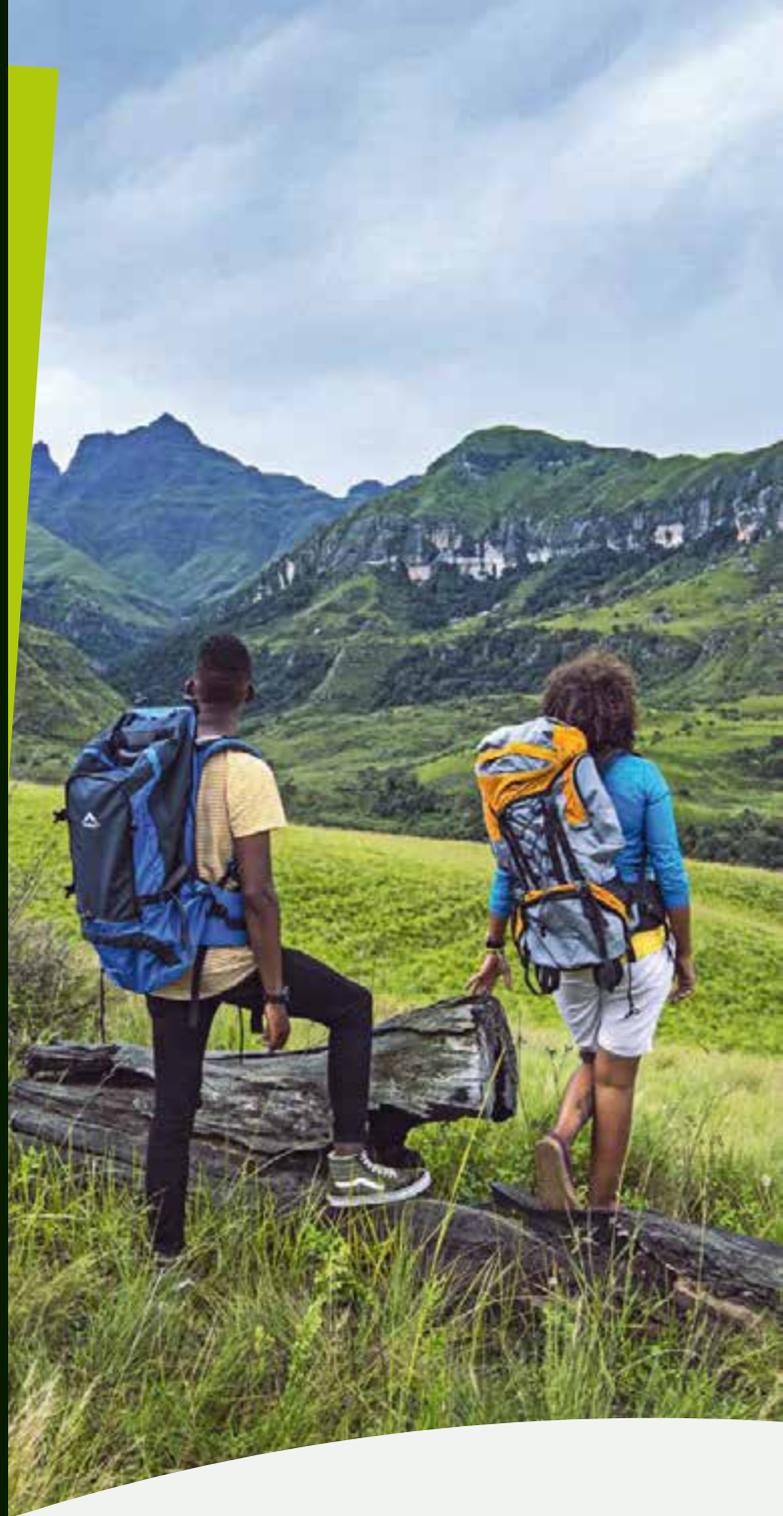


**TOURISM
RECOVERY
PROGRAMME**

**FEMALE.
SUSTAINABLE.
DIGITAL.
TOURISM
IN AFRICA**

Study results for small and medium-sized enterprises (SMEs) from **South Africa, Egypt and Kenya**



Supported by



Bundesministerium für
wirtschaftliche Zusammenarbeit
und Entwicklung



enpact



**Empowering
Entrepreneurship
Initiative**

THE TOURISM RECOVERY PROGRAMME AND THE STUDY

In 2020 enpact and the TUI Care Foundation launched a joint initiative to help tourism businesses during the COVID-19 pandemic. The initiative provides direct support to business owners in developing and threshold countries through an innovative combination of educational content and financial assistance. Two programmes were launched in 2020, helping 330 businesses in Egypt, Ghana, Indonesia, Jordan, Kenya and Mexico to weather the economic impact of the pandemic.

The Tourism Recovery Programme is the Empowering Entrepreneurship Initiative's third project. It is being run by enpact and the TUI Care Foundation in cooperation with the German development agency GIZ on behalf of the Federal Ministry for Economic Cooperation and Development (BMZ). The programme is supporting an additional 415 small and medium-sized enterprises (SMEs) from the tourism sector in Egypt, Mexico, Kenya, South Africa and Tunisia through a combination of mentoring, digital educational provision and direct financial assistance.

The Tourism Recovery Programme commissioned the sustainable tourism organisation, Insitut für nachhaltigen Tourismus, led by Professor Harald Zeiss, to analyse the challenges faced by these SMEs. The researchers' main question was this: How do conditions in Egypt, Kenya and South Africa affect the development of SMEs in the tourism sector? The study is based on expert interviews as well as an online survey of 206 SMEs conducted between November 2021 and February 2022. The selected SMEs are taking part in the Tourism Recovery Programme, have been operating for less than ten years, demonstrate potential for social and ecological innovation, and suffered severe financial difficulties due to the pandemic.

THE SIGNIFICANCE OF TOURISM

Until the COVID-19 pandemic happened, tourism in Africa was enjoying above-average growth compared with other sectors of the economy. However, the impact of the pandemic was devastating: around 30% of jobs were lost and for a while the tourism sector in these countries almost ground to a halt.

SMEs generally play a crucial role: in the countries of the Global South they are present throughout most of the tourism supply chain, organising excursions, operating hotels, accommodation facilities and restaurants, and functioning as suppliers and service providers. They have great potential for innovation and a considerable influence on the tourist destinations they serve.

INSIGHTS

Gender-specific differences	4
Actions for improved sustainability	5
Economic importance	7
Digital marketing channels	9
Major challenges	10
The significance of mentoring	11

ON SITE

Kamaroutes	
The country needs female entrepreneurs	12
Wild Routes Africa	
More resilience for South Africa's tourism	14
Dayra Camp	
Home of cosmopolitan travelers	16
Nubia	
Preserving a millennia-old culture through tourism	18
The African Thrillist	
Kenya unvarnished	20
Hikemaniak	
Kenya is much more than safari	22

RECOMMENDED ACTIONS	24
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HIGHLIGHTS OF THE STUDY

BOLD, AMBITIOUS WOMEN

6.8% of the women surveyed said they wanted to develop new products and services: that is twelve percentage points higher than for the male respondents. The women also expressed a desire to drive forward sustainability and innovation to a greater extent in their business.



76.8%



75.2%

MAJOR BENEFITS FOR LOCAL COMMUNITIES

Three-quarters of respondents said local communities benefited directly from tourism.



92.7%

INTERNATIONAL GUESTS: A DRIVING FORCE FOR SUSTAINABILITY

The survey respondents said environmental protection played an important or very important role for 92.7% of international guests; the figure is 16 percentage points lower for national guests.



97.6%



74.3%

TOURISM SMES RELY ON NON-PUBLIC FUNDING

Three-quarters (74.3%) of the businesses surveyed said their most significant challenge was access to financing.

SUSTAINABILITY: AN IMPORTANT ECONOMIC FACTOR FOR EGYPTIAN, KENYAN AND SOUTH AFRICAN SMES

The respondents said a commitment to sustainability was important or very important for their business's economic situation today (89%) and for its future growth (97.6%).

