administration.

60. These partnerships have not operated since before the 2009 political crisis yet INTH feels that it could benefit from further exchanges. If the new hotel training school comes to fruition, it will also have some capacity needs that can also be addressed through such partnerships. ESSVA could also benefit through exchanges, such as with South African TTIs that focus on wildlife and ecotourism.

MEDIUM-TERM

Revive Quality Label in Madagascar, Perhaps Through a Regional Initiative

61. The current accommodations classification system does not involve regular reviews of properties, thus eliminating an important incentive for maintaining standards. However, another incentive system could be put in place by reintroducing the short-lived yet well-regarded "Welcome to Madagascar" quality label that had been adapted in 2004 following a similar system in Réunion. Supported through a grant from the German government and fees paid by participating businesses, the program utilized anonymous evaluators that scored tourism establishments according to their level of customer service, cleanliness, and food quality.

[62] Ideally data should be collected during the exact same periods every year so as to allow for accurate year-on-year comparisons.
[63] Caribbean Tourism Organization (2013b) *Latest 2012 Tourism Statistics*, http://www.onecaribbean.org/statistics/2012statistics.aspx
[64] MITD was formerly known as the Industrial and Vocational Training Board (IVTB)

62. Of the 80 participants, 30 passed and were able to use the quality label in their marketing materials. All participants, however, were given highly useful reviews indicating training needs and other areas for improvement. It has been suggested that the program could in fact be implemented across the Indian Ocean, thus giving it wider recognition and therefore providing greater value to participants. A quality label called "Hospitality Assured Caribbean", adapted from a UK-based program, has been successfully adopted in seven Caribbean countries[65].

4.3 Access

SHORT-TERM

Explore Options for Restructuring Air Madagascar

63. The fate of AM and tourism in the country are closely linked. Given the profound impact the airline's current status is having on the industry, major changes are required. Options for improving the airline's performance should be explored, particularly through examining successful case studies of other countries' national carriers. One option that has become more prevalent in recent years, especially for small airlines with important long-haul markets, has been the creation of strategic partnerships with larger airlines. A good example of this model comes from the Seychelles. In February 2012, Etihad Airways obtained a 40% stake in the struggling Air Seychelles. As part of the deal, Etihad injected US$20 million into the company and took over management for five years[66]. While AS lost some direct flights to Europe, it has significantly broadened its network and recently returned to profitability[67].

64. Another model used in some other countries, and even by AM in the past, is to contract outside management of the airline. Further study of these and other options will be necessary for determining the best way forward. This should be pursued as a matter of urgency.

MEDIUM-TERM

Further Liberalize Air Service

65. It is important to have more competition both on international and domestic routes, as this leads to a combination of better service, lower prices, and increased route frequencies. In terms of international routes, the government of Madagascar should encourage the entry of reputable international carriers to help the country better connect with strategic tourism source markets. As for domestic flights, routes should ideally be opened to not only national companies but also international operators registered in Madagascar[68].

Pursue Opportunities to Improve Intra-Regional Air Connectivity

66. A number of regional tourism stakeholders, including the COI, have advocated for the creation of a regional low cost carrier (LCC). Such an initiative would undoubtedly give a strong boost

[65] Caribbean Tourism Organization (2013a) *About Hospitality Ensured* http://hospitalityassuredcaribbean.com/about-us/

[66] The management contract includes an optional five-year extension.

[67] Thome, W. (2013) "Air Seychelles Turns the Corner with a Million US Dollar Profit", Blog posting, 3/9/2013, http://wolfganghthome.wordpress.com/2013/03/09/air-seychelles-turns-the-corner-with-a-million-us-dollar-profit/

[68] The Ministry of Transport has indicated that it is open to receiving proposals from airlines interested in flying domestic routes. However, the airlines would also have to service the country's "social routes", which are important for development purposes but unlikely to be profitable given limited demand.

to multi-country visits within the region. However, some question the feasibility of an LCC, both in terms of potential demand as well as political will. Even without an LCC, however, less expensive intra-regional flights could be possible for international tourists through increased flexibility and cooperation among the principal airlines in the region. Some already offer one-way flights between countries at half the cost of a round-trip ticket. Yet these promotional rates are rarely advertised and often cannot be booked by travel agents through global distribution systems (GDSs). Airlines operating in the region should agree on a policy for these flights, widely disseminate the promotional prices within the market[69], and ensure they are incorporated into GDSs.

