

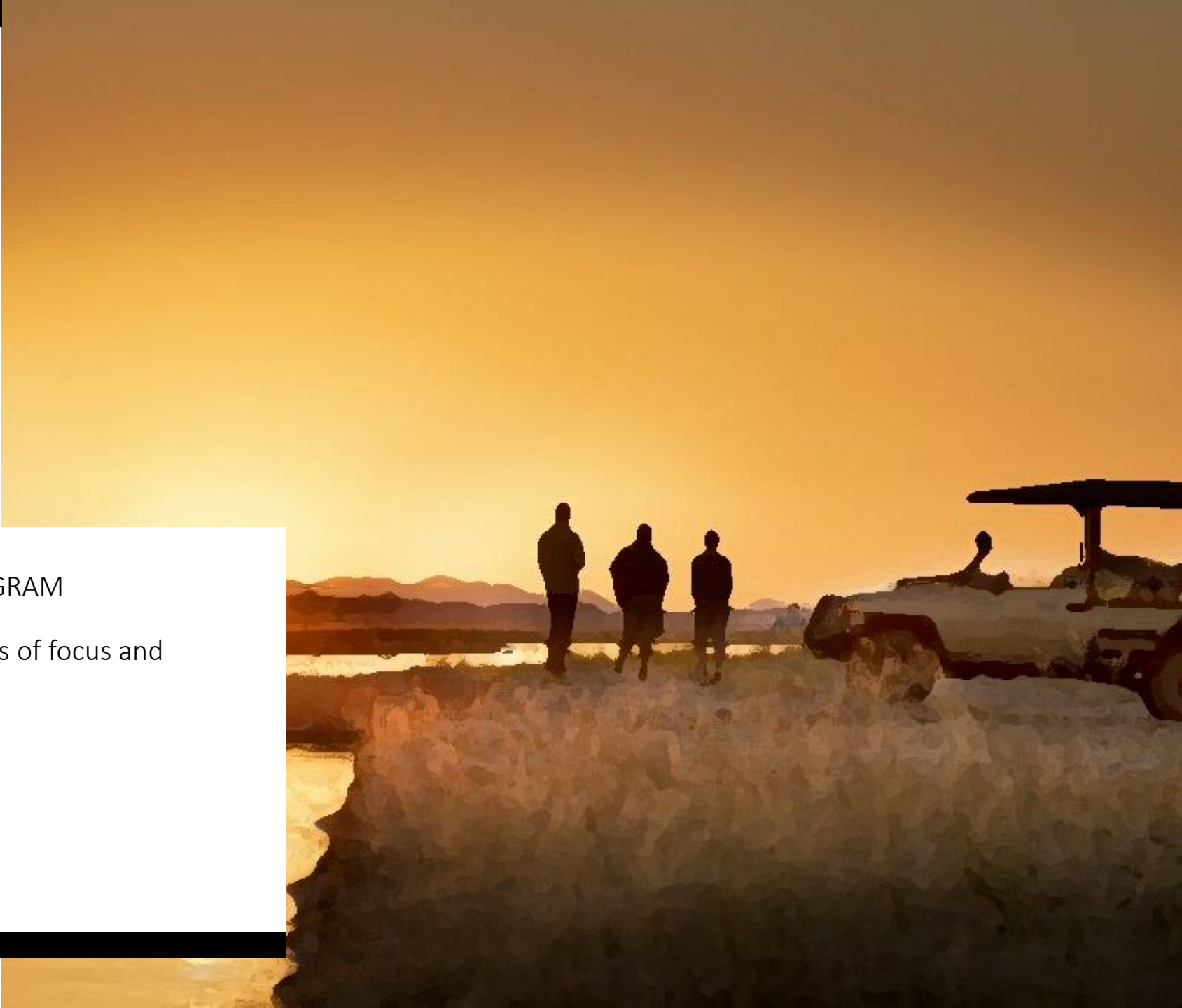


ZIMBABWE DESTINATION DEVELOPMENT PROGRAM

A market analysis report: markets and segments of focus and optimal marketing budget allocation

Final report
8 November 2022

With the technical assistance of:



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The information and data found in this document are current as of the date of submission to ZTA and subject to change given market forces and external variables.

8 November 2022

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CONTEXT

- Zimbabwe has long been facing a stagnation in tourism demand, compounded by the global COVID-19 pandemic.
- The government authorities disseminate research on total visitor arrivals and visitor origin which helps tourism stakeholders understand macro growth and performance.
- This data, while useful, does not by itself provide sufficient understanding of industry conditions and issues, market dynamics and travel consumer insights. It does however provide a basis for developing such insights and has informed the development of key markets and consumer segmentation analysis.
- The Government of Zimbabwe (GoZ), represented by the Ministry of Environment, Climate, Tourism and Hospitality Industry (MECTHI) and Zimbabwe Tourism Authority (ZTA) is working with IFC on a program of technical assistance.
- The program is known as the Zimbabwe Destination Development Program (ZDDP).

- The program is designed to accelerate recovery of the tourism sector following the pandemic and build greater resilience going forward.
- GoZ wishes to drive more targeted tourists to Zimbabwe and better inform decision making by investing in market research on brand health and consumer insights.
- To this end, ZTA via IFC engaged Twenty31 Consulting Inc., a research-based management consultancy with a strong performance record in the global travel & tourism industry to conduct a market portfolio analysis, segmentation to support prioritization and marketing investment allocation across different markets.
- The resulting report is intended to feed into marketing investment decision-making.

- Zimbabwe and its counterparts in the SADC region have been among the hardest hit tourist destinations by the devastation of the COVID-19 pandemic.
- Despite this, several travel and tourism trends are emerging in the post-pandemic environment as tourism gradually resumes for which Zimbabwe is well-placed to leverage given its overall destination profile.
- Post-pandemic travellers, both regional and international, will be seeking longer stays (given fewer regular opportunities to travel) in more immersive, authentic, and nature-based environments, often with a focus on sustainability and regeneration.
- The post-COVID traveller also seeks spiritual rejuvenation and personal growth of the kind that Southern African safari and nature-based destinations are understood to provide.
- There remain a number of challenges to overcome, however, in order to appeal to post-COVID travellers for Zimbabwe to capitalize on their full potential as a modern developing destination.

- Notable challenges are around ease of access to particular underserved destinations within Zimbabwe, domestic connectivity, consistency of public services, airline capacity, and the various costs for travellers associated with working around these challenges.
- While these challenges are ongoing however, Zimbabwe is generally highly regarded for its tourism offerings – particularly those associated with nature-based accommodation, safaris, nature-based experiences, and affiliated services such as guides.
- Zimbabwe also has a wealth of tourism offerings and regions for potential further development, and Zimbabwe’s cities can be developed further as regional tourism hubs. Bulawayo for example is gateway to Matobo National Park, home to the Matobo Hills rock formations and Stone Age cave art, while Mutare is a potential hub for the many natural wonders and attractions of the Eastern Highlands. Additionally, with Harare possessing the main international airport, city break tourism is another area of potential development.

- A considerable opportunity for future tourism destination for Zimbabwe, including developing as a regional hub for multi-destination travellers is the KAZA conservation area, which includes the Upper Zambezi River and Okavango basins and Delta, the Caprivi Strip of Namibia, the south-eastern region of Angola, south-western Zambia, the northern wildlands of Botswana and western Zimbabwe and contains 2 World Heritage Sites, 36 National Parks, and 60% of the remaining world elephant population.
- In terms of overseas markets, the USA and European source markets such as the UK, Germany, and France have represented key tourism markets and that is likely to continue.
- However, Japan and Australia were growing markets prior to the pandemic and with effective post-COVID strategies these trends could resume.
- India and Nigeria also represent considerable potential in terms of overall outbound travel market size.

- In terms of market segments, considering post-COVID trends in travel and tourism benchmarked against what Zimbabwe can offer, as well as existing key demographics for the destination, Twenty31 developed 4 key market segments: Adventure Travellers, Cultural Explorers, Mature Safari Travellers, and Family Travellers.
- These 4 segments represent a cross-section of travellers among whom Zimbabwe will be able to leverage its greatest existing and emerging strengths as a destination in the coming years – particularly a range of adventure activities, opportunities for cultural immersion, development of the longer-stay overseas and regional market (particularly South Africa), nature-based and sustainable offerings, and family-friendly vacation offerings.
- Further development of these markets and segments will require a combination of targeted investment partnership with the private sector, as well as international branding efforts by Zimbabwe to facilitate awareness-raising and outreach to build visitor advocacy and drive recovery.



SECTION 1: SITUATIONAL ANALYSIS OF TOURISM IN ZIMBABWE

With the technical assistance of:





BRIEF AND DELIVERABLE

BRIEF

- Assess historic marketing investment and cost of acquisition in source markets and regions.
- Engage stakeholder focus group (to be designed and verified with IFC) to identify and understand the sectoral objectives for national branding activities and for pursuing marketing, communications and travel trade activities in primary and prospective source markets.
- Engage stakeholders to identify and understand the reach and limitations of regional branding, particularly for those efforts related to the KAZA region, as well as regional mechanism in place to implement such branding programs, including a focus on the efforts of Zimbabwe within this regional approach.
- Determine, to the extent possible, the size and characteristics of the market that visited Zimbabwe between 2000 and 2018/2019, to provide an indication of tourism demand in Zimbabwe. Country of origin and trip motivation will be important factors.

OUR DELIVERABLE

- Stakeholder engagement was conducted to add contextual and qualitative analysis to the initial findings.
- Secondary research on the state of tourism at the global, regional, and domestic level, including an analysis of the ongoing impact of COVID-19 at these levels of specificity.
- Secondary research on emerging travel trends driving global tourism, specifically those most relevant for Zimbabwe in a post-COVID context.
- Detailed analysis of Zimbabwe's competitiveness and drivers of competitiveness drawing on the World Economic Forum's Travel & Tourism Competitiveness Index.
- Detailed analysis of Zimbabwe's airline access, connectivity, and capacity.



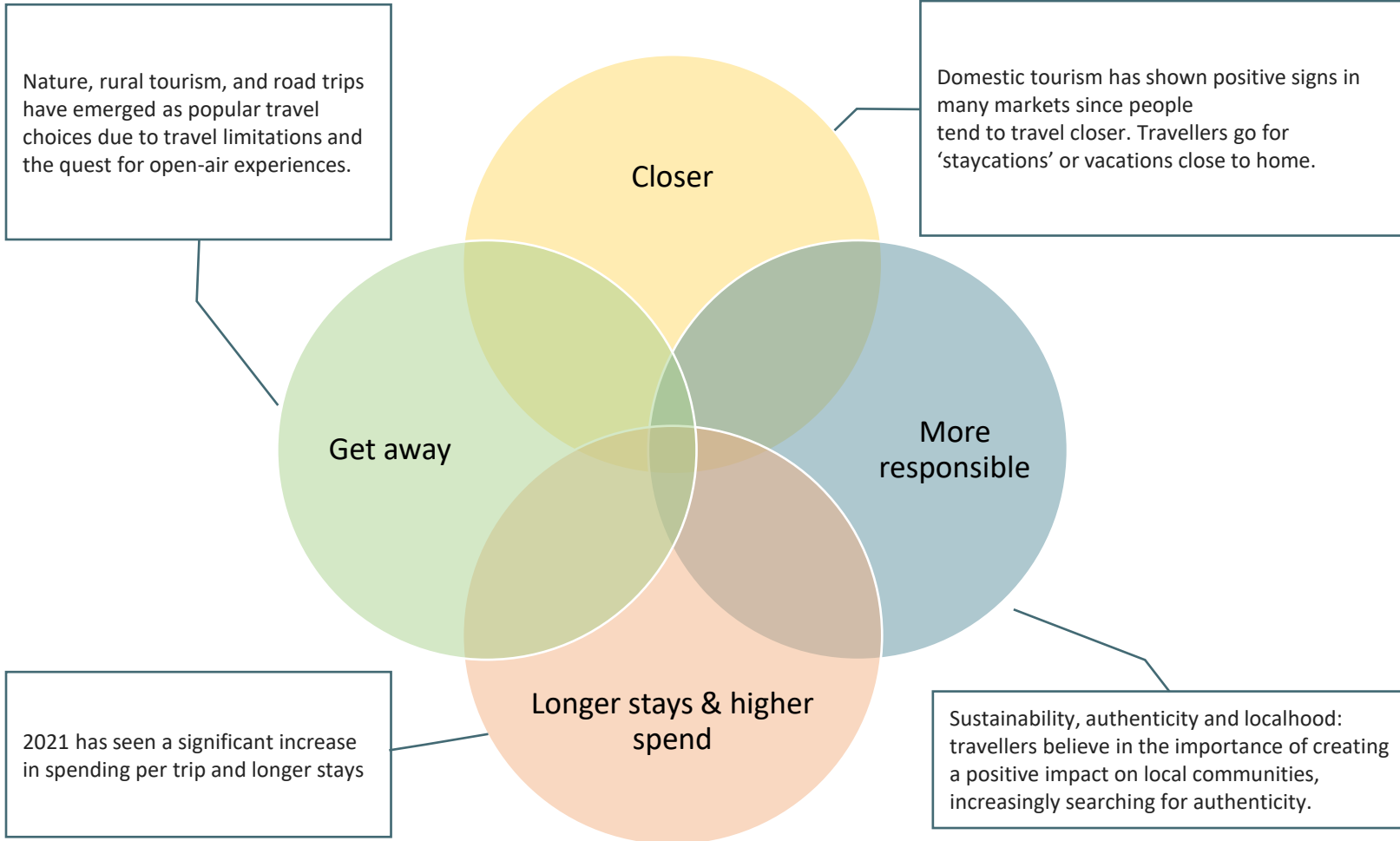
SUMMARY

Insight	Details	Takeaway/ Recommendation
Overall COVID Impact	<p>The global travel and tourism industry is profoundly impacted and will face a real risk to near-term survival of many tourism operators and a significant disruption to communities, SMEs, trade channels and destinations.</p> <p>In terms of Zimbabwe specifically, like any other country, Zimbabwe’s tourism sector was also badly impacted. The tourism activity gradually started attaining normalcy in 2021 (though there remained uncertainties due to the spread of the Omicron variant). All ports of entry have now been opened. Returning residents and visitors will no longer be required to present a negative COVID19 PCR certificate at the port of entry but should present a valid Vaccination Certificate showing they are fully vaccinated. A negative PCR certificate is only for the unvaccinated. Those with a booster shot have an entry advantage.</p>	<ul style="list-style-type: none"> • The tourism sector of the future will be very different from the pre-2020 landscape. • This brings challenges for the sector, but also opportunities to encourage innovation, drive new business models, explore new niches and markets, open new destinations, and move to more sustainable and resilient tourism development models.
New Opportunities	<p>Despite its catastrophic impact, the changing post-pandemic environment also presents new opportunities for destinations.</p>	<ul style="list-style-type: none"> • Destinations will need to cognizant of emerging travel trends in order to adapt to the “new normal” as well as understand the opportunities that will emerge from it. • Destinations seeking to differentiate in the new normal will need to consider the longer-term picture, while pursuing opportunities around digitalisation, supporting a transition away from carbon-intensive practices, and promoting interventions to build a more sustainable and resilient global tourism industry.
Slow Recovery in SADC Region predicted to rebound	<p>While the World Bank’s prediction that destinations with emerging and developing economies would be among the hardest hit has been borne out, Southern Africa is projected to grow 2.4% in 2022, according to the African Development Bank’s Southern Africa Economic Outlook.</p>	<ul style="list-style-type: none"> • The economic hardships of the pandemic point to a clear role for tourism in driving recovery and, while harder hit economically, nature-based destinations like South Africa and Zimbabwe have a strong foundation to facilitate this. • The region hosts vast flora and fauna, including the big five wildlife, two of the Seven Wonders of the World.

THE POST-PANDEMIC RECOVERY PERIOD IS PRECIPITATING A NUMBER OF SHIFTS IN CONSUMER



COVID-RELATED CONSUMER TRENDS



KEY IMPLICATIONS

- While international tourism bounces back, domestic tourism continues to drive recovery of the sector in an increasing number of destinations, particularly those with large domestic markets.
- According to experts, domestic tourism and travel close to home, as well as open-air activities, nature-based products and rural tourism are among the major travel trends that will continue shaping tourism in 2022.
- The recovery period following the pandemic presents destinations with the opportunity to adapt to and capitalize on new trends.
- With people travelling less and with more safety concerns, tourists are prioritizing few but longer trips on which they are willing to spend more, as well as prioritizing open air and outdoor experiences.

Source: UNWTO

SUMMARY

Insight	Details	Takeaway/ Recommendation
Growth in sustainable tourism	Throughout economic recovery, as travel and tourism becomes a greater contributor to the economic well-being of each destination, plans for responsible development and sustaining those elements generating growth must be taken into consideration. Common terms used to define sustainable tourism include 'holistic' and 'inclusive'.	<ul style="list-style-type: none"> • This poses a particular challenge and opportunity for developing destinations in Africa. • While these destinations are among the most vulnerable to climate change, they also have the greatest potential for tourism to support community development and economic growth.
Regenerative tourism	Regenerative tourism represents a new proactive systems approach to long-term sustainable tourism. Regenerative tourism takes the bold stance that tourism can leave a destination better off than it would be otherwise, leveraging tourism income, traveller advocacy, and community agency to create an improving and regenerating tourism ecosystem.	<ul style="list-style-type: none"> • Particularly for nature-based destinations, regenerative tourism represents a model for ensuring that tourism actually benefits the natural environment, society, cultural heritage, and communities. • This is a nascent area however and Zimbabwe has the opportunity to grow its destination into this model as an early adopter which can drive differentiation.
High value tourism	COVID-19 will speed the transition to high-value tourism for many destinations looking for an alternative to mass-tourism. HVTs are those who deliver more value to the destination than the average traveller and are interested in the types of experiences the destination offers.	<ul style="list-style-type: none"> • Emerging high value consumer segments are more engaged on the impact and benefits of tourism, therefore tapping into higher value tourism necessitates a shift away from the more quantity-over-quality approach to mass tourism.
Regional tourism	Another impact of COVID-19 has been to shift the emphasis of the global tourism market away from overseas travel towards nearby, regional, and domestic tourism. 'Roadtrip' tourism is a key component of this particularly for destinations with a large and varied land-mass. This also impacts group size with an emphasis on smaller groups, families, and VFR choosing private and self-drive options.	<ul style="list-style-type: none"> • The growth in the prominence of nearby and regional travel is an opportunity for Zimbabwe to develop its regional market as well as developing its sub-destinations within its varied land-mass.
Growing role for traveller advocacy	Newer sustainable and regenerative approaches to tourism have a bold and confrontational tone which can both challenge and excite consumers. One of the most crucial aspects to understand for destination brands is that much of the progress in building a destination brand at the level of the individual traveller takes place after their trip. An inspiring travel experience can convert a previous visitor into an advocate for the destination, through the sharing of their experiences and memories.	<ul style="list-style-type: none"> • Giving the traveller a sense of agency and ownership of their experience and the sanctity of the destination, it takes place in, represents an opportunity to develop powerful visitor advocacy. • Advocacy is a powerful tool for destination development in the age of social media.



INSIGHTS FROM KEY STAKEHOLDERS

Analysis of observations from key stakeholders in Zimbabwe and recommended actions from the market.

With the technical assistance of:



ZIMBABWE FACES A NUMBER OF CHALLENGES IN MARKETING ITSELF AS A MULTI-STOP STANDALONE DESTINATION BEYOND THE MORE WELL-KNOWN LOCATIONS.



POTENTIAL FOR ZIMBABWE AS A STANDALONE DESTINATION

- Most tour operators currently sell Zimbabwe as an add-on to other regional itineraries. Zimbabwe is rarely sold as a stand-alone destination, although most operators recognize that it once was, and has great potential to become one again.
- To regain and achieve this, better marketing of products was necessary and the private sector players in those areas must be involved within this promotion and marketing. While this takes place currently, the international market could benefit from a greater understanding of product offerings in the rest of the country, and operators themselves can play the role of ambassadors in this regard.
- Some destinations within Zimbabwe, such as Victoria Falls, are well-marketed throughout the world, particularly the luxury accommodations and the adventure tourism opportunities available. However, there was little known about the rest of country, outside of the regional market who have some historical familiarity.

- Operators see the return of access to and knowledge of these products as a key driver for growth as it could drive costs down for travelers looking to experience different products and destinations in one itinerary.
- Being able to promote easy access to these other Zimbabwean destinations would also open opportunities for the younger FIT market.
- While many interviewees mentioned there was potential for this, they noted that as Zimbabwe looks to recovery in the post-pandemic era, the destination will likely have more success continuing to market themselves as a stop on a multi-country itinerary, as this is their current product and that realistically creating a stand-alone destination would require a great amount of investment and innovative marketing from ZTA and the private sector.

TARGETED INVESTMENT AND STRATEGIC PARTNERSHIPS WILL BE KEY TO OVERCOMING ZIMBABWE'S CHALLENGES AS A DESTINATION.



CHALLENGES FOR DEVELOPING ZIMBABWE AS A STANDALONE DESTINATION



COMMUNICATION/ PROMOTION

A lack of knowledge and non-specific perceptions of unsafety remain a challenge. Zimbabwe has not yet successfully marketed its full range of products to their full potential, and many markets still see Zimbabwe as an unsafe destination to visit or know very little about it.



AIR ACCESSIBILITY

Air access continues to be a major impediment to Zimbabwe's growth, with limited airlines and flights providing direct access to Harare or Victoria Falls and almost none providing internal connections to other attractions.



IMMIGRATION/ VISAS

Many stakeholders noted difficulties with granting visas and the immigration process. Examples include long wait times in airports for passport control, inefficient border crossings, and slow network/connection issues creating delays in the immigration process.

OPERATORS HAVE RECOMMENDED A NUMBER OF SPECIFIC ACTIONS THAT ZIMBABWE COULD TAKE TO ALLEVIATE CHALLENGES, PARTICULARLY AROUND ACCESSIBILITY.

SPECIFIC RECOMMENDED SOLUTIONS FOR CHALLENGES



COMMUNICATION/ PROMOTION

Collaborative Promotion and Targeted Messaging: ZTA, along with the private sector and government, should invest more in promotion and ensuring messaging centers on safety and the diverse experiences Zimbabwe can offer compared to other SADC destinations.



AIR ACCESSIBILITY

Domestic Air Services: While Victoria Falls are Harare are more accessible, getting to other destinations (such as Mana pools, Kariba, Hwange or the Eastern Highlands) is extremely difficult and can be expensive. Before the 1990s these were popular attractions, but now Zimbabwe lacks a regular scheduled service to reach them. Having access to this type of domestic service would greatly increase potential to become a more stand-alone destination, enabling visitors to book and tailor complete itineraries within the country.



TRANSPORTATION INFORMATION

Information Resources: Fully independent travellers would be more willing and able to engage in their preferred modes of travel if better directions and information resources were provided to them and more assurances of safe infrastructure could be given, including key landmarks, petrol stations, local maps, and online resources to plan routes/ itineraries prior to travel.



IMMIGRATION/ VISAS

Regional Visa: Like those provided in East Africa, which would provide individuals with access to several countries in Southern Africa (Zambia, Zimbabwe, Botswana, etc.). This may ease immigration procedures, as many tourists arriving would already have their visa within their passport and would only need to be reviewed/ stamped upon arrival in order to enter Zimbabwe and create a one-entry type system to ease the way that people move between countries.

Website Improvement: Specifically, to ensure information provided within the website is regularly updated and timely. With regular updates to accept visa payments online, rather than requiring these to be done in person upon arrival, the immigration process at the airports would be greatly improved.

IN ORDER TO DEVELOP AS A STANDALONE DESTINATION, ZIMBABWE SHOULD PROMOTE CORE ATTRIBUTES AROUND UNIQUENESS, ECO-FOCUS, SAFETY, AND FRIENDLINESS.

MARKETABLE ATTRIBUTES FOR DEVELOPING ZIMBABWE AS A STANDALONE DESTINATION



VARIED & UNIQUE

Key to marketing Zimbabwe will be emphasizing the immense unique variety to be found in the rest of this vast country, from the Great Zimbabwe Monuments, the Nyanga Mountains in the east, and its wide selection of world-class safari experiences.



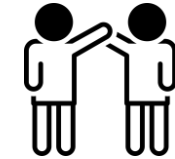
ECO-DESTINATION

Closely related to its uniqueness, the natural assets of Zimbabwe are world-class and conservation is core to its identity as a varied nature-focused and wildlife destination. This ecological focus is key to attracting lucrative FIT and younger intrepid travellers.



Safe

While Zimbabwe's economic and political past has created some trepidation among travellers, the destination is opening up to the world – Zimbabwe's varied wonders are open and safe for visitors.



FRIENDLY & WELCOMING PEOPLE

The people of Zimbabwe are warm, friendly, welcoming, and help to create a unique experience in the region. They like to share their culture and make travellers feel welcome. This attribute should also bolster the safety attribute

TOURISM IS CHANGING FAIRLY RAPIDLY, WITH A RESUMPTION AND INCREASE IN BUSINESS TRAVEL, COUPLED WITH A DIVERSIFICATION OF OFFERINGS AND TYPES OF TRAVELLERS.

HOW TOURISM IN ZIMBABWE IS EVOLVING



New Resorts

Zimbabwe, particularly outside of safari parks, has historically relied largely on traditional hotels.

There is now an increasing trend towards modern developed resorts offering more variety in terms of accommodation and activities.



Younger Generations

Hotels and other businesses in the major hubs in Zimbabwe (Harare etc.) have previously hosted almost exclusively older clientele coming for safari trips or wildlife viewing itineraries in the region.

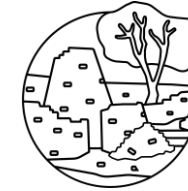
However, with an increase in investment and business travel, younger professionals are increasingly frequenting these establishments.



MICE Tourism

Major hubs such as Harare are seeing a post-COVID resumption and increase in MICE travel, with conferences and events resuming and attracting business travellers.

This presents opportunities to develop particularly regional travel, as many of these MICE travellers hail from the surrounding Southern African region.



Regional Diversification

Along with the diversification driven by mineral investment and prospecting, investment into infrastructure is improving access to a wider variety of destinations within Zimbabwe such as the Eastern Highlands and Great Zimbabwe monuments.



Investor Travel

With growing interest and investment in mineral wealth such as gold, platinum, chrome, and diamonds, investors are travelling around Zimbabwe, diversifying the geographic scope of business travel which presents opportunities to better develop tourism assets and products in areas proximate to mineral deposits.

A COMBINATION OF COLLABORATIVE MARKETING, INNOVATIVE LOGISTICAL INVESTMENT, AND DIVERSIFYING OF OFFERINGS COULD HAVE A GREAT IMPACT ON DRIVING TOURISM.



OPPORTUNITIES TO DRIVE FUTURE TOURISM DEVELOPMENT



Innovative Transport Services

Travellers in Zimbabwe have historically relied primarily on self-driving or direct flights. Public transport is generally not considered desirable for tourists, however bespoke internal transport services for tourists such as luxury coach routes could improve access and diversify geographic distribution of tourists within Zimbabwe.



Collaborative Marketing

Hotels and tour operators in Zimbabwe feel they have had to self-promote in order to attract visitors and develop their brand. Some have grouped together to collaborate on marketing, though the impact of this could be magnified if it were formalized and bolstered with the support of ZTA.



Internal Air Connectivity

While there have been marked improvements and developments around infrastructure, operators feel internal flight connectivity could still be improved and would have a considerable impact of geographic diversification of tourism within Zimbabwe.



Voluntourism and Community Tourism

Increasingly, visitors to the country want to be around the local people and want to see the way that local people live, thus promoting experiences that engage local communities would be popular with travellers, particularly the growing youth segment. Ecotourism is also growing in popularity and should be prioritized more in marketing and promotional efforts

IT WILL BE CRITICAL FOR ZTA'S MESSAGING TO EMPHASIZE ZIMBABWE'S OPENNESS, SAFETY AND WIDE VARIETY OF OFFERINGS CATERING TO ALL TASTES.



KEY MESSAGING TO TRAVELLERS TO ENCOURAGE TRAVEL TO ZIMBABWE



Zimbabwe is Safe

Operators stress that, while challenges exist for tourism in Zimbabwe, the relative safety of the country is a considerable asset which is not sufficiently communicated. Compared to neighbouring South Africa, Zimbabwe is notably safe for tourists to visit and travel within.



Zimbabwe is Open For Business

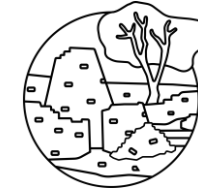
There is a lot of potential for regional markets, but ZTA could be doing more to attract regional conferences and marketing Zimbabwe more to the regional markets.

There is a lot of opportunity for business-and-leisure trips, particularly if tours and activities in Harare are better marketed to people travelling for business.



Zimbabwe is Ready for the Post-COVID Era

Not only has Zimbabwe weathered the COVID crisis, arguably better than many of its neighbours, it is now reopening to the world with renewed vitality and a wider and growing range of offerings than previously, appealing to a wider range of interests and demographic profiles.



Zimbabwe has More to Offer

Tourism has previously been concentrated around Victoria Falls and a few other key attractions. However, not only is Victoria Falls at the centre of the KAZA region, which itself has much else to offer, the wider country has a tremendous variety to offer, from the Nyanga Mountains in the Eastern Highlands, to Lake Kariba, to the Great Zimbabwe monuments, and much more.

A COMBINATION OF INFRASTRUCTURE, SECTOR COMMUNICATION, AND DIVERSIFIED PRODUCTS WILL HELP ZIMBABWE DEVELOP AS A DESTINATION.

TOP RECOMMENDATIONS FOR DEVELOPING BETTER TOURISM



IMPROVED EASE OF ACCESS

Increase airline routes into the country, establish a domestic charter service system like that of other similar destinations (i.e., Safari Link in Kenya or Mack Air in Botswana), to improve accessibility.



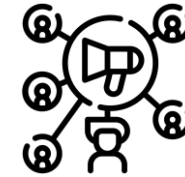
IMPROVED ENTRY PROCESSES

Creation of an e-visa and online payment for visas, regional visas to streamline entry processes. Slow internet connectivity could pose a hindrance to this however so poses a parallel challenge. A regional visa system would require a level of regional cooperation that may take longer to implement.



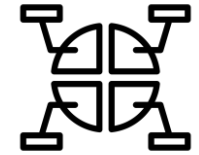
SOCIAL RESPONSIBILITY AND SUSTAINABILITY

Better market eco-friendly companies with an ethical perspective on travel. Recognize that Zimbabwe's primary asset is nature, focus on marketing, promoting, and preserving these to ensure Zimbabwe is seen as an ethical, environmentally conscious destination. New policies to protect the environment should be introduced and incorporated into marketing strategies to reinforce this commitment.



BETTER COMMUNICATION WITH MARKETS & TRADE

Involve tourism industry and private sector in campaigns to ensure effective targeting and needs of tourism industry factored into tourism investment. New messaging focused on safety, stability, and luxury aspects – shift perception globally, using digital channels and authentic content.



DIVERSIFIED PRODUCT

Look at price points of luxury accommodations compared to regional markets, and how other products can be introduced to create price diversity, specifically to enable more younger-generation and FIT travelers.



SECTION 2: MARKET SEGMENTATION

With the technical assistance of:



BRIEF AND DELIVERABLE

BRIEF

- Develop detailed profiles using a simple profiling or segmentation model to describe the different markets that visit Zimbabwe based upon these characteristics.
- Add to these market segments any recommended new segments that are suitable for Zimbabwe to attract and retain in the short to medium term.
- For the top market segments assess Zimbabwe's brand perception and competitor sets, structural factors (e.g., market presence, connectivity).
- Perform a deep dive (following steps above) for the Zimbabwe market and conduct verification interviews with stakeholders in Livingstone to determine any differences in segments with regards to profiles, volumes and market share.
- Make recommendations (with targets) for how to grow market share of desired markets.

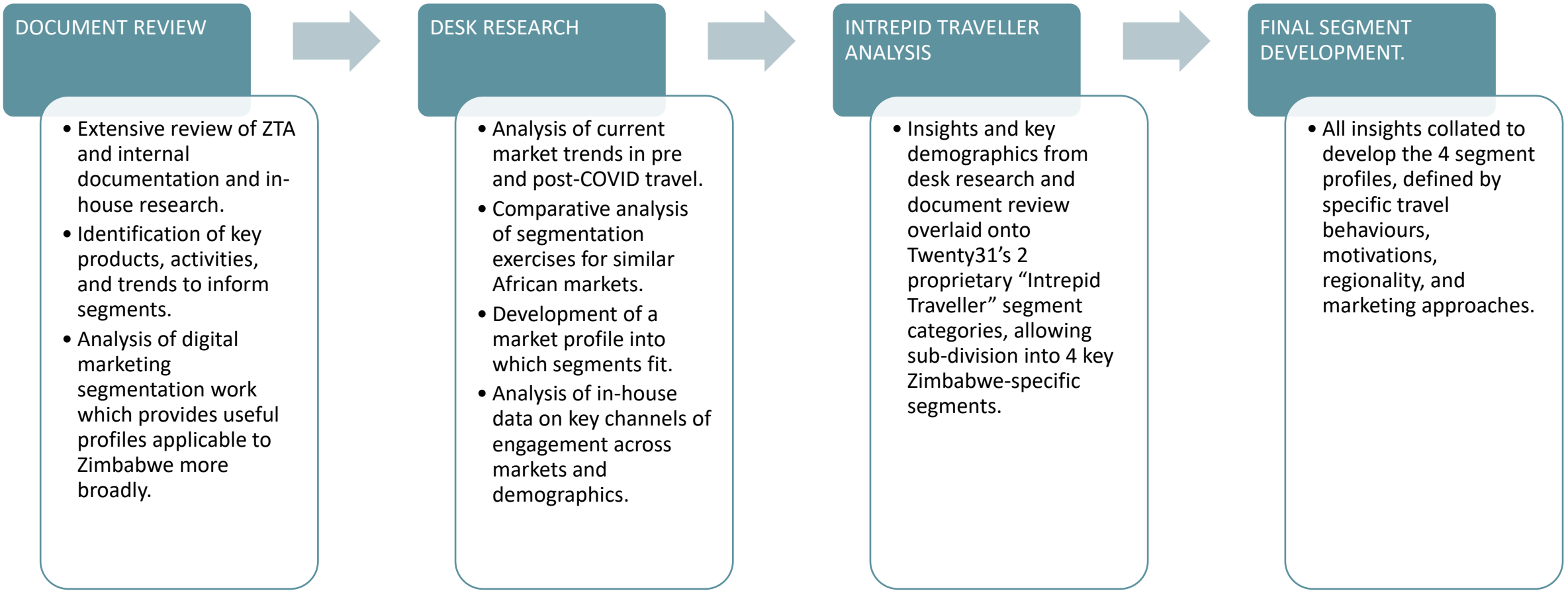
OUR DELIVERABLE

- 2 overarching intrepid traveller consumer segment categories were identified and further subdivided into 4 granular segments.
- Interviews are still ongoing and will be integrated into analysis.
- Historical and in-house data for Zimbabwe drawn upon to map consumer and product trends to emerging segments.
- Overall demographics and attitudes of intrepid traveller segments were mapped out in order to develop a series of personas.
- Analysis was included of online behaviour and booking and inspiration sources in order to inform targeted marketing by source market.
- Traveller attitudes and motivations were also mapped by source market.