The full version of the study, including all data, can be accessed at:

bit.ly/africastudy2022



IMPORTANT INSIGHTS FROM THE SUSTAINABILITY STUDY

1 GENDER-SPECIFIC DIFFERENCES

Considerable differences between men and woman are a sign that (financial) support programmes for new businesses should take the founders' gender into account.

FIG 1 Funding a new business with personal savings

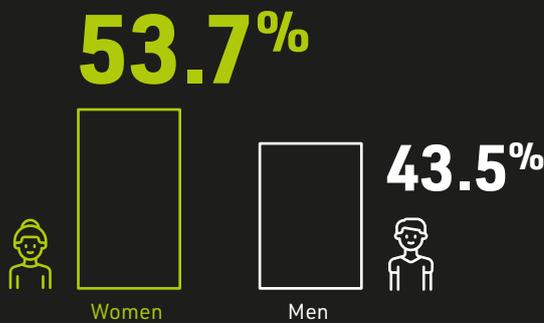


FIG 2 Plans to develop new products and/or services

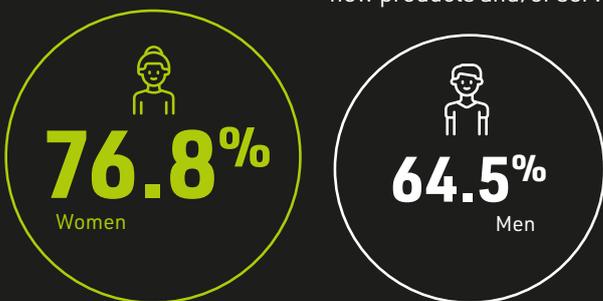
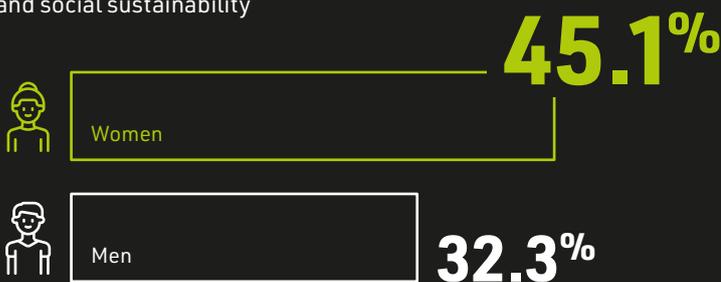


FIG 3 Plans to improve environmental and social sustainability



The majority of female respondents said their main source of funding to start their business was personal savings (53.7%). For the male respondents this figure was lower at 43.5% (FIG 1). This suggests that women have less access to alternative sources of funding. There could also be cultural reasons at play here: according to information gleaned from individual interviews, women seem to receive less support from their families to start and run their own business.

What is more, women believe they face more difficulties in the business environment than men do after starting a company. One-quarter of female respondents said they lacked managerial skills and training opportunities. The figure for the male respondents was much lower at 14.5%. Female business owners were also more likely to see the competition as a problem (28% of female respondents, 17.7% of male respondents).

A similarly problematic aspect for female survey respondents was access to international markets (63.4%). Male respondents did not consider this problem to be as serious (52.4%). In future there must be more focus on development support in this area: support programmes for women-led tourism businesses should concentrate on access to gender-specific educational content, targeted financial assistance and the creation of international networks. This will enhance the potential of female businesses owners in the tourism sector.

Gender-specific measures would not only benefit women – they would strengthen the economy as a whole. When asked about product and service development, the female survey respondents proved to be very open to innovation. 76.8% said they were planning to develop new products and/or services, while only 64.5% of male respondents said the same (FIG 2). When it comes to tapping into new markets the picture is similar: 75.6% of female respondents said they wanted to do this,

whereas only 63.7% of male respondents said the same. These figures clearly demonstrate the great economic potential of female entrepreneurship.

There was a noticeable difference between female and male respondents regarding the planning of **projects to improve environmental and social sustainability. Almost half of female respondents (45.1%)** said they had projects in the pipeline for the next three years. Only one-third (32.3%) of the men said the same **FIG 3**.

Given the attitudes to sustainability in the surveyed countries – discussed in the next section – the female respondents see a lot of business potential in an international customer base. At the same time they demonstrate great willingness to improve the environmental and social conditions in their home countries and to contribute purposefully to the UN Sustainable Development Goals. The male respondents, on the other hand, need more support to recognise the importance of social and environmental sustainability.

2 ACTIONS FOR IMPROVED SUSTAINABILITY

The data collected on Egypt, Kenya and South Africa show that local community involvement is very high. Three-quarters of the survey respondents said they supported local communities. Money generated by tourism creates jobs, pays for further training and contributes to a modest level of prosperity. When it comes to product development, there is considerable potential at the environmental level: although international guests are particularly interested in environmental protection, this was not reflected to the same extent in the survey respondents' attitudes.

The respondents were asked to evaluate the situation regarding sustainability in their country and their local area. **It was surprising how high the level of community involvement of all respondents was** – regardless of their gender or where they were from. More than three-quarters of businesses (75.2%) said their business models supported local communities. **FIG 4**. There was a focus on working together, which was also reflected in the findings from the personal interviews. Almost all the people surveyed said they believed that cooperation with the local population is essential to their business's success.

What is more, 70.9% of respondents said they intentionally trained and employed young people from their local communities.

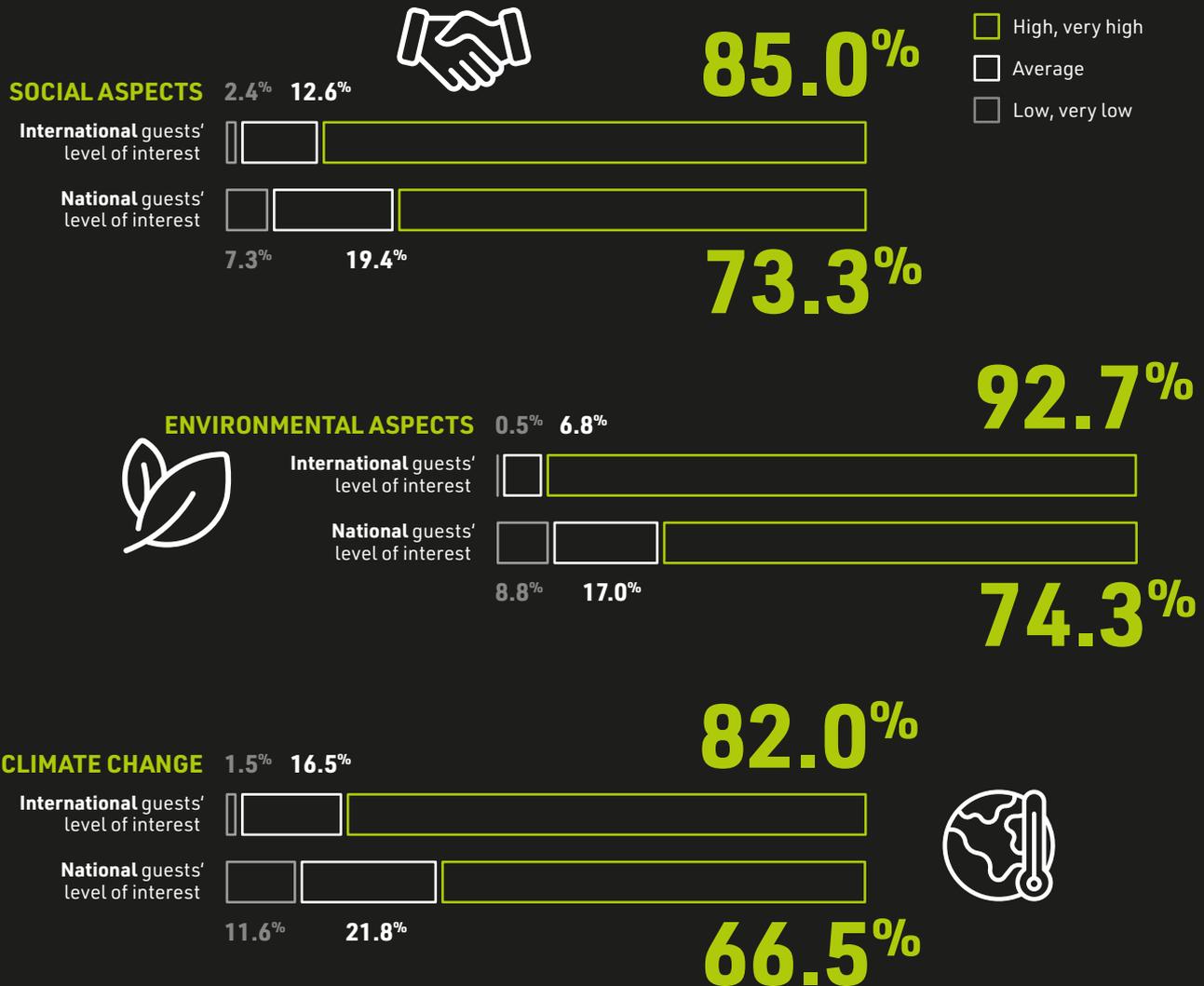
In this way, SMEs can play a key role in local development. This kind of impact is especially important in rural areas, since it creates sources of income that can supplement the income from agriculture, helping prevent growing numbers of people migrating to urban areas. The fact that these business owners choose to help their local communities is very positive. This is an area that support programmes could focus on.