LONG-TERM

Create a List of Priority Tourism Roads (and Rail Lines) to be Considered for Future Projects

67. While the government is currently prioritizing road construction largely based on agribusiness prospects, tourism development potential should also be considered among the key criteria. As such, a list of priority roads and rationale for each should be generated. This should logically flow from the updated TMP and could even potentially be incorporated into the document. Maintenance, and perhaps even private management, of railway lines should also be considered.

68. A few examples of roads that could help stimulate tourism linkages if upgraded are Diego Suarez-Ambilobe, Diego Suarez-Joffre Ville (including access to Montagne d' Ambre National Park), Tamatave-Fénérive Est (East), and Tuléar-Andavadoaka. In terms of rail, the FCE line takes passengers on a highly scenic journey from the highland town of Fianarantsoa down to the east coast. Yet it rarely runs now, as it is in need of urgent repairs.

4.4 Marketing

SHORT-TERM

Upgrade Marketing Efforts in English and German-Speaking Countries

69. Some members of the private sector believe that Madagascar is investing too much of its marketing budget on France and not enough in larger markets such as the UK, Germany, and USA[70]. Given the size of these markets (see Table 6) and their affinity for nature-based tourism, it would seem that they hold some untapped potential. While distance may make the American market slightly less promising, it includes a large number of highly motivated wildlife enthusiasts/birdwatchers, as well as a significant segment of safari tourists that could be enticed to extend their trips from the African mainland. There also seems to be scope for increases in the other German-speaking source markets such as Austria and Switzerland.

70. Reaching all of these markets is challenging with Madagascar's limited marketing budget (and limited air access). It is therefore recommended that ONTM increase its capacity to engage in more cost-effective online promotion, including through the use of social media. ONTM has initiated such efforts, but thus far only for the French-speaking market.

[69] They may want to restrict these promotional prices during high season months.
[70] Some stakeholders believe that Scandinavian countries, the Netherlands, and Eastern Europe (including Russia) hold considerable potential and should also be targeted.

Work Through VIO to Expand Presence in Key Emerging Markets

71. Based on recent member feedback, it appears that VIO will focus its efforts primarily on emerging source markets such as China, Australia, and Brazil. Madagascar should explore this opportunity, which would enable it to be represented in markets that it would otherwise have difficulty reaching. While Madagascar may not yet be prepared to attract large numbers from these markets, this initiative would allow the country to lay a foundation that may prove quite valuable in the medium to long term. Some relatively short-term dividends, however, could come by selling joint packages with Mauritius or Seychelles to Chinese tourists, who prefer multi-destination holidays.

MEDIUM-TERM

Engage in a More Comprehensive Branding Process

72. Pending the availability of funds, ONTM should initiate a process that will produce a highly-recognizable brand. An experienced destination branding company should be engaged to ensure professional output. Also, a highly inclusive process should be utilized to ensure broad stakeholder buy-in. The brand should ultimately highlight the country's comparative advantages within both the regional and global context. Ideally, it should be utilized for at least five years. Results should include enhanced brand awareness within key markets as well as cost savings by avoiding frequent redesigns and reprints.

Conduct Familiarization Trips to Acquaint Indian Ocean Tour Operators with Madagascar

73. A well-designed familiarization tour[71] could increase country knowledge and comfort levels of tour operators which also operate tours to destinations such as Mauritius, Réunion, and Seychelles. This would ultimately stimulate the promotion and selling of more multi-country packages. The tour could potentially be timed around the annual Antananarivo tourism trade fair, which takes place at the end of May.