SEGMENTS OF OPPORTUNITY WERE DEVELOPED FOLLOWING A STRUCTURED METHODOLOGY COMBINING RESEARCH WITH TWENTY31 PROPRIETARY DATA.



METHODOLOGY



SECTION SUMMARY

Insight	Details	Takeaway/ Recommendation
Rise of the 'Intrepid Traveller'	Market segmentation in a tourism context must take into account the evolution of leisure travel beyond pure "getaway" travel – the contemporary intrepid traveller seeks authentic and enriching experiences, commensurate with various emerging trends in travel, particularly in a post-COVID context (slow travel, nature-based travel, regenerative tourism etc).	<ul style="list-style-type: none"> Zimbabwe is well-placed to develop in a complimentary fashion with these emerging travel motivations and should emphasize the uniqueness, authenticity, and variety of their destination offerings as global travel recovers.
4 priority segments for Zimbabwe identified	Using the two intrepid traveller master segments as a base (Spirited and Cultural Travellers) combined with previously identified segments and aligning with emerging product and experiences, Twenty31 developed 4 target segments for Zimbabwe, Family Travellers, Cultural Explorers, Adventure Travellers, and Mature Safari Travellers.	<ul style="list-style-type: none"> The 4 segments represent a spread of Zimbabwe's key product offerings, attractions, and styles of travel, allowing for targeted marketing. Family Travellers and Cultural Explorers for example can be appealed to through cultural immersion and enriching educational experiences while Mature Safari Travellers will favour longer nature-based trips.
Synthesis of established traditional and growing non-traditional products	As mentioned, this segmentation takes into account the kinds of travellers to whom a combination of emerging product offerings (such as cultural immersion activities, gastronomy, and conservation awareness activities) and more established offerings (such as adventure/adrenalin activities) would appeal.	<ul style="list-style-type: none"> These segments can be mapped to the variety of established and emerging travel product trends which should inform targeted marketing.
Online channels and word-of-mouth remain essential for reaching these segments	Among travellers interested in Southern Africa, a combination of online channels (Google, review sites, OTAs) and word-of-mouth, remain paramount channels both for trip inspiration and booking activities.	<ul style="list-style-type: none"> A healthy and dynamic online presence will be essential to effective targeted marketing while developing traveller advocacy in-market will be vital (see slide 29).
Intrepid travellers interested in Southern Africa are driven by a desire for enriching immersive experiences	In terms of traveller attitudes and consistent with emerging products and segments, travellers interested in Southern Africa are seeking immersive and enriching experiences that expand their knowledge and connect them with people, cultures, and history, as opposed to a conventional "getaway" experience.	<ul style="list-style-type: none"> Zimbabwe's variety of experiences and relative lack of overtourism stands it in good stead to appeal to travellers seeking something different and authentic. Zimbabwe can market itself as a more "undiscovered" alternative to more established safari destinations, the KAZA region being a primary component.

DRAWING ON TWENTY31'S INTREPID TRAVELLER SEGMENTATION MODEL, 2 TRAVELLER CATEGORIES AND 4 DISTINCT TRAVELLER SEGMENTS WERE IDENTIFIED FOR ZIMBABWE.

HIGH-POTENTIAL MARKET SEGMENTS FOR ZIMBABWE

THE INTREPID TRAVELLER

SPIRITED CATEGORY

Mature Safari Traveller



Adventure Traveller



CULTURAL CATEGORY

Cultural Explorer



Family Traveller



PART 1: IDENTIFYING ZIMBABWE'S CONSUMER SEGMENTS

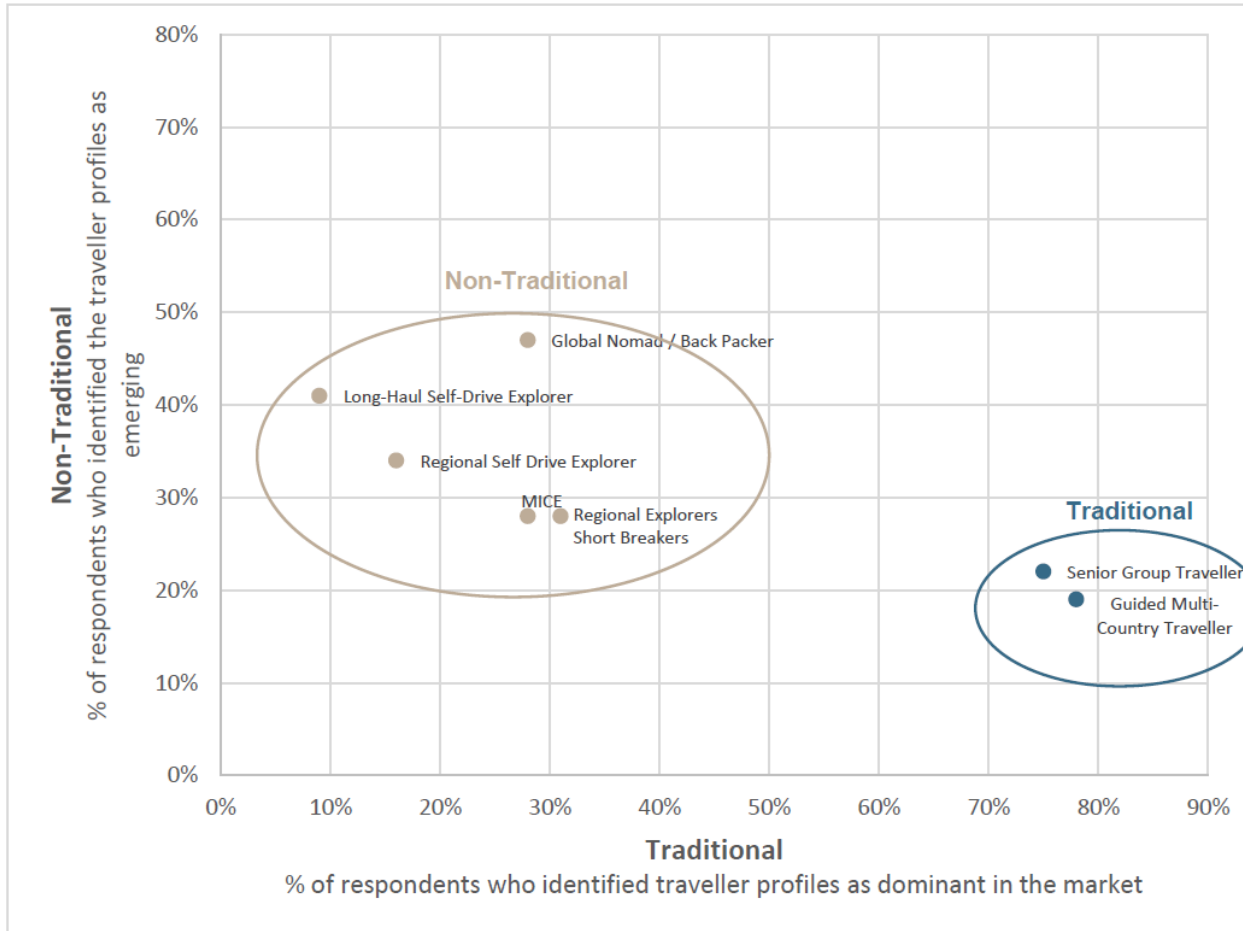
Developing key market segments for Zimbabwe



THE GROWTH OF EMERGING PRODUCT CATEGORIES IS COINCIDENT WITH EVOLVING CONSUMER CATEGORIES ATTRACTED TO ZIMBABWE.



DEFINING TRADITIONAL AND NON-TRADITIONAL CONSUMER CATEGORIES, 2022



KEY IMPLICATIONS

- According to research conducted by Victoria Falls, the destination is seen to increasingly be attracting new kinds of consumers such as adventurous global nomads and both long-haul and regional self-drive explorers, and this finding anecdotally scales to Zimbabwe according to other sources.
- In 2020, slight shifts in market share started to occur. Traditional markets contributed a total proportion of 44% of revenue for all firms in the sample. This change in trajectory continued in 2021, with traditional profiles dropping to 42%.
- This is indicative of a changing “dominant” market type in the face of the pandemic.
- As we will see, these evolving trends are commensurate with the rise of the “intrepid” traveller category.

Source: Recovery and Resilience Data Tracking Report, Victoria Falls, 2022

VICTORIA FALLS AND SAFARI CONTINUE TO DOMINATE IN TERMS OF CORE PRODUCT OFFERINGS BUT CULTURAL ACTIVITIES ARE SHOWING INCREASING DEMAND.



PRODUCTS OF OPPORTUNITY FOR MARKET SEGMENTS



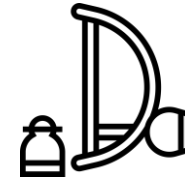
Safari

Safari remains primary product in Zimbabwe, particularly among the core market of older affluent travellers from key markets such as the USA.



TOURING VICTORIA FALLS

Victoria Falls continues to be the primary attraction in Zimbabwe according to operators and this crosses over with adventure activities, particularly for younger travellers.



CULTURAL

The growing FIT market is seeking more immersive experiences, particularly cultural experiences and participatory eco-conscious experiences.



ADVENTURE AND NIGHTLIFE

Some travellers are looking for adventure travel, or nightlife.

Adventure activities could be seen as a bi-product of core offerings like Victoria Falls and safaris, however nightlife is a nascent product category.

ZIMBABWE'S CORE GENERATIONAL DEMOGRAPHIC OF OLDER TRAVELLERS IS BEING BOLSTERED BY YOUNGER FIT AND MULTI-GENERATIONAL TRAVELLERS.



TRENDS IN TRAVEL MARKET DEMOGRAPHICS



Millennial FIT Travellers

There has been a steady rise of fully independent travelers (FIT) to Zimbabwe, which typically tend to be younger millennials, who are traveling to Zimbabwe mainly for the adventure products available there and for honeymoons.

Millennial travellers, especially FITs will take part in the available adventure activities such as white-water rafting, bungee and swings, ultralight flights, foot safaris and more.

Younger travellers are less likely to be put off by political historical safety concerns, however they do have reservations about hunting.



Older Generations

All interviewees confirmed that the primary demographic they receive is older generations (Baby Boomers and in many cases retirees, especially from the US) travelling in pre-booked tours.

Older travellers are less interested in and capable of adventure activities so will typically stay for shorter periods in adventure destinations such as Victoria Falls, as there is little for them to do outside of seeing the falls or taking a boat cruise. While the boomers pay more for accommodation, the greater length of stay and local spend of the FITs balances this equation.



Multi-Generational Travel

In recent years there has been an upswing in multi-generational travel, or individuals choosing to travel with multiple members of their families, most often Boomers funding and travelling with their Gen X children and Millennial/Gen Z grandchildren.

This is a demographic that could be grown through development and promotion of more family-friendly activities.

GREATER WEALTH, GLOBALIZATION, INCREASING MEDIA CONSUMPTION AND URBANIZATION HAS CREATED THE INTREPID TRAVELLER.

RISE OF THE INTREPID TRAVELLER

With increased globalization and connectivity, travellers are now more exposed to possibilities beyond more conventional tourism models.

Increased urbanization and media consumption has generated demand for more authentic experiences beyond just “getting away” or pure leisure.

Furthermore, these trends have only been accelerated as global travellers emerge from the COVID-19 pandemic.



The emergence of the **sophisticated, educated, global traveller** where the destination means less than the desire for an **authentic experience.**

- **Tourists** — “getting away”; simple/uncomplicated travel; bargain, tours
- **Travellers** — “going to”; expect levels of complication/part of learning experience; seeking adventure, cultural immersion

CONSISTENT WITH GLOBAL TRENDS, LOCAL & AUTHENTIC EXPERIENCES WITH GOOD VALUE FOR MONEY ARE INCREASING PRIORITIES FOR INTREPID TRAVELLERS.



INTREPID TRAVELLER HABITS VS. EXPECTATIONS, 2021

Travel Habits



- **Planning** - The majority enjoy the planning process the most. Takes on average 3 – 6 months or 2 weeks to a month for spontaneous short haul trips



- **Trusted Sources** - People do their due diligence extensively with Google, Travel Agents, friends/family, documentaries etc.



- **Duration** - Varies depending on type of holiday and proximity of destination (3-5 days for short haul and 10 days to 3 weeks in summer)



- **Budget** - Budget remains an important element to consider. Value placed on getting a good deal (stars and amenities)



- **Lodging** - Look for hotels and accommodation that are distinctive (ability to have a local experience)



- **Avoid** - Weather seems to be an important element when considering travelling

Expectations

- Intrepid travellers have specific expectations when it comes to authenticity:
- **Entertainment** – through events such as festivals, concerts, bands, rituals, bazaars
- **Amenities** – such as hotels, restaurants, luxury tents with traditional activities, parks & gardens, entertainment for children
- **Guidance** – through tour guides and programs (emphasis through hotels), information centers, theatre to showcase history
- **Outdoor Activities** – that allow one to experience the natural assets, including safaris, wilderness tours, climbing, hiking, horseback, rafting, and other comparable activities.

TWENTY31'S RESEARCH HAS UNCOVERED 2 LIKELY HIGH-POTENTIAL INTREPID CONSUMER SEGMENT CATEGORIES DEFINED BY SOCIAL VALUES.



HIGH-POTENTIAL CONSUMER SEGMENTS

According to Twenty31's research, this new category of intrepid travellers can be divided into 2 overarching segments:

- **Spirited travellers** who crave bold and sometimes risky new experiences that challenge them.
- **Cultural travellers** who crave culturally immersive and learning experiences.
- Note: Spending patterns of these travellers over-index to higher-value including longer length of stay; wider dispersal patterns within destinations; and higher daily spend vs. the mass market. While Zimbabwe-specific data was not available, we know from comparative markets, these two segments account for 40% to 60% of total traveller spending.

% of Total Travel Consumer Population (per market)	Spirited	Cultural
Total	12%	12%
UK	12%	10%
France	8%	14%
Germany	12%	17%
India	15%	15%
GCC	15%	10%

TWENTY31'S RESEARCH HAS UNCOVERED 2 LIKELY HIGH-POTENTIAL INTREPID CONSUMER SEGMENT CATEGORIES DEFINED BY SOCIAL VALUES, CONT'D.



HIGH-POTENTIAL CONSUMER SEGMENTS

While our analysis has uncovered four main high-value consumer segments, we know that other segments also travel to Zimbabwe. However, in the absence of hard data specific to Zimbabwe, we are unable to fully determine the percentages of the segments currently travelling to the country. The following provides a general observation, based on secondary data and observations from the stakeholder interviews.

Current representation of Zimbabwe's (national) and Victoria Fall's traveller base:

- Secondary research suggests the Spirited and Cultural traveller segments represent approximately 24% of the total global traveller population.
- Based on Zimbabwe's current product and experience offering, with confidence, we can estimate that Zimbabwe is likely over-indexing on attracting Spirited and Cultural traveller segments. We estimate this to be 50% to 60% of the current total traveller base to the country.
- At the same time, we assume that high-value, including luxury travellers are a sub-set of these two segment groups.
- Therefore, we assume other 40% to 50% of the visitor mix to Zimbabwe includes the following segments:
 - Business, meeting, convention, incentive and event travellers (i.e., MICE segments – expected to be rather limited or Zimbabwe)
 - Visiting friends and relative (VFR) segments
 - Back-packer/lower-value traveller segments
- Additionally, there is a likely percentage of the MICE segment that could be classified as Spirited or Cultural travellers. While the prime motivator to travel to Zimbabwe could be to attend a MICE event, these travellers could also engage in leisure based activities.
- To note, Zimbabwe likely has more of an opportunity to influence and attract Spirited and Cultural travellers, than they do with discretionary travel from VFR and back-packer/lower-value segments.
- As such, the majority of product development, marketing and travel trade efforts should be engaged around the Spirited and Cultural traveller segments (and a separate strategy for MICE given the difference engagement channels).

SPIRITED TRAVELLERS ARE GENERALLY HEDONISTIC NATURAL CONSUMERS WITH HIGH BRAND ENGAGEMENT AND ENJOY RISK.



SPIRITED TRAVELLERS

Social Values outline the underlying influencing factors for travel – they are what define a consumer’s daily habits, interests and societal.

Travel Motivators are the direct and in-direct factors that impact if and when a consumer will travel – and what they want to experience while on vacation

Spirited travellers are natural hedonists, motivated by showing off and comparison as well as a sense of escape and continuous travel.

They hold social values around the joy of consumption and social mobility and have high brand and fashion engagement.

Travel Motivations

- 1 Show Off
- 2 Hedonistic Rejuvenation
- 3 Constant Travel
- 4 Comparison Travel
- 5 Escape
- 6 Luxury Travel
- 7 Shared Experiences
- 8 Samplers
- 9 Exhibitionism

Social Values

- 1 Joy of Consumption
- 2 Social Mobility
- 3 Importance of Brand
- 4 Attraction for Crowds
- 5 Penchant for Risk
- 6 Fashion & Trends
- 7 Importance of Aesthetics
- 8 Pursuit of Novelty
- 9 Happiness
- 10 Need for Status Recognition
- 11 Enthusiasm for New Technology
- 12 Social Intimacy



CULTURAL TRAVELLERS ARE SPONTANEOUS AND CRAVE IMMERSION IN CULTURE, NATURE, AND HISTORY.



CULTURAL TRAVELLERS

Cultural travellers are generally spontaneous and prefer unstructured travel.

Their priority tends to be immersion whether in culture, nature, or local history and they value experiences shared with others.

Their values lean strongly towards spontaneity, the importance of culture, and multiculturalism.

Travel Motivations

- 1 Cultural Immersion
- 2 Unstructured Travel
- 3 Nature Travel
- 4 Historical Travel
- 5 Constant Travel
- 6 Shared Experiences
- 7 Escape
- 8 Hobbies
- 9 Roots Travel

Social Values

- 1 Importance of Spontaneity
- 2 Culture Sampling
- 3 Multiculturalism
- 4 Intuition & Impulse
- 5 Adaptability to Complexity
- 6 Religion à la Carte
- 7 Happiness
- 8 Introspection & Empathy
- 9 Pursuit of Novelty
- 10 Global Consciousness
- 11 Personal Control
- 12 Flexible Families

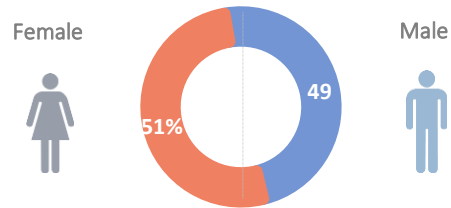


SPIRITED TRAVELLERS ARE HIGHLY SOCIAL AND OPEN-MINDED - THEIR TRAVEL OUTLOOK IS EXPERIMENTAL AND ADVENTUROUS, FAVOURING HEDONISTIC EXPERIENCES SHARED WITH OTHERS.



SPIRITED TRAVELLER SNAPSHOT, 2021

Gender



Values

Travel Motivators

- Comparison Travel
- Luxury Travel
- Hedonistic Rejuvenation
- Samplers
- Constant Travel
- Exhibitionism
- Shared Experiences

Social Values

- Top Defining Values
- Importance of Spontaneity
 - Personal Challenge
 - Neo-Romanticism
 - Social Intimacy
 - Interest in the Unexplained
 - Multiculturalism

Info and Advocacy Status

- Highest reliance on social media for planning and advocacy

Age Profile

55%
Between 18-34 years old
Avg: 38

Education and Employment

Income: Higher than avg.
Education: Higher than avg.
Occupation: FT

Marketing Considerations

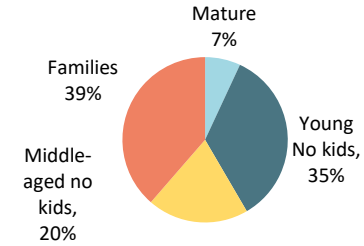
Product Appeal:

- Vibrant, lively, nightlife
- Provide opportunities to Show Off & brag
- Uncomplicated, familiar, safe
- Social packages, group tours with some independent
- Range of price points
- Vibrant cities

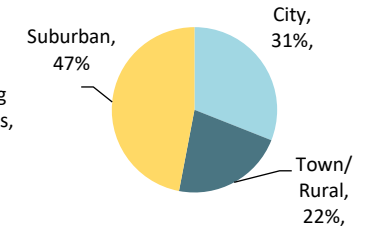
Communications Appeal:

- Emphasize comfort and security
- Social media and websites
- Appeal to younger singles and young families

Lifestage

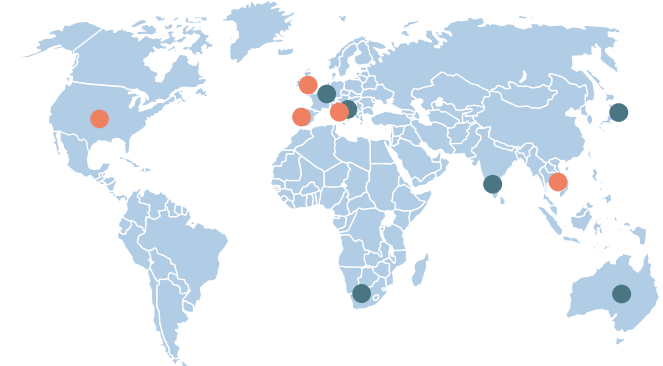


Rural/Urban



Destination Choices

- = Favourite Destination ● = Dream Destination
- | Favourite Destination | Dream Destination |
|-----------------------|-------------------|
| 1. Spain | 1. South Africa |
| 2. Thailand | 2. Italy |
| 3. Italy | 3. Japan |
| 4. USA | 4. Australia |
| 5. UK | 5. France |

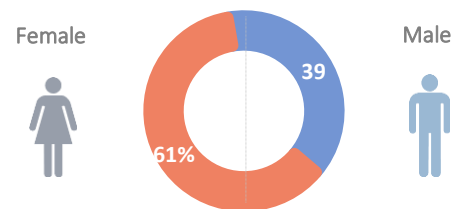


CULTURAL TRAVELLERS ARE DEFINED BY LOVE OF CONSTANT TRAVEL AND OPPORTUNITIES TO EMBRACE, DISCOVER, AND IMMERSE THEMSELVES IN CULTURE, PEOPLE, AND SETTINGS.



CULTURAL TRAVELLER SNAPSHOT, 2021

Gender



Values

Travel Motivators

- Cultural Immersion
- Unstructured Travel
- Nature Travel
- Historical Travel

Social Values

- Top Defining Values
- Importance of Spontaneity
 - Personal Challenge
 - Neo-Romanticism
 - Social Intimacy
 - Interest in the Unexplained
 - Multiculturalism

Info and Advocacy Status

- **Inspiration:** Peer-to-Peer, Word-of-Mouth and Advocacy for inspiration
- **Planning:** Websites

Age Profile

44%
Between 44-64 years old
Avg: 52

Education and Employment

- Income:** Higher than avg.
- Education:** Higher than avg.
- Occupation:** FT – Nearing Retirement

Marketing Considerations

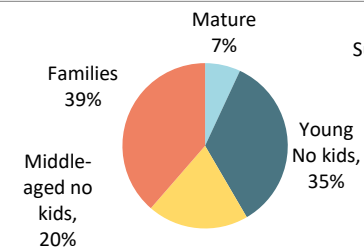
Product Appeal:

- Offers opportunity for Escape and Hedonistic Rejuvenation
- Vibrant Cities
- UNESCO sites
- Exhibitionist, with opportunities to Show Off
- Some novelty
- Slightly younger focus, some child-friendly activities
- Use coupons and promotion

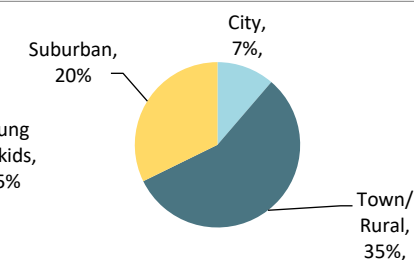
Communications Appeal:

- Use various mixed media
- Word-of-mouth advocacy
- Approachable, authentic but not too low-key
- Emphasize relaxation and opportunities to 'let loose'

Lifestage

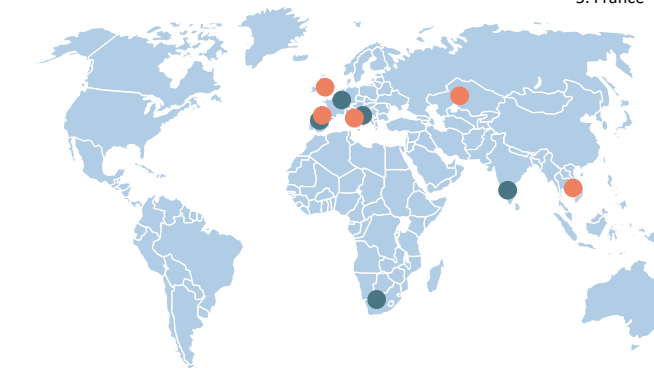


Rural/Urban



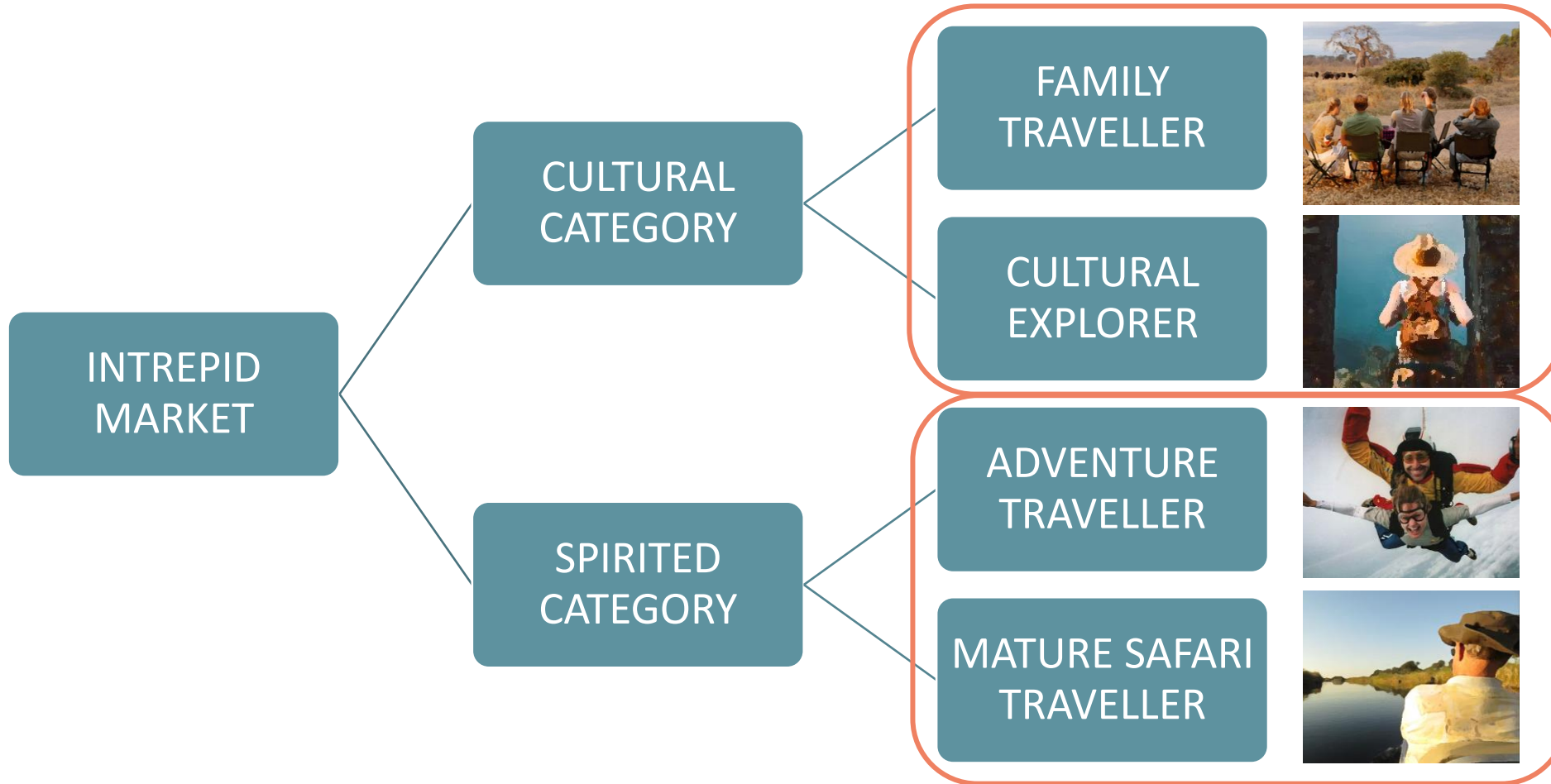
Destination Choices

- = Favourite Destination
 - = Dream Destination
- | Rank | Favourite Destination | Dream Destination |
|------|-----------------------|-------------------|
| 1. | Italy | South Africa |
| 2. | Spain | Italy |
| 3. | UK | Spain |
| 4. | Turkey | India |
| 5. | Thailand | France |



THE TWO INTREPID SEGMENT CATEGORIES CAN BE FURTHER SUBDIVIDED INTO 4 KEY MARKET SEGMENTS FOR ZIMBABWE SPECIFIC MARKET CONTEXT.

HIGH-POTENTIAL MARKET SEGMENTS FOR ZIMBABWE



FAMILY TRAVELLERS.

FAMILY TRAVELLER PROFILE - CASSIDY

Age: 35-45

Nationality: US, UK, Europe, Australia, South Africa

Job: Freelance graphic designer (remote worker – fulltime mother)

Party composition: Family of 4

Inspiration for visiting Zimbabwe: Conversations with family members in South Africa who recommended other sites and destinations within Zimbabwe

Places visited: Victoria Falls, some excursions into Livingstone and nearby parks

Length of stay: 7 days

Motivation for visiting Zimbabwe: Enriching and educational experience for children as well as an inspiring and breath-taking experience for adults. Desire to share a wildlife experience with children

“As a mother, its really important for me to take my family to places where they can learn about nature and other cultures. Zimbabwe also has so many activities for kids and adults alike to enjoy, and learn a great deal in the process”



CHANNEL PREFERENCES

Preferred digital platforms: Instagram, Facebook, YouTube, Trip Advisor,

Preferred content: Immersive Photos & Video, Reviews

Online behaviours: Digital Natives, Predominant Mobile Users, High frequency Social Media Users, Shared Economy Users, Constant Communicators, Compulsive Sharing , Digital Exhibitionism / Bragging, Checking In And Tagging, Impulse Buyers Online

Searches/ interests: Culture, People, Food, Tradition, Art and Artifacts, History, Nature, Family activities, Amusement parks, Child friendly

Travel cross reference: Online travel agents, news content, national geographic, travel and culture blogs

Touch points: YouTube ads, TripAdvisor, live content, Facebook ads

CULTURAL EXPLORER PROFILE - SHANNON

Age: 25-45

Nationality: US, UK, Europe, Africa, Asia And Australia

Job: Psychotherapist and part-time artist

Party composition: Couple (Shannon and her partner)

Inspiration for visiting Zimbabwe: Avid reader of travel websites such as Lonely Planet and Conde-Naste generating a gradually growing interest in Zimbabwe and surrounds

Places visited: Victoria Falls as a base with overland tour to Hwange National Park

Length of stay: 11 days

Motivation for visiting Zimbabwe: Cultural immersion and a totally new experience, reconnecting with nature and finding artistic inspiration

“Zimbabwe has always fascinated me and piqued my curiosity. The Kaza region is a central point between so many interesting areas and cultures that I can’t wait to connect with”



CHANNEL PREFERENCES

Preferred digital platforms: Instagram, Facebook, YouTube, Trip Advisor

Preferred content: Immersive Photos & Video, Reviews

Online behaviours: Digital Natives, Predominant Mobile Users, High frequency Social Media Users, Shared Economy Users, Constant Communicators, Compulsive Sharing, Digital Exhibitionism / Bragging, Checking In And Tagging, Impulse Buyers Online, Online Dating

Searches/ interests: Culture, People, Food, Travel, Tradition, Art and Artifacts, History, Nature

Travel cross reference: Online travel agents, news content, national geographic, travel and culture blogs

Touch points: YouTube ads, TripAdvisor, live content, Facebook ads

ADVENTURE TRAVELLERS.