Unfortunately the level of commitment to environmental sustainability is not as high as the level of community involvement. Despite being aware of their international guests' considerable interest in the environment, not even half of the respondents said they were committed to this issue. Research shows that, by international standards, many African countries lag behind in terms of their ecological sustainability.¹

FIG 4 New tourism businesses support local communities



FIG 5 From the surveyed SMEs' perspective: international guests are a driving force for sustainability



Increased support for tourism SMEs – particularly women-led businesses – with a focus on environmental and species conservation and renewable energies would make sense. Support programmes such as the Tourism Recovery Programme provide access to funding and digital training focusing on the value of nature and the economic opportunities that sustainable, nature-based tourism creates. Increasing this kind of support would significantly strengthen the position of local business owners with regard to international market access, competitiveness in the local market and attractiveness to investors.

In the survey respondents' opinion **national and international guests have differing levels of interest in sustainability-related topics** **FIG 5**. 63.1% said that international guests considered environmental protection to be a very important issue. In contrast, they saw national guests as being less interested in environmental protection. Just 46.1% said national guests considered environmental protection to be a very important issue.

3 ECONOMIC IMPORTANCE

The respondents believe that sustainable business practices are already having a considerable impact on their company’s economic situation today – and that this is set to increase in the future. However, the survey results also show that implementing such measures is considered to be difficult.

Knowing that their guests are interested in sustainability, **the SMEs are aware of the large extent to which sustainable practices can contribute to the success of their business.** First of all they were asked to rate the economic importance of sustainability for their business today. The majority – 68.4% – said it was very important and one-fifth (21.4%) said it was important **FIG 6**.

The SMEs were also asked to rate the **importance of sustainability for the future growth of their business.** Here, too, the respondents recognised the key role that sustainability plays. 80.6% of respondents said sustainability was very important and 17% rated it as important.

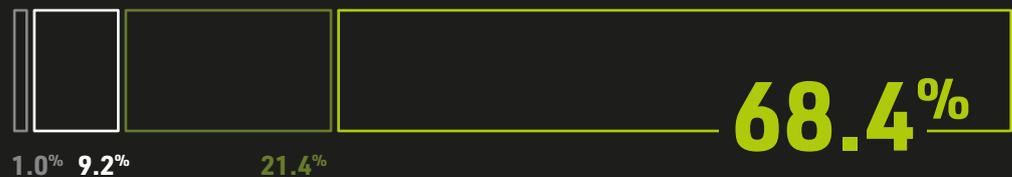
A comparison of the three countries provides interesting insights. Kenyan SMEs considered sustainable development – both now and in the future – to be considerably more important than respondents from the other two countries did. 80.8% of the Kenyan SMEs said it was very important (in comparison, the figure was 55.1% for Egypt and 64.6% for South Africa). 92.3% of the Kenyan respondents said sustainability was very important for future business growth. The figure was 79.7% for the South African respondents and 63.3% for the Egyptian respondents **FIG 7**.

However, the survey results also show that **tourists’ expectations of SMEs** poses a greater problem for Kenyan SMEs than for those from the

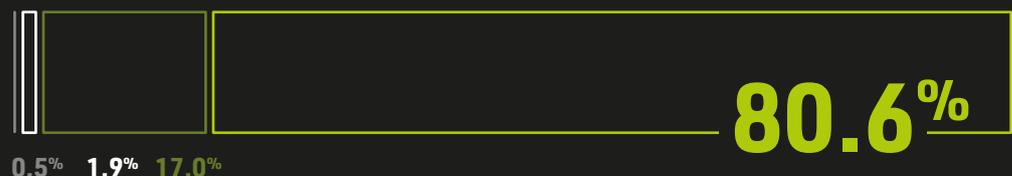
FIG 6 The economic significance of sustainable business is growing



How do you rate the economic importance of sustainability **today** for your business?



How do you rate the importance of sustainability regarding the **future growth** of your business?



Not important Moderately important Important Very important

other two countries. More than one-third (37.2%) of Kenyan respondents selected this aspect when asked about business challenges, compared to only 16.3% of Egyptian and 17.7% of South African respondents **FIG 8**.

The survey results also show that **tourists' expectations of SMEs** regarding sustainability are growing. The high relevance ascribed to sustainability as a factor contributing to an SME's economic situation clearly demonstrates that the respond-

ents are coming under increasing pressure to meet these expectations.

In the case of Kenyan SMEs, in particular, **it is necessary to investigate what the barriers are to implementing sustainability measures**. Since the Kenyan respondents considered guests' expectations to be higher than the other two groups did, this could explain why the Kenyan group was especially concerned about not being able to meet expectations.

FIG 7 The importance of sustainable business for future growth is rated differently in the three countries