4.5 Product Development and Enhancement

SHORT-TERM

Reinitiate RFT Plan with Some Market-Based Alterations

74. If the RFT concession process is well-designed and fully transparent, it is anticipated that experienced hospitality-sector investors from Madagascar and abroad will be attracted. However, the list of concessions created in 1999 will need to be critically reviewed. Investment experts have suggested that some of the sites may not have the appropriate size or location. Additionally, some have become inhabited. As such, a market-based review with tourism investment experts should be first undertaken to make the necessary alterations. It will also be important to advocate for the implementation of the 2008 Investment Law in order to provide land rights and incentives that may be needed to attract highly-desirable investors.

Launch Concessions in National Parks

75. MNP, through funding from the German government, is now in the process of studying possible accommodations concessions inside national parks. While strict environmental and

[71] A complimentary or reduced-rate travel program for travel professionals designed to acquaint them with specific destinations or suppliers and stimulate the sale of travel.

social impact assessments would need to be conducted, concessions could help address two key challenges cited earlier in this review. First, it could help fill some key accommodations gaps near national parks. Anecdotal evidence in Madagascar points to a strong correlation between the opening of high quality accommodations near parks and visitation increases. Second, concession fees for what would likely be more up-market accommodations could represent a sustainable source of much-needed revenues for parks.

MEDIUM-TERM

Create a National-Level Community Tourism Association

76. Umbrella associations have been established in numerous countries in order to address some of the challenges community tourism groups face. Such bodies can offer members with highly valuable benefits that include regular training courses, specific technical assistance, opportunities to exchange best practices, links to tour operators and other marketing channels, and a unified voice for advocacy. They can also help support the creation of new community tourism products. The largest challenge for these umbrella associations is sustainability, as most are initiated through donor support. In the case of Madagascar, there may be some opportunities for the association to become largely self-sustaining. In addition to membership fees, which tend to be small, money could potentially be generated from park entrance fees.[72] It could also be worth exploring channeling to the association a small portion of concession fees paid by tourism investors.

Conduct a Study to Determine Tourists' Willingness to Pay Higher Park Fees

77. Visitors to Category A parks in Madagascar pay approximately US$11 while those visiting Category B parks pay approximately US$4.50. These fees are quite low by international standards, especially in light of the extraordinary biodiversity found in Madagascar's parks. Given the lemurs' strong drawing power, an appropriate benchmark may be Uganda – a premier African primate destination due to the presence of chimpanzees and gorillas. On top of US$35 park entrance fees, visitors must pay US$150 to track chimpanzees in Kibale National Park and US$500[73] to track gorillas in Bwindi Impenetrable National Park[74].

78. It is likely that tourists would be willing to pay more than the current fees, at least for some of the more attractive parks. This possibility, however, would need to be tested with the market. Surveys can be conducted both with individual tourists as well as tour operators to measure their willingness to pay more to visit parks. Revenues from higher entrance fees, if returned to MNP directly, would provide MNP with funds to improve its facilities and ultimately improve the visitor experience.

Provide Tourism Capacity Building to MNP Staff

79. As few officials from MNP have a background in tourism, a series of workshops and short-courses could help equip them with the knowledge and technical insights needed to better

[72] There could be an attempt to reintroduce the practice of donating 50% of park entrance fees to community development projects. Of this amount, a portion could be used to support the community tourism association.
[73] Uganda Wildlife Authority (2013) *Visitor Tariffs* http://www.ugandawildlife.org/about-uganda-master/visitor-tariffs
[74] It should also be noted that top category park entrance fees are lower in Uganda than its main East African counterparts: Tanzania (US$100), Kenya (US$80), and Rwanda (US$50). In Rwanda, gorilla tracking costs US$750 per person.

manage tourism. A basic training needs assessment should be conducted to identify course subject areas. These may include product development, guiding, customer service, visitor center management, and product merchandising.

SECTION 5
Conclusions

80. If elections are held successfully and a new administration takes office later this year, it will need to determine which sectors offer the greatest opportunity for spurring broad-based economic development. In examining the tourism sector, it should recognize its immense potential not only for spurring infrastructure development and generating significant amounts of foreign exchange but also its impact on local economies throughout the country. If well-managed, the labor-intensive tourism sector can generate jobs and additional income opportunities for a large cross section of the country's population – especially youth and women. Further, tourism is also one of the best tools available for conserving unique natural and cultural resources.