ADVENTURE TRAVELLER TRAVELLER PROFILE - ZACK

Age: 18-35

Nationality: US, UK, Europe, Asia, Australia, South America, Africa and Middle East

Job: Actuary

Party composition: Group of 4 (College friends)

Inspiration for visiting Zimbabwe: Researching travel packages after initial interest in a safari and adventure holiday in Africa

Places visited: Victoria Falls, Hwange, Antelope Park (Gweru) as part of an overland package with Nomad Tours (packages with Botswana, Zambia, and South Africa)

Length of stay: 5 days in Zimbabwe (as part of a 20-day overland trip)

Motivation for visiting Zimbabwe: "Bragging rights" about having gone beyond the more well-known destinations and explored further into Zimbabwe

"Zimbabwe is the adventure of a lifetime – I can't wait to look out over the smoke that thunders while I sip my gin and tonic and feel like I am looking over the edge of the world"



CHANNEL PREFERENCES

Preferred digital platforms: Instagram, Facebook, YouTube, Trip Advisor

Preferred content: Instant messages, Immersive photos & video, reviews

Online behaviours: Digital Natives, predominant mobile users, high frequency social media users, shared economy users, constant communicators, compulsive sharing, digital exhibitionism / bragging, checking in and tagging, impulse buyers online, online dating

Searches/ interests: Adventure, Social Activity, food, gear, sports equipment, travel, technology, outdoors, life skills/hacks, brands

Travel cross reference: Online shopping, Online travel agents, news content, experimental media, Netflix, amazon, native content

Touch points: YouTube ads, TripAdvisor, live content, Facebook ads (

MATURE SAFARI TRAVELLERS.

MATURE SAFARI TRAVELLER PROFILE - HAYDN

Age: 40+

Nationality: US, UK, Europe, Asia , Australia, Africa and Middle East

Job: Retired stockbroker

Party Composition: 2 family friend couples (each in their own vehicle)

Places visited: Entry via Livingstone/Victoria Falls border, cross-country via private vehicle stopping in Hwange, Antelope Park, Great Zimbabwe, and Bulawayo, re-entering South Africa via Beitbridge

Inspiration for visiting Zimbabwe: Lifetime love of the bush and the opportunity to explore further into Africa than just the parks offered within reach in South Africa

Length of stay: 20 days (self-drive tour)

Motivation for visiting Zimbabwe: Extended independent safari trip with retiree friends



"I have always had a love for the bush since my childhood in Natal. Its where I go to reconnect and unwind. I try and go as often as possible and now that I am retired, I have more time and resources to explore deeper into neighboring countries like Zimbabwe"



CHANNEL PREFERENCES

Preferred digital platforms: Instagram, Facebook, YouTube, Trip Advisor

Preferred content: Immersive photos & video, reviews

Online behaviours: Predominant PC users, moderate to low frequency social media users

Searches/ interests: Safari, Wildlife and Nature, food, Wilderness, travel, outdoors, Nature

Travel cross reference: Online travel agents, news content, national geographic, safari blogs

Touch points: YouTube ads, TripAdvisor, live content, Facebook ads



PART 2: KEY CHANNELS

Identifying key channels for reaching consumer segments of opportunity

With the technical assistance of:

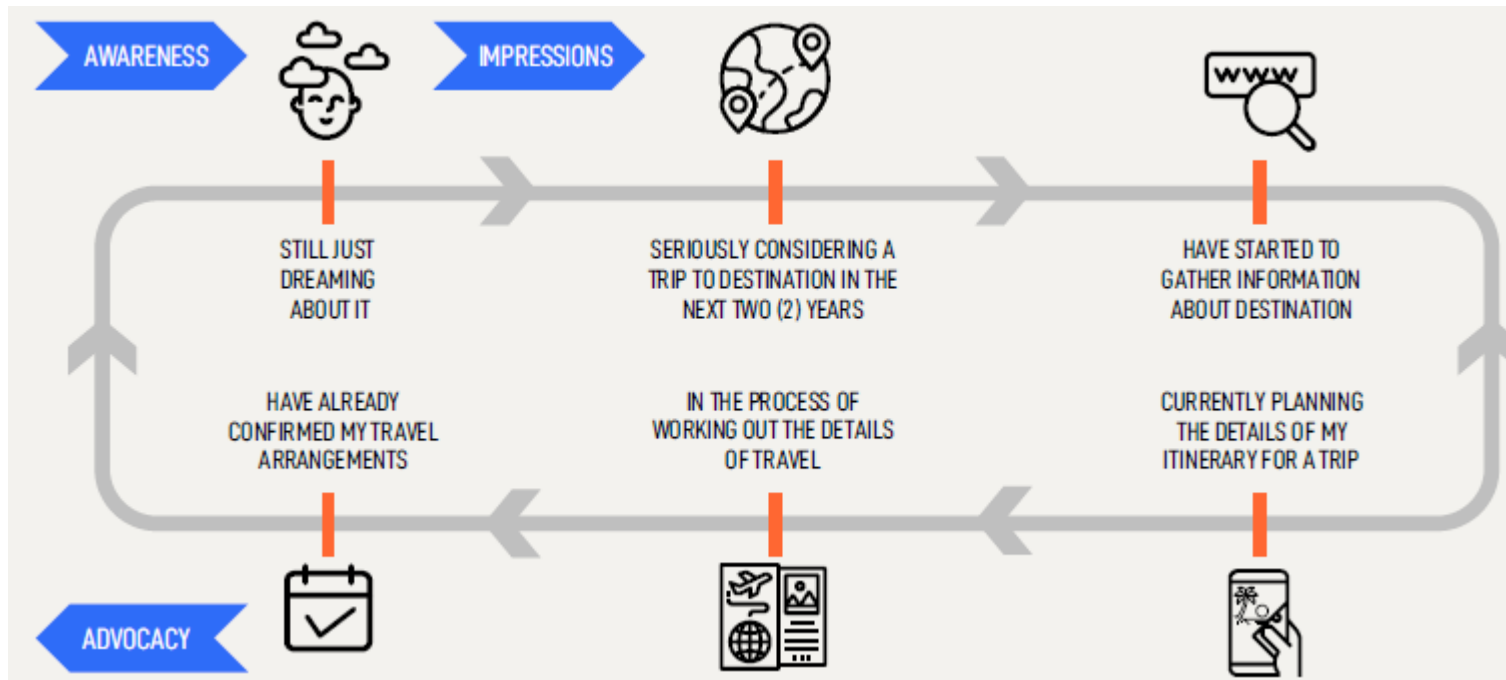


THE TRAVELLER PATH TO PURCHASE HELPS TO CONTEXTUALIZE THE MARKET OPPORTUNITY TO DEVELOP ADVOCACY.



MARKETING ALONG THE PATH TO PURCHASE

THE PATH TO PURCHASE









KEY IMPLICATIONS

- Understanding the path to purchase is essential to define a more granular understanding of both barriers and opportunities to enhance the consumer journey and increase visitation through targeted marketing and destination branding initiatives.
- The purpose of a granular understanding of the path to purchase is to enhance the role that the destination brand can play in converting some basic level of awareness or slight interest, into bookings and the post-trip advocacy role.
- This involves the understanding that, at the level of the individual traveller, the greatest impact on the destination brand will be made by the traveler through their interactions with others.
- More distinctly, it is an opportunity to create engagement with a destination brand – the first steps on the path to generating traveller advocacy.

MARKETS CAN BE CLUSTERED INTO SIX GROUPS WITH EACH GROUP HAVING A DIFFERENT MIX OF CUSTOMER PREFERENCES.

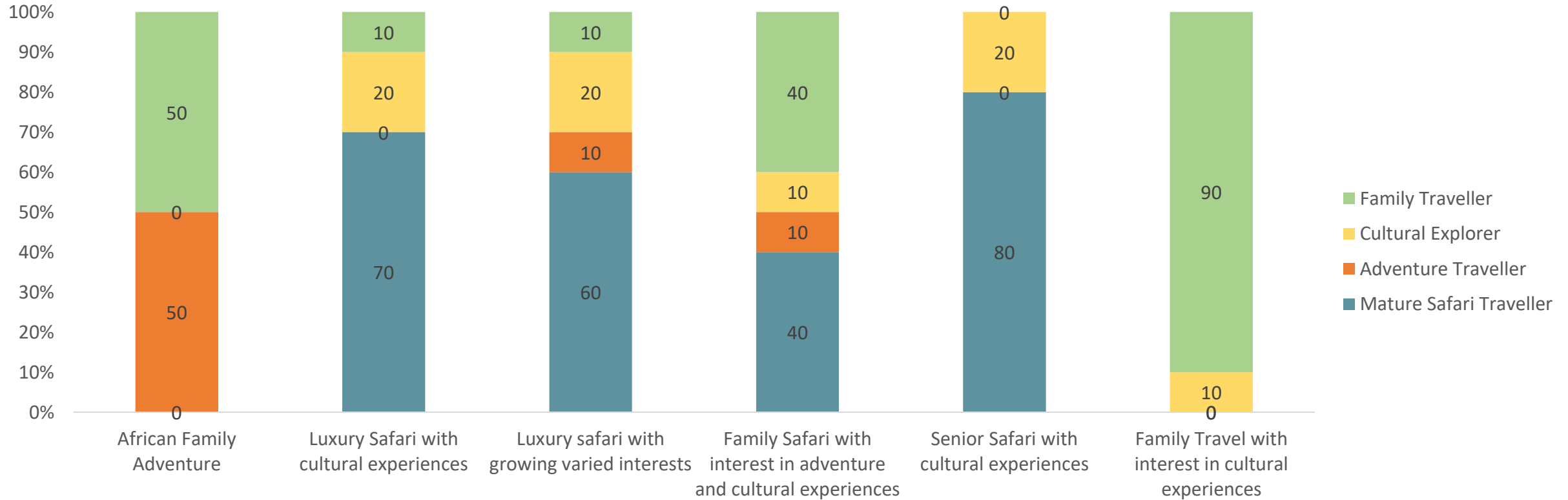


CHANNEL PER MARKET

	GROUP NAME	DESCRIPTION	RELEVANT MARKETS
	African Family Adventure	Markets that need a balance between younger and family travellers looking for an authentic vacation experience within Africa	South Africa, Botswana, Zambia
	Luxury Safari with cultural experiences	Markets that have a heavy concentration on the high net-worth senior market looking for an authentic safari-type experience; growing focus on the cultural and extended family group travel segment	Germany, United States, Italy, Netherlands, United Kingdom
	Luxury Safari with varied interests	Markets that have a heavy concentration on the high net-worth senior market looking for an authentic safari-type experience; growing focus on the cultural and extended family group travel segment; some ability to target the adventure-seeking young professional and gap-year market	United Kingdom, France, Australia, Germany, United States
	Family Safari with interest in adventure and cultural experiences	Markets that need a balance between higher net worth mature and extended family groups; potential to target younger South Africans interested in adventure and cultural trips in Africa	South Africa
	Senior Safari with cultural experiences	Markets that have almost exclusive focus on the seniors' market focused on safaris, with some concentration on cultural enthusiasts	Japan, United States
	Family Travel with interest in cultural experiences	Markets with majority focus on the multi-generational Emirati family market and expat families	United Arab Emirates and GCC



THE BREAKDOWN OF THE CUSTOMER SEGMENTS IN EACH GROUP IS SHOWN BELOW. THIS WILL INFORM THE MARKETING MESSAGING IN EACH SOURCE MARKET.

CHANNEL PER MARKET



THERE ARE 5 BROAD GROUPS THAT SOURCE MARKETS CAN BE GROUPED INTO ACCORDING TO THEIR RELEVANT CHANNEL MIX

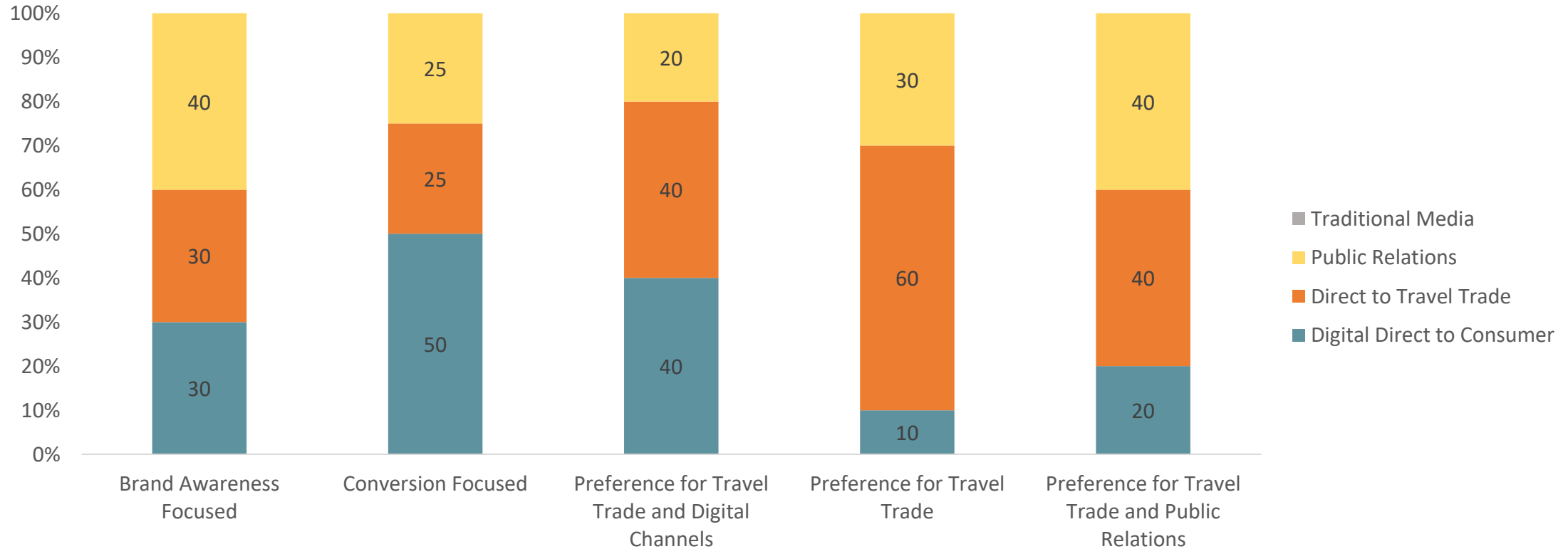
CHANNEL PER MARKET

	GROUP NAME	DESCRIPTION	RELEVANT MARKETS
	Brand Awareness Focused	Lower brand awareness, thus, need to leverage PR and direct to consumer digital media. Use local travel trade to connect with consumers to consider a trip to Southern Africa	South Africa, Botswana, Zambia
	Conversion Focused	Higher brand awareness and ability to engage FIT consumers in addition to use of PR to drive engagement with travel trade	South Africa
	Preference for Travel Trade and Digital Channels	Mid-level brand awareness and very engaged digital consumer - ability to equally use digital and travel trade channels supported by engaged PR	Germany, United Kingdom, United States, Italy, France, Australia, New Zealand, Netherlands
	Preference for Travel Trade	Heavy usage of travel trade channels and PR to connect with key segments	Japan, Germany, United States (luxury market)
	Preference for Travel Trade and Public Relations	PR and travel trade focused market based on consumer travel preferences	United Arab Emirates

SINCE TRADITIONAL MEDIA IS BECOMING LESS PROMINENT, IT IS RECOMMENDED THAT THE MARKETING INVESTMENT FOCUSES ON THE OTHER THREE CHANNELS ACROSS MARKETS.



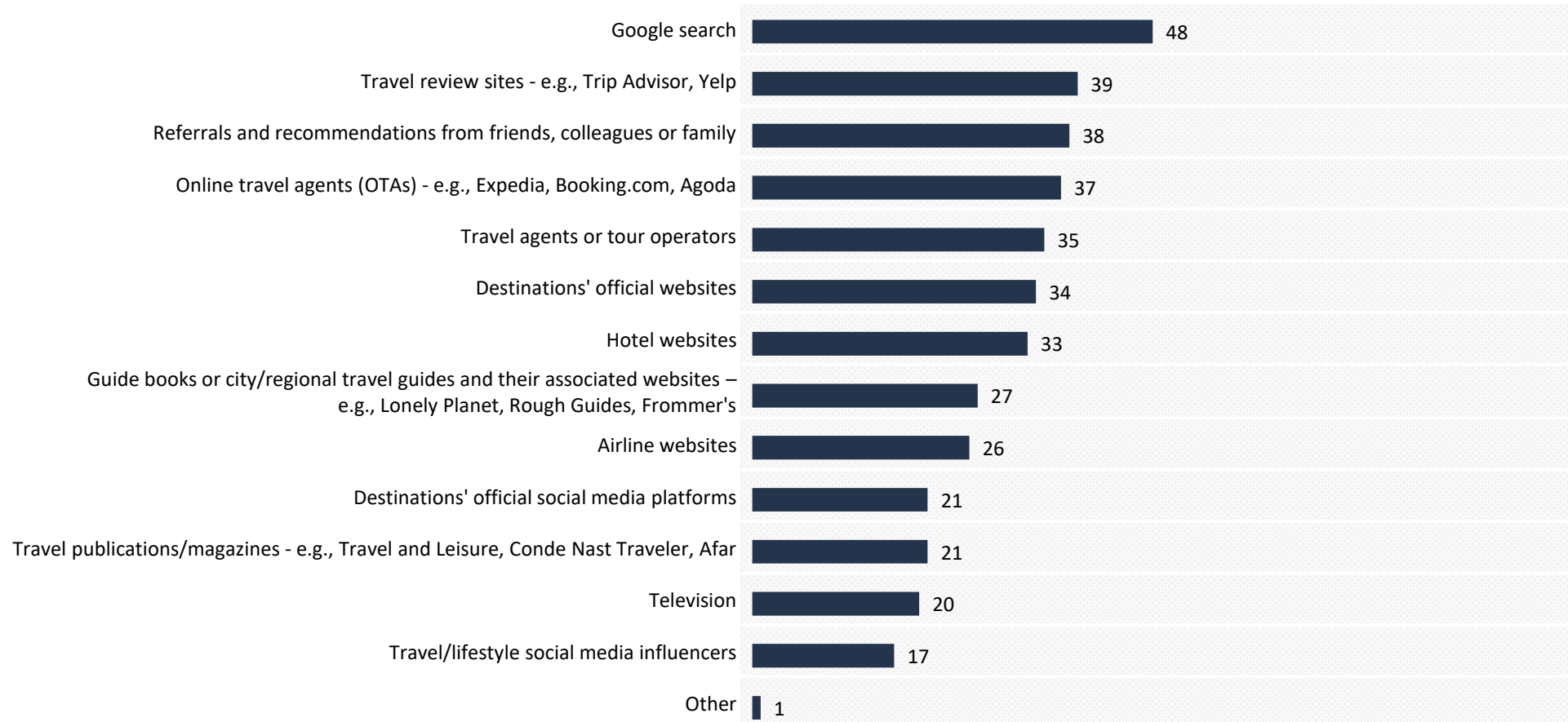
CHANNEL PER MARKET



GOOGLE SEARCH, TRAVEL REVIEW SITES. AND PERSONAL RECOMMENDATIONS ARE MOST LIKELY SOURCES OF INSPIRATION FOR DESTINATION CHOICE GLOBALLY.

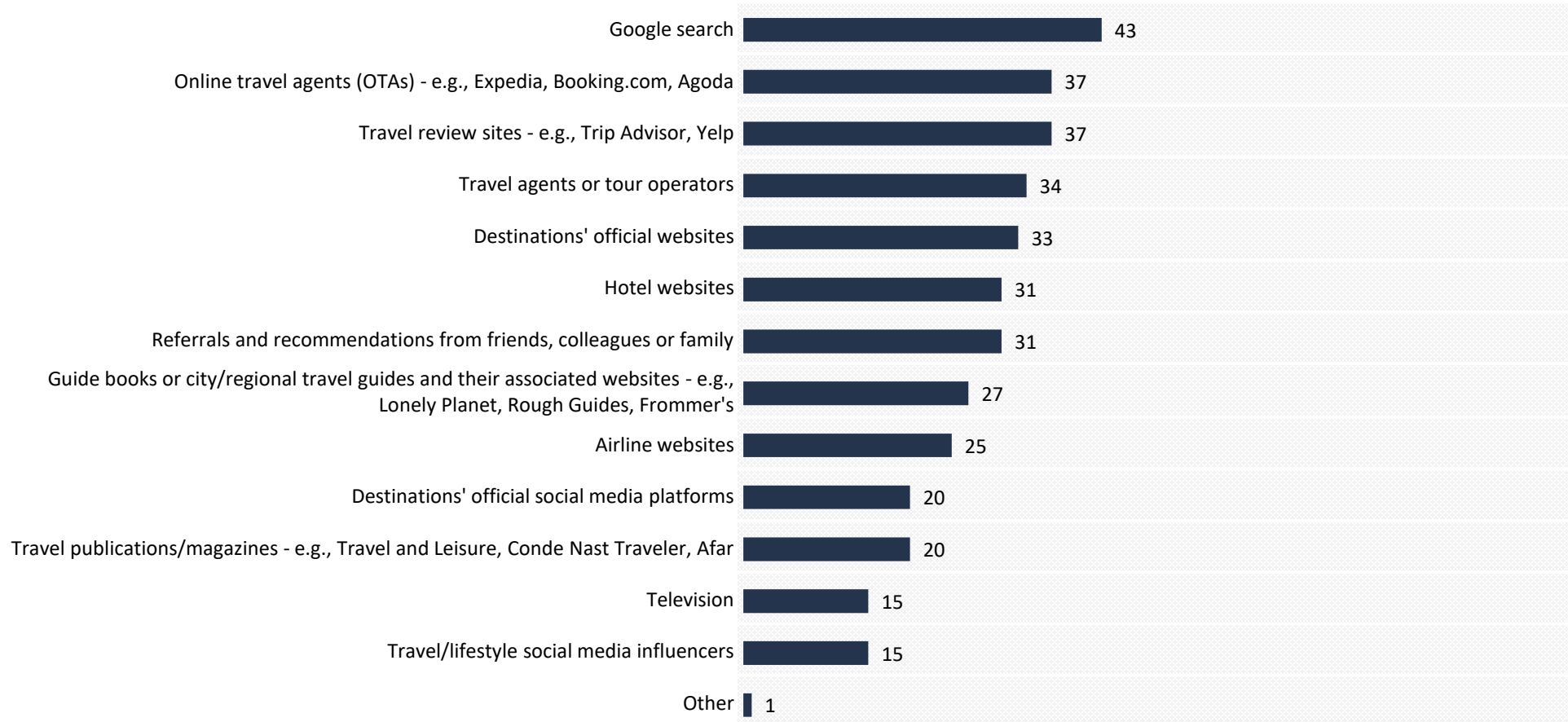


TOP SOURCES OF DESTINATION INSPIRATION, 2021



SIMILAR INFORMATION SOURCES ARE IMPORTANT FOR TRIP PLANNING – BUT OTAS ARE ALSO KEY.

TOP SOURCES OF INFORMATION TO AID TRIP PLANNING, 2021



ITALY IS THE ONLY MARKET RELYING MOST ON TRAVEL REVIEW SITES FOR TRIP PLANNING, WHILE RUSSIANS USE TRAVEL AGENTS – ELSEWHERE GOOGLE IS DOMINANT.



TOP SOURCES OF INFORMATION TO AID TRIP PLANNING – BY MARKET, 2021

	France	Germany	Italy	Saudi Arabia	Poland	Russia	Spain	UK	USA
1st	Google search (43%)	Google search (38%)	Travel review sites (43%)	Google search (50%)	Google search (56%)	Travel agents or tour operators (48%)	Google search (46%)	Google search (38%)	Google search (47%)
2nd	Online travel agents (OTAs) (37%)	Online travel agents (OTAs) (38%)	Google search (42%)	Referrals and recommendations (40%)	Travel agents or tour operators (49%)	Google search (47%)	Online travel agents (OTAs) (45%)	Travel review sites (37%)	Travel review sites (41%)
3rd	Travel review sites (34%)	Travel agents or tour operators (37%)	Online travel agents (OTAs) (38%)	Destinations' official websites (37%)	Online travel agents (OTAs) (44%)	Referrals and recommendations (46%)	Travel review sites (39%)	Online travel agents (OTAs) (32%)	Online travel agents (OTAs) (38%)
4th	Travel agents or tour operators (31%)	Hotel websites (28%)	Destinations' official websites (32%)	Hotel websites (36%)	Travel review sites (44%)	Destinations' official websites (44%)	Destinations' official websites (38%)	Hotel websites (28%)	Hotel websites (37%)
5th	Destinations' official websites (29%)	Travel review sites (27%)	Travel agents or tour operators (30%)	Online travel agents (OTAs) (34%)	Hotel websites (42%)	Hotel websites (39%)	Travel agents or tour operators (35%)	Destinations' official websites (25%)	Destinations' official websites (35%)

RUSSIA RELIES MORE ON PERSONAL RECOMMENDATIONS, WITH OTHER MARKETS MORE FOCUSED ON GOOGLE SEARCH AND TRAVEL REVIEW SITES.



TOP SOURCES OF DESTINATION INSPIRATION – BY MARKET, 2021

	France	Germany	Italy	Saudi Arabia	Poland	Russia	Spain	UK	USA
1st	Google search (50%)	Google search (45%)	Google search (49%)	Google search (52%)	Google search (62%)	Referrals and recommendations (54%)	Google search (52%)	Google search (47%)	Google search (51%)
2nd	Online travel agents (OTAs) (40%)	Online travel agents (OTAs) (38%)	Travel review sites (45%)	Referrals and recommendations (43%)	Travel agents or tour operators (56%)	Google search (48%)	Online travel agents (OTAs) (47%)	Travel review sites (40%)	Travel review sites (44%)
3rd	Travel review sites (39%)	Travel agents or tour operators (38%)	Online travel agents (OTAs) (37%)	Destinations' official websites (39%)	Online travel agents (OTAs) (47%)	Travel agents or tour operators (45%)	Travel review sites (42%)	Online travel agents (OTAs) (32%)	Referrals and recommendations (38%)
4th	Referrals and recommendations (32%)	Travel review sites (35%)	Destinations' official websites (35%)	Hotel websites (38%)	Hotel websites (46%)	Destinations' official websites (45%)	Destinations' official websites (39%)	Referrals and recommendations (29%)	Destinations' official websites (37%)
5th	Travel agents or tour operators (32%)	Referrals and recommendations (35%)	Travel agents or tour operators (33%)	Airline websites (37%)	Travel review sites (44%)	Hotel websites (39%)	Referrals and recommendations (38%)	Hotel websites (29%)	Online travel agents (OTAs) (36%)

SECTION 3: MARKET PORTFOLIO ANALYSIS



BRIEF AND DELIVERABLE

BRIEF

- Assess the global market attractiveness based on country size, performance and potential of each potential source market where data is available.
- Assess Zimbabwe's brand perception data (where available), competitor sets (based on multi-channel search behaviour, where available, booking data and market share), structural factors and pandemic recovery and complete an ability to win analysis that weighs attractiveness against structural, pandemic and brand perception factors.
- Consolidate attractiveness and ability to win scores to create a framework for source market prioritisation.
- Propose prioritised source markets to 10-25 priority source markets in terms of attractiveness and ability to attract visitors. Set data-driven arrivals targets for visitor arrivals by source market and region.

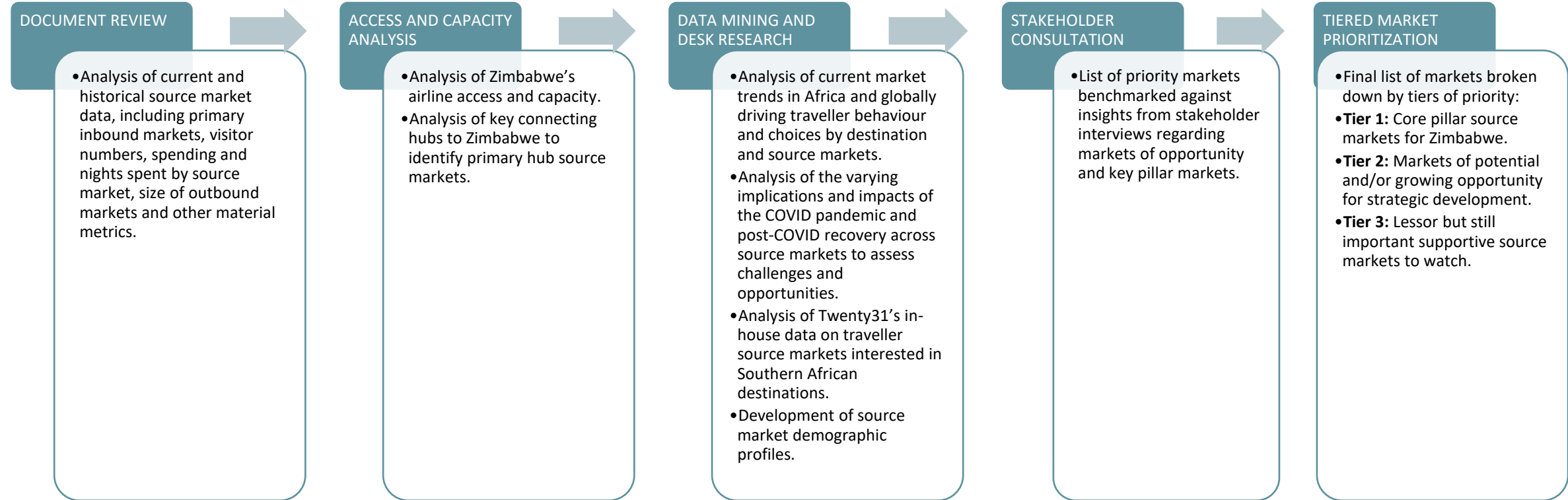
OUR DELIVERABLE

- Demographic snapshot of visitors to Zimbabwe drawing on existing data.
- List of recommended priority source markets based on subsequent analysis.
- Secondary analysis of overall inbound tourism figures by source market at the global and regional level including factors such as group composition, length of stay, average spend, age, chosen activities, and trip purpose.
- Analysis at source-market level for international travellers interested in Southern Africa demographic distribution and level of interest in visiting Zimbabwe specifically.
- Analysis of potential source market size to feed into prioritization of source markets.

MARKETS OF OPPORTUNITY WERE DEVELOPED FOLLOWING A STEPWISE ASSESSMENT METHODOLOGY

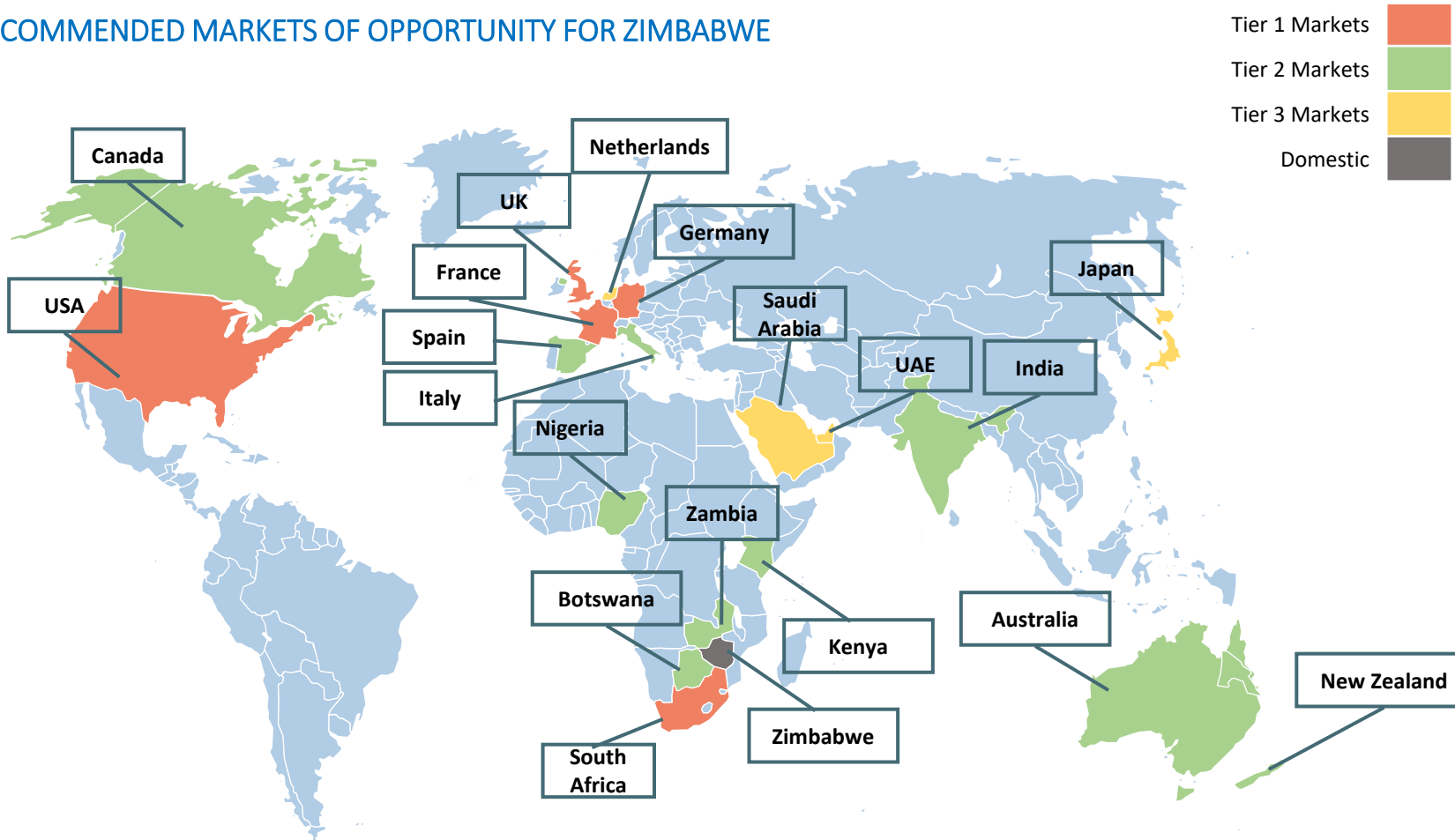


METHODOLOGY



MARKET PORTFOLIO ANALYSIS.