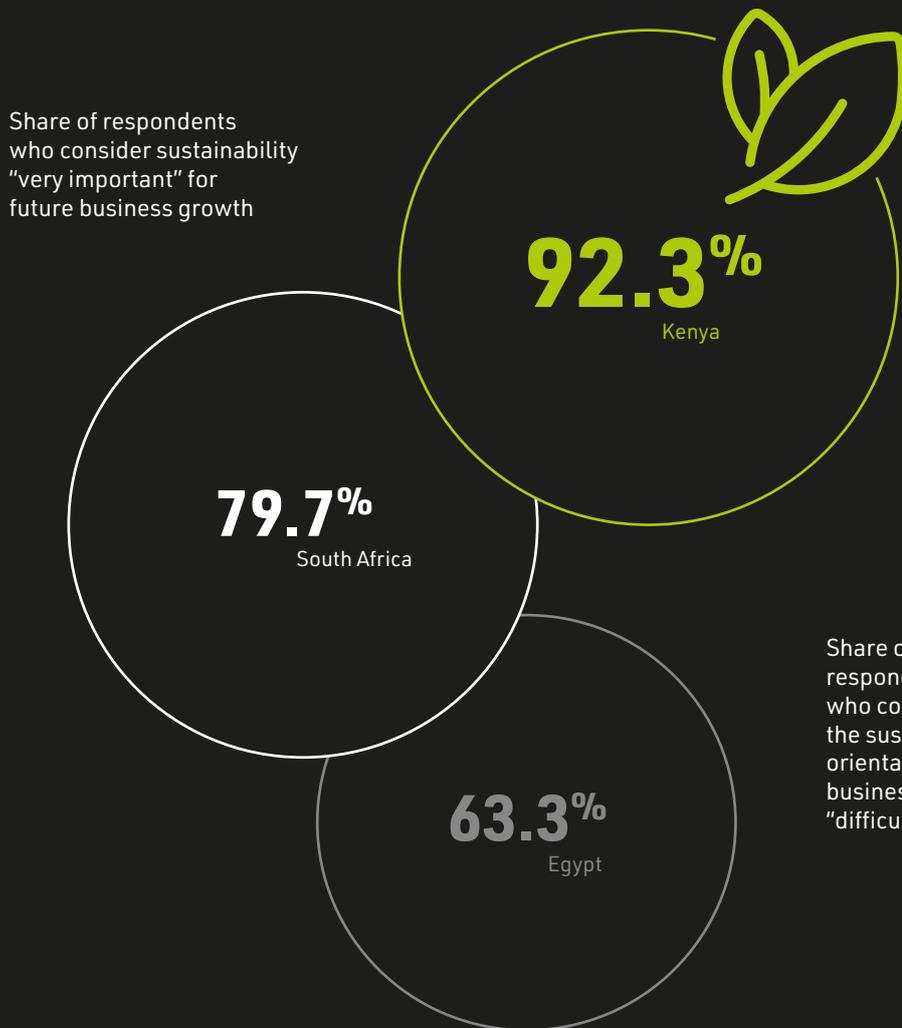


FIG 8 Sustainable orientation of business activities – a particular challenge in Kenya

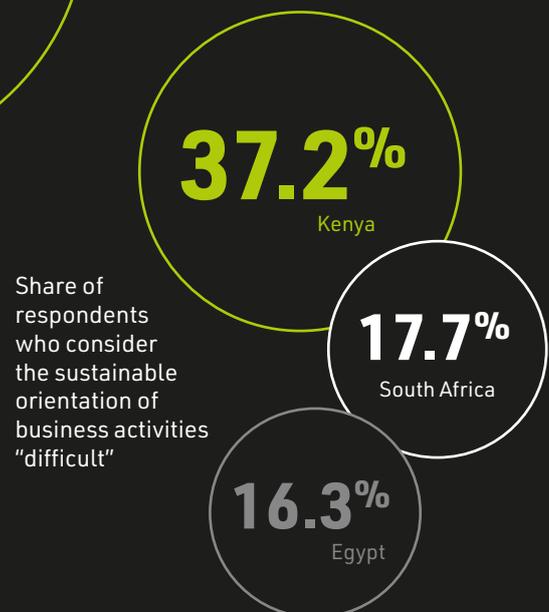
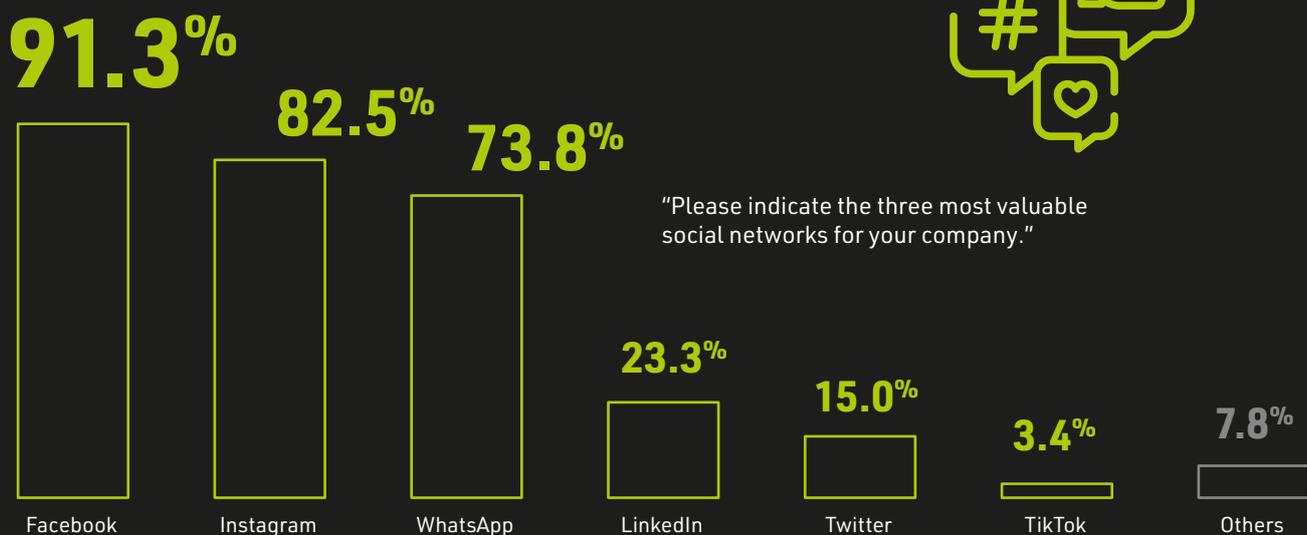


FIG 9 Digital channels as a key marketing tool



4 DIGITAL MARKETING CHANNELS

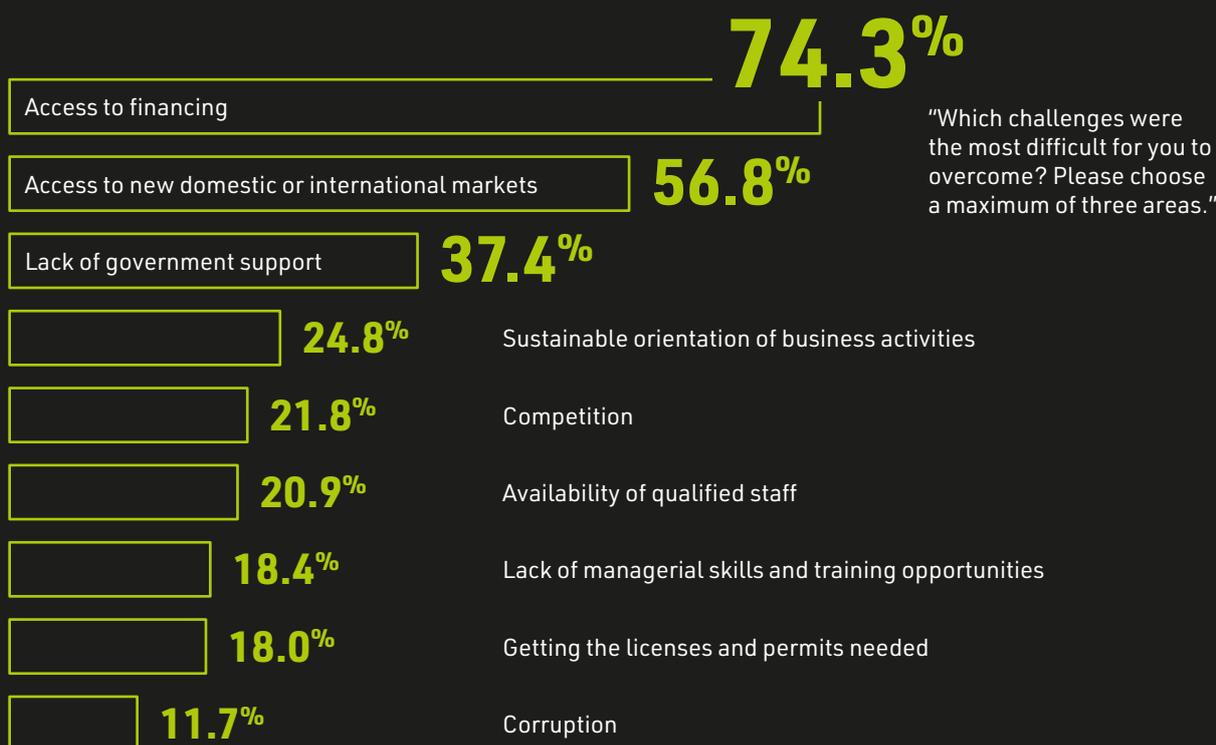
SMEs use social media and messenger services for sales and marketing – almost exclusively. That is why digitalisation and the internet are so vital for access to (international) markets. In Egypt, Kenya and South Africa the social media platforms Facebook and Instagram and the messaging service WhatsApp are the most important channels that the surveyed SMEs use to communicate with their customers.