81. Based on statistics from years past, there is little doubt that tourism arrivals and receipts can grow significantly in a context of political stability. Just returning to 2008 tourism levels would mean an additional 120,000 tourist arrivals and nearly US$200 million[75] in additional receipts per year[76]. Beyond this evidence there is considerable indication there is the sense that Madagascar tourism could grow considerably more through an improved policy and business enabling environment.

82. When a new administration decides to prioritize tourism, it will be compelled to realize that there are some major constraints that need to be addressed in order to truly revitalize the sector. This will inevitably require some difficult decisions. First and foremost would be changes that result in more reliable and less expensive air transport, especially on domestic routes. The upgrading of roads and port infrastructure development will also be very important for cultivating key market segments as well as ensuring that the benefits of tourism are widespread.

83. Addressing land access issues for foreign investors, along with the implementation of transparent, well-managed concession processes will be instrumental in attracting tourism investors to Madagascar. An increase in the number of quality accommodations should be accompanied by an improvement in service quality standards and delivery. As such, the country's training institutions will need ongoing support. Communities offering tourism will also need assistance to improve their standards, perhaps through the creation of a strong umbrella association. Additionally, facilities should be up-graded

[75] Tourism receipts in 2008 were estimated at US$459.75 million whereas corresponding figures from 2011 were US$262.51 million. The difference between the two is US$197.24 million.
[76] Ministère du Tourisme (2012b) *Statistiques Tourisme Madagascar 1999 à 2012*, Antananarivo.

and expanded in some national parks. When combined, these activities would produce a highly compelling product offering that must then be brought to market through consistent creative branding and strategic marketing.

84. Finally, Madagascar would do well to look past differences with its Indian Ocean neighbors to explore benefits of mutual cooperation. Integration activities recommended within this report include development of a cruise tourism strategy, assistance with and sharing of tourism statistics, exchanges between TTIs, cross-marketing to stimulate multi-country visits, development of a regional quality label, studying opportunities for less expensive air links, and joint promotion in emerging destinations. Indeed it seems all Indian Ocean island economies have an interest in seeing Madagascar develop further as a tourism destination, as it represents a strong complement to their product offerings. As such, Madagascar should take advantage of opportunities provided through organizations such as VIO and COI, which believe that all members will benefit when the profile of the entire region is raised and are working towards this goal.

Annexes

Annex 1: List of Stakeholders Consulted

Name	Position	Organization
Public Sector		
HE Jean Max Rakotomamonjy	Minister	Ministry of Tourism
Mr. Jeannot	Secretary General	Ministry of Tourism
Ms. Nirina Andrianaivo Rakotomalala	Director of Tourism raining	Ministry of Tourism
Mr. Njakanirina David Raveloson Andriambololona	Director of Information Systems	Ministry of Tourism
Mr. Djawhar Mahamad	Director of Standards and Regulations	Ministry of Tourism
Mr. Marcel René Rakotoseheno	General Director of Tourism Development	Ministry of Tourism
HE Benjamin Ramarcel Ramanantsoa	Minister	Ministry of Transport
Mr. Rigobert Tina Rakotoarinirina	Director General of Air, Maritime, and Fluvial Transport	Ministry of Transport
Mr. Jérôme Sambalis	Director General	Ports Authority of Madagascar (APMF)
Mr. Robert Jean Razafy	Director General	Civil Aviation Authority of Madagascar (ACM)
Ms. Voahangy Ravoniharoson	Director of Air Transport	ACM
Parastatal Organizations		
Ms. Vola Raveloson	Executive Director	Madagascar National Tourism Office (ONTM)
Mr. Tsitohaina Andriamanohera	Manager: Tourism Research	ONTM
Mr. Toky Rasoanindrainy	Manager: Partnerships and Training	ONTM
Mr. Hugues Ratsiferana	CEO	Air Madagascar
Ms. Noromanana Rabenitany	Director	National Institute of Tourism and Hospitality (INTH)
Ms. Irène Andreas	Administrator	INTH
Mr. Eric Robson Andriamihaja	Deputy General Manager	Economic Development Board of Madagascar
Mr. Harimisa Razafinavalona	Executive Director	Analamanga Regional Tourism Office (ORTANA)
Mr. Herintsoa Dany Rakotoson	President of the Administrative Council	ORTANA
Mr. Roger Lalao Ranaivosoa Ramanitrarivo	Director	Regional Tourism Office of Vakinankaratra (ORTVAK)
Ms. Rosette Andrianaivo	Executive Director	ORTVAK
Ms. Josiane Rakotonirina	Head of Conservation and Research	Ranomafana National Park
Mr. Donald Rakotomalala	Head of Sector	Ranomafana National Park