RECOMMENDED MARKETS OF OPPORTUNITY FOR ZIMBABWE



Region	Source Market
Americas	USA
	Canada
Europe	UK
	France
	Germany
	Spain
	Italy
	Netherlands
Asia	Japan
	India
Middle East	UAE
	Saudi Arabia
Oceania	Australia
	New Zealand
Africa	South Africa
	Nigeria
	Kenya
	Botswana
	Zambia
Domestic	Zimbabwe

RECOMMENDED MARKETS OF OPPORTUNITY (CONT'D)

Region	Source Market	Rationale
Tier 1	USA	Primary overseas source market for Zimbabwe and should be a recovery priority as international travel from the USA resumes. There is a proportionally large outbound travel population from the USA and considerable degree of spending power.
	UK	Highly established market for Zimbabwe and should constitute a primary recovery priority.
	South Africa	South Africa has historically been and will likely remain for some time, the primary regional source market for Zimbabwe. It has among the largest outbound travel populations, close links with Zimbabwe both historically and politically and should be considered a regional pillar market.
	Germany	After the UK, Germany has historically represented the healthiest European source market for Zimbabwe with healthy spending power. Culturally, many Germans have a connection to Africa with a relatively large expat population in South Africa.
	France	Tertiary European source market for Zimbabwe with pre-COVID trends showing healthy growth which could be resumed as the tourist industry recovers.
Tier 2	Canada	Lesser inbound market than the USA in terms of historical numbers, Canada shares some traits including relatively high GDP per Capita. Canada should be a lesser priority than the USA, however marketing efforts in the USA are likely to be largely applicable to Canada with a degree of social media and word-of-mouth advocacy crossing their shared border.
	Australia & New Zealand	As a more distant destination, Australia and New Zealand have not historically shown very high inbound figures to Zimbabwe. However, they have affluent and travel-savvy populations and historical data shows a higher number of nights spent than many other source markets (likely due to its distance). These markets were effectively eliminated by COVID, however recent interest shows potential for recovery and development.
	Botswana	While a small outbound population, Botswana enjoys both relative economic stability in an African context with one of the fastest-growing economies as well as proximity to Zimbabwe. It has also shown among the highest inbound populations to Zimbabwe in recent years.
	Zambia	Zambia shares not only a border with Zimbabwe but Victoria Falls. While it does not have the sizeable middle class of South Africa or the rapid recent development of Nigeria, its proximity and shared assets with Zimbabwe make Zimbabwe an obvious and proximate choice for its small outbound leisure travel population.



RECOMMENDED MARKETS OF OPPORTUNITY (CONT'D)

Region	Source Market	Rationale
Tier 2	India	Tertiary priority among Asian markets. India has the second-largest outbound travel population and a growing middle class driven by rapid development in recent years and may represent an important market in years to come.
	Nigeria	Nigeria is a major emerging market in Africa, rapidly industrializing with a large population and notably, like India, a very large outbound travel market. An emerging middle class in this source market could represent a considerable development opportunity for Zimbabwe.
	Italy	Italy competes closely with Spain as a mid-tier European market and was identified in the CPCS passenger point of origin analysis as a key market
	Kenya	Identified as a key market by the CPCS passenger point of origin analysis, Kenya has been one of the fastest-growing economies in Africa over the past decade, with a comparatively vibrant and growing industrial and commercial sectors.
	Spain	Spain ranks closely with Italy as a mid-tier European source market for Zimbabwe and was identified in the CPCS passenger point of origin analysis as a key market
Tier 3	Japan	While a relatively small population, Japan has a relatively high outbound travel population relative to its overall population size with very healthy GDP per capita. Additionally, pre-COVID inbound figures show very healthy growth among Japanese travellers, surpassing Germany in 2016.
	UAE & Saudi Arabia	According to the airline capacity analysis Dubai International airport is the third-largest connecting point to Harare and Victoria Falls and both Saudi Arabia and Dubai highly mobile and affluent expat populations to whom Zimbabwe could appeal.
	Netherlands	The Netherlands is the largest inbound European population after the UK, France, and Germany and represents a market for potential further development.
Domestic	Zimbabwe	Domestic travel in Zimbabwe remains nascent. However, encouraging domestic travel and empowering Zimbabweans to explore their own country (particularly given Zimbabwe's size and geographic diversity), is necessarily a priority alongside the gradual recovery of international travel.



PART 1: ZIMBABWE'S GLOBAL TOURISM MARKETS RATIONALE

Secondary and proprietary analysis of Zimbabwe's key markets

With the technical assistance of:





SUMMARY

Insight	Details	Takeaway/ Recommendation
There is a strong VFR component to visitation	In terms of purpose of visit within overall visitation, much larger proportions enter Zimbabwe in order to visit friends and relatives than for leisure purposes.	<ul style="list-style-type: none"> While this is likely driven by the regional market, it indicates an opportunity to further develop the more affluent components of the regional market who are able to voluntarily travel to engage in VFR.
A tiered approach to destination prioritization is recommended	<p>Broadly speaking, Zimbabwe's tourism source markets of opportunity fall into 3 tiers:</p> <ul style="list-style-type: none"> Tier 1: Established and high leverage markets Tier 2: Emerging high potential markets Tier 3: Nascent markets that could represent future opportunities as they develop 	<ul style="list-style-type: none"> In light of these tiered markets, and as will be made clear in the budget allocation section, it is recommended that Zimbabwe use this as a guide in terms of budget allocation, as focusing on a limited number of markets will allow for more targeted and effective market development.
The regional market represents 82% of overall market share	Unsurprisingly, the regional market far outstrips overseas regions in terms of market share. There is both the opportunity to better mobilize the regional market and to grow the overseas market. However, 44% of this contingent are in transit and many are not leisure visitors per se.	<ul style="list-style-type: none"> While the regional market is nowhere near as lucrative as the overseas market, there is the opportunity to further mobilize the more affluent contingent of this market by translating VFR into greater leisure spend and longer stays.
South Africa is by far the largest African market	Unsurprisingly given its shared border and relatively affluent population, South Africa is the most lucrative regional market for Zimbabwe. Maintaining and developing this market has very different requirements from developing the international markets.	<ul style="list-style-type: none"> Many South Africans engage in self-drive or other land-based transport so ground infrastructure will be important for their ease of access. This is also a lucrative market in terms of increasing length of stay through facilitating and encouraging longer self-drive trips.
There is a considerable gap between the size of outbound overseas markets and consideration of Zimbabwe	Consideration of Zimbabwe as a future travel destination remains very low relative to other established destinations.	<ul style="list-style-type: none"> Developing the destination will require growing the burgeoning interest in Zimbabwe among such lucrative markets as Europe, Oceania, and the USA. This will likely take time in terms of developing an established global profile but some important foundations (such as the growing reputation of the KAZA region as well as packaging alongside other destinations) have been established.

STAKEHOLDERS AGREED THAT THE KEY SOURCE MARKETS FOR ZIMBABWE CONTINUE TO BE THE CORE MARKETS FOR THE SOUTHERN AFRICAN REGION.

STAKEHOLDER FEEDBACK ON KEY MARKETS



USA

North America, but particularly the USA, is largely considered the strongest market that operators work with which aligns with traditional market emphasis by Zimbabwean tourism, as well as the historically high proportion of international revenue generated by US visitors.



SADC/ Regional

There is broad agreement on the potential of regional tourism for Zimbabwe. The regional market is seen as more likely than internationals to visit Zimbabwe as a stand-alone destination. The emergent affluent African market from South Africa and other regional countries are rarely looking for multi-stop tours but are instead looked for a single contained 'all in one experience. Some self-drive travel from South Africa was also mentioned; this was quoted as being predominantly white South Africans looking for an adventurous road trip.



UK, Germany & Key Western European Markets

Along with the USA, European markets (with the UK and Germany receiving notably high mentions) should continue to be a major focus for Zimbabwean tourism and constitute an economic pillar for the international tourism industry however, as with all markets, these will take some time to recover.



Australia

The Australian market was referenced as historically strong prior to the pandemic but has been temporarily affected by it. However, recently the Australian market has been improving. The market has potential for recovery as the COVID restrictions in Australia begin to lift. Australians have begun to travel to Zimbabwe in greater numbers recently, which highlights the potential this market may have in coming years.

THE REGIONAL MARKET WILL BE A GROWING AND KEY COMPONENT OF ZIMBABWE'S TOURISM RECOVERY WITH SEVERAL EMERGING AFFLUENT MARKETS EMERGING.



THE REGIONAL PICTURE

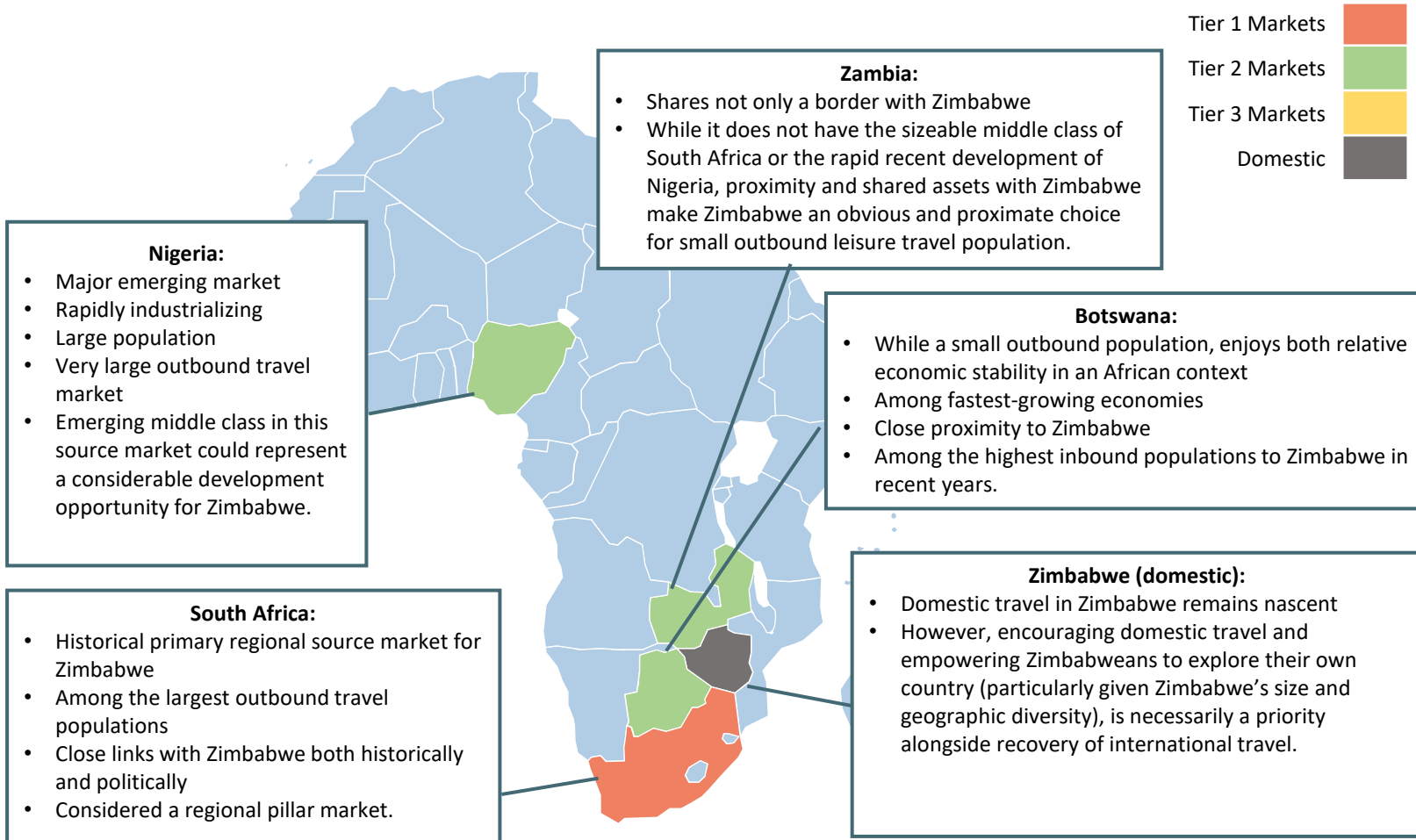
- Zimbabwe has been going through a period of political and economic instability for the last two decades, which has affected its perception negatively, particularly in Western countries. This is evidenced by numerous negative articles in Western media and travel advisories issued by Western governments.
- However, perception of Zimbabwe appears to be relatively more positive within Africa. As demonstrated by the Visitor Exit Survey of 2015/16, the majority of the visitors were from Africa (80.7%), followed by those from Europe (9.8%) and the Americas (5.7%).
- South Africa already represents a cornerstone market for Zimbabwe across the 4 segments identified, however Mature Safari Travellers, while prominent, are less proportionally dominant than other markets due to more distributed regional opportunities for safari tourism both within South Africa and throughout the region.

- An advantage of the regional over the overseas market is that, among overseas visitors, Zimbabwe often constitutes one stop on a multi-country itinerary, which is rarely the case for the affluent African regional market who are usually looking for a one-stop trip, which constitutes greater opportunities for developing sub-destinations within Zimbabwe rather than merely the better-known attractions.
- The regional market's greater share of VFR and self-drive travel which allow for greater tourism development not dependent on improvements in air transport connectivity.
- While South Africa has historically represented a key pillar of the market, opportunities emerging from affluent sections of society from markets such as Nigeria and Botswana are ripe for development and represent a potentially significant driver of recovery as international travel gradually resumes.
- Zambia, Malawi, and Botswana all represent an established VFR market which could be further developed by targeting the identified market segments.

THE REGIONAL MARKET SHOWS A COMBINATION OF SMALL BUT GROWTH MARKETS AS WELL WITH EMERGING MIDDLE CLASSES REPRESENTING OPPORTUNITIES.



THE REGIONAL PICTURE – KEY MARKET PROFILES



KEY IMPLICATIONS

- South Africa is by far the largest regional market for Zimbabwe and is a long-standing regional pillar of the tourism market and this is set to continue.
- Zambia and Malawi follow closely as source markets; however, it is less likely that they have as many leisure travellers and Malawi is not considered a lucrative market. However, Malawi, Zambia, and Botswana all have healthy potential to build on the VFR market. These markets can be lucrative by focusing on the market segments rather than the mass market.
- Botswana represents a small but significant inbound market with a growing middle class and impressive economic development in recent years.
- Nigeria, as a rapidly industrializing market with a large absolute population, proportionally very large outbound population, and a growing middle class, could represent a future cornerstone regional market for Zimbabwe.

Source: Stakeholder Interviews; Visitor Exit Survey, 2015/16; Twenty31 Consulting Inc.

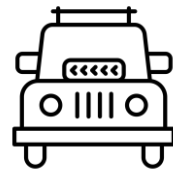
COVID HAS FACILITATED A SHIFT TOWARDS TRAVELLERS FROM THE SADC REGION WHICH COULD PRESENT MAJOR OPPORTUNITIES FOR GROWTH.

STAKEHOLDER FEEDBACK ON REGIONAL MARKETS



Currency Issues

Due to the fact that Zimbabwe now uses the US Dollar as their primary currency, they have to an extent priced out regional markets, due to the fact that travelers coming from nearby countries have to transfer their currencies into US Dollars to pay for the expenses in Zimbabwe, which can be very unfavorable for them, because of how weak some of them are compared to the US Dollar.



Self-drive

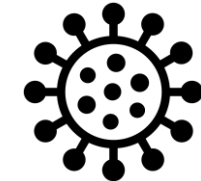
During the pandemic, Zimbabwean operators saw a rise in regional markets of people who self-drove into the country for safari or fishing vacations, which were often cheaper than other products offered.

However, especially since most regional travelers come from South Africa, it has been difficult for regional travelers to afford the US Dollar pricing of the Zimbabwe products.



Current lack of city break tourism

Primarily, operators in Zimbabwe (including those based in Harare) are seeing regional travelers coming for safari, visiting and staying in national parks, and not typically spending much time in cities. To the extent this is seen, it tends to be business travel (whether regional or international). Other cities such as Bulawayo have great potential in this regard while other cities are significant hubs for nature tourism. Mutare for example acts as a gateway to the Eastern Highlands and Mozambique's Gorongosa National Park.



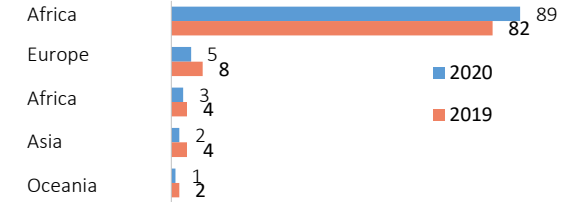
COVID as a driver of regional travel

While regional travel was initially worst affected by COVID, the crisis has precipitated a shift towards overland and regional travel broadly. Regional travellers have the resources, the connections, and the local knowledge to be a major source market for the destination.

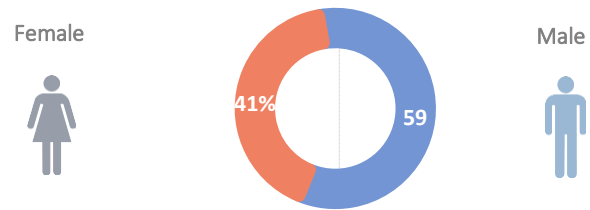
Regional markets might stay for longer because they don't want to move around as much as international travelers – though an over focus on safari remains a challenge (since they likely have safari where they are coming from).

VISITORS TO ZIMBABWE SKEW BROADLY MALE, AGED 30-44, WITH A HIGH VFR AND TRANSITORY CONTINGENT WITH MOST TRAVELLING EITHER ALONE OR IN FAMILY GROUPS.

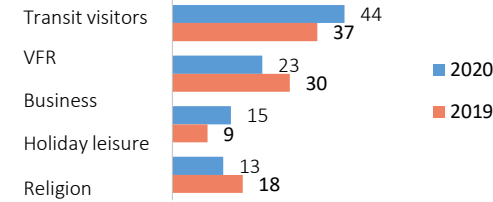
OVERALL GLOBAL VISITOR PROFILE



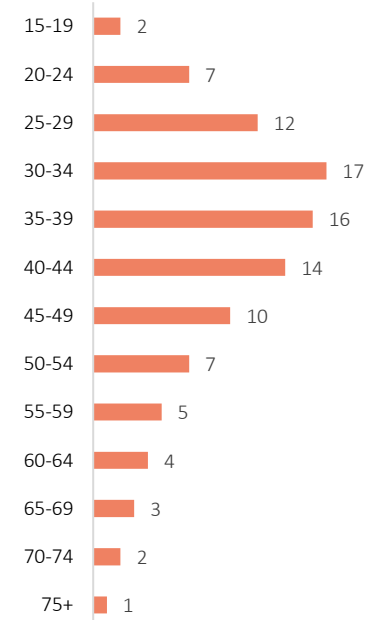
Gender, 2015/16



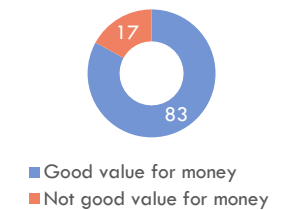
Purpose of visit, 2019-2020



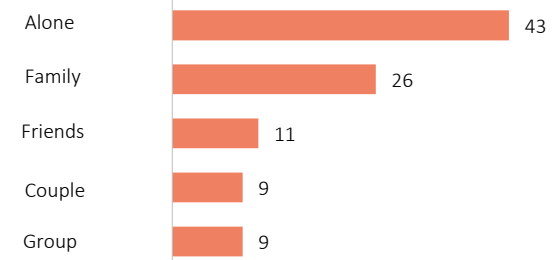
Age, 2015/16



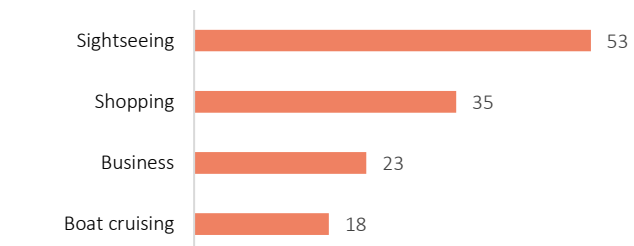
Trip was good value for money, 2015/16



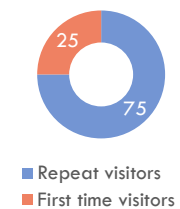
Visitor Composition, 2015/16



Activities engaged, 2015/16



Likelihood to repeat visit, 2015/16



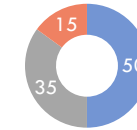
BRITONS INTERESTED IN SOUTHERN AFRICA TEND TO BE YOUNGER, HIGHLY EDUCATED, MARRIED WITH NO CHILDREN.



DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SOUTHERN AFRICA – UK, 2021



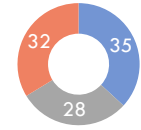
Level of Education



■ High ■ Medium ■ Low

Q7. What is the highest level of formal education you have completed?

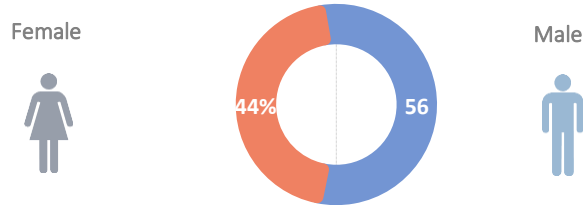
Level of Income



■ High ■ Medium ■ Low

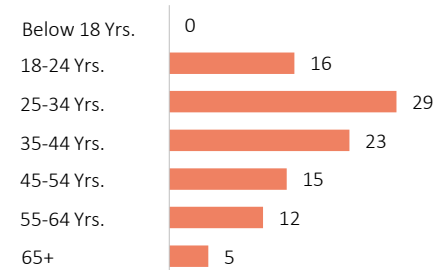
Q8. What is your average annual household income?

Gender



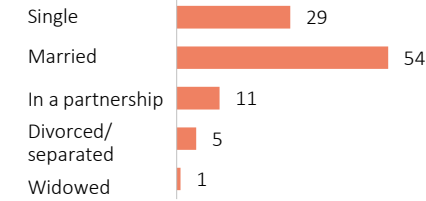
Q2. What is your gender?

Age



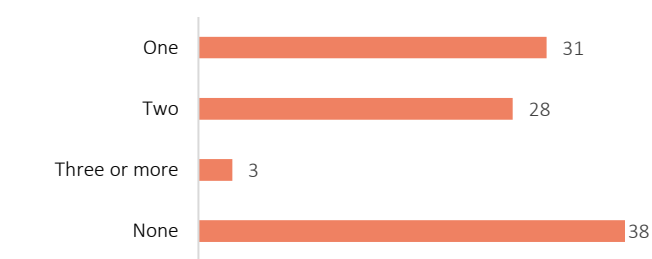
Q1. How old are you?

Relationship Status



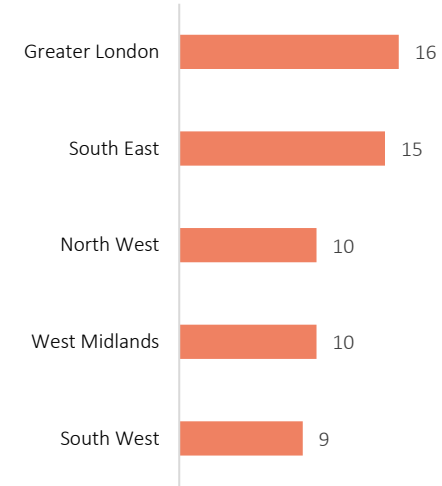
Q4. What is your relationship status?

Number of Children Under 18 in Household



Q3. How many children under 18 years of age are living with you in your household?

Top 5 Regions



Q5. In which of the following regions do you live?

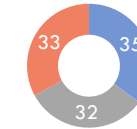
AMERICANS INTERESTED IN SOUTHERN AFRICA SKEW MALE, ARE MARRIED, AND HAVE CHILDREN.



DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SOUTHERN AFRICA – USA, 2021



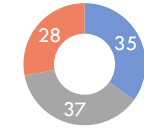
Level of Education



■ High ■ Medium ■ Low

Q7. What is the highest level of formal education you have completed?

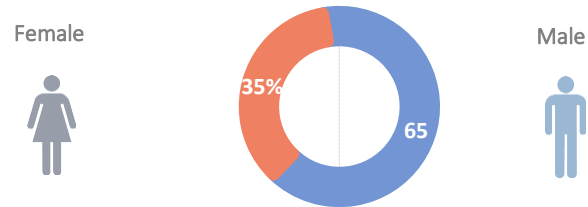
Level of Income



■ High ■ Medium ■ Low

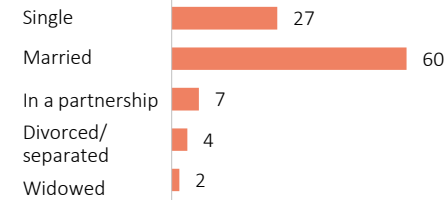
Q8. What is your average annual household income?

Gender



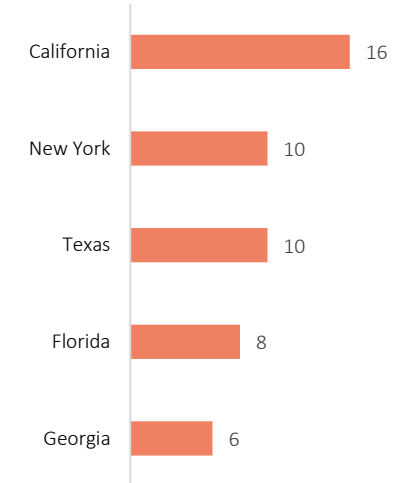
Q2. What is your gender?

Relationship Status



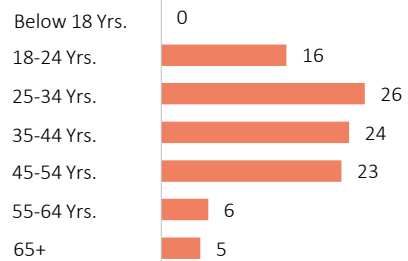
Q4. What is your relationship status?

Top 5 Regions



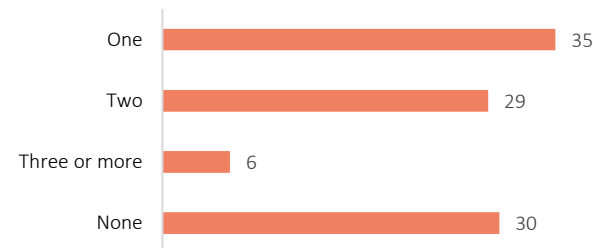
Q5. In which of the following regions do you live?

Age



Q1. How old are you?

Number of Children Under 18 in Household



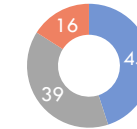
Q3. How many children under 18 years of age are living with you in your household?

FRENCH INTERESTED IN SOUTHERN AFRICA TEND TO SKEW MALE, ARE MIDDLE AGED, AND MARRIED.

DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SOUTHERN AFRICA – FRANCE, 2021



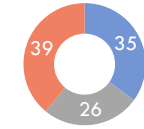
Level of Education



■ High ■ Medium ■ Low

Q7. What is the highest level of formal education you have completed?

Level of Income

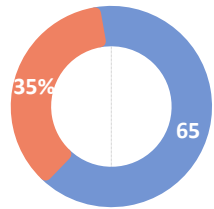


■ High ■ Medium ■ Low

Q8. What is your average annual household income?

Gender

Female

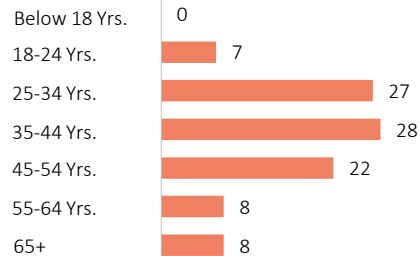


Male



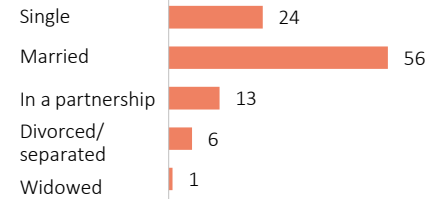
Q2. What is your gender?

Age



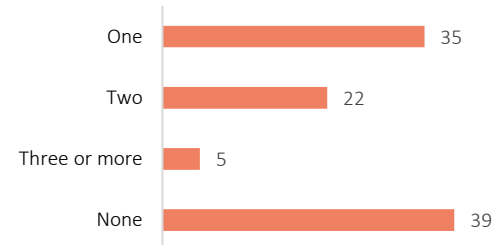
Q1. How old are you?

Relationship Status



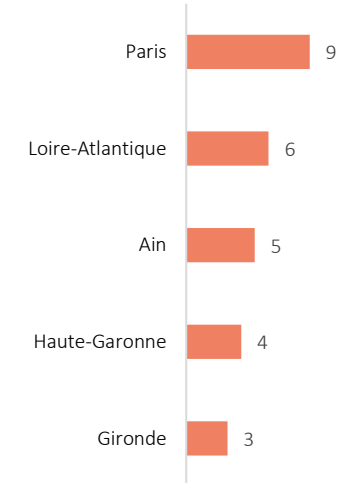
Q4. What is your relationship status?

Number of Children Under 18 in Household



Q3. How many children under 18 years of age are living with you in your household?

Top 5 Regions



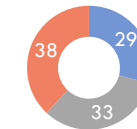
Q5. In which of the following regions do you live?

GERMANS INTERESTED IN SOUTHERN AFRICA ARE YOUNGER, WITH NO KIDS WITH AVERAGE EDUCATION AND INCOME.

DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SOUTHERN AFRICA – GERMANY, 2021



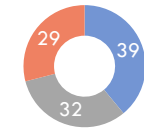
Level of Education



■ High ■ Medium ■ Low

Q7. What is the highest level of formal education you have completed?

Level of Income

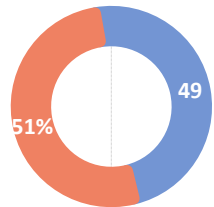


■ High ■ Medium ■ Low

Q8. What is your average annual household income?

Gender

Female

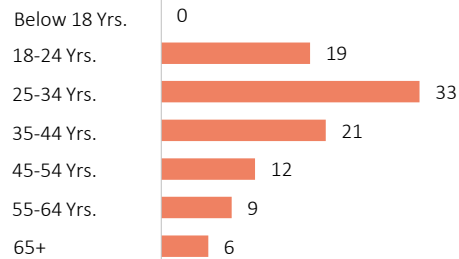


Male



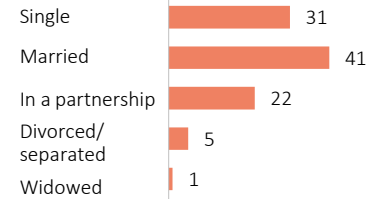
Q2. What is your gender?

Age



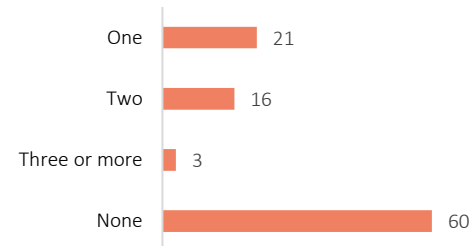
Q1. How old are you?

Relationship Status



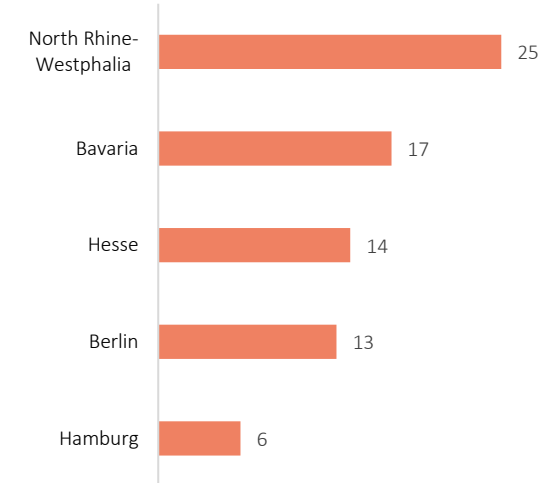
Q4. What is your relationship status?

Number of Children Under 18 in Household



Q3. How many children under 18 years of age are living with you in your household?

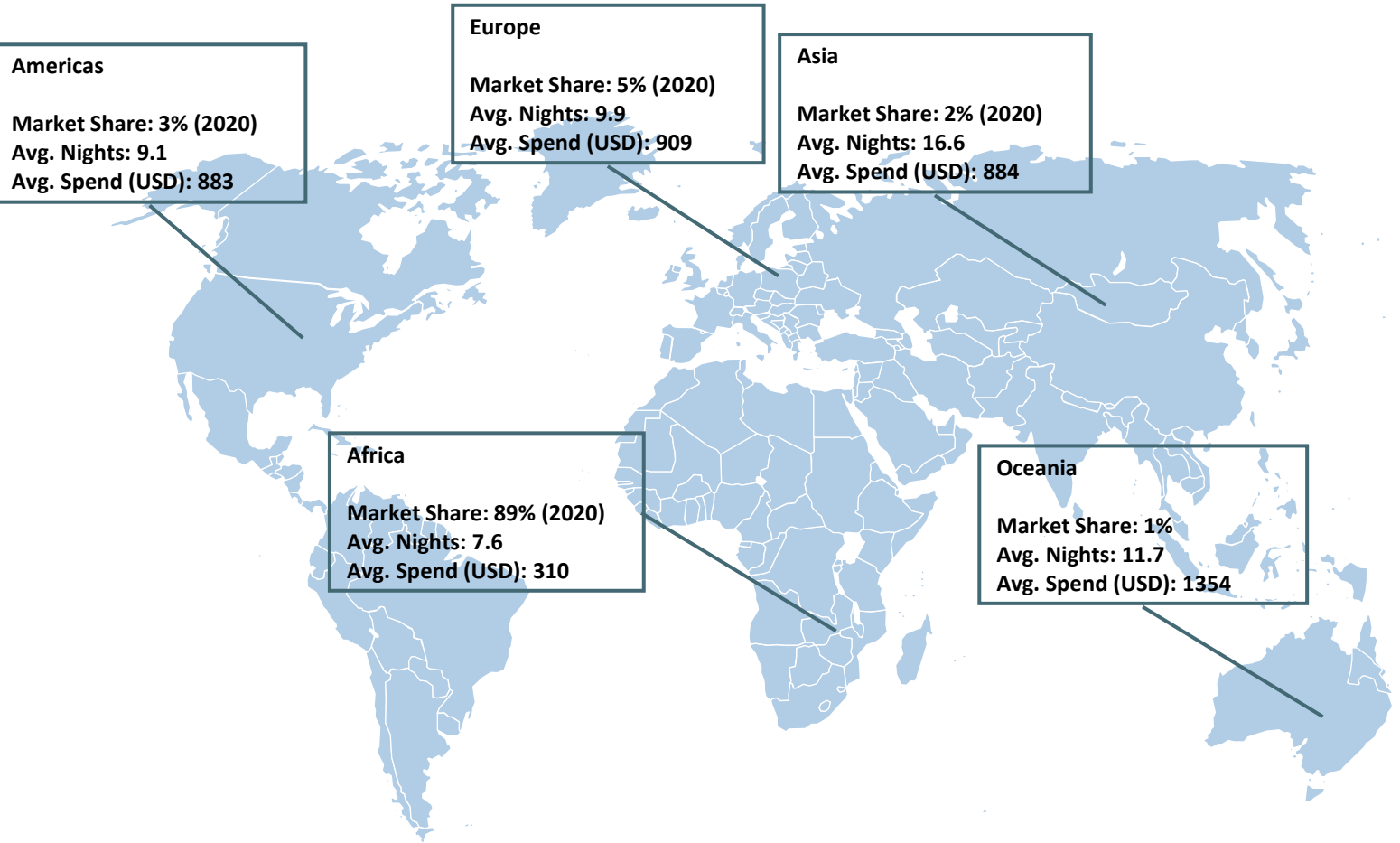
Top 5 Regions



Q5. In which of the following regions do you live?