As part of the survey they were asked about the importance of social networks and messaging services. **On average the respondents use around three social networks for their business (2.97, to be exact).** Facebook was mentioned most frequently in the survey (91.3%), followed by Instagram with 82.5% – a platform that is mainly used for sharing photos and offers limited opportunities for traditional communications. WhatsApp was in third place, used regularly by 73.8% of respondents. Less popular networks were LinkedIn (23.3%), Twitter (15%) and TikTok (3.4%) **FIG 9**. The results are impressive because the traditional marketing channels that still play an important role in Europe (print media, radio, TV and out-of-home advertising) are virtually never used, as became clear from the individual interviews. Social media are faster, cheaper and allow businesses to be more flexible in how they present themselves. What is more, they can be used both domestically and internationally without incurring additional costs.

The three countries surveyed differ in the way they use the individual services. Interestingly, Egyptian respondents said they hardly used Twitter at all (2%), but the percentage of Kenyans

who said they used it was more than ten times that figure (24.4%). In South Africa, one in seven respondents (13.9%) cited Twitter as important for their business. The situation is different regarding TikTok, a video platform that is growing very rapidly internationally. 6.1% of Egyptian respondents cited it as relevant, while a much smaller percentage of respondents in South Africa (3.8%) and Kenya (1.3%) said they used it.

Several important things can be gleaned from the data. First and foremost, it should be noted that the respondents said they used innovative and youth-oriented channels to market their products. This is only possible because in some regions there are more people with smartphones and there is better network coverage than in Europe. Data from the individual interviews confirms that **even in rural areas people make purchases via smartphone – something that is by no means a given in Germany.** This allows the survey respondents to achieve positive sales results more quickly and cost-effectively, without having to rely on the expertise of external service providers. Several survey respondents said they had taught themselves to use these platforms for marketing.



5 MAJOR CHALLENGES

Three-quarters of respondents said accessing financing for their business was a particular challenge, with a lack of access to affordable loans, government funding and private investment. This is why many of them rely on personal savings or money from their family. However, contrary to what data from public sources suggests, corruption does not pose a major problem to the tourism businesses that were surveyed.

Almost half of respondents said **their main source of funding to start their business had been personal savings** (47.6%) **FIG 10**. Government support, which is commonplace in Europe, for example, was not available to most of these SMEs. Just 2.4% of respondents said they had received government funding. The people who were surveyed relied almost exclusively on their own money to start their business. This problem was also apparent in the answers that respondents gave to

the question about their most difficult challenges: for three-quarters (74.3%) of the businesses surveyed, the most significant challenge was access to financing.

Similarly, **knowledge about sources of funding, investment and financial management** also played a significant role. Half of respondents said it was most important for a company founder to have broad knowledge of funding and investment (46.1%) and financial management (44.2%).

In Africa corruption is a major problem for SMEs.² However, the results of the survey do not reflect this. **Just 11.7% of respondents named corruption as a difficult challenge to overcome.**

In comparison to Europe, it is clear that in the countries surveyed **starting a business mainly depends on a person's own financial standing** – or that of their family. The interviews revealed that an unexpectedly high share of respondents came from upper middle class or upper class families (government officials, self-employed entrepreneurs), and a disproportionately large number had spent

time abroad when they were younger, either on a privately organised visit or to study. However, the respondents said they were frustrated with government red tape, which made it difficult to carry out even simple administrative tasks. This meant they had less time to focus on core business activities.

To open up entrepreneurship to less privileged groups, needs-oriented development programmes and financial instruments must be set up, offering scalable support for entrepreneurial activities – regardless of income, gender or educational level.

6 THE SIGNIFICANCE OF MENTORING

One-quarter (24.4%) of the **female founders surveyed cited a lack of training opportunities as a difficult challenge.** The figure for male respondents was just 14.5%. Once again, it is likely that this is a result of the cultural and societal expectations placed on women and their restricted access to entrepreneurial training.

Interestingly, the survey showed that businesses are in contact with other businesses – and even with their competitors in some cases. The majority of respondents said they turned to their contacts in other companies when they needed advice on business-related issues. **A majority of respondents mentioned mentors in larger businesses (57.3%)**

FIG 11 Half of respondents also said they were able to reach out to business associations or other SMEs. This means that these networks play an important role in the three surveyed countries.

However, contacts in foreign companies tend to be missing from the respondents' business networks. **In the interviews they said they would like to be in closer contact with overseas companies to facilitate access to European markets.** This lack of international exchange is also cited in research studies as a barrier to SMEs.³

FIG 11 Mentors are the most important kind of contact for business advice

53.7%



¹ cf. Hartmann, Rainer. *Tourismus in Afrika: Chancen und Herausforderungen einer nachhaltigen Entwicklung*. Berlin/Boston: Walter de Gruyter GmbH 2020: p. 44

² cf. Muriithi, Samuel M. *African Small and Medium Enterprises (SMEs) Contributions, Challenges and Solutions*, in: *European Journal of Research and Reflection in Management Sciences* 6(2017), p. 43.

³ cf. OECD. *Tourism in OECD Countries 2008. Trends and Policies*. Paris: OECD Publishing 2008: p. 31ff



"South Africa gave me the chance to prove myself. Tourism opens doors here."

VANESSA MBENOUN
Founder

KAMAROUTES THE COUNTRY NEEDS FEMALE ENTREPRENEURS



FOUNDER

Vanessa Mbenoun

FOUNDED IN

2017

EMPLOYEES

20

GUESTS/YEAR

BEFORE COVID-19

120

INTERNATIONAL GUESTS

100%

LOCATION

Johannesburg, South Africa
and Windhoek, Namibia



LONGING FOR SOUTH AFRICA

At the age of 18, Vanessa Mbenoun moved to South Africa to study tourism. Compared to her home country, the travel industry here is much more advanced: There is an authentic welcoming culture towards guests, there is more investment and environmental and animal protection is much more pronounced: "It was a completely different kind of tourism than in Cameroon, simply great. I wanted to build on that."

While studying, Vanessa worked part-time at a travel agency. "It was a very good job, but I wanted to sell travel in South Africa in my own way. As someone who is from West Africa and empathises with what foreigners crave here." With her empathy as a basic capital, Vanessa launched into



self-employment. At the same time, she has become a mother. What she lacks, however: a babysitter, a business plan, a computer ... The list seems endless. The social environment, the legacy of apartheid, makes things even more difficult.

Vanessa: "As a black woman from abroad, it's hard to get a foothold in the industry. I don't want to call it racism, but there's still a lot of resistance," she says.

"I was sure I would find something I loved in South African tourism. I just didn't know exactly how I would get there."

VANESSA MBENOUN
Founder



STRAIGHTFORWARD, EVEN WHEN IT HURTS

As a female entrepreneur, she is the absolute exception. In many cases, the idea that a black woman could take on a leadership position is missing, Vanessa says. She accompanies her guests on their trips, stays with them in hotels and lodges – and yet is often dismissed by the staff.

Vanessa doesn't relate this in a complaining tone at all. She takes note, protests, and draws her consequences. Vanessa: "Sometimes I can't stand the discrimination. I then change hotels and explain the situation to my guests."

SUSTAINABILITY – AN IMPULSE FROM THE GUESTS

Not only do solvent customers come from there, but also new ideas. Vanessa: "My focus was not originally on sustainability. But my European customers were much more aware of that and made me rethink." You can no longer book walks with lions or elephant rides with Kamaroutes. Vanessa places a special emphasis on social aspects. For example is she visiting Kliptown,

a district of Johannesburg, with her guests. The unemployment rate is 70 percent, and informal settlements dominate the scene. At the same time, the residents are keen to show foreign tourists their home – especially so that the situation will change for the better because of the attention, according to Vanessa.

