Pushing the boundaries: Reimagining and repacking destinations across Southern Africa against a COVID-19 backdrop
The economic importance of tourism for SADC (WTTC March 2018 report on 2017 performance)

- Economic cornerstone together with agriculture, mining & other sectors
- Direct GDP contribution of USD19.4bn (2.8% of total GDP)
- GDP total contribution of USD56.3bn (8.2% of GDP)
- Direct employment contribution of 2,526,000 (2.4% of total employment)
- Total employment contribution of 6,326,000 (6.1% of total jobs)
- Visitor exports generated USD18.3bn (9.1% of total exports)
- Travel and Tourism investment was USD9.1bn (6.2% of total investment)
About SADC’s Transfrontier Conservation Areas (TFCAs)

- 18 SADC TFCAs at different stages of development.
- Founded on the realisation that the natural capital and cultural heritage straddling boundaries between countries are shared assets, with substantial potential to meaningfully contribute to biodiversity conservation, wildlife preservation, and the socio-economic development.
- Cross-border regions made up of components with varying types of conservation status.
- While the most are separated by borders, TFCAs are jointly managed by participating countries.
- Home to some of the SADC’s most significant tourism destinations.
Current portfolio with respect to SADC TFCAs
LT&C Case Study: Kavango Zambezi TFCA
Multiple Land Uses!

National parks, a host of game reserves, forest reserves, game management areas, communal lands and conservation and tourism concession areas designated for the use of natural resources.

Some of PAs have designated concessions for non-consumptive tourism development!
How to get there...

**Regional Airports**
- **Maun Airport**, Maun, Botswana – 65km to the Okavango Delta, Botswana
- **Katima Mulilo Airport**, Katima Mulilo, Namibia – 400km to Khaudum National Park Namibia and 125km to Chobe National Park, Botswana
- There are a number of charter flight options available.

**International Airports**
- **Harry Mwanga Nkumbula International Airport**, Livingstone, Zambia – 15km from Victoria Falls
- **Victoria Falls Airport**, Zimbabwe – 20km from Victoria Falls and 100km from Hwange National Park, Zimbabwe

**Road Access**
- Road access between Namibia, Botswana, Zimbabwe and Zambia is good.
ACTIVITES & ATTRACTIONS

36 formally proclaimed national parks.

Largest contiguous population of African elephant on the continent.

Threatened species including African wild dog, lion, cheetah.

Over 600 bird species identified.

Chobe National Park, the Okavango Delta, the Makgadikgadi Pans, Hwange National Park, Kafue National Park, the Victoria Falls...

A plethora of adventure travel activities and experiences on offer
A destination rich in culture and heritage

2.5 to 3 million people live in KAZA across its five Partner States, mainly in rural areas.

Through cultural heritage tourism and employment opportunities presented by the tourism value chain, KAZA Partner States aim to enhance the participation of these rural communities in the tourism economy not only through their provision of tourism-related goods and services, but also through celebration and nourishment of the region’s rich cultural diversity.
An overview of the significance of their operations in the KAZA region in the last financial year (Source: Dr. Anna Spenceley EU Impacts on PA Tourism Survey 2020 Report)

<table>
<thead>
<tr>
<th>Value of product procurement last FY (food, drink, craft, office supplies, capital equipment, etc.)</th>
<th>Value of hospitality support services expenditure in the last FY (e.g. entertainment, laundry, transport, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Imported</td>
</tr>
<tr>
<td>Total (USD)</td>
<td>14,781,629</td>
</tr>
<tr>
<td>% of total</td>
<td>16.6%</td>
</tr>
<tr>
<td>Average (USD)</td>
<td>189,508</td>
</tr>
<tr>
<td>n =</td>
<td>78</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Value of environmental services expenditure last FY (e.g. security, anti-poaching, park or concession fees, etc.)</th>
<th>Value of payments to local community initiatives (e.g. donations or CSR)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Imported</td>
</tr>
<tr>
<td>Total (USD)</td>
<td>2,374,136</td>
</tr>
<tr>
<td>% of total</td>
<td>9.3%</td>
</tr>
<tr>
<td>Average (USD)</td>
<td>37,096</td>
</tr>
</tbody>
</table>
Overview of KAZA Survey Respondents
(Source: Dr. Anna Spenceley EU Impacts on PA Tourism Survey 2020 Report)
Support needed from Private Sector survey respondents: (Source: Dr. Anna Spenceley EU Impacts on PA Tourism Survey 2020 Report)