REGIONALLY, AFRICA SHOWS BY FAR THE HIGHEST MARKET SHARE BUT ALSO THE LOWEST AVERAGE SPEND AND NIGHTS SPENT.

SIZE OF GLOBAL OUTBOUND INTERNATIONAL MARKETS, 2015/16* ; 2020



KEY IMPLICATIONS

- Unsurprisingly, Africa has by far the highest market share but also the lowest average number of nights spent, and average spend, though this is to be expected.
- Oceania and Europe show the highest average spend, though Oceania has the second-lowest market share.
- Oceania has the lowest market share but the highest average number of nights.
- Asia Shows the second-lowest but the highest average number of nights.
- Europe has the highest market share of overseas regions.

*Figures are from 2015/16 unless specified as 2020

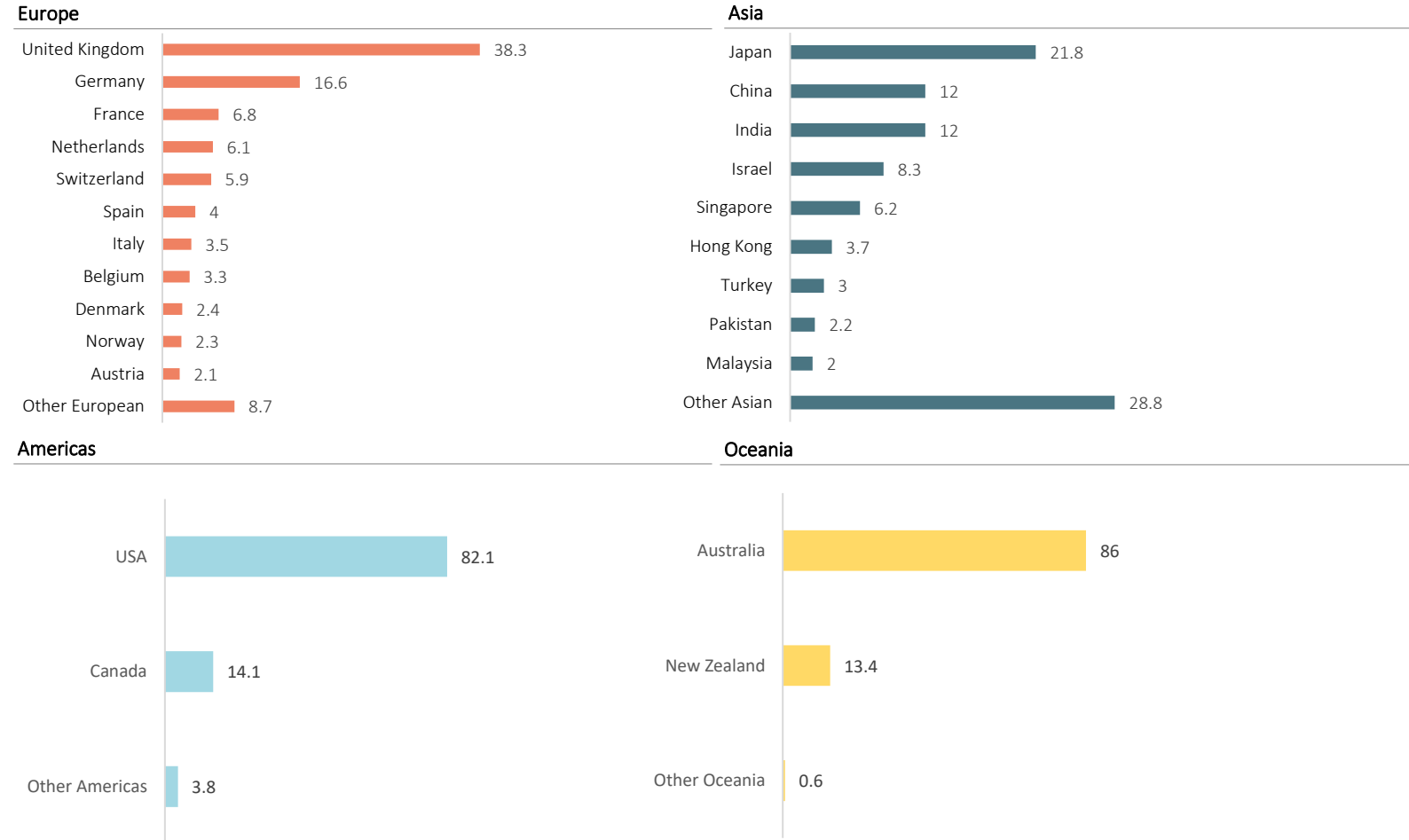
Sources: Visitor Exit Survey, 2015/16; 2020 Tourism Trends Statistics Report



THE UK, JAPAN, USA, AND AUSTRALIA ALL HAVE A CONSIDERABLE LEAD OVER THEIR REGIONAL COUNTERPARTS AS INBOUND ZIMBABWEAN SOURCE MARKETS.



REGIONAL DISTRIBUTION OF VISITORS, 2015/16

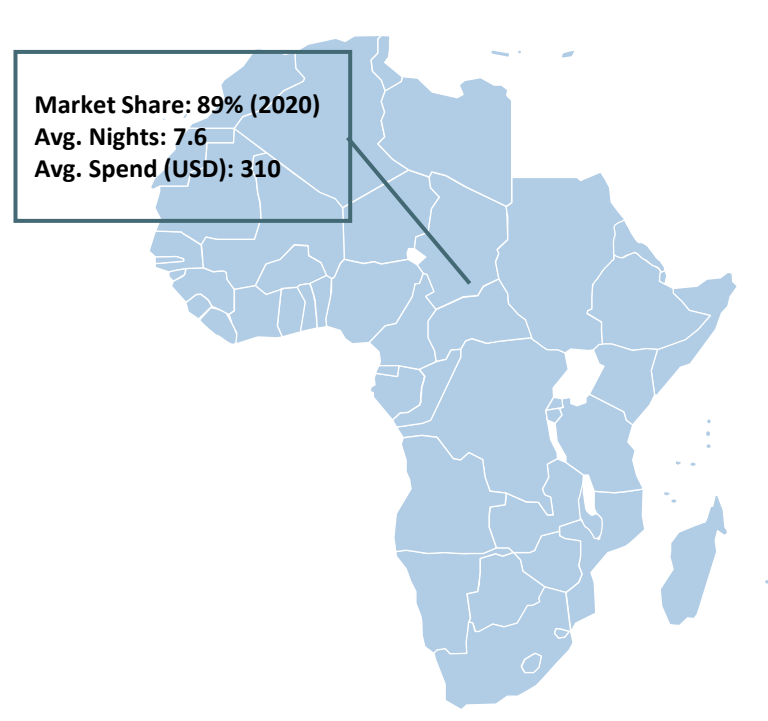


KEY IMPLICATIONS

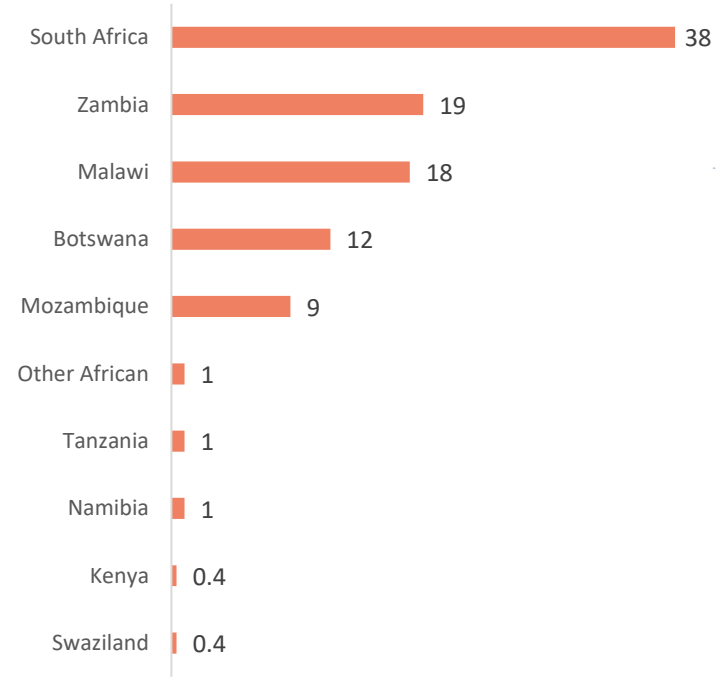
- The largest European source markets by some margin are the UK at 38.3% followed by Germany at 16.6%.
- There is relatively little variation between other European source markets.
- The USA also far outstrips other American source markets at 82.1%.

SOUTH AFRICA REPRESENTS BY FAR THE LARGEST AFRICAN SOURCE MARKET, FOLLOWED BY ZAMBIA, MALAWI, AND BOTSWANA.

RELATIVE SIZE OF AFRICAN MARKETS, 2015/16; 2020



Country of usual residence, Africa 2015/16



KEY IMPLICATIONS

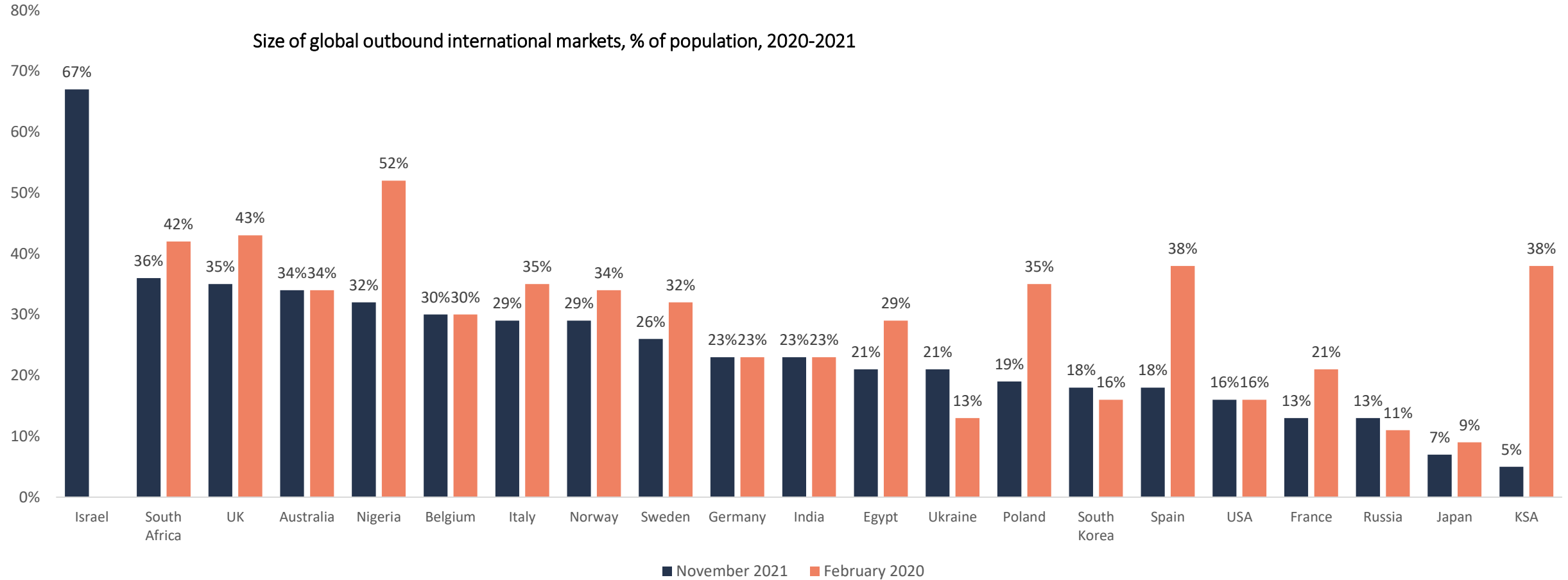
- South Africa is by far the largest regional market for Zimbabwe.
- Zambia and Malawi follow closely; however, it is less likely that they have as high a proportion of leisure travellers.
- Mozambique and Botswana also represent small but significant inbound markets.

Source: Visitor Exit Survey, 2015/16

ACCORDING TO TWENTY31'S DATA, ISRAEL, SOUTH AFRICA, UK, AUSTRALIA, AND NIGERIA SHOW AMONG THE HIGHEST PROPORTIONS OF OUTBOUND TRAVELLERS.



SIZE OF GLOBAL OUTBOUND INTERNATIONAL MARKETS, 2020-2021



Sources: Twenty31 Consulting Inc.; World Bank

IN TERMS OF ABSOLUTE FIGURES, INDIA HAS BY FAR THE LARGEST OUTBOUND TRAVEL MARKET, FOLLOWED BY THE USA, UK, SOUTH AFRICA, AND EGYPT.



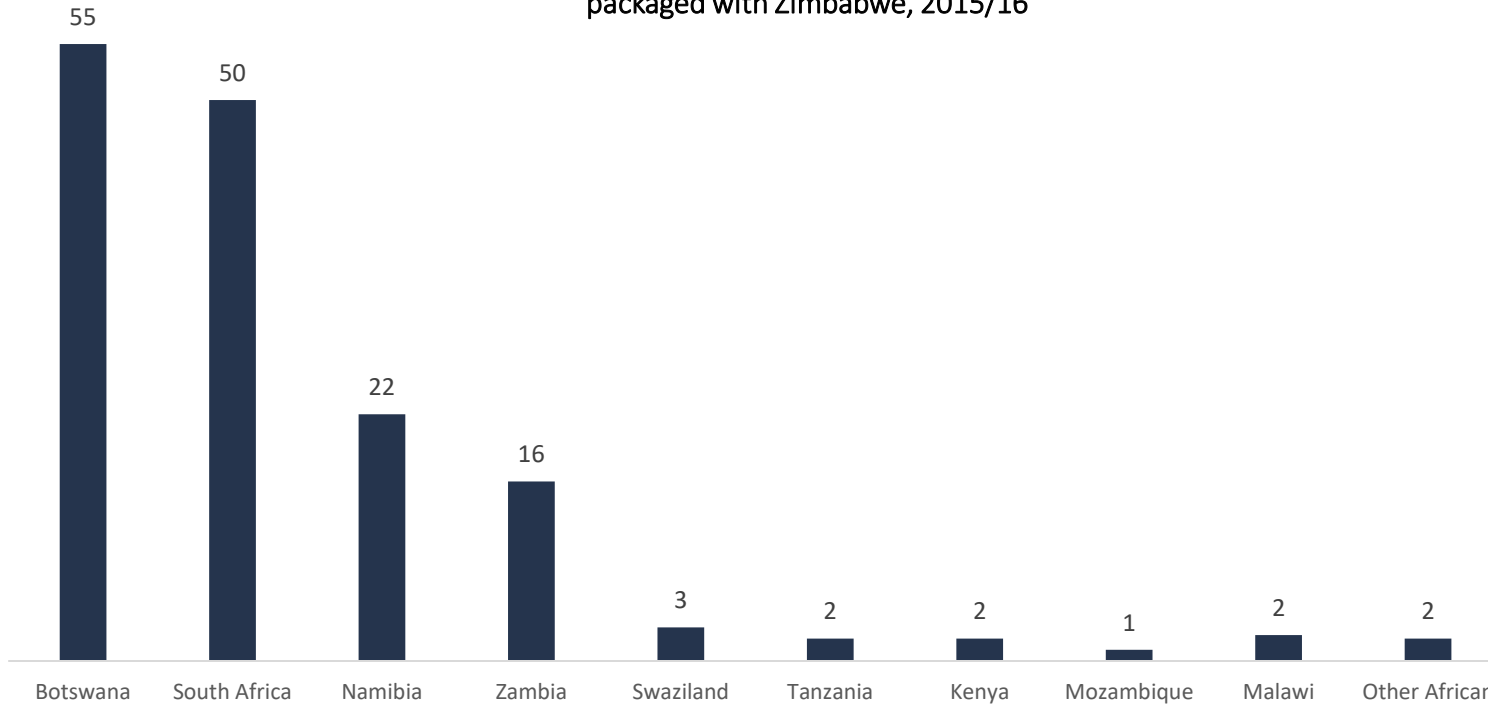
ABSOLUTE SIZE OF GLOBAL OUTBOUND INTERNATIONAL MARKETS, 2020-2021



OVER HALF OF TRAVELLERS TO ZIMBABWE ON A PACKAGE TOUR WERE PACKAGED WITH EITHER BOTSWANA OR SOUTH AFRICA.

COUNTRIES PACKAGED WITH ZIMBABWE, 2015/16

Percent distribution of total vs. holiday/leisure visitors by countries packaged with Zimbabwe, 2015/16



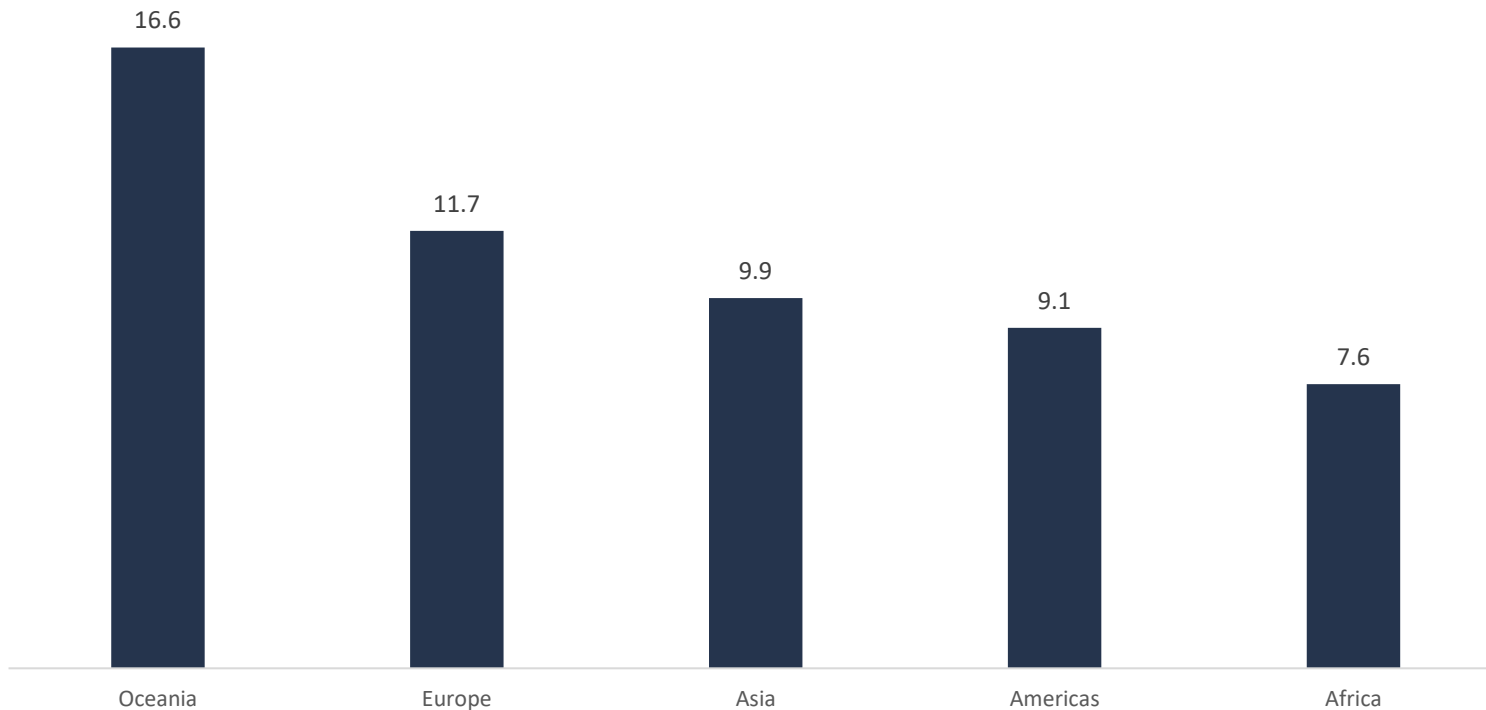
KEY IMPLICATIONS

- Holiday/leisure visitors who were on package were asked about the other countries included in the same package with Zimbabwe.
- The survey results show that Zimbabwe was packaged with Botswana in 55.3% of the cases, South Africa in 50.3% of the cases and Namibia (21.7%). One in five of the visitors (20%) reported that they were visiting Zimbabwe only.
- Despite its proximity, only 16% of package travellers were packaged with Zambia.

TRAVELLERS FROM FURTHER AFIELD SUCH AS OCEANIA AND EUROPE SHOWED CONSIDERABLY LONGER LENGTHS OF STAY IN ZIMBABWE

AVERAGE LENGTH OF STAY, 2018

Average length of stay by inbound tourist's place of origin, days, 2018



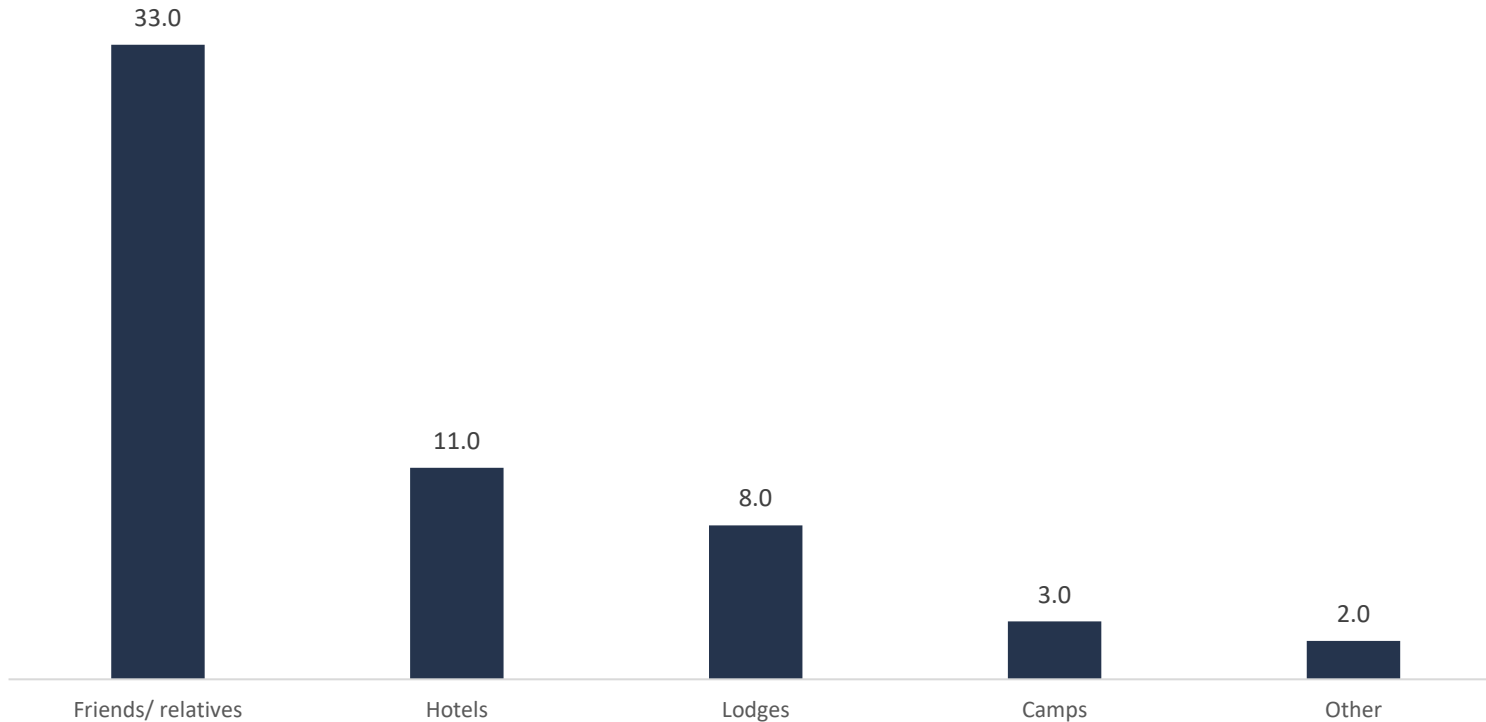
KEY IMPLICATIONS

- The average length of stay for all visitors was 8.6 nights. Asians had the highest average length of stay of 16.6 nights followed by those from Oceania who had 11.7 nights in the country.
- Although the proportion of visitors from African countries was the highest (80.7%) their average length of stay was the lowest, 7.6 nights.

LARGE PROPORTIONS OF VISITORS TO ZIMBABWE DID NOT USE ANY ACCOMMODATION, WHILE A CONSIDERABLE PROPORTION STAYED WITH FRIENDS AND RELATIVES.

ACCOMMODATION TYPES AVAILABLE, 2018

Percentage distribution of inbound tourists by types of accommodation availed, 2018



KEY IMPLICATIONS

- With regard to type of accommodation availed by the tourists, as many as 42% did not utilise any accommodation.
- These included excursionists and visitors who slept in coaches/buses, trucks, cars, churches etc.
- Camps represent a relatively low proportion of accommodation availed at only 3%.
- Another significant proportion, 33%, stayed at friends or relatives' place.



SECTION 4: INVESTMENT ALLOCATION

With the technical assistance of:



FUTURE PROJECTIONS THROUGH 2025 ARE BASED ON THE CURRENT MARKET BUT THIS IS SUBJECT TO MAJOR VECTORS OF CHANGE IN A VOLATILE GLOBAL MARKET.



METHODOLOGY, APPROACH, AND KEY FACTORS

- The division reflected here is for the total Destination Marketing and Promotion budget as identified in the ZTA strategy budget breakdown. This does not include organizational overhead, salaries, and administration.
- The budget breakdowns here, and in the accompanying tables are in percentage values to allow for exchange rate disparity between bank and market rates and potential fluctuations.
- The future projections through 2025 are based on current market positions used in the research but given the current volatile global situation there can be potential major agents of change that make projection difficult and ill-advised. For this reason, these projections will require constant review and revision, especially within annual budget cycles.
- The major vectors of change will be:
- **Global Health:** The potential resurgence of COVID variants and renewal or revision of health protocols. Disparate approaches to managing the pandemic, have raised concerns about the potential risks of international

- **Geo-Politics:** The current war in Ukraine is causing ongoing destabilization of the region that has significant political and economic ramifications. There is also potential for political shift in the two core markets via the increasing likelihood of the end of the Johnson government in the UK through political scandals and the increasing negative impacts of Brexit. In the USA, there is the potential loss of political control and governance of the Biden Administration and return of isolationist policies.
- **Economics:** The cumulative result of all the above continues to have significant impacts on global economies. The threat of recession, rising costs of food and energy are impacting disposable income in many markets. As the demographic most impacted by the pandemic, many Baby Boomers have had increased health costs and an increased aversion to travel. Rising costs, particularly house prices and interest rates are also having significant effect on Millennials.

travel.
SECTION 1: INCEPTION REPORT

SECTION 2: MARKET SEGMENTATION

SECTION 3: PORTFOLIO ANALYSIS

SECTION 4: INVESTMENT ALLOCATION

THE DIVISION OF NATIONAL/REGIONAL SOURCE MARKETS REFLECTS THE PRIORITY IDENTIFIED WITHIN THE RESEARCH WITH FURTHER QUALIFICATION FROM STAKEHOLDERS.



SOURCE MARKETS

- The division of National/Regional source markets here reflects the priority markets identified within the research with further qualification from the conducted interviews.
- **Core Markets:** The US and UK remain core source markets and this is unlikely to change, but it should be noted that these forward projections will need to be annually reviewed and revised due to the potential for significant political change in both.
- **Europe:** In the European budgets the allocations represent the need to invest an increased amount 2023-24 to restore market confidence. France and Germany have been separated here as they were consistently identified as the strongest source markets, mostly due to the French familiarity with Africa due to historical and colonial legacy and the strong German connection to Namibia, for whom they are one of the leading source markets who are increasingly travelling within the region.

- These markets also share challenges and opportunities in the digital space, with a heavy focus in content in their own language, and in Germany a historical aversion to online booking and e-commerce among older travellers, although this may have significantly changed during the pandemic, as a 19% rise in online sales was recorded in 2020-21.
- **South African and Regional Markets:** These have been very heavily focused on during the pandemic period, and the sustainability of the markets were discussed at length in the interviews. Of particular interest has been the emerging affluent African market, which tends towards self-contained trips and has been on the increase.
- This market will need to be reviewed and revised as several interviewees suggested that increases in this form of travel were related to the ability of Zimbabwe to retain these markets compared to other global destinations during the pandemic and still provide travellers with a good experience. Budget reviews should assess if this market is delivering on its promise.

AUSTRALIA AND NEW ZEALAND SHOW POTENTIAL FOR RECOVERY WHILE CHINA IS NO LONGER CONSIDERED A PRIORITY MARKET.



SOURCE MARKETS

- **Oceania:** Australia and New Zealand were historically a strong and growing market for Zimbabwe, but this market was effectively eliminated during the pandemic via border closures and travel restrictions. However, several interviewees have reported retuning interest and enquiries, hence the projected return to growth reflected in budget allocations.
- **Emerging Markets:** These are harder to define moving beyond the pandemic as the travel landscape has changed significantly. As noted in the research these markets must be carefully reviewed based on their past performance, awareness of the destination, and post-pandemic position. Careful strategic planning and identification of these markets is recommended. The previous 'Look East' approach to Asia and focus on China is now definitely in question. A consistent response from interviewees was that pre-pandemic the Chinese had delivered very little in terms of value and yield.

- There are also now very strong indications that Chinese population are now much more averse to travel, and the maintained 'zero COVID' policy restrictions may stay in place for some time, along with Government driven and mandated domestic travel to shore up the National economy. While there were anecdotal references made to returning emerging markets (Brazil and India the most frequent mentioned) these will need to be qualified through tactical testing and campaigns through 2024 before committing to increased budget in 2025.
- **Domestic Market:** The domestic market in Zimbabwe has potential for growth and is of growing importance for many destinations globally as domestic populations are less affected by travel restrictions within the country. As such, a healthy domestic market provides economic insulation against travel disruptions and restrictions.
- Note: Budget allocations are based on estimates and take into account media buying levels in different markets.

BUDGET ALLOCATION IS DIVIDED BY REGIONAL AND NATIONAL SOURCE MARKETS WITH SOME SOURCE MARKETS GROUPED TOGETHER SUCH AS THE USA AND CANADA.



BUDGET ALLOCATION BY SOURCE MARKET - RECOMMENDATION

Source Market	Budget Allocation		
	2023	2024	2025
US & Canada	25%	20%	20%
UK	25%	20%	20%
France and Germany	15%	10%	5%
Rest of Europe	5%	10%	5%
South Africa and Regional	10%	15%	15%
Australia and New Zealand	5%	5%	15%
Emerging Markets	10%	10%	10%
Domestic	5%	10%	10%

SOURCE MARKET ALLOCATIONS ARE DIVIDED BY BOTH SEGMENTS AND CHANNELS TO ALLOW GRANULAR BUDGET ALLOCATION.



SEGMENT AND CHANNEL SPLIT

Segment Split

- It is recommended that within each of the target markets (as detailed in the tiered approach in the portfolio analysis section), that Zimbabwe focus on these 4 segments within each target market in terms of budget allocation.
- These source market allocations are then divided by the segments identified in the research, based on the size of these markets, their propensity to travel and the products available in Zimbabwe.
- While the US and UK markets are dominated by Mature Safari Travellers, the closer accessibility and familiarity with the destinations in the UK and Europe means that other travel types are more likely to be effectively targeted.
- In the Southern African and regional markets, the Mature Safari market is more likely to consume domestic products. Equally the domestic market is likely to be heavily focused on family holidays or more adventurous options for younger travellers.

Channel Split

- In each market the allocated percentages for each segment are then divided into offline and digital marketing.
- Offline marketing refers to print and electronic (non- digital) advertising and media, co-operative marketing with both international and local trade, hosting buyers and offline media and trade show attendance/ representation.
- Digital marketing refers to online advertising, social media marketing, co-operative marketing with online channels, use of digital content, online media, and mobile marketing.
- These allocations reflect the increasing predominance of digital marketing for inspiration, information, and conversion globally but also that some segments, particularly Mature Safari and Family Travellers, are less likely to use online resources and may instead seek the security of dealing with travel agents and operators.



PART 1: OFFLINE MARKETING

With the technical assistance of:



RECOMMENDATIONS ARE BASED ON THE FINDINGS OF THE MARKET AND SEGMENTATION RESEARCH.