ROLE MODEL FOR FEMALE EMPOWERMENT

At its own expense, Kamaroutes supports an orphanage for girls in Kliptown. This gender-specific orientation is no coincidence. Around three quarters of her guests are female. Vanessa recently founded the Solo Womxn brand, which focuses exclusively on the special needs of women. Vanessa on the background: "Time and again, women can't fully enjoy their travels because they get into unsafe situations, are misjudged or discriminated against. With us, it's different – no matter what the skin colour of our female customers, where they come from or what their sexual orientation is."

The entrepreneur stands for gender equality and inclusion of marginalised populations. This is evident in her career, her social commitment and also her future plans: Vanessa wants to write a doctoral thesis on women, inclusion and diversity: "I think this is very important for the continent. I don't see enough women in leading positions yet." In addition to Solo Womxn, she wants to offer a travel platform just for women. "That's also where the support from the Tourism Recovery Programme comes in handy, especially since I was without income during the lockdown. So I was able to focus on learning a lot of things entrepreneurially that will help me implement my new project."



Justin Perumal grew up in South Africa. He left the country in 2006, only to return ten years later. He hoped for social change – an illusion. But he stays and founds the travel agency Wild Routes Africa. Tours with local artists and completely new offers for domestic tourism: Justin thinks a lot differently and provides impetus for new tourism formats in South Africa – more sustainable, more inclusive, and more resistant to external shocks like the Corona pandemic.

“My philosophy is to take responsibility for the uniqueness of one’s personal circumstances.”

JUSTIN PERUMAL
Founder



WILD ROUTES AFRICA MORE RESILIENCE FOR SOUTH AFRICA'S TOURISM

FOUNDER

Justin Perumal

FOUNDED IN

2016

EMPLOYEES

12

GUESTS/YEAR

BEFORE COVID-19

994

INTERNATIONAL GUESTS

93%

LOCATION

Durban, South Africa

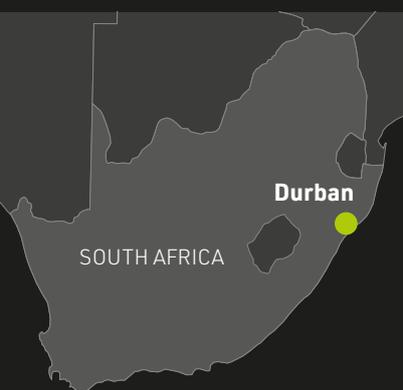
Justin finds his return to South Africa after years in England a cultural shock. "I saw the situation in the country through completely different eyes than the person who had left South Africa ten years ago." At the same time, he felt the urge to take responsibility. For more climate protection, the preservation of culture and the peculiarities of local communities. He had studied Strategy and Global Marketing but had no contact with the tour-

ism industry. Nevertheless, this is precisely where he finds his field of activity. Firstly, he sees the people working here as more open-minded and committed, and secondly, he wants to get to know his homeland anew in this way. He gets in touch with travellers via social networks, recognises their needs through their digital profiles, and thus wins the first customers for his company Wild Routes Africa.

SHUTTLES WITH WILD ROUTES AFRICA – ROAD TRIP WITH ADDED VALUE

Wild Routes Africa launched in 2016 as a boutique transfer service for trips to nature reserves. Traditional providers limit themselves to just shuttle service – expensive and lacking information about attractions along the way. Justin: "They didn't provide any value, so my idea was to include the transfer already as part of the trip." Binoculars for guests, a local tour guide, and vehicles equipped with Ipads that provide information about wildlife tracking and conservation make up the transfers with Wild Routes Africa.

Organised day tours are the next step in development. Justin: "We wanted to give travellers a really immersive experience. To do that, interactions with people who have nothing to do with the tourism industry at its core are ideal." He now matches his guests with local street artists, museum curators, conservationists or wildlife doctors, whose time is compensated. While this squeezes the margin, it also pays dividends in the social aspects of sustainability and the unique selling proposition. Justin is passionate about the special, the authentic.





DOMESTIC TOURISM AS THE KEY TO RESILIENCE

Social inclusion is Wild Routes Africa's core competency. This is evident when the share of international guests plummeted with the COVID-19 crisis. "Before, guests were mostly from Europe and the US. We quickly had to reorient ourselves." So domestic tourism comes to the fore and Justin draws his conclusions: "Resilient tourism in South Africa only works through stronger domestic tourism." For a long time, this has been seen as a kind of discount market, favouring international guests.

"I'm already seeing a lot of 'green' approaches in the hospitality industry currently, especially in design."

JUSTIN PERUMAL
Founder

Yet, according to Justin, it is just another market. In order to appeal to young black South Africans in particular, he founded his subsidiary Locals Who Wander in 2020. Here, for example, he offers affordable Gin Journeys – a safari that also includes cocktail workshops. "It's important to note that they often feel like strangers in primarily white-travelled spaces like safari lodges." Justin aims for more diversity. He says the Tourism Recovery Programme's support has given him important impetus for this new business model.

MANIPULATION IN THE NAME OF THE ENVIRONMENT

Social sustainability has been Justin's main emphasis from the beginning. Ecological issues drive him just as much. "We need to become more low-carbon in the future and be conscious of how we treat the environment." Time and again, Justin tells us, supposed eco-projects in tourism appear to him as marketing campaigns. With dubious added val-

ue. Justin, on the other hand, has concrete goals and knows how to achieve them together with his guests: "There are many ways to incorporate green products without guests feeling they have to compromise – I call it constructive manipulation." Zero waste is at the top of the agenda as well as safaris, where part of the profits are donated to rhino conservation organisations, for example. A win-win situation – created by tourism.



For many years, 36-year-old Mohamed Serageldin worked as a mechanical engineer for international corporation. Then the turning point. He decides to quit his job and in 2015 together with his wife and another partner, opens the eco-friendly Dayra Camp in Nuweiba. By the beach of the harbour town, far away from the touristic hotspots, they create a meeting site for musicians, artists, globetrotters and backpackers. Their motivation: being hosts for tolerant people from countries all over the world – and most important: to be sustainable.

“At Dayra it’s all about the community. We aim to unite like-minded people”

MOHAMED SERAGELDIN
Founder

DAYRA CAMP HOME OF COSMOPOLITAN TRAVELERS



FOUNDER

Mohamed Serageldin
Reem Abu Ellela
A. Abo EL Seoud

FOUNDED IN

2015

EMPLOYEES

19

GUESTS/YEAR BEFORE COVID-19

2,200

INTERNATIONAL GUESTS

30%

LOCATION

Nuweiba, Sinai Peninsula,
Egypt

PEACEFUL COEXISTENCE – AT THE INTERFACE OF CULTURES

Those who decide to make the journey to Dayra Camp at the foot of the Sinai Mountains do not expect luxurious accommodation. Guests spend the nights in simple huts and tents on the beach. The environment is even more intense: there are art workshops, yoga and musical events. The atmosphere is characterised by tolerance and cosmopolitanism. Mohamed: “You can see veiled women sunbathing on the beach. A few meters away, someone is bathing completely naked. The most diverse people come together here, and they all know that they are safe here and can let off steam as long as they don’t disturb the privacy of others.” This practiced openness to the world sets an important example in the important Egyptian-Israeli border region.

Since a young age, Mohamed has loved organising parties and short trips for friends and family. He always loved bringing people together and having fun. In 2015, he took the plunge and opened the Dayra Camp in Nuweiba together with his wife and a partner.

For months, they get up at 5 am every day, clean the whole beach of trash which had cumulated over the years, plant hundreds of trees and build infrastructure in the region. Mohamed: “We didn’t have much and didn’t think a lot about the future. It was magical, we practiced mindfulness to perfection.”