Approximate value of financial support required the enterprise can support itself again: (Source: Dr. Anna Spenceley EU Impacts on PA Tourism Survey 2020 Report)
Types of financial support sought

(Source: Dr. Anna Spenceley EU Impacts on PA Tourism Survey 2020 Report)
Impacts of the pandemic on Protected Area tourism

Substantial loss of vital market-based funding to manage land, build resilient biodiversity conservation, and reward communities and private landowners of the opportunity costs of co-existing with wildlife.
85% of respondents expected tourism arrivals to recover to 50% of pre-COVID levels by the end of 2021. In this regard:
- 57% expected arrivals to reach the 50% level during the second half of 2021.
- 28% expected arrivals to reach the 50% level during the first half of 2021.

Stakeholder views were more varied regarding timing of a full (100%) recovery in arrivals to pre-COVID levels. In this regard:
- 13% expected a 100% recovery during 2021,
- 43% a 100% recovery during 2022,
- 28% a 100% recovery during 2023 and
- 16% a 100% recovery from 2024 onwards.

Overview of SADC region opinion leader survey
July – August 2020
Some Considerations: Opportunities and threats on the COVID-19 road to recovery

OPPORTUNITIES

- Leveraging regionally integrative TFCA partnerships
- Capitalising on low-volume, nature-based tourism as low-risk-of-infection travel opportunity
- Strengthening travel corridors and cross-border routes between Member States
- Adopting consistent internationally endorsed SOPs across TFCA regions
- Implementing a domestic and regional tourism marketing strategy drive

THREATS

- Product dilution due to tourism businesses struggling and some closing due to COVID-19 travel limitations
- International travel warnings in key source markets
- A possible second wave in the region and key international source markets
- Limited air travel opportunities due to struggles faced by airlines
- Real and perceived fears linking tourism with COVID-19
KAZA Partner States Demonstrate Collaboration with respect to tourism market development & COVID recovery efforts...

TFCAs require marketing and investment promotion interventions that go beyond marketing, towards market development which focuses on both supply and demand sides, and that adds value to the tourism experience in a manner that expands the benefits of tourism to more than one country. This approach is intended to complement individual country efforts, while diversifying SADC’s tourism offerings through capitalizing on the region’s (sustainable/healthy) natural and cultural assets and contributing to economically inclusive socio-economic growth.
Ease of movement between destinations: KAZA Univisa
Working together to promote the destination Land Rover Experience Tour of KAZA 2019

- 31 Oct. – 13 Nov. 2019
- 5 countries
- 15 days
- 18 cars
- 47 participants
- More than 2,000 kilometers
- Estimated Advertising Value of EUR1,029,950 (2019 & 2020 combined)
Developing tools for collective marketing of a single & multi-faceted destination
WEBINAR SERIES
WEEK 7

20 YEARS OF TRANSFRONTIER CONSERVATION IN SADC
Contributing to resilience across borders

Roundtable - Pushing the Boundaries: Reimagining and repackaging destinations across Southern Africa

20 August 2020 • 13:30-15:00 [SAST]

Moderators:
• Ms. Netsai Bolnim, Regional Senior Tourism Expert
  (TCF/GOPA- on behalf of the SADC/GIZ Transboundary Use and Protection of Natural Resources Programme)
• Mr. Felix Chaita
  Chief Executive Officer (Zambwa Tourism Agency)
• Mr. Givenore Chidzidzi
  Acting Chief Executive (Zimbabwe Tourism Authority)
• Ms. Khotlomeloe Sebang
  Executive Manager Marketing (Botswana Tourism Organisation)
• Mr. Brett McDonald
  Chief Executive Officer (Flame of Africa and KAZA Collection)
• Mr. Ulrich Kloes
  Managing Director (WIGWAM Tours)

For more information on the programme and registration for each event, please visit: www.tfcaportal.org/public-events
To view recordings and presentations of past events, visit: www.tfcaportal.org/past-events

If you missed our recent Power House Debate with some of Southern Africa’s biggest Tourism Influencers, you have another chance.
https://mailchi.mp/.../if-you-missed-our-recent-power...

PUBLIC-PRIVATE DIALOGUE...
Working with private sector
Thank you!

netsai.bollmann@afci.de