GLOBAL OFFLINE ALLOCATIONS

- In some cases, offline allocations have been progressively reduced and digital allocations increased to reflect increased digital usage and generational shift.
- In the South African/ Regional and the Domestic Market, not all segments are considered potential markets for travel. For example, there is likely little engagement with Mature Safari Travellers from domestic and regional both source markets due to the products available in their home country, and as such these segments are not broken down per these source markets within the table opposite.
- It should be noted that these are recommendations based on the findings of this research and segmentation project, and this is not a marketing strategy.
- The segmented budgets that follow identify potential channels and activities for each (by type).
- Specific activities within these guidelines will need to be identified within broader strategic planning.

Source Market	Segment	Offline	Digital
US & Canada	Family Traveller	70%	30%
	Cultural Traveller	50%	50%
	Adventure Traveller	20%	80%
	Mature Safari Traveller	90%	10%
UK	Family Traveller	50%	50%
	Cultural Traveller	50%	50%
	Adventure Traveller	20%	80%
	Mature Safari Traveller	90%	10%
France and Germany	Family Traveller	50%	50%
	Cultural Traveller	50%	50%
	Adventure Traveller	30%	70%
	Mature Safari Traveller	90%	10%
Rest of Europe	Family Traveller	50%	50%
	Adventure Traveller	40%	60%
	Cultural Traveller	70%	30%
	Mature Safari Traveller	90%	10%
South Africa and Regional	Family Traveller	70%	30%
	Cultural Traveller	80%	20%
	Adventure Traveller	90%	10%
	Mature Safari Traveller	0%	0%
Australia/NZ	Family Traveller	60%	40%
	Adventure I Traveller	10%	90%
	Cultural Traveller	50%	50%
	Mature Safari Traveller	80%	20%
Emerging Markets	Family Traveller	50%	50%
	Cultural Traveller	40%	60%
	Adventure Traveller	30%	70%
	Mature Safari Traveller	90%	10%
Domestic	Family Traveller	80%	20%
	Adventure Traveller	20%	80%

FOR ALL MARKETS, THE SEGMENTS ARE THEN BROKEN DOWN INTO THE TYPE OF OFFLINE ADVERTISING THAT IS MOST SUCCESSFUL.



OFFLINE MARKETING DEFINITIONS

- **Awareness and Branding** refers to print and electronic advertising, mostly done through travel publications and broadcasts. The success of these initiatives is measured through readership and reach and tracked offline calls-to-action (CTAs).
- **Media Partnerships** includes advertorial content in travel publications, and content in travel and wildlife broadcast media. This is tracked through engagement with offline CTAs, and audience reach and ratings.
- **PR and Market Development** refers to hosting media entities per each market on specific media-focused FAM trips, supported jointly with the trade who may provide a joint contribution for the trip.
- **Trade Support** additionally includes attendance at travel-focused trade shows, both regional and demographic to support promotion of the destination. It is tracked by attendance at each show, and generated leads.

- **Co-Operative Marketing with International Trade** refers to joint campaigns conducted with proven agents and operators within the source market and can include print advertising as well as direct mail to client databases with promoted content. This is tracked through reach, response rate and overall conversions.
- **Co-Operative Marketing with the Local trade** refers to joint campaigns conducted with the local tourism trade directly to the source market and includes print advertising and direct mail to client databases with promoted content includes. The success of this marketing is tracked through reach, response rate, and overall conversions.
- **Trade Support and Market Development** includes hosting buyer on destination familiarization (FAM) trips, supported by the local trade who may provide a joint contribution for the trip. These help to boost the destinations client base and reach, and success if tracked by the percentage increase in sales.

THE USA AND CANADA MARKETS ARE DOMINATED BY MATURE SAFARI TRAVELLERS.



SEGMENTED BUDGETS – US AND CANADA: OFFLINE

- The dominance of the Mature Safari Travellers in these markets, and the long-haul nature of travel to Zimbabwe justifies the investment onto offline and strong partnerships with key agents and operators, both for co-op marketing and supported hosted buyer program.
- Print advertising in key travel publications (such as National Geographic) will be needed for awareness in the safari and Family market, and in more outdoor and adventure-oriented publications (such as Outside) for Cultural and Adventure Travellers.
- US Trade shows tend to be smaller and often thematic and may be better replaced by DMO supported roadshows for the trade.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with International Trade	20%	20%	20%
	Co-op Marketing with Local Trade	10%	10%	15%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
Family Traveller	Trade Shows Attendance	10%	10%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	15%
	Co-op Marketing with International Trade	20%	20%	20%
	Co-op Marketing with Local Trade	15%	15%	20%
	Trade Support and Market Development	15%	15%	20%
Cultural Traveller	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	15%
	Co-op Marketing with International Trade	20%	20%	20%
	Co-op Marketing with Local Trade	15%	15%	20%
Adventure Traveller	Trade Support and Market Development	15%	15%	20%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	35%
	Co-op Marketing with International Trade	15%	15%	20%
Adventure Traveller	Co-op Marketing with Local Trade	15%	15%	15%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	15%	15%	5%
	Trade Shows Attendance	5%	5%	5%

THE UK IS A MORE DIVERSE MARKET REFLECTING SHORTER AIR ACCESS AND HIGHER FAMILIARITY WITH ZIMBABWE.



SEGMENTED BUDGETS – UK: OFFLINE

- While Mature Safari Travellers are still strongly represented in the UK market, it is more likely to diversify, given the relative shorter air access and product knowledge. The familiarity with the destination also makes them more likely to engage with local Zimbabwe operators, justifying increased co-op with local trade.
- Print advertising in key travel publications (such as BBC Wildlife and Sunday Travel Supplements) will be needed for awareness in the safari and family market, and content and media in TV travel and wildlife programming. The increasing popularity of digital over traditional media is represented in a decreased allocation to offline media.
- UK trade show budgets tend to be centered on World Travel Market (WTM) and more diverse and specialized shows such as bird fairs or wildlife art exhibitions can be considered.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with International Trade	20%	20%	20%
	Co-op Marketing with Local Trade	10%	10%	15%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
	Trade Shows Attendance	10%	10%	5%
Family Traveller	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	15%
	Co-op Marketing with International Trade	20%	20%	20%
	Co-op Marketing with Local Trade	15%	15%	20%
	Trade Support and Market Development	15%	15%	20%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
Cultural Traveller	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	15%
	Co-op Marketing with International Trade	15%	15%	20%
	Co-op Marketing with Local Trade	20%	20%	20%
	Trade Support and Market Development	15%	15%	20%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
Adventure Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	35%
	Co-op Marketing with International Trade	15%	15%	20%
	Co-op Marketing with Local Trade	15%	15%	15%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	15%	15%	5%
	Trade Shows Attendance	5%	5%	5%

THE LANGUAGE CHALLENGE IN GERMANY AND FRANCE REQUIRES STRONG PARTNERSHIPS WITH KEY AGENTS AND OPERATORS.



SEGMENTED BUDGETS – FRANCE AND GERMANY: OFFLINE

- Both the Germany and France markets have a degree of historical familiarity with the destination but also require access to content in their languages and trust in travel information and bookings, requiring strong partnerships with key agents, and operators both for co-op marketing and a supported hosted buyer program combined with native content on local language media platforms.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	5%	5%	5%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
Family Traveller	Trade Shows Attendance	10%	10%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	5%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	10%	10%	25%
	Trade Support and Market Development	15%	15%	20%
Cultural Traveller	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	15%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	10%	10%	15%
Adventure Traveller	Trade Support and Market Development	15%	15%	20%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with International Trade	15%	15%	15%
Adventure Traveller	Co-op Marketing with Local Trade	15%	15%	15%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%

THERE IS A GREATER DIVERSITY OF SEGMENTATION ACROSS THE REST OF EUROPE REQUIRING COORDINATION WITH TRADE TO SUPPORT INVESTMENT INTO THESE MARKETS.



SEGMENTED BUDGETS – REST OF EUROPE: OFFLINE

- The greater diversity of segmentation across the rest of Europe requires work with the trade to support identification of and investment into these markets, including partnerships with proven agents, and operators (Some of whom are active in multiple European markets) both for co-op marketing and supported hosted buyer programs.
- The reported increase of millennial Adventure and Cultural Travellers from Europe justifies investment into content marketing, particularly hosted media, for appropriate publications and broadcast.
- European Trade shows have traditionally been focused on ITB and FITUR but in the post-pandemic environment supporting roadshows for the trade to small sales events throughout Europe may be advisable.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	5%	5%	10%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
Family Traveller	Trade Shows Attendance	10%	10%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	5%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	10%	10%	25%
	Trade Support and Market Development	15%	15%	20%
Cultural Traveller	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	15%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	10%	10%	15%
Adventure Traveller	Trade Support and Market Development	15%	15%	20%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with International Trade	15%	15%	15%
Adventure Traveller	Co-op Marketing with Local Trade	15%	15%	15%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%

THE REGIONAL MARKET IS MORE DOMINATED BY FAMILY, CULTURAL, AND ADVENTURE TRAVEL.



SEGMENTED BUDGETS – SOUTH AFRICA AND REGIONAL: OFFLINE

- This market has proven to be less safari-focused and dominated by Family, Cultural, and Adventure travel, especially to Victoria Falls.
- The emergent affluent African traveller relies heavily on contained ‘all-inclusive packaging’ and while they have strong trust and loyalty in agents and operators within their markets, but may be more likely to use local Zimbabwean operators than some international markets.
- Print advertising in popular family and lifestyle publications and broadcast media is an important focus.
- INDABA, the WTM Africa Travel week and regional events will be useful for market and business development.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	15%	15%	15%
	Media Partnerships	15%	15%	15%
	Co-op Marketing with International Trade	20%	20%	20%
	Co-op Marketing with Local Trade	20%	20%	20%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
Family Traveller	Trade Shows Attendance	10%	10%	10%
	Awareness and Branding	15%	15%	15%
	Media Partnerships	25%	25%	25%
	Co-op Marketing with International Trade	20%	20%	20%
	Co-op Marketing with Local Trade	20%	20%	20%
	Trade Support and Market Development	10%	10%	10%
Cultural Traveller	PR and Market Development	10%	10%	10%
	Trade Shows Attendance	0%	0%	0%
	Awareness and Branding	15%	15%	15%
	Media Partnerships	25%	25%	25%
	Co-op Marketing with International Trade	20%	20%	20%
	Co-op Marketing with Local Trade	20%	20%	20%
Adventure Traveller	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
	Trade Shows Attendance	15%	15%	15%
	Awareness and Branding	15%	15%	15%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with International Trade	20%	20%	20%



AUSTRALIA AND NEW ZEALAND SHOW SIGNS OF SLOWLY EMERGING FROM PANDEMIC RESTRICTIONS THOUGH TRUST WILL NEED TO BE RESTORED.



SEGMENTED BUDGETS – AUSTRALIA AND NEW ZEALAND: OFFLINE

- Having been effectively cut off from international travel for two years due to the COVID-19 pandemic and resulting travel restrictions and border closures, these markets require strategic ‘reconnection’ with the destination through awareness raising and media engagement.
- The increasing popularity of digital marketing over traditional media is represented in a decreased allocation to offline media.
- Trust in travel needs to be regained, and there will likely be a stronger reliance on agents and operators within these markets who will be key partners for co-operative marketing and hosted buyer programs.
- Roadshows and sales meetings will likely be more effective than trade shows which are less popular in these markets and may struggle to return post pandemic.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	5%	5%	5%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
Family Traveller	Trade Shows Attendance	10%	10%	10%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	5%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	10%	10%	25%
	Trade Support and Market Development	15%	15%	20%
Cultural Traveller	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	15%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	10%	10%	15%
Adventure Traveller	Trade Support and Market Development	15%	15%	20%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with International Trade	15%	15%	15%
Adventure Traveller	Co-op Marketing with Local Trade	15%	15%	15%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%

THE PANDEMIC HAS CONSIDERABLY REDRAWN THE TRAVEL LANDSCAPE FOR EMERGING MARKETS.



SEGMENTED BUDGETS – EMERGING: OFFLINE

- The business landscape of emerging markets has changed significantly following the COVID-19 pandemic, and markets that showed promise pre-pandemic may be less likely to return to growth (as previously noted this is particularly true for China). These markets will need to be re-defined by working with the industry and by creating tactical campaigns in these markets with clearly measured and defined results. The increasing popularity of digital marketing over traditional media is represented in a decreased allocation to offline media.
- Due to the extremely restrictive protocols used in Asia during the pandemic, trust in travel needs to be regained, and there will likely be a stronger reliance on agents and operators within these markets who will be key partners for co-operative marketing and hosted buyer programs.
- As per Australia and New Zealand, roadshows and sales meetings will likely be more effective than trade shows which are less popular in these markets and may struggle to return post pandemic.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	5%	5%	10%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
Family Traveller	Trade Shows Attendance	10%	10%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	25%	25%	5%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	5%	5%	25%
	Trade Support and Market Development	15%	15%	20%
Cultural Traveller	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	5%
	Media Partnerships	20%	20%	15%
	Co-op Marketing with International Trade	25%	25%	25%
	Co-op Marketing with Local Trade	10%	10%	15%
Adventure Traveller	Trade Support and Market Development	15%	15%	20%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%
	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with International Trade	15%	15%	15%
Adventure Traveller	Co-op Marketing with Local Trade	15%	15%	15%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	15%	15%	15%
	Trade Shows Attendance	5%	5%	5%

DOMESTIC TRAVEL CAN BE ENHANCED BY PACKAGING COOPERATIVE MARKETING WITH LOCAL OPERATORS TO EXPAND BEYOND FAMILY TRAVEL WITHIN REACH OF HARARE.



SEGMENTED BUDGETS – DOMESTIC: OFFLINE

- The domestic market is predominantly driven by Family travel to destinations within reach of Harare.
- This can be expanded through improved packaging and cooperative marketing with local operators as seen in other African destinations such as the Sho't Left campaign in South Africa or the 'Tembea Kenya' campaign. Arranging FAM trips and hosted buyer programs for local agents and operators will increase the diversity of domestic itineraries. Zimbabwe's own "ZimBho" campaign has already initiated this effort.
- Use of media targeting younger Zimbabwean travellers, couples and groups of friends with independent and adventure travel options is important for developing a culture of social travel and consideration of competitive domestic options to international travel.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Family Traveller	Awareness and Branding	30%	30%	30%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Local Trade	30%	30%	30%
	Trade Support and Market Development	10%	10%	10%
	PR and Market Development	10%	10%	10%
Adventure Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Local Trade	30%	30%	30%
	Trade Support and Market Development	20%	20%	20%
	PR and Market Development	10%	10%	10%



PART 2: DIGITAL MARKETING

With the technical assistance of:



AS WITH OFFLINE MARKETING, EACH SEGMENT IS ADDITIONALLY DIVIDED BY THE KINDS OF DIGITAL MARKETING MOST SUCCESSFUL FOR EACH SEGMENT.



DIGITAL MARKETING DEFINITIONS

- Similar to the offline marketing breakdown, each segment is additionally broken down into the type of digital media / marketing that is most successful per each segment of the market, and thus requires investment and allocated budget.
- **Awareness and Branding** refers to programs such as online display advertisements and search-engine optimization and search-engine management for the destination. The success of this objective is measured through the number of impressions generated online, google ranking for keywords associated with the destination, and the click-through rate for search-engine landing pages.
- **Media Partnerships** includes generating online channel and content partnerships and providing strategic selection and support to influencers to promote the destination. This is tracked through reach, engagement rates, tracked online calls-to-action direct to landing pages, tracked UTM links, and EMVS of placement.

- **Co-Operative Marketing with the Trade** refers to digital campaigns, both social media and web-based, designed and implemented in collaboration with international and local online travel agencies (OTAs) and travel platforms. This success is measured through the number of total page views, valued conversion click-through rates, and traffic to landing pages.
- **Individual Operator Marketing:** Recent trends suggest that individual operators are a crucial component of digital marketing efforts.
- **Direct Consumer Marketing** refers to social media advertising which reaches directly to the market and potential consumers via targeted content promoted in defined, created and acquired audiences. This is tracked through reach, engagement, overall conversion, and tracked UTM links.
- **In-Destination Marketing** includes marketing activities conducted through mobile marketing, which a traveler can access while in-destination. This is measured through mobile-based calls-to-action, and the amount of downloads / access to PWAs.

CONTENT MARKETING REPRESENTS 5% OF THE OVERALL DIGITAL ALLOCATION THROUGH 2025.



SEGMENTED BUDGETS – ALL MARKETS: DIGITAL

Segment	Objective	Programs and Activities	KPIs	% of Budget 2023	% of Budget 2024	% of Budget 2025
Global	Content Marketing	Digital Content production and management Social content aggregation by #	Volume of content and EMV of shared content. Views online UTM links to content platforms	5% (Of overall digital allocation)	5% (Of overall digital allocation)	5% (Of overall digital allocation)
	DMO Development	Digital Platform Management Social and Web management	Google Analytics Social Insights data	95%	95%	95%

THE US MARKET IS HIGHLY DIGITALLY ACTIVE AND ONLINE BOOKINGS HAVE CONTINUED TO SEE CONSTANT GROWTH.



SEGMENTED BUDGETS – US AND CANADA: DIGITAL

- The US market is very digitally active with 90.8% of Americans using the internet (307 Million users of which 276 Million are mobile users). This is slanted to an extent against the aging population (29% of the population are over the age of 55) but there is growing online use among Baby Boomers.
- Online bookings have continued to see constant growth but there remains a division between inspiration and research and bookings that is generational. The US safari market is dominated by boomers and retirees who may be inspired by online content but are still more likely to book offline.
- Generation X, who are likely Family and Cultural Travellers are increasingly ‘millennial aligned’, gravitating towards both online content and purchases.
- Social media is extremely powerful (72% of online users) and is the likely most effective way of reaching and driving referred conversions to Millennial travellers, in particular Instagram. They are likely to represent the majority of Adventure Travellers and a growing number of Cultural Travellers. They are also more likely to use their mobile devices to access information.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	40%	40%	40%
	Media Partnerships	40%	40%	40%
	Co-op Marketing with Trade	5%	5%	5%
	Direct Consumer Marketing	10%	10%	10%
	In Destination Marketing	5%	5%	5%
Family Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	30%	30%
	In Destination Marketing	10%	10%	10%
Cultural Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	30%	30%
	In Destination Marketing	10%	10%	10%
Adventure Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	40%	40%	40%
	In Destination Marketing	10%	10%	10%

SECTION 1: INCEPTION REPORT

SECTION 2: MARKET SEGMENTATION

SECTION 3: PORTFOLIO ANALYSIS

SECTION 4: INVESTMENT ALLOCATION

THE UK IS AS DIGITALLY CONNECTED AS THE USA BUT WITH GREATER FAMILIARITY WITH ZIMBABWE AS A DESTINATION.



SEGMENTED BUDGETS – UK: DIGITAL

- The UK is as connected as the US (92% connected) and 77% of the population actively using social media.
- Usage is again age defined (99% of adults aged 17-44 are online), but only 54% over the age of 74.
- However, given the higher usage levels of social media and the younger age of UK travellers reported by the research interviews (particularly the increase in family travel and millennial couples) combined with greater familiarity with the destination a progressively increased investment into social media content and marketing is justified.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	40%	40%	40%
	Media Partnerships	40%	40%	40%
	Co-op Marketing with Trade	5%	5%	5%
	Direct Consumer Marketing	10%	10%	10%
	In Destination Marketing	5%	5%	5%
Family Traveller	Awareness and Branding	20%	15%	15%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	35%	35%
	In Destination Marketing	10%	10%	10%
Cultural Traveller	Awareness and Branding	20%	15%	15%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	35%	35%
	In Destination Marketing	10%	10%	10%
Adventure Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	40%	40%	40%
	In Destination Marketing	10%	10%	10%

FRANCE AND GERMANY ARE DEFINED BY LANGUAGE AND COUNTRY-SPECIFIC CONTENT, WITH FRANCE RESTRICTING NON-FRENCH DIGITAL CONTENT.



SEGMENTED BUDGETS – FRANCE AND GERMANY: DIGITAL

- France has 91% internet penetration with mobile access at almost 99% of users. Social media use is at 75% of the online population, heavily slanted towards younger users (due to the abundance of English language content).
- France is one of the few countries on earth that regulated language content on the internet, with non-French content restricted. While this has shifted, there is still a heavy focus on French content and preference for French content among the older population. Online travel is growing, although pre-pandemic was still only approaching 50% of sales.
- Germany has 94% internet penetration 78% of whom are social media users. Consistent growth of online sales has made Germany one of the largest online booking shares in Europe (growing at 4% annually pre-pandemic). The German population was a slow adopter of e-commerce and sales, but this is changing rapidly. The market is still driven heavily by German-specific content and channels, with TUI opening blockchain access to improve connection to local agents, but also investing heavily into social media marketing to expand into younger markets.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	40%	40%	40%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	10%	10%	10%
	In Destination Marketing	10%	10%	10%
Family Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	20%	20%	20%
	In Destination Marketing	10%	10%	10%
Cultural Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	20%	20%	20%
	In Destination Marketing	10%	10%	10%
Adventure Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	30%	30%
	In Destination Marketing	10%	10%	10%

EUROPE HAS SEEN AN INCREASE IN MILLENNIAL FIT TRAVELLERS WHICH JUSTIFIES GREATER INVESTMENT INTO DIGITAL CONTENT PARTNERSHIPS AND SOCIAL MEDIA MARKETING.



SEGMENTED BUDGETS – REST OF EUROPE: DIGITAL

- As noted, the diversity of source markets from across Europe, particularly those emerging from the pandemic requires careful and strategic selection. Individual markets should be assessed by their internet penetration and social media usage: (<https://datareportal.com/reports/?tag=Western+Europe>).
- The reported increase of Millennial FIT from Europe justifies investment into digital content partnerships and social media marketing.
- Digital is an excellent means of carrying out tactical assessment of markets, via an initial low investment into shared and promoted content used for tactical research and A/B testing of content to measure engagement, and then progressively invest into increased conversion-driven spend.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	40%	40%	40%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	10%	10%	10%
	In Destination Marketing	10%	10%	10%
Family Traveller	Awareness and Branding	10%	5%	5%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	20%	25%	25%
	In Destination Marketing	10%	10%	10%
Cultural Traveller	Awareness and Branding	10%	5%	5%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	20%	25%	25%
	In Destination Marketing	10%	10%	10%
Adventure Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	30%	30%
	In Destination Marketing	10%	10%	10%

DIGITAL MARKETING IN SOUTHERN AFRICA IS CHALLENGED BY LOWER INTERNET PENETRATION, WITH SOCIAL MEDIA USAGE HIGHEST IN NIGERIA AND SOUTH AFRICA.



SEGMENTED BUDGETS – SOUTH AFRICA AND REGIONAL: DIGITAL

- Internet penetration in Southern Africa is lower than in the West. In South Africa 60% of the population are online (of which 67% are mobile users). However, as in much of Africa use of mobile applications and digital services have become habitual.
- The emerging African affluent market as identified the trade interviews are strong mobile users, but limitations of e-commerce services and access to global distribution channels there is heavily reliance on both local agents and direct contact with suppliers.
- Social media use is very high, and South Africa has the second highest usage (after Nigeria) at 41% of online users active on social media platforms.
- This justifies investment into region-specific digital content and cooperative online marketing.
- The heavy use of mobile devices will mean that these travellers are likely to respond to in-destination marketing as they search for local information and businesses. This will be fortified by regional data and roaming agreements.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	10%	5%	5%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	40%	40%	40%
	Direct Consumer Marketing	20%	25%	25%
	In Destination Marketing	10%	10%	10%
Family Traveller	Awareness and Branding	10%	5%	5%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	40%	40%	40%
	Direct Consumer Marketing	20%	25%	25%
	In Destination Marketing	10%	10%	10%
Cultural Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	40%	40%	40%
	In Destination Marketing	10%	10%	10%
Adventure Traveller	Awareness and Branding	10%	5%	5%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	40%	40%	40%
	Direct Consumer Marketing	20%	25%	25%
	In Destination Marketing	10%	10%	10%

AUSTRALIA AND NEW ZEALAND ARE HIGHLY CONNECTED WHICH COULD REPRESENT AN OPPORTUNITY TO DRIVE RECOVERY AND GROWTH FOR THESE MARKETS.



SEGMENTED BUDGETS – AUSTRALIA AND NEW ZEALAND: DIGITAL

- Both Australia and New Zealand represent one of the most connected populations on the planet. 99% of Australians and 94% of New Zealanders are connected to the internet.
- Both are extremely active on Social Media. 83% of online Australians and 82% of online New Zealanders are active on Social Media. The popularity of Facebook shows a broad generational use of social media. 66% of the Australian population between 16 and 64 have active Facebook accounts.
- Digital marketing in Australia experienced extraordinary growth during the pandemic with 60% growth 2020-21 (iab Australia). The increasing rate of millennial FIT travel justifies an increase in direct consumer social media marketing.
- However, at a broader level, online travel bookings in the region are very common for domestic and Asian regional travel, but longer haul travel especially by older travellers will be more likely to involve local agents as trust is regained as they emerge from pandemic travel restrictions.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	40%	40%	40%
	Media Partnerships	40%	40%	40%
	Co-op Marketing with Trade	5%	5%	5%
	Direct Consumer Marketing	10%	10%	10%
	In Destination Marketing	5%	5%	5%
Family Traveller	Awareness and Branding	20%	15%	15%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	35%	35%
	In Destination Marketing	10%	10%	10%
Cultural Traveller	Awareness and Branding	20%	15%	15%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	35%	35%
	In Destination Marketing	10%	10%	10%
Adventure Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	20%	20%	20%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	40%	40%	40%
	In Destination Marketing	10%	10%	10%

ASSESSMENTS OF EMERGING MARKETS ARE ENABLED BY DIGITAL MEANS AND SHOULD BE ASSESSED BY THEIR INTERNET PENETRATION AND SOCIAL MEDIA USAGE.



SEGMENTED BUDGETS – EMERGING: DIGITAL

- As noted, the diversity of source markets previously considered ‘emerging’, particularly those emerging from the pandemic requires careful and strategic selection. Individual markets should be assessed by their internet penetration and social media usage, although accurate data on internet usage can be hard to access for some countries in Asia.
- Digital is an excellent means of carrying out tactical assessment of markets, via an initial low investment into shared and promoted content used for tactical research and A/B testing of content to measure engagement, and then progressively invest into increased conversion-driven spend.
- Digital marketing to the Chinese market requires heavy investment into China-specific platforms (such as Weibo and Wechat) due to the restriction of social media platforms and search engines. With the current ongoing ‘zero COVID’ policies and restrictions on Chinese travel, and projected mandated promotion of domestic travel, investment into digital marketing in China is highly questionable.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Mature Safari Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	40%	40%	40%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	10%	10%	10%
	In Destination Marketing	10%	10%	10%
Family Traveller	Awareness and Branding	10%	5%	5%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	20%	25%	25%
	In Destination Marketing	10%	10%	10%
Cultural Traveller	Awareness and Branding	10%	5%	5%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	30%	30%	30%
	Direct Consumer Marketing	20%	25%	25%
	In Destination Marketing	10%	10%	10%
Adventure Traveller	Awareness and Branding	10%	10%	10%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	20%	20%	20%
	Direct Consumer Marketing	30%	30%	30%
	In Destination Marketing	10%	10%	10%

DOMESTIC INTERNET PENETRATION IS VERY LOW AND TENDS TO BE LINKED TO INCOME AND THEREFORE MEANS AND PROPENSITY TO TRAVEL.



SEGMENTED BUDGETS – DOMESTIC: DIGITAL

- Local internet penetration is low at 33% of the population, and there are challenges when it comes to relatively low connectivity and high costs. Only 8.7% of the population are social media users.
- However, access to the internet and social media is also linked to income and affluence and thereby ability and propensity to travel.
- Awareness at a search level combined with social media advertising that can lead to access to reliable information and access to products and business is essential.
- Digital support of domestic travel campaigns and platforms (such as the South African or Kenyan approach) will build and expand this market.

Segment	Objective	% of Budget 2023	% of Budget 2024	% of Budget 2025
Family Traveller	Awareness and Branding	30%	30%	30%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	10%	10%	10%
	Direct Consumer Marketing	20%	20%	20%
	In Destination Marketing	10%	10%	10%
Adventure Traveller	Awareness and Branding	20%	20%	20%
	Media Partnerships	30%	30%	30%
	Co-op Marketing with Trade	10%	10%	10%
	Direct Consumer Marketing	30%	30%	30%
	In Destination Marketing	10%	10%	10%



Zimbabwe
A World of Wonders

APPENDIX

With the technical assistance of:



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INTERVIEWS WITH KEY STAKEHOLDERS IN ZIMBABWE WERE UNDERTAKEN TO ADD DIRECT INSIGHTS FROM OPERATORS AND THE MARKET.



STAKEHOLDER ENGAGEMENT METHODOLOGY

NAME	ORGANIZATION	BASED IN
Jim Brown	YoAfrica	Zimbabwe – Victoria Falls
Sarudzai Muza	Airports Company Zimbabwe	Zimbabwe – Harare
Farai Chimba	Victoria Falls Hotel	Zimbabwe – Victoria Falls
Lovemore Machipisa	Africa Travel Vic Falls	Zimbabwe – Victoria Falls
Bruno De Leo	Batonka Guest Lodge and Pioneers Zimbabwe	Zimbabwe – Victoria Falls
Roland Verwerk	Boundless Southern Africa	South Africa
Illana Clayton	Travel Smart Crew	South Africa
Hilton Walker	Great Plains	South Africa
Robin Mcleod	TA Safaris	South Africa
Shelley Cox	We Are Victoria Falls	Zimbabwe – Victoria Falls
Wengai Nhau	Tourism Business Council of Zimbabwe	Zimbabwe – Harare
Audrey Bvirimbi	Hilton Transfers	Zimbabwe – Harare
Innocent Kufa	Rainbow Towers	Zimbabwe – Harare
Tinashe Munjoma	Miekles Hotel	Zimbabwe – Harare
Tintotenda Kwesha	Amanzi Lodge	Zimbabwe – Harare
Sarah Wild	York Lodge	Zimbabwe – Harare
Janet Tsoka	Traverze Travel and Tours	Zimbabwe – Harare
Loreen Munaku	Lilly Trotter	Zimbabwe – Kariba
Pious Tshuma	Recency Hotels	Zimbabwe – Masvingo

METHODOLOGY NOTE

- 19 Stakeholders were interviewed so far with insights integrated in the core reporting across the subsections.
- A standard discussion guide was developed with 11 questions around trends in the tourism market for Zimbabwe, key segments and channels, challenges and opportunities, and insights on developing Zimbabwe as a standalone destination.
- A separate questionnaire among SATSA members following the same broad themes was also developed.
- These interviews were undertaken via direct one-on-one calls.



Zimbabwe
A World of Wonders



IMPACT OF COVID-19

Qualitative desk research assessment of the impact of COVID-19 on tourism at the global, domestic, and local level

With the technical assistance of:



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COVID-19 IS PROVING TO BE THE MOST SIGNIFICANT THREAT TO THE VIABILITY OF THE TRAVEL AND TOURISM INDUSTRY ACROSS THE WORLD.



GLOBAL IMPACT OF COVID-19

- COVID-19 is likely to be deemed the most abrupt shock to the global economy and society in modern history.
- The global travel and tourism industry is profoundly impacted and will face a real risk to near-term survival of many tourism operators and a significant disruption to communities, SMEs, trade channels and destinations.
- While continued action and vigilance will be required to control further spread of the virus, urgent action is also required to protect the livelihoods of the millions of individuals and businesses impacted.
- While most developed countries are on the tail-end of the pandemic and vaccine rollouts are proceeding fairly rapidly, the crisis is far from over and, even once the threat of the virus itself has been significantly diminished, the road to recovery for many sectors, especially tourism, will be a long one.

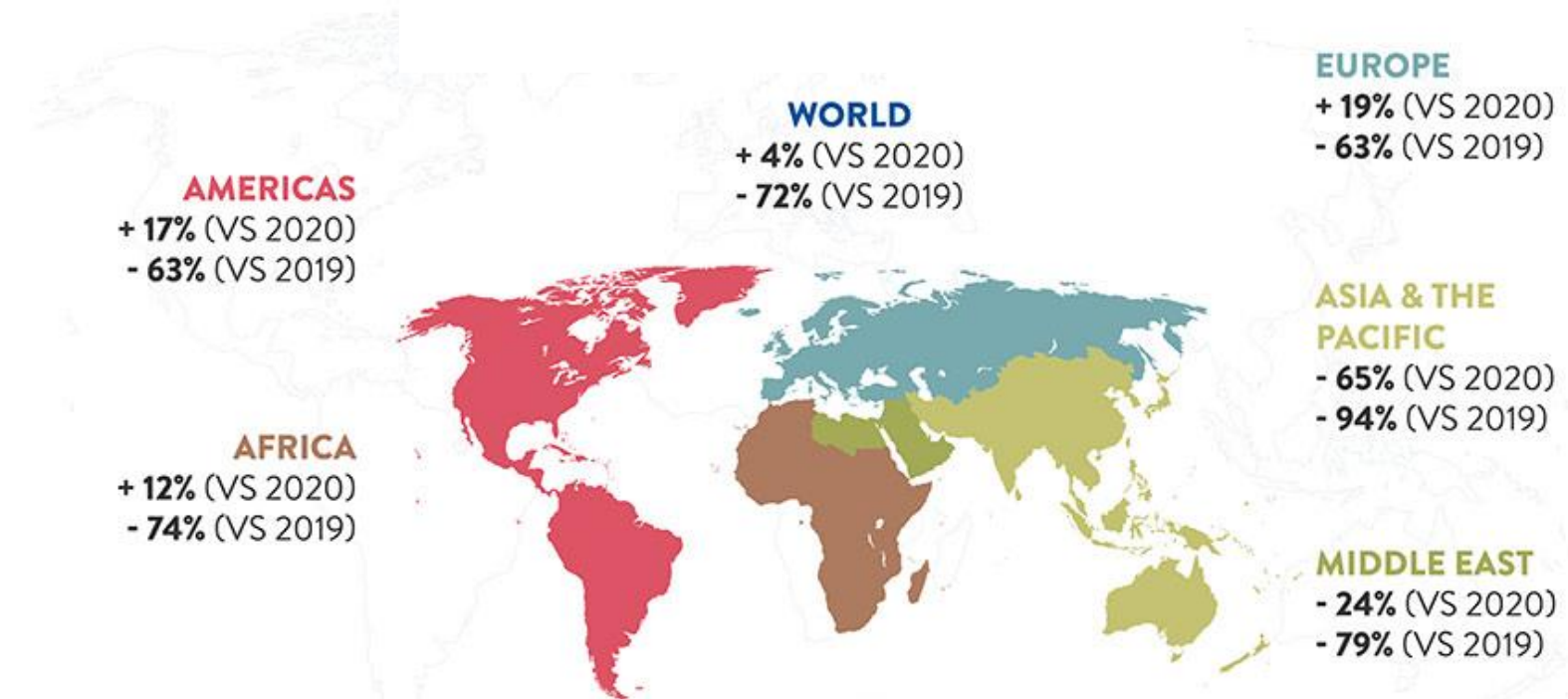
- Global tourism may not return to 2019 levels quickly (e.g., Tourism Economics, a division of Oxford Economics suggests a return to 2019 tourism levels by 2025, under certain conditions), and while tourism may recover, albeit in an altered form, destinations need to develop strategies and action plans with a focus on resilience as a competitive advantage and as much downside management of risk as a first priority in order to hit the ground running once the pre-conditions for resumption of tourism, such as societal and travel restrictions are gradually lifted, are met.
- Whatever the specifics of the new normal, the tourism sector will be a very different in going forward from what it was in 2019.
- An across-the-board deterioration of tourism is not the full story, and a more granular analysis predicts growth in certain specific subsectors and clusters that are able to accommodate the demands of a pandemic environment.