MINDFULNESS AS THE KEY TO SUSTAINABILITY

From the very beginning, this mindfulness encompassed key sustainability categories. This can also be seen in one of the camp's core concerns, which is preserving the cultural heritage of the Beduin – who have been living in the Sinai for centuries – and to bring their way of life closer to the public, for example through video documentaries. At the same time, the camp involves women of the local tribe by offering them a steady income.

"We take every opportunity to give back to local community"

MOHAMED SERAGELDIN
Founder

Mohamed: "For the Bedouin children, we once organised events with Argentine clowns. We take every opportunity to give something back to the local communities. Also, we attach similarly great importance to the ecological component, for example in feeding leftover food to the Bedouin animals. Plastic is not used at all and we are washing with bio-degradable soap only".

TENS OF THOUSANDS OF FOLLOWERS

With its innovative concept, the camp represents the future of Egyptian tourism: more sustainable and digital. Parallel to the opening of the camp in 2015, Mohamed launched his Facebook channel and later another on Instagram, which now has respectively 43,000 and 20,000 followers! "This helps us enormously to draw attention to our-

self – even in Cairo, which is about 500 kilometers away". Almost all his guests found their way to Dayra through the camp's social media platforms. But the digitalisation plans go far beyond that: for example, an online self-check-in system, which will become available for their members in the future.

AGILITY STRENGTHENS RESILIENCE

As many others, Dayra Camp also faced a massive drop in guest numbers because of the COVID-19 pandemic. Nationwide, an estimated 900,000 jobs have been lost in the tourism industry. However, "We are agile and small. That's why we got through this difficult period relatively well and didn't have to lay anyone off", Mohamed says.

"Now's the time to grow", he says. Together with his partners, he will be opening a second camp soon, which will be in Sokhna, about an hour outside Cairo. The Tourism Recovery Programme's

support came just at the right time. "The digital teaching offer and the interaction with my mentor really helped us in structuring the setup of the new camp – from marketing to recruitment", Mohamed says. The new site is also offering better opportunities for environmental protection: electricity generated through wind energy, climate-friendly refrigerators as well as buildings and furniture made of renewable materials – the team shows that sustainability is "no longer a crazy idea", as Mohamed says – even in Egypt.



The Nubians are steeped in legend. Several thousand years before Christ, they founded the first kingdom of Africa. Until deep into the 20th century, they maintained their own language, customs and traditions. However, driven by social mobility and new forms of life and work, their cultural characteristics have been fading for several decades. Mahmoud Atiya's family wants to do something to counteract this – see the "Nubian Eco Village," an eco-lodge in Aswan founded in 2015.

"Our first guests were so pleased they applauded – an incredible experience."

MAHMOUD ATIYA
Founder



NUBIA PRESERVING A MILLENNIA-OLD CULTURE THROUGH TOURISM



FOUNDER

Mahmoud Atiya
Mohamed Beshir
Adel Edris

FOUNDED IN

2015

EMPLOYEES

10

GUESTS/YEAR

BEFORE COVID-19

680

INTERNATIONAL GUESTS

80%

LOCATION

West Aswan, Egypt

Mahmoud Atiya was born in Aswan, he is Nubian. Awareness of his ethnic group's unique culture – and the threat to it – runs deep in his family. Mahmoud: "My uncle,

Mohammed, has been driving the issue for half his life. In 2010, he founded an NGO to save the language and culture from extinction".

NUBIAN CULTURE – A VALUABLE ASSET

Tourism plays a special role within the framework of the NGO. Of all things. Mahmoud: "Our region has been popular with travelers for many years. This creates work, but also contributes to the dilution of cultural characteristics." This is due to structural reasons: Travel providers, for example, are rarely Nubians. According to Mahmoud, they often lack a deeper understanding of the culture, and sustainability aspects are often neglected as well.

Mahmoud and his family are taking a completely different approach with their Nubian Eco Village. Mahmoud: "In essence, we are showing the Nubians that their culture

has thousands of valuable characteristics. Whether it's food, handicrafts or clothing. Instead of forgetting them, they can turn these qualities into new sources of income." This perspective weighs heavily in a region that has a youth unemployment rate of about 40 percent. Especially to girls and divorced women, Mahmoud and his family offer training on how to entertain guests, sell food and handicrafts to travelers, and thus increase their family's income. Of course, the Nubian culture is also lived in the Eco Village itself. Guests can enjoy traditional sand and aroma therapies as well as healing massages and traditional Nubian home cooking.





Mohamed Beshir
 Founder of the NGO
 and uncle of Mahmoud



WITH FOCUS ON ECOLOGY

At the same time, Mahmoud is pursuing ecological goals. The water consumption per guest in the Nubian Eco Village is about two-thirds lower than in conventional hotel facilities. Electricity consumption – there is no air conditioning and candles are used instead of lamps – is even one tenth. There are no

“Uncles and aunts, cousins and mother-in-laws – they all pitch in.”
MAHMOUD ATIYA
 Founder

televisions or radios. In addition, organic vegetables and fruits are grown. Their furniture and interiors are made from renewable materials that are found in the surrounding area. Ecological compatibility is more than strategy here – it is the cultural heritage of the Nubians.

WITHOUT CERTIFICATION – AND THEN COVID-19 CAME ALONG

A convincing concept. However, sustainability plays no role in the Egyptian hotel industry’s certification system. On the contrary: lack of air conditioning, for example, means a downgrade. Marketing through classic travel agencies is largely ruled out. This

structural problem is not new – the COVID-19 pandemic on the other hand, is: In 2021, the number of guests dropped by around 95 percent. At the beginning of 2022, the village’s income is zero. Only one-third of employees can be retained.

DIGITAL INTO THE FUTURE

For Mahmoud and his team, the support from the Tourism Recovery Programme comes at the right time. “It’s the first time in all these years that we’ve received help.” With the financial support and the

mentoring from a TUI employee in Germany, they are now working on the rebranding: “We want to improve our access to the international market. To do that, we need to become more digital. We need to reach guests directly through our own channels and show what we offer.” For the international guests, many of whom visit Aswan and Luxor and are transported by cruise ship on the Nile at night – Mahmoud is planning more sustainable offers: “We want to offer sailing cruises. They are more exclusive, quieter and can be combined with yoga or meditation,” he enthuses. And the carbon footprint would be lower, too. “My dream is that we use the least resources in all of Egypt,” he says.





"The more we grow, the more lives we can positively impact."

RAISSA OCHOLA
Founder

The first guest of Raissa Ochola is from Belgium. He speaks neither English nor Swahili, the country's second official language. Communication is possible – but only with gestures and facial expressions. An adventure for both. Raissa succeeds in immersing her guest in Kenyan culture and feels confirmed: "Vacation is more than a stay in a 5-star hotel. It's about letting guests experience authenticity while also doing something meaningful."

THE AFRICAN THRILLIST KENYA UNVARNISHED



FOUNDER

Raissa Ochola

FOUNDED IN

2019

EMPLOYEES

3

GUESTS/YEAR BEFORE COVID-19

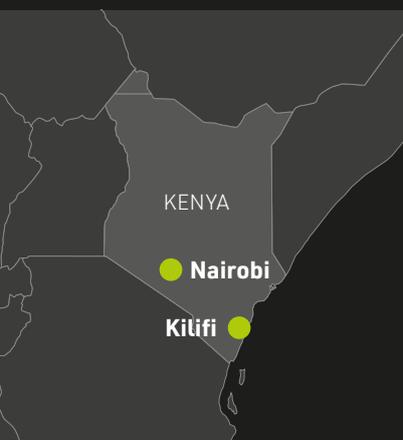
300

INTERNATIONAL GUESTS

70%

LOCATION

Nairobi and Kilifi, Kenya



MARKETING KENYA – IN AN UNCONVENTIONAL WAY

'A day in the life of a local Kenyan' – with this title, the native Kenyan began to promote her tours via an Internet platform in 2018. In this way, she reaches especially international guests. Raissa: "I am from here. I know about typical Kenyan lifestyle in all its facets. I would like to show this world especially to my international guests. It's quite different from the classic Kenya vacation."