Name	Position	Organization
Private Sector		
Ms. Sonja Gottlebe	Manager	Boogie Pilgrim Go To Madagascar
Mr. Davy Marechal	Sales and Market Manager	Madagascar Discovery Agency Go To Madagascar
Ms. Olivia Madhow-Rasoamanarivo	Vice President of the Administration Board	Tour Operator Association (TOP)
Ms. Constance Rafelomanana	Executive Secretary	TOP
Ms. Rita Ravelojaona	President	Madagascar Federation of Hotels and Restaurants (FHORM)
Mr. Ny Aina Ratsimba	Secretary General	FHORM
Mr. Jeannot Jaofetra Ranaivo	Director of Training	Ecole Supérieure Spécialisée du Vakinankaratra (ESSVA)
Mr. Fano Rambolamanana	Tour Guide	Independent
International Development Agencies		
Mr. Eric Rakoto-Andriantsilavo	National Secretary	Integrated Growth Poles Project (IG2P)
Ms. Tiana Murielle Rabarivelo	Manager of Private Sector Projects	Agence Française de Développement (AFD)
Ms. Elise Juguet	Manager of Private Sector and Finance Projects	AFD
Ms. Mylène Faure	Head of Project	GIZ
Ms. Joëlle Rajaonarison	Head of Project, Private Sector Support	European Union

Annex 2: Summary of Key Challenges and Recommendations

Principal Challenges	Recommendations
Policy and Planning	
• TMP is outdated • Lack of coordination with other government bodies with role in tourism sector • Country still largely unprepared for cruise tourism • Slow and incomplete statistics collection hampering market intelligence	**High Priority** • Review tourism master plan • Create cruise tourism development strategy • Establish inter-ministerial tourism committee **Medium Priority** • Upgrade tourism statistics collection system
Human Resource Development	
• Major gaps in TTI's programs • Low quality of service in many establishments	**Medium Priority** • Create partnerships with international TTIs • Revive quality label in Madagascar, perhaps through regional initiative
Access	
• Domestic flights are very expensive, unreliable, and also deemed "unsafe" • International medium to long-haul routes are limited • Connectivity to Indian Ocean destinations limited by high prices • Poor road (and rail) network constrains circuit development	**High Priority** • Explore options for restructuring Air Madagascar • Further liberalize air service • Pursue opportunities to improve intra-regional air connectivity **Medium Priority** • Create list of priority tourism roads (and rail lines) to be considered for future projects
Marketing	
• Poor diversification of source markets • Branding efforts have had limited effectiveness • Limited knowledge of Madagascar tourism options among Indian Ocean tour operators	**High Priority** • Upgrade marketing efforts in English and German-speaking countries • Work through VIO to expand presence in key emerging markets **Medium Priority** • Engage in more comprehensive branding process • Conduct familiarization trips to acquaint Indian Ocean tour operators with Madagascar
Product Development	
• Hotel supply does not always match market demand • Community tourism has had little market penetration • National parks underperforming in terms of revenue generation and services offered	**High Priority** • Reinitiate RFT plan with some market-based alterations • Launch concessions in national parks **Medium Priority** • Create national-level community tourism association • Conduct study to determine tourists' willingness to pay higher park fees • Provide tourism capacity building to MNP staff

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