WHILE EUROPE AND THE AMERICAS HAVE SHOWN THE STRONGEST RECENT RESULTS IN TERMS OF TOURISM RECOVERY, AFRICA REMAINS ONE OF THE HARDEST HIT REGIONS.



GLOBAL IMPACT OF COVID-19

International Tourist Arrivals, 2021



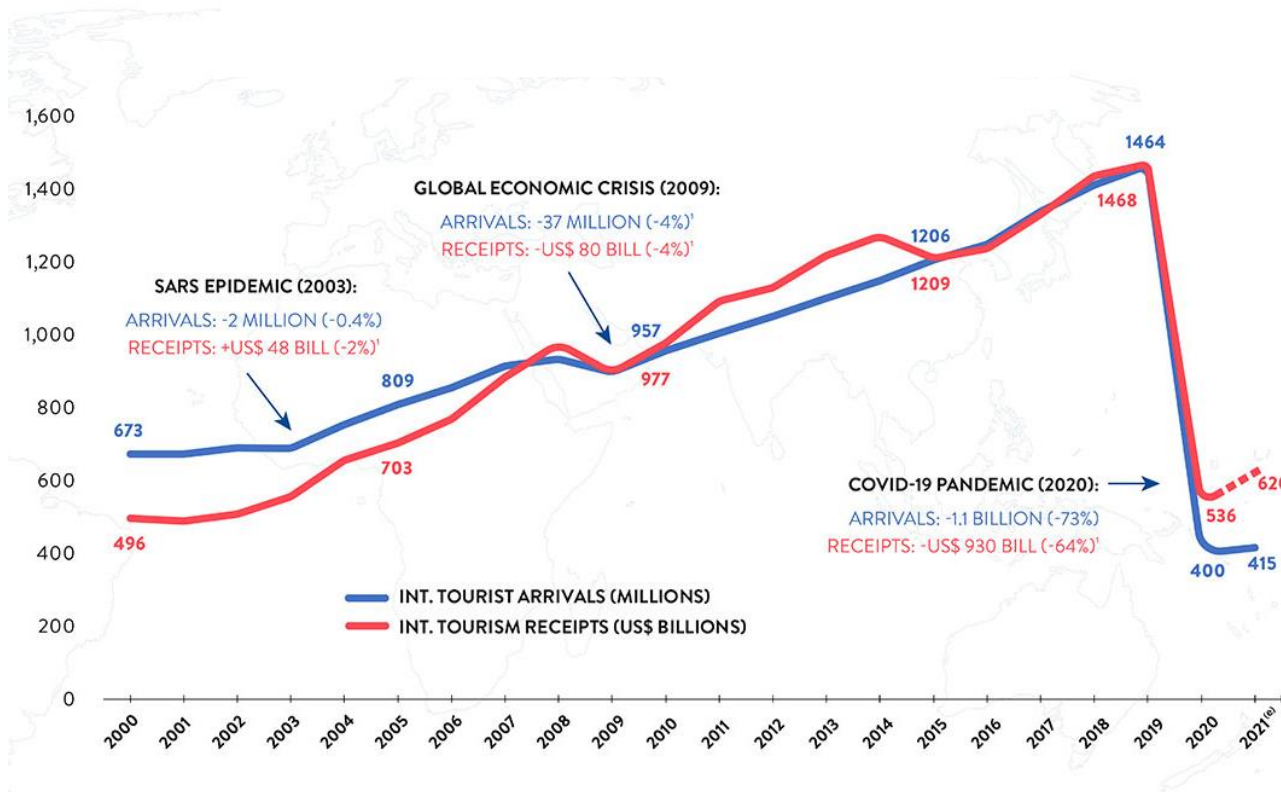
KEY IMPLICATIONS

- Europe and the Americas recorded the strongest results in 2021 compared to 2020 (+19% and +17% respectively), but still both 63% below pre-pandemic levels.
- By comparison, Africa saw a 12% increase in arrivals in 2021 compared to 2020, though this is still 74% below 2019.
- By subregion, the Caribbean saw the best performance (+63% above 2020, though 37% below 2019), with some destinations coming close to, or exceeding pre-pandemic levels.
- Southern Mediterranean Europe (+57%) and Central America (+54%) also enjoyed a significant rebound but remain 54% and 56% down on 2019 levels, respectively. North America (+17%) and Central Eastern Europe (+18%) also climbed above 2020 levels.
- In the Middle East arrivals declined 24% compared to 2020 and 79% over 2019.

WHILE RECOVERY IS MOVING AHEAD, IT WILL TAKE SOME TIME FOR GLOBAL TOURISM TO RETURN TO PRE-PANDEMIC LEVELS AND RECOVERY WILL TAKE TIME AS A RESULT.

GLOBAL IMPACT OF COVID-19

International Tourist Arrivals and Tourist Receipts 2000-2021



KEY IMPLICATIONS

- International tourism experienced a 4% increase in 2021, 15 million more international tourist arrivals (overnight visitors) compared to 2020 (415 million versus 400 million).
- However, international arrivals were still 72% below the pre-pandemic year of 2019, according to preliminary estimates. This follows on from 2020, the worst year on record for tourism, when international arrivals decreased by 73%.
- The uplift in demand was driven by increased traveller confidence amid rapid progress on vaccinations and the easing of entry restrictions in many destinations.
- International tourism rebounded moderately during the second half of 2021, with international arrivals down 62% in both the third and fourth quarters compared to pre-pandemic levels. According to limited data, international arrivals in December were 65% below 2019 levels.

EMERGING ECONOMIES, INCLUDING THOSE IN THE SADC REGION, ARE AMONG THE HARDEST HIT AND EFFECTIVE TOURISM RECOVERY STRATEGIES WILL BE CRITICAL.



REGIONAL (SADC) IMPACT OF COVID-19

- The World Bank predicted that destinations with emerging and developing economies would be among the hardest hit.
- However, Southern Africa is projected to grow 2.4% in 2022, according to the African Development Bank's Southern Africa Economic Outlook.
- The SADC has a clear mandate to drive the recovery of the regional tourism industry, in partnership with governments and the private sector.
- According to the World Health Organization (WHO) the COVID-19 pandemic has led to a dramatic loss of human life worldwide and presents an unprecedented challenge to public health, food systems and the world of work.

- The economic and social disruption caused by the pandemic has been devastating tens of millions of people are at risk of falling into extreme poverty, while the number of undernourished people, estimated at nearly 690 million at the end of 2019, rose to 820 million people, just one year later.
- Like all of the region, Zimbabwe's tourism sector was badly impacted by the pandemic and resultant economic shock.
- The tourism activity gradually started attaining normalcy in 2021 but the concerns arising from the infections due to the latest variant of the virus, Omicron, has led to stringent measures like 100% quarantine for all arrivals at all borders in Zimbabwe.
- However, the region has several advantages to leverage as global tourism recovers. The region hosts vast flora and fauna, including the big five wildlife, two of the Seven Wonders of the World and is a key player in the global tourism sector, particularly from a nature tourism perspective.



CONSUMER TRAVEL TRENDS

Secondary and primary analysis of current key consumer travel trends driving the evolution of the global travel and tourism market

With the technical assistance of:



DESPITE ITS CATASTROPHIC IMPACT, THE CHANGING POST-PANDEMIC ENVIRONMENT ALSO PRESENTS NEW OPPORTUNITIES FOR DESTINATIONS.



CONSUMER TRENDS EMERGING FROM THE PANDEMIC

- While in the short-term the primary imperative for most sectors is to find the best and most flexible policy solutions to survive the pandemic intact, looking ahead, the post-COVID world presents opportunities to learn from the crisis as well as play an active role in defining the new business landscape.
- For example, experts foresee growing demand for open-air and nature-based tourism activities, with domestic tourism and ‘slow travel’ experiences (an approach to travel that emphasizes connection to local people, cultures, food and music).
- Destinations seeking to differentiate in the new normal will need to consider the longer-term picture, while pursuing opportunities around digitalisation, supporting a transition away from carbon-intensive practices, and promoting interventions to build a more sustainable and resilient global tourism industry.
- Safety and hygiene have become key selection criteria for travellers when planning a vacation.

- Destinations regarded as having highly robust and credible hygiene measures in place will have a distinct competitive advantage in the new normal, with some destinations like Dubai showing early reputational successes in this regard.
- Digitalization of tourism services is also expected to continue to accelerate, with higher use of automation, contactless payments and services, virtual experiences, and real-time information provision across the value chain.
- Travellers are also likely to prefer ‘private solutions’, avoiding big gatherings or mass accommodation, and prioritizing private means of transport.
- Thus, ‘road trip tourism’ is seen as a growth area, particularly in destinations with a large and varied land-mass and borders with neighbouring source markets such as Canada and the United States, and this trend may present opportunities for Zimbabwe as it develops its sub-destinations and seeks to grow its regional tourism profile.

COVID-19 WILL DEFINE THE INCREASING IMPORTANCE OF SUSTAINABLE TOURISM AT THE GLOBAL AND REGIONAL LEVEL.



CONSUMER TRAVEL TRENDS – GROWTH IN SUSTAINABLE TOURISM

- Prior to the pandemic, international tourist arrivals were increasing steadily year after year, with the World Tourism Organization (UNWTO) noting that by 2031 there could be 2 billion tourists travelling around the world.
- Again, prior to the effects of COVID-19, the most recent Asia Pacific Visitor Forecasts, from the Pacific Asia Travel Association (PATA), predicted that international visitor arrivals into the region (i.e., Asia Pacific and the Middle East) would reach nearly 900 million by 2023, growing at an average annual growth rate of 5.5% over the 2018-2023 period.
- While those numbers are impressive, the travel and tourism industry must always keep in mind that the issue of sustainable and responsible development must be addressed.
- Especially in economic recovery, as travel and tourism becomes a greater contributor to the economic well-being of each destination, plans for responsible development and sustaining those elements generating growth must be taken into consideration.

- This is especially critical as the world is facing dramatic social, political, environmental and economic changes, particularly in relation to the potentially irreversible damage to our planet caused by climate change.
- This is particularly relevant for desert and water-deficient destinations, who will see the most severe impacts of climate change, but also have the greatest potential for tourism to support community development and economic growth.
- Therefore, the future of tourism should not be defined only in terms of growth, particularly in relation to visitor arrival numbers.
- The narrative needs to be changed and the industry should be focusing on capacity management.
- The industry needs to rethink the measure of success beyond arrival numbers and start thinking of people, planet, and profit.

AS DESTINATIONS SEEK HIGHER VALUE FORMS OF TOURISM, SUSTAINABILITY CONCERNS WILL NEED TO BE INCORPORATED INTO THESE ENDEAVOURS.



CONSUMER TRAVEL TRENDS – GROWTH IN SUSTAINABLE TOURISM (CONT'D)

- Some destinations and destination management organizations have already become less concerned with growing visitor numbers and are instead placing a greater emphasis on higher yield and longer stays.
- Nevertheless, as destinations look to attract higher value forms of tourism, new destinations and developing destinations, especially, must be careful to ensure that travel remains inclusive, welcoming people from all walks of life, while respecting a country's people and traditions, and sustaining the culture and heritage of the destination.
- Sustainable tourism is becoming more and more important to tourists in choosing and interacting with their destination and no one wants to visit a destination that has been robbed of its natural beauty, culture and heritage.

- According to UNWTO, sustainable tourism should *“maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.”*
- This trend occurs alongside a series of related tourism trends such as a growth in solo travel, smaller groups, and *“slow travel”*.
- Slow travel is an approach to travel that emphasizes connection: to local people, cultures, food and music. It relies on the idea that a trip is meant to educate and have an emotional impact, in the present moment and for the future, while remaining sustainable for local communities and the environment.
- This implies a greater emphasis on cultural immersive tourism which is identified as an area of potential growth for Zimbabwe beyond more conventional adventure and safari offerings.

SUSTAINABLE TOURISM WILL DIFFERENTIATE LEGACY VS. NEW, UNIQUE AND IN-DEMAND DESTINATIONS AROUND THE WORLD.



CONSUMER TRAVEL TRENDS – GROWTH IN SUSTAINABLE TOURISM (CONT'D)

- To validate that the UNWTO definition of sustainable tourism was representative of industry perspectives, Twenty31 asked several expert tourism industry analysts drawn from the Twenty31 network what sustainable tourism meant to them. Interviewees by and large offered definitions consistent with that stated previously.
- Common terms used to define sustainable tourism included *'holistic'* and *'inclusive'*.
- While these perspectives varied, several key themes emerged throughout responses as to what sustainable tourism entails.
- According to Twenty31's in-house research, there is a broad consensus on the factors that constitute sustainable tourism, broken down into 6 key points.

Sustainable Tourism:

- 1 **TAKES A HOLISTIC APPROACH TO PLANNING AND DEVELOPMENT** | It considers and plans for the long-term wellbeing and sustainment of individuals, businesses, cultural heritage, biodiversity, and environment.
- 2 **PRIORITIZES THE LONG-TERM OVER THE SHORT-TERM** | Organic, small-scale growth in the short-term was considered inherently more sustainable in the long-term.
- 3 **USES RESOURCES RESPONSIBLY** | It recognizes that resources are limited and minimizes consumption as much as possible, especially water and energy. It also recognizes the importance of fair and equitable treatment of staff.
- 4 **CONSIDERS TOURISM'S TRUE COSTS AND BENEFITS** | It accounts for externalities and minimizes any negative unintended side effects of tourism on both the environment, society and communities.
- 5 **ENGAGES AND INCLUDES ALL RELEVANT STAKEHOLDERS OF A HOST COMMUNITY** | It is planned and delivered by a range of people who have a stake in the continued success of the local area, understand the community's needs and will make decisions in its best interest.
- 6 **IS ROOTED TO PLACE** | The culture, environment, and uniqueness of the host community is deeply embedded into the tourism offering. Tourism adapts to reflect these norms, rather than the other way around.

NATURE-BASED TOURISM, INCORPORATING CULTURAL ELEMENTS WILL INCREASINGLY BE IN-DEMAND BY DISCERNING, EDUCATED TRAVELLERS.



CONSUMER TRAVEL TRENDS – GROWTH IN NATURE-BASED TOURISM

- For the purposes of this research, Twenty31 defines nature-based tourism as responsible travel to natural areas, which conserves the environment, protects cultural assets and improves the welfare of local people. It is tourism based on the natural and cultural attractions of an area.
- Among interviews with sustainability experts, there was a general acknowledgement that sustainability issues were rising on the global agenda.
- Many acknowledged that today’s tourists are increasingly seeking alternative, more authentic travel experiences, an element that is widely considered to go hand-in-hand with sustainability.
- Recent research validates this perceived increase in demand for nature-based and authentic cultural travel experiences.
- According to research by the World Tourism Organization and IUCN, global levels of education are on the rise—a trend that is highly correlated with interest for outdoor recreation and cultural and nature-based tourism.

- More highly educated tourists seek opportunities to discover and learn while they travel, often opting for interest-based experiences such as wildlife viewing, cultural exploration and celebrations, and guided tours. They are also more likely than the average tourist to visit a protected natural area.
- Many interviewees associated the demand for authentic travel with the Millennial generation whom they widely claim have higher and more deeply held expectations related to sustainability.
- Some interviewees pointed out that these social impact expectations will become increasingly significant in the tourism industry as Millennials age and their purchasing power increases.
- Of course, it remains to be seen whether these values and increased purchasing power will translate into a broader willingness to spend more of their disposable income on more customized sustainable tourism experiences that will often come with a higher price tag. However, as we shall see, indications are promising.

COVID-19 WILL SPEED THE TRANSITION TO HIGH-VALUE TOURISM FOR MANY DESTINATIONS LOOKING FOR AN ALTERNATIVE TO THE MASS-TOURISM APPROACH.



CONSUMER TRAVEL TRENDS – HIGH VALUE TOURISM AS ALTERNATIVE TO MASS TOURISM

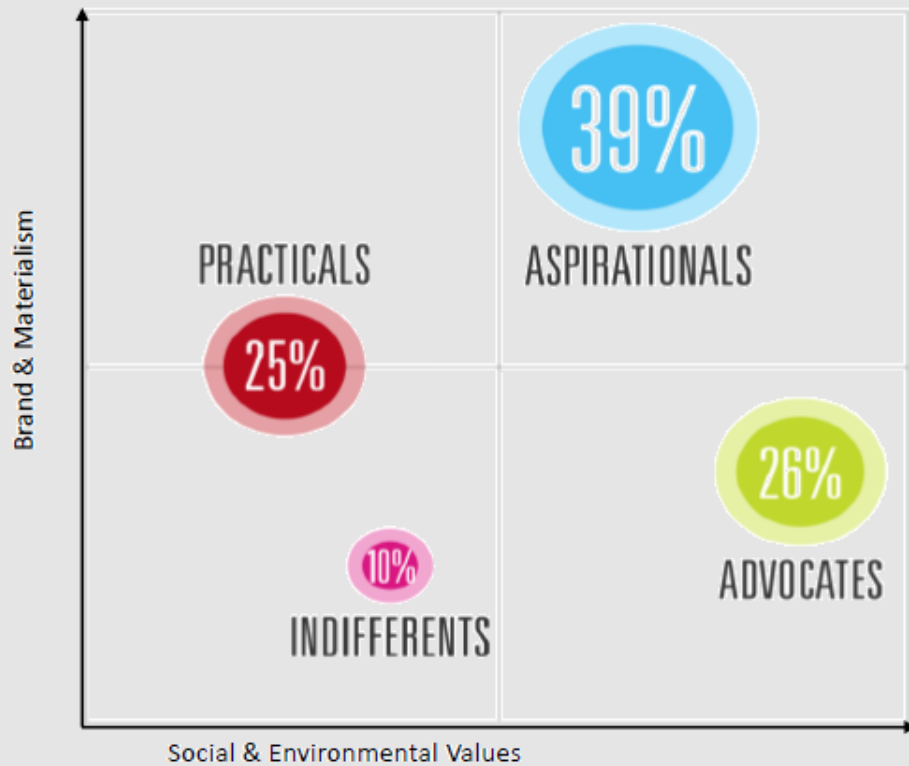
- The concept of the High-Value Traveller (HVT) is one that is gaining increasing attention as destinations around the world grapple with steep competition and the risks and impacts of tourism.
- Tourism Australia and Tourism New Zealand are two examples of destinations that have shifted their strategies from volume-driven to value-driven models. In this context, ‘value’ can be a difficult concept to define in a consistent way.
- In some cases, it may simply involve visitors spending more than average, though it would be simplistic to reduce it to this in all cases.
- The crucial factor is the delivery of value to the destination, operators, the community, the natural environment, and the traveller themselves.
- In some cases, this may involve “high touch” travel, where people pay a lot for exclusive experiences, but it need not be limited to this. A tour facilitated by a local resident can be an example of high value travel, and it need not be expensive. But it is a bespoke experience where both the traveller and the guide derive direct benefit.

- HVTs are those who deliver more value to the destination than the average traveller, and are interested in the types of experiences the destination offers. It is important to note that this segment is not fixed; a host community’s HVTs are determined by the overall strategy and/or marketing campaign goals of the destination and may shift accordingly.
- Recent market segmentation by GlobeScan characterizes an ‘Aspirational’ consumer group mostly comprised of younger consumers.
- This segment is defined by their love of shopping, desire for responsible consumption, and their trust in brands to act in the best interest of society.
- GlobeScan also notes that: *“they are among the most likely to support companies, destinations and brands that have a purpose of making a positive difference in society through their products, services, and operations”*.
- Research suggests that 90% of Aspirational consumers say they are *“willing to pay more for products produced in a socially and environmentally responsible way”*.

NEW CONSUMER SEGMENTS ARE EMERGING THAT SHOW GREATER ENGAGEMENT WITH HIGH VALUE AUTHENTIC EXPERIENCES.

WHO ARE THE ASPIRATIONALS?

A RECEPTIVE AND ENGAGED SEGMENT OF CONSUMERS, READY FOR PURPOSEFUL BRANDS



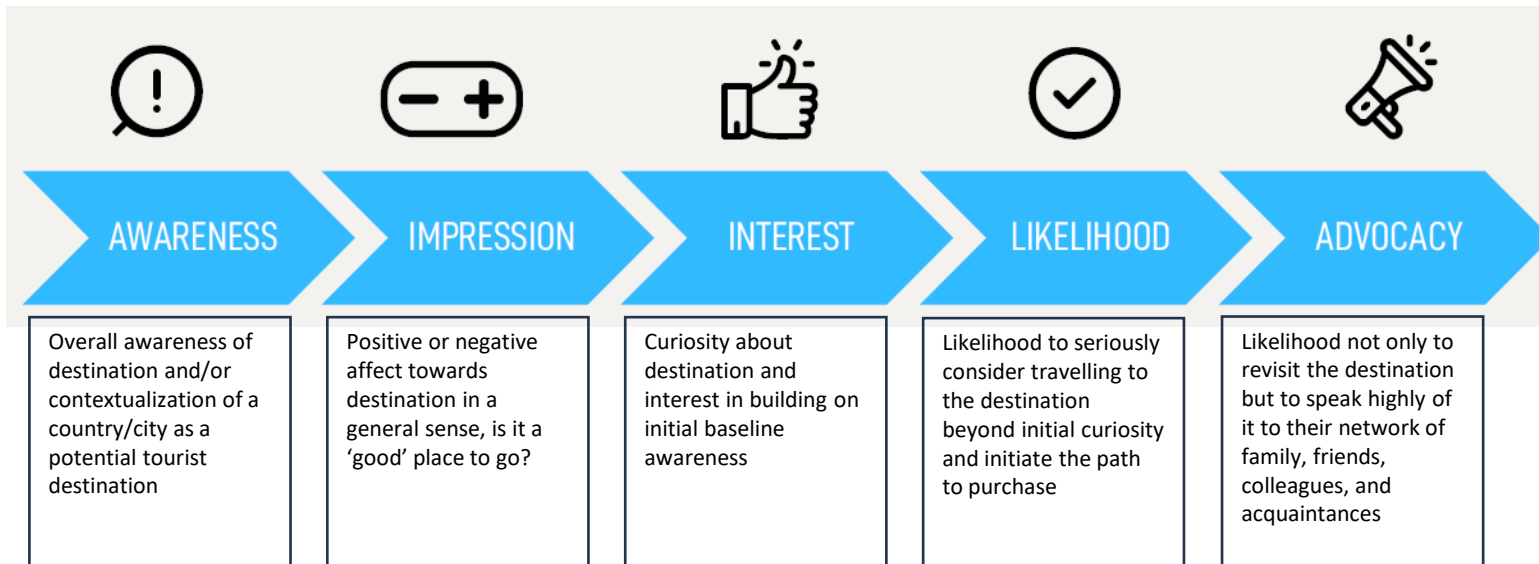
SUMMARY

- Developed by GlobeScan, SustainAbility, and BBMG, The 2018 Aspirational Consumer Index is an in-depth survey of consumer attitudes, motivations and behaviours relating to sustainable consumption among participants across 21 international markets..
- Countries with the largest populations of Aspirational consumers include Nigeria (58%), India (53%), South Africa (52%), Indonesia (51%), Kenya (44%), and Brazil (42%). In developed markets, countries with the largest Aspirational populations include Canada (42%), the United Kingdom, (41%), Spain (37%), and the United States (36%)
- The Aspirational consumer segment is likely to engage in high value travel in the first place and consider the experience from a learning and immersion perspective, as well as speak highly of it if the destination meets that need.
- Additionally, Aspirationals represent a harmonious fusion of materialism and social and environmental values and thus represent potential brand ambassadors for immersive destinations with strong regenerative and sustainable values which Zimbabwe is well-positioned to leverage..

CONVERTING AWARENESS INTO ADVOCACY IS THE MOST CRUCIAL EFFORT IN GROWING A BOLD DESTINATION BRAND AMONG VISITORS.

THE ROLE OF THE TRAVELLER

AWARENESS TO ADVOCACY: AN APPROACH TO AMPLIFYING A DESTINATION BRAND



KEY IMPLICATIONS

- Newer sustainable and regenerative approaches to tourism have a bold and confrontational tone which can both challenge and excite consumers.
- One of the most crucial aspects to understand for destination brands is that much of the progress in building a destination brand at the level of the individual traveller takes place after their trip.
- An inspiring travel experience can convert a previous visitor into an advocate for the destination, through the sharing of their experiences and memories.
- Like any mission-focused paradigm, sustainable and regenerative tourism will be driven and embedded by advocacy and citizen activism, and this will ultimately be spread by the consumer.
- This has also in some cases involved a shift in language from “tourists”, “consumers”, or “travellers”, towards “visitors” and creating a sense of “temporary localhood”.

REGENERATIVE TOURISM REPRESENTS A NEW PROACTIVE SYSTEMS APPROACH TO LONG-TERM SUSTAINABLE TOURISM.



CONSUMER TRAVEL TRENDS – EMERGENCE OF REGENERATIVE TOURISM

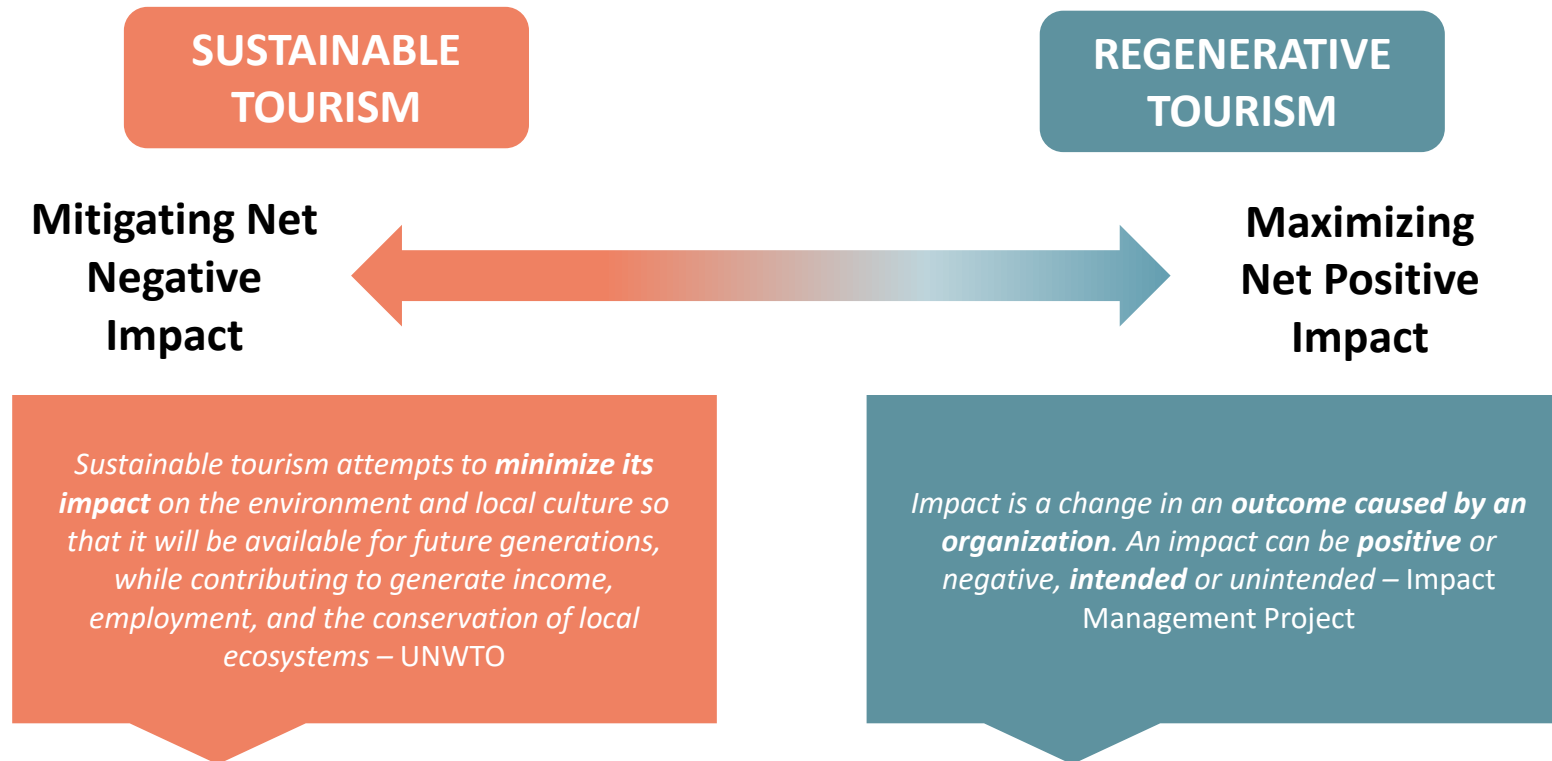
- Regenerative tourism could be seen as the latest stage in a gradual evolution of travel and tourism in the direction of ethics and non-harm.
- Earlier concepts like sustainable tourism focused on minimising harm which starts from the assumption that travel and tourism can only mitigate negative impacts.
- Regenerative tourism, by contrast, seeks to maximise positive impacts.
- Mitigation alone assumes an inexorable deterioration that can only be slowed and is ultimately insufficient to address problems such as climate change, biodiversity loss, or societal inequalities.
- Regenerative tourism, critically, takes the bold step to demand a net positive impact by the sector.
- Regeneration by definition describes processes or dynamics that renew or revitalize systems – whether natural systems, cultures, or communities.

- The integration of these distinct but overlapping systems is also key to what regenerative tourism represents in terms of the evolution of the sector.
- Earlier iterations of ethical tourism models such as eco-tourism, sustainable tourism, or indigenous tourism, either wholly or partly compartmentalised the environment, culture, technology, and societies.
- Although many destinations have adopted what can be readily interpreted as regenerative principles and strategies, as an approach, regenerative tourism is highly nascent with few destinations explicitly using the term or applying a globally recognized methodology.
- As such, regenerative tourism is ripe for innovative leadership by destinations willing and able to make the appropriate strategic investments and provide a blueprint for the sector globally as tourism emerges from the COVID-19 pandemic into *the new normal*.

THE FUNDAMENTAL DIFFERENCE BETWEEN REGENERATIVE AND SUSTAINABLE TOURISM IS ROOTED IN TOURISM'S POSITIVE OR NEGATIVE IMPACT



HOW IMPACT DELINEATES SUSTAINABLE TOURISM FROM REGENERATIVE TOURISM



KEY IMPLICATIONS

- The term “sustainable tourism” starts with premise that tourism is fundamentally harmful and that the best that can be achieved on the part of destinations is to minimize this harm.
- Regenerative tourism takes the bold stance that tourism can leave a destination better off than it would be otherwise, leveraging tourism income, traveller advocacy, and community agency to create an improving and regenerating tourism ecosystem.
- As such, previous approaches to sustainable tourism based on low volume tourists flows need to apply to an effectively designed regenerative tourism framework.
- Given that regenerative tourism harnesses the positive impact of tourism, it can employ high volume targets if the potential of regenerative tourism is effectively harnessed.