The concept bears and Raissa is expanding her offer. She's also offering boat tours and safaris and is launching her own travel agency in 2019 – the birth of The African Thrillist. "I saw tourism as an opportunity to do what I like. To create travel experiences,

and to do it in harmony with the local community." It's not a no-brainer. Certainly not for women. As an entrepreneur, she must earn respect in a male-dominated environment, for example among the Muslim captains who sail travelers across the Indian Ocean in classic dhow boats. Today, she works with half a dozen captains.



REALITY INSTEAD OF FOLKLORE

This has nothing to do with tourist folklore. Raisa sees the enormous problems that people have to deal with on a daily basis. The situation in the slums. Kenya is still one of the 50 poorest countries in the world. Even as a teenager, she and her friends got involved in volunteer work. She kept this up and started the Project Life Africa, which provides targeted and lasting support for schools, children’s homes, and sports clubs far away from the tourist crowds.

In consultation with the Life Africa partners – and provided the guests are open to it – Raisa takes tours there. “That’s where real interaction takes place, for example when the children and my guests play soccer together, sing or simply have a little chat.” She aims to create encounters at eye level as much as possible: “Slum safaris don’t work at all. When you take tours to difficult areas, you have to proceed responsibly and clarify up front whether it’s okay for the local people.”

“It’s also about helping people earn a decent income.”

RAISA OCHOLA
Founder



OPENING UP SALES CHANNELS

Meeting people at eye level also includes showcasing the skills and talents of local people. For example, Raisa recently started selling hats and jewellery made by local artists and craftspeople to its guests. “Those people are very creative, but they lack experience in marketing. This is where I

come in and support them.” In doing so, Raisa creates work and contributes to modest prosperity: “Many Kenyans live in poverty, have hardly any prospects. I want to show them that it’s worth pursuing your own ideas and recognising opportunities.”



PIONEER ON THE INDIAN OCEAN

Raisa herself also has considerable hurdles to overcome. First and foremost, the effects of the COVID-19 pandemic. Guest numbers are collapsing, countless times she wants to give up. Raisa: “The Tourism Recovery Programme was like a blessing for me. I needed the financial support. Most importantly, a mentor encouraged me and showed me ways to continue my strategy.” Her future plans?

In June, Raisa wants to set up her own office in Kilifi, a town of about 30,000 people on the Indian Ocean, to sell tours and merchandise directly. “I also want to set up the first water refilling station in Kilifi there. Tourism in particular must finally do something about the plastic problem.” Raisa will also be a pioneer there – and fill sustainable tourism with life.

UNESCO World Heritage, home of the Big Five – who thinks about Kenya, immediately thinks about the savannah Serengeti or the beaches at the Indian ocean. Kenyas remarkable mountain landscape however remains largely undiscovered – even by the Kenyans themselves. Gitonga Wandai wants to change that and – by organising mountain tours – enables a unique connection between guests and the local communities.

“The COVID-19 lockdown was tough. I bridged the period of zero income by planning how to further improve my offerings.”

GITONGA WANDAI
Founder



HIKEMANIAK KENYA IS MUCH MORE THAN SAFARI

FOUNDER

Gitonga Wandai

FOUNDED IN

2016

EMPLOYEES

3

GUESTS/YEAR BEFORE COVID-19

1,942

INTERNATIONAL GUESTS

10%

LOCATION

Ikigai, Lavington,
Nairobi, Kenya

Gitonga Wandai grew up in a rural region of Kenya, always preferring to spend his time in nature. For his studies he moves to the city. In subsequent jobs, the office work dominates and the dissatisfaction spreads. In October 2015, he sets out to a hike in the Kenyan-Ugandan border region. The hike usually takes up to four days. Gitonga decides to go alone, cutting the time in half. As he reaches the summit at 4,200 meters, he writes “hike maniac” in a little notebook. And, a few months after that, founds his eponymous company.

“It does sound strange, but on this day on that summit I thought to myself: ‘Start something of your own! Help people who are also stuck in the daily life to explore new places – preferably through hiking tours’”, Gitonga says. For Kenyan tourism, which largely focuses on safaris and beach vacations, it was an very unusual idea and an ambitious dream, too. “Hiking was neither known nor popular among Kenyans at that time. This was also due the fact that outdoor activities used to be exclusively reserved for international guests.”

A SPECIAL KIND OF INTERACTION

Gitonga wants to change that. Initially, he offers guided hikes every two weeks, then weekly. For day hikes, he recruits local guides, who can increase their families’ income through this opportunity. At the end of the hike, the local communities prepare food, offer tea and can sometimes sell handicrafts. As a result, ten to 15 percent of the total income remains in the local communities. For longer tours, such as

four- to five-day expeditions to Mount Kenya, Gitonga hires a cook and a porter. No matter if for one or several days: In addition to impressions of nature, Gitonga believes the tours thrive on interaction. “The best moments are when travelers and locals eat together in the communities at the end of the tour,” he says. “We create a connection between people from completely different backgrounds – that’s great.”





Alongside that, Gitonga is developing the hiking infrastructure as a whole. For example, he is working with the Kenya Wildlife Service to signpost hiking routes. They provide information on distances and what to look out for on the trails. That is because dangerous animals are a particular concern. Simply "waking up and heading out," as Gitonga says, "that doesn't work here."

PROTECTING THE MOUNTAIN ENVIRONMENT - AND NETWORKING

Yet the intention of expanding the modest infrastructure is not to maximise growth. Gitonga says: "The more popular hiking becomes, the more often the issue of overtourism comes up." Early on, Hikemaniak limited the number of people to up to 15, especially on mountain expeditions. "This way we want to make sure our visit doesn't have a negative impact on nature. Ideally, we leave the sites in better condition than we found them."

"I believe with our way of doing business, we are a force for the future of Kenyas tourism", Gitonga says. He wants to share his idea and build an international network of entrepreneurs with a focus on social and environmental sustainability. "Through the Tourism Recovery Programme, we have been given an important platform to do this. It has allowed us to interact with companies from all over the world."

"I love what I do. The exchange in the Recovery Programme is a blessing in this."
GITONGA WANDAI
FOUNDER

THE POWER OF DOMESTIC TOURISM

This should by no means be taken as an attempt to diminish the importance of domestic tourism, however. Before the Corona pandemic, 90 percent of his guests were Kenyans or people who worked in the country for NGOs, for example. "When we were allowed to reopen after the lockdown, they

came back in large numbers!". The ten percent of international guests are still missing. "That hurts and I have to change that. Climbers from Europe should discover that the experiences here in Kenya are just as good!"



TOURISM RECOVERY PROGRAMME

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RECOMMENDED ACTIONS

CREATE TRAINING OPPORTUNITIES

To provide targeted support for sustainable tourism in African markets, development programmes are needed that focus in particular on providing digital training on aspects of environmental and social sustainability. Demand for these kinds of programmes is high.

FACILITATE FUNDING

Customised funding programmes are needed to bring about sustainable market transformation and increase entrepreneurship in tourist destinations. Alongside traditional funding schemes, direct money transfer programmes* as used in the Tourism Recovery Programme can provide scalable, needs-based support to accelerate economic change.

SET UP MENTORING PROGRAMMES

Mentoring programmes are becoming a valued tool for entrepreneurs in the surveyed countries. They create useful networks and should be utilised to a greater extent in development cooperation, especially in partnership with the private sector.

PROVIDE INCREASED SUPPORT FOR WOMEN-LED BUSINESSES

There should be targeted support for female business owners as they are structurally disadvantaged in various areas – from financing to starting up to gaining access to international markets. Women-led businesses also demonstrate greater willingness to invest in social and environmental sustainability.

* cf. Deutscher Bundestag. Bargeldtransfer als Instrument in der Entwicklungszusammenarbeit, 2016, p. 3