Zimbabwe
A World of Wonders

ZIMBABWE'S TOURISM LANDSCAPE

Secondary analysis of Zimbabwe's competitiveness as a destination and key challenges

With the technical assistance of:



twenty•31
tourism by design





SUMMARY

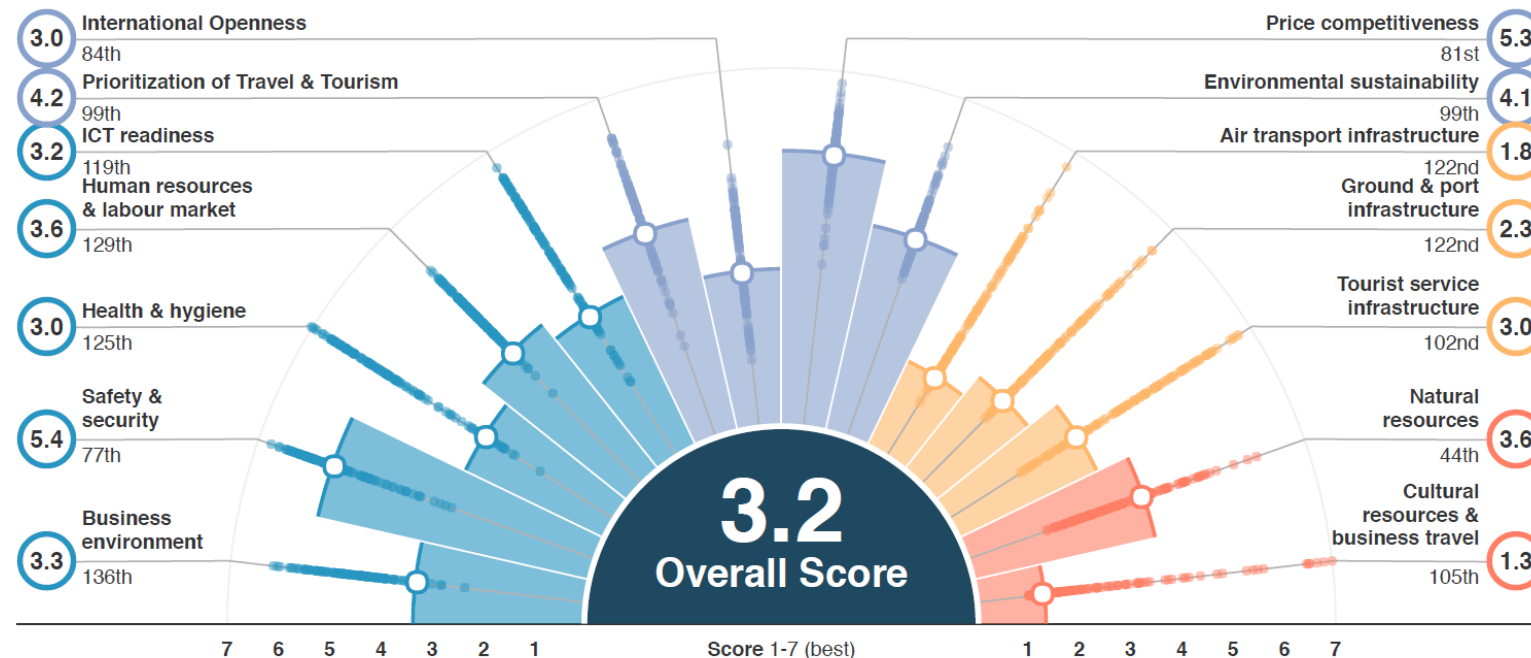
Insight	Details	Takeaway/ Recommendation
Close competition with SADC peers	Zimbabwe jostles closely with its SADC peers on a range of destination competitiveness metrics. It scores below South Africa, Zambia, Namibia, and Botswana on enabling environment; however, it leads Zambia on infrastructure and policy and enabling conditions.	<ul style="list-style-type: none"> Zimbabwe's relative weakness on enabling environment should be addressed by bolstering its performance as a business environment and its perceived safety and security which drive its scores down in this area.
Relative strength in natural & cultural resources	Zimbabwe is relatively well-regarded on natural and cultural resources, at 65 th overall out of 114 destinations – this is driven by a high rank (44 overall) on natural resources, according to the 2019 Travel and Tourism Competitiveness Index by the World Economic Forum.	<ul style="list-style-type: none"> Zimbabwe's strengths around its natural assets are a strength that can be better leveraged to foster improvements in other areas, particularly by improving access to these assets and mobilizing private sector investment.
Price and public services as barriers	In terms of potential barriers to visiting Zimbabwe, prices and general public services (customs, administrative processes) are cited most frequently.	<ul style="list-style-type: none"> Greater sensitization on the role of tourism and greater investment in both infrastructure and human resources in the public sector could alleviate some of these barriers.
Guides, parks, and safari offerings are strengths	The most highly rated services in Zimbabwe tend to be those related to its natural assets, specifically guides, parks, safaris, hotels, and lodges.	<ul style="list-style-type: none"> Greater partnership and collaboration between the tourism sector and public sector could help to bridge this gap. Additionally, this positive perception of its nature-based services should be a key emphasis in its marketing.

ACCORDING THE WORLD ECONOMIC FORUM'S TRAVEL AND TOURISM COMPETITIVENESS INDEX, AS OF 2019, ZIMBABWE RANKS 114TH OF 140 GLOBAL DESTINATIONS.



OVERALL COMPETITIVENESS PROFILE FOR ZIMBABWE

Key Indicators			
Overall TTCI Rank	114/140	T&T industry GDP	USD 422.4m
International tourist arrivals	2,423m	T&T industry Share of GDP	2.4
International tourism inbound receipts	USD 149.2m	T&T industry employment	22,000 jobs
Average receipts per arrival	USD 61.6	T&T industry employment % of Total	1.4%



KEY IMPLICATIONS

- Zimbabwe ranks 114th out of 140 destinations included in the TTCI 2019, just behind Zambia and ahead of Ghana, Algeria, Venezuela, Eswatini, and Côte d'Ivoire.
- The destination scores a 3.2 out of a possible 7 as its overall index score.
- It scores relatively well on price competitiveness, safety and security, and prioritization of travel and tourism.
- Poorer-scoring metrics were around air transport infrastructure, cultural resources, and business travel.

Source: WEF TTCI

IN SOUTHERN AFRICA, SOUTH AFRICA, NAMIBIA, AND BOTSWANA RANK HIGHEST WHILE ZIMBABWE SHOWS MIDDLING PERFORMANCE AHEAD OF ESWATINI, LESOTHO, AND ANGOLA.



REGIONAL COMPETITIVENESS

Global Rank	ENABLING ENVIRONMENT					T&T POLICY & ENABLING CONDITIONS				INFRASTRUCTURE			NATURAL & CULT. RESOURCES	
	Business Environment	Safety & Security	Health & Hygiene	Human Resources & Labor Market	ICT Readiness	Prioritization of T&T	Int'l. Openness	Price Compt'ness	Environ. Sustainability	Air Transport Infrastructure	Ground & Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Res. & Business Travel
South Africa	61	4.6	3.9	3.7	4.4	4.6	4.5	2.5	5.6	3.7	3.3	3.5	4.3	3.6
Namibia	81	4.8	5.0	3.5	4.4	4.2	4.8	2.8	5.7	4.3	2.9	3.4	4.6	3.5
Botswana	92	4.9	5.3	3.3	4.3	4.1	4.8	2.3	5.5	4.3	2.1	2.8	3.6	3.4
Zambia	113	4.4	5.3	2.6	3.8	3.2	3.9	2.9	5.1	4.4	1.8	2.4	2.5	3.6
Zimbabwe	114	3.3	5.4	3.0	3.6	3.2	4.2	3.0	5.3	4.1	1.8	2.3	3.0	3.6
Eswatini	118	4.4	5.5	3.1	3.8	2.3	4.6	2.7	5.1	3.7	2.2	3.1	3.0	2.2
Lesotho	124	4.1	5.4	3.0	3.6	3.2	5.1	2.6	5.1	4.5	1.3	1.8	2.8	2.2
Angola	134	3.5	5.0	3.2	3.2	2.3	3.2	1.9	5.3	4.1	1.7	2.0	2.7	2.2
Southern Africa Average		4.2	5.1	3.2	3.9	3.4	4.4	2.6	5.7	4.2	2.1	2.7	3.3	3.2



KEY IMPLICATIONS

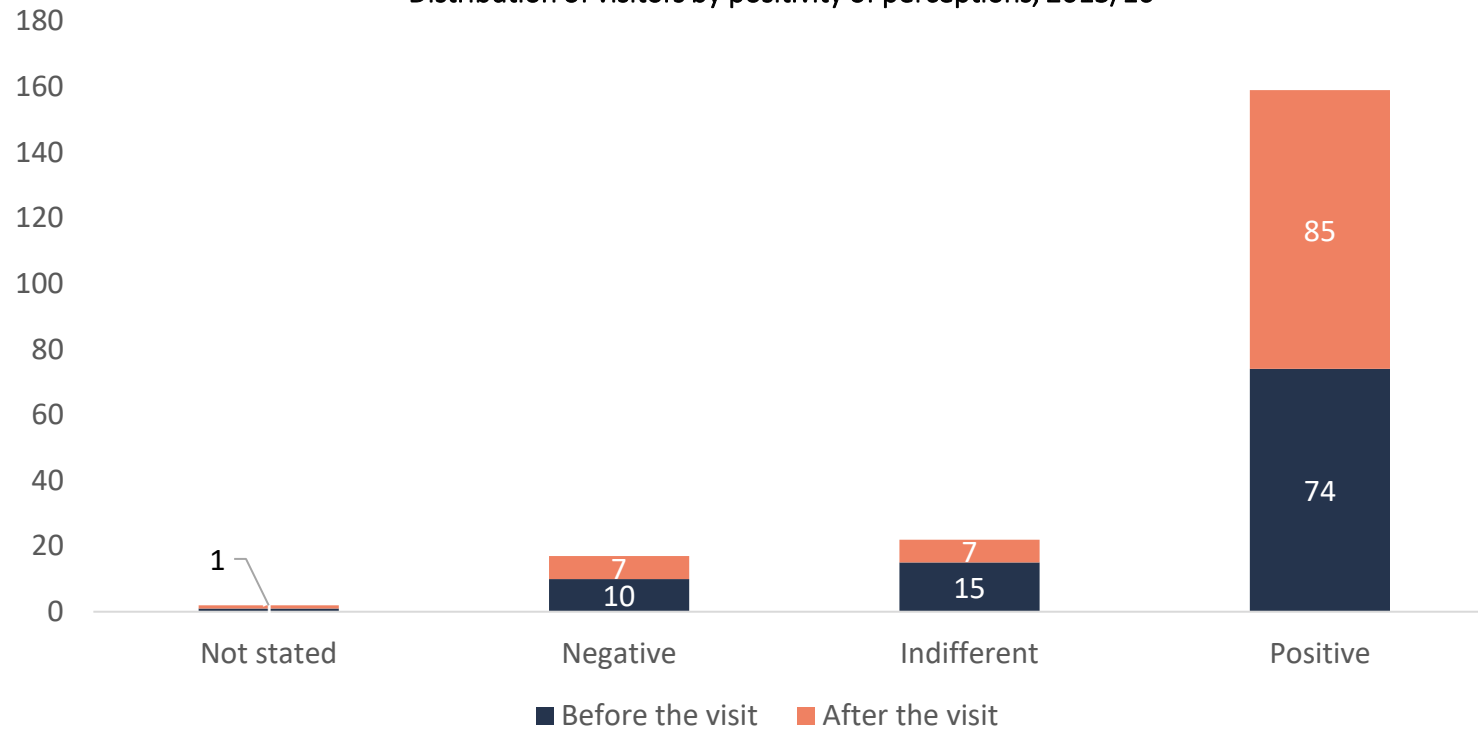
- At the regional level, Zimbabwe occupies a middle tier of Southern African countries, ahead of Eswatini, Lesotho, and Angola.
- While not the highest absolute score, Zimbabwe is in the top 20% on natural resources, showing a relative strength.
- Weaker performing indicators on the relative level are business environment, health & hygiene, human resources & labour market, ICT readiness, air transport infrastructure, and ground & port infrastructure.

VISITORS TO ZIMBABWE HEAVILY SKEW POSITIVE TOWARDS THE DESTINATION, PARTICULARLY AFTER THEIR VISIT.



POSITIVITY TOWARDS ZIMBABWE AS A DESTINATION

Distribution of visitors by positivity of perceptions, 2015/16



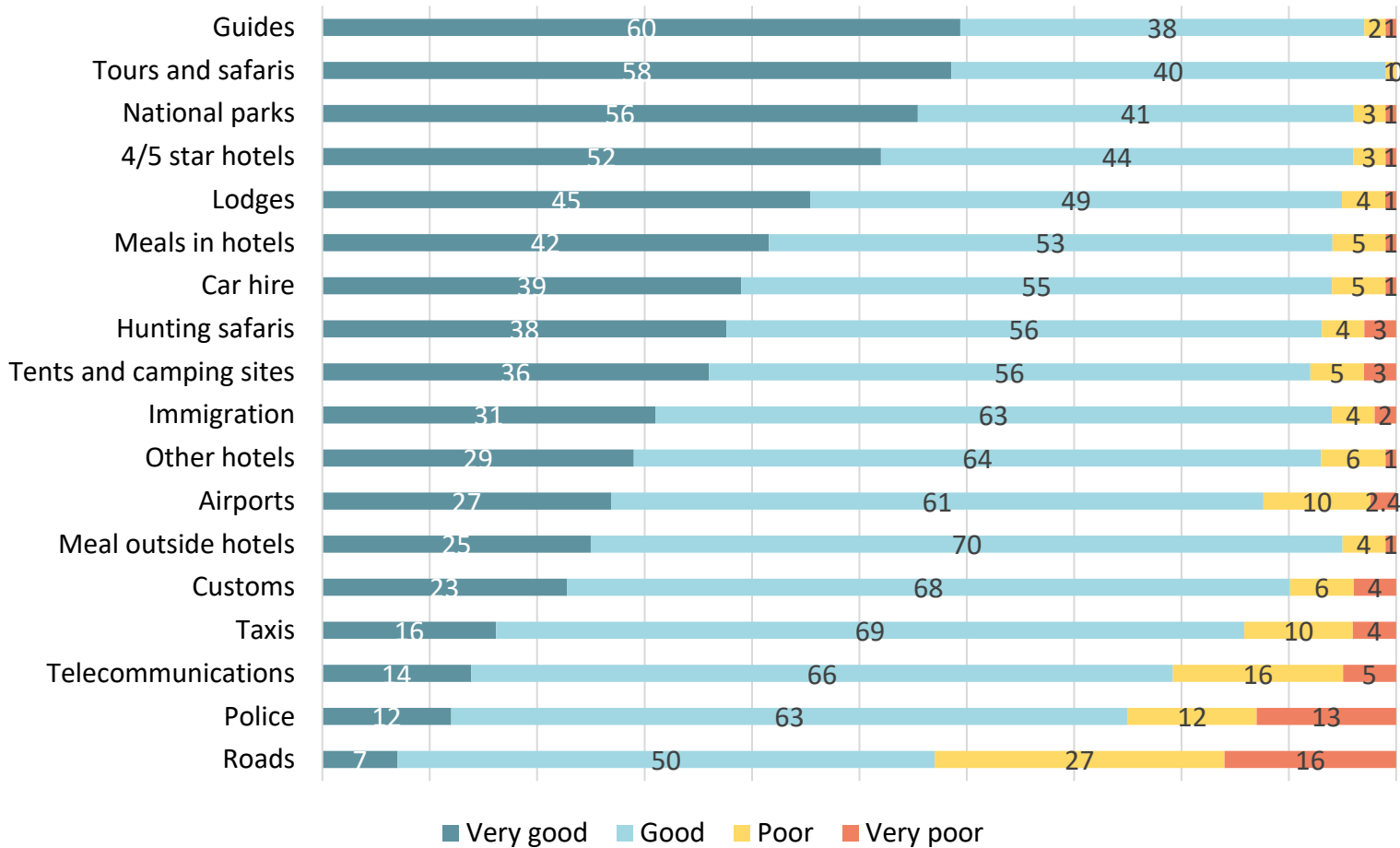
KEY IMPLICATIONS

- Visitors generally skew heavily towards positive perceptions of Zimbabwe, and this is increased after their visit (from 74% to 85%).
- About 70% of visitors who came in with a positive perception departed the country with the same perception.
- However, 3.4% of visitors came into the country with a positive perception and went away with an indifferent or negative perception.
- On a positive note, 15% of visitors came with an indifferent or negative perception and left the country with a positive perception.

IN TERMS OF FACILITIES AND SERVICES, GUIDES, SAFARIS, NATIONAL PARKS, AND HOTELS ARE VERY REGARDED.



RATING OF FACILITIES AND SERVICES, 2015/16



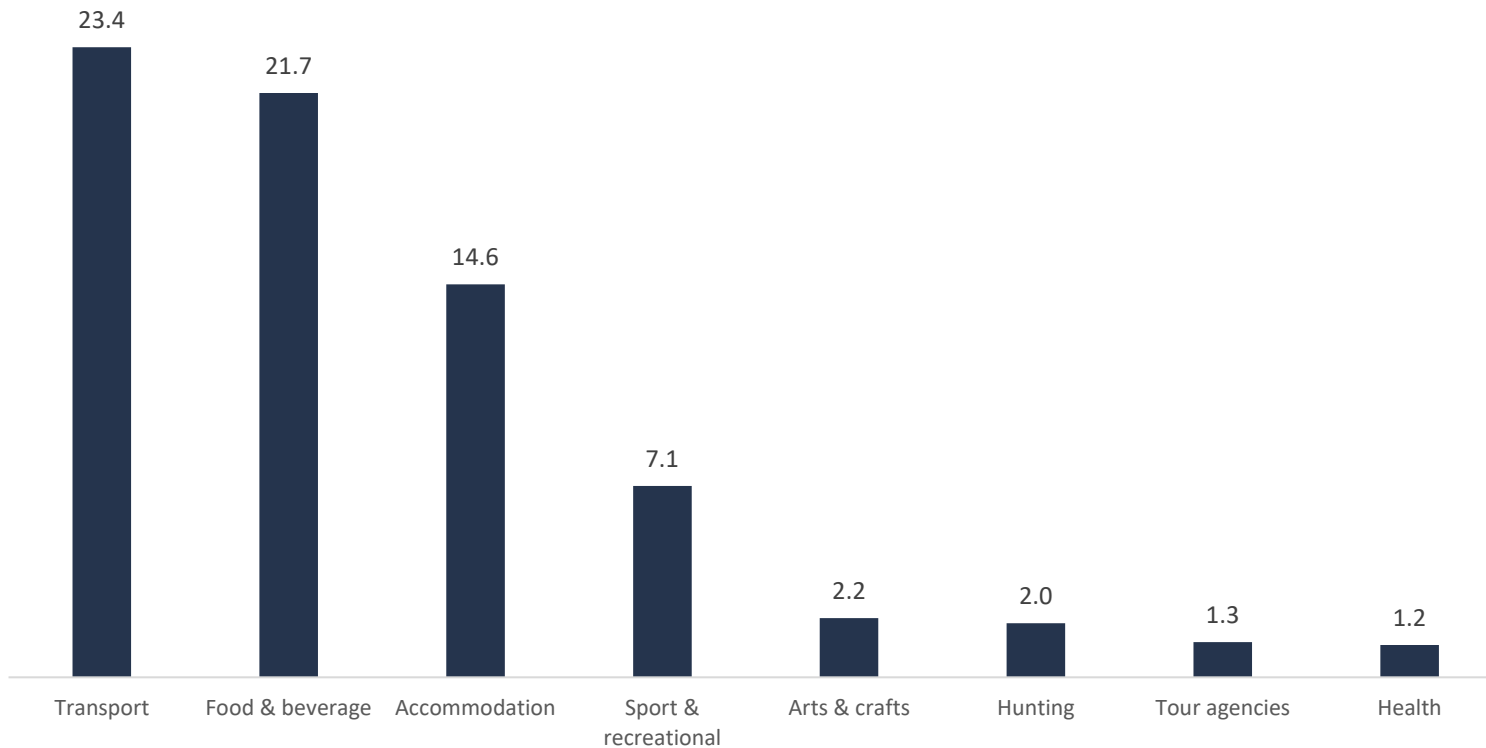
KEY IMPLICATIONS

- Generally speaking, facilities that cater to safari travellers (guides, parks, safari tours, and high-end hotels and lodges) were very well regarded by travellers and unsurprisingly represent a considerable strength for Zimbabwe in terms of facilities and services.
- However, facilities relating to general transport and communications infrastructure (taxis, telecommunications, and roads) as well as public services (customs, police) come in for greater scrutiny.

TRANSPORT SERVICES REPRESENT THE MOST SIGNIFICANT SINGLE COST TO TOURISTS, SPREAD ACROSS BOTH INBOUND AND DOMESTIC TOURISTS.

EXPENDITURE ON TOURISM PRODUCTS AND SERVICES, 2018

Total % Internal Tourism Expenditure on Products and Services, 2018



KEY IMPLICATIONS

- Transport represented the greatest single expense for visitors according to the 2018 TSA.
- Transport is the only item on which the expenditure incurred is significant between both domestic and inbound tourists.
- Food and beverage was a close second followed by accommodation.
- Of the total expenditure incurred on accommodation services, 92.6 percent is on account of inbound tourism. Besides, “Sports and recreational activities”, and “Arts and crafts” are also almost entirely consumed by inbound tourists.
- Health-related expenditure is found to be entirely incurred by domestic tourists.



ZIMBABWE CONNECTIVITY AND CAPACITY ANALYSIS

Analysis of transport connectivity and access to Zimbabwe

With the technical assistance of:





SUMMARY

Insight	Details	Takeaway/ Recommendation
Calls for improvements in air transport and civil aviation infrastructure	The National Development Strategy emphasizes two broad improvement streams: 1. To have a reliable safe world-class air transport infrastructure and services including targets for increasing air cargo handling capacity and passenger traffic four-fold by 2025 according to the National Development Strategy 1 (NDS-1) (2021-2025). 2. Calls for improvements in civil aviation infrastructure (rehabilitation, upgrading, maintenance and expansion). This includes air traffic control and safety equipment, communication equipment, and other airport handling equipment and facilities.	<ul style="list-style-type: none"> Both air transport and civil aviation infrastructure contribute to a challenge for Zimbabwe as a tourist destination, but also an opportune area of improvement as Zimbabwe broadens its tourism offerings and markets.
Challenge of domestic connectivity	Air Zimbabwe suffers from its inability to sell tickets outside of Zimbabwe. For tourism purposes, the only company that can sell tickets outside of Zimbabwe for tourists interested in domestic routes is Fastjet.	<ul style="list-style-type: none"> A strong domestic air service, providing sufficient capacity to the main attractions of the country, and with the possibility of buying tickets from outside is a key enabler for the development of tourism in Zimbabwe. Allowing tourism routes throughout the country, would in turn increase the number of days spent in the country, as well as tourist spending.
Victoria Falls' centrality within KAZA region	Victoria Falls as centrally located in the KAZA region which includes 2 World Heritage Sites, 36 national parks, and 60% of the remaining world elephant population.	<ul style="list-style-type: none"> Victoria Falls is at the center of the KAZA region and can be regarded as the ideal air gateway into the KAZA region since it can receive a larger class of wide-body aircraft. With the growth in nature-based tourism and authentic experiences globally, KAZA represents the single greatest opportunity for Victoria Falls to develop itself as not just a major tourism hub for Zimbabwe, but for nature tourism in the whole region.

THE NATIONAL DEVELOPMENT STRATEGY FOCUSES ON CALLS FOR IMPROVEMENT AS WELL AS HAVING A RELIABLE AND SAFE WORLD-CLASS AIR TRANSPORT INFRASTRUCTURE.



ZIMBABWE AIR TRANSPORT – GOVERNMENT POLICY

- Currently, the Government does not have a dedicated policy document for the aviation sector. Rather, government policy objectives are set out in higher-level policy documents. This is quite usual - while many countries do not have a formal policy for air transport, the development of an air transport policy is a great tool to advance reforms and provide a common understanding of the situation of the stakeholders of the sectors.
- However, considering the overall supportive legal framework in Zimbabwe, there is no need to push for such a policy to be developed from an air service development perspective.
- Currently, there is also no transportation sector policy document (the last one having expired in 2016), but the current national development strategy for Zimbabwe, the National Development Strategy 1 (NDS-1) (2021-2025), includes specific policy objectives related to aviation. The key elements of NDS-1 from an aviation perspective are as follows:

1. To have a reliable safe world-class air transport infrastructure and services. Includes targets for increasing air cargo handling capacity as well as increasing passenger traffic four-fold by 2025.
 2. Calls for improvements in civil aviation infrastructure (rehabilitation, upgrading, maintenance and expansion). This includes air traffic control and safety equipment, communication equipment, and other airport handling equipment and facilities.
- Other aviation specific strategies to meet the objectives of NDS 1 include:
 1. Complete the substantial rehabilitation and upgrading of aviation infrastructure at airports.
 2. Improve airspace management, safety and security as well as airport operations.
 3. Continue to liberalise the air transport market and finalise the way forward for Air Zimbabwe.
 4. Launch a privatisation programme to attract private sector funding for rehabilitation and upgrade of airport facilities to accommodate the projected growth in passenger and freight movements.
 5. Pursue PPPs to expedite completion of the key capital infrastructural projects especially relating to aviation safety.

GOVERNMENT'S APPROACH TO THE AVIATION SECTOR IS SUPPORTIVE OF REVITALIZING AND DEVELOPING IT, PARTICULARLY IN RELATION TO REFURBISHMENT OF INFRASTRUCTURE AND EQUIPMENT.



ZIMBABWE AIR TRANSPORT – GOVERNMENT POLICY

6. Operationalize the Bilateral Air Service Agreements (BASAs) to facilitate market access.
 7. Clear arrears to IATA in order to pave way for re-admission into alliances.
 8. Up-scale private investment and participation in infrastructure through long-term National Air Infrastructure Development Plan.
 9. Promote local network and connectivity (Routes, frequency and reliability of services)
- In general, the Government's stated policies toward the aviation sector are supportive of revitalizing and developing the sector, particularly in relation to refurbishment of infrastructure and equipment.
 - This appears to have translated into actions on the ground, e.g., with the redevelopment of infrastructure and equipment at VFA in 2016, ongoing upgrading of infrastructure at HRE, and the ongoing recapitalization/investment plan for NHS.
 - Another key achievement of recently stated Government policy is the recent unbundling of CAAZ, which was achieved in 2018.

- It is encouraging to note that the clearing of arrears and repatriation of money from ticket sales to airlines, which is closely related to Zimbabwe's currency crisis (noted in the previous section) is on the priority list of actions in Government policy, but at this time remains an ongoing issue
- Continued improvements in the air navigation and surveillance systems are necessary and could be recommended, as the technology in this area is evolving fast.
- However, it is recommended to wait for specific requests from airlines before making recommendations in this area, as such recommendations would require a comprehensive technical analysis to be undertaken.
- According to site visits by CPCS in 2021, there are currently no primary and secondary radars in place at VFA and HRE. ATC relies on procedures only.

TOURISM TRAFFIC IN ZIMBABWE IS LARGELY CONCENTRATED AROUND VICTORIA FALLS WITH LIMITED CAPACITY BETWEEN THE MAJOR INTERNAL AIRPORTS.



ZIMBABWE DOMESTIC CONNECTIVITY

- Leisure tourism is currently largely concentrated at the far northwest corner of the country, presenting opportunities for diversification.
- Historically, Zimbabwe has offered tourism circuits that include many other attractions, such as national parks and ruins that are unique in Africa. Yet, these other areas and attractions are seldom visited today due to the challenges to reach these places.
- Air domestic connectivity is mainly provided today by two companies (Air Zimbabwe and Fastjet) that offer limited capacity between the Harare, Victoria Falls, and Bulawayo airports. A few charter companies operate smaller planes that take tourists to the lodges in the northern area of the country, mainly from VFA and with limited seat capacity.
- As of July 2019, Zimbabwe owed US\$196 million to the world's airlines in unremitted ticket sales through the IATA Clearing House. The International Air Transport Association (IATA) expressed concerns and warned that the debt could force operators to reduce flights into the country.

- To prevent further arrears, the Ministry of Finance and Economic Development (MoFED) allowed airlines to continue charging for airfares in foreign currencies
- For tourism purposes, the only company that can sell tickets outside of Zimbabwe for tourists interested in domestic routes is Fastjet, which operates two aircraft (50 seaters) that also serve some international routes in addition to HRE, VFA, and BUQ.
- Domestic connectivity is such a challenge that, in practice, tourism in Zimbabwe is limited to the areas neighbouring the international airports to which tourists arrive. This greatly limits the attractions that can be easily visited in the country, and thus limits international travel demands to short term stays, mainly in the VFA area.
- A strong domestic air service is a key enabler for tourism development in Zimbabwe, by allowing tourism routes throughout the country, which in turn increases the number of days spent in the country, as well as tourist spending.

A HEAVY SKEW TOWARDS INTERNATIONAL SERVICES INDICATES A LACK OF AN EFFECTIVE NATIONAL CARRIER.



OVERVIEW – ZIMBABWE ACCESS AND CAPACITY

- Zimbabwe was the 128th largest aviation market in 2019 with 1.57 million scheduled airline seats on offer; by means of direct comparison Zambia was in 133rd position with 1.45 million seats.
- Within Africa the region ranked 20th and within the IATA defined Southern Africa region ranked in 4th position with a 3.8% share of a market dominated by South Africa that accounts for a 75.8% share.
- Over three quarters (78%) of the capacity in 2019 was operated on international services with some 1,226,771 seats available; the equivalent of 3,361 per day.
- In comparison, domestic capacity was some 347,922 seats or 953 seats a day; for every domestic seat 3.5 international seats were operated.
- Such a heavy skew or capacity towards international services reflects the lack of an effective national carrier, the high levels of connectivity via other gateways outside of Zimbabwe and the value of the market to some overseas carriers.

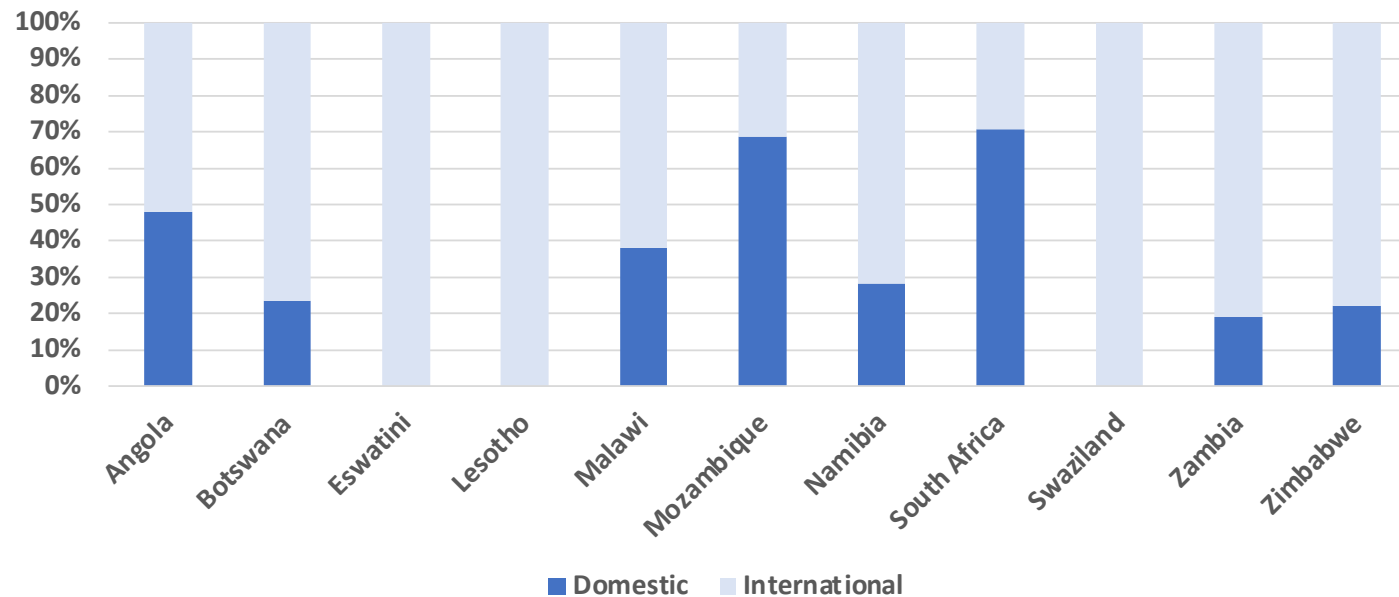
- Beyond the headline data there are many insights and data points that need to be understood having compared two specific data sets in the context of the aviation market: the capacity and booking data.
- the starting point of any market is the scheduled airline capacity that is offered and how that has developed over time provides a reflection of the confidence in the market and reveals any changes in airline activity.
- As noted, earlier Zimbabwe was the fourth largest country market in Southern Africa although in the latest 2021 data the country has moved into third position ahead of Angola.
- South Africa dominates the regional market accounting for over three quarters of the regional market and is some thirteen times larger than Angola which was in second position in 2019.

AS OF 2019, SOUTH AFRICA AND MOZAMBIQUE WERE THE ONLY TWO SOUTHERN AFRICAN COUNTRIES WITH A LARGER DOMESTIC THAN INTERNATIONAL MARKET.



DOMESTIC AND INTERNATIONAL CAPACITY, 2019

Domestic vs. international capacity, Southern Africa, 2019



KEY IMPLICATIONS

- Typically, markets are split into a mix of domestic and international capacity.
- Domestic capacity generally provides important connectivity to major airports, normally in capital cities that then support a range of international services.
- Geography, alternate transport modes, and the size of a country can also influence the proportions of domestic to international capacity.
- In the case of South Africa, at least in 2019 before several airlines collapsed the domestic market accounted for over 70% of all capacity with Mozambique (64%) the only other country market in Southern Africa with a larger domestic than international market.

THE REGIONAL MARKET IN ZIMBABWE HAS SHRUNK CONSIDERABLY ACCORDING TO DATA FROM 2021.



SCHEDULED AIRLINE CAPACITY FOR SOUTHERN AFRICA, 2021

Scheduled airline capacity In Southern Africa 2016-2021

Country	2016	2017	2018	2019	2020	2021
South Africa	29,090,348	29,799,400	29,959,231	31,206,693	13,149,091	15,540,298
Angola	2,356,164	2,383,446	2,418,863	2,354,556	772,184	616,528
Mozambique	1,496,327	1,436,890	1,463,557	1,962,188	875,164	933,598
Zimbabwe	1,435,196	1,418,018	1,561,210	1,574,693	828,194	772,839
Zambia	1,320,545	1,318,505	1,396,764	1,458,789	702,243	764,044
Namibia	863,905	1,225,358	1,352,586	1,161,073	445,513	335,452
Malawi	487,814	525,103	588,952	708,495	342,162	328,605
Botswana	543,236	506,592	520,297	628,906	239,509	238,261
Lesotho	70,864	49,515	42,061	42,418	12,398	14,505
Eswatini/ Swaziland	43,140	43,155	7,144	32,288	9,973	16,808
Grand Total	37,707,448	38,705,982	39,346,050	41,140,243	17,376,431	19,560,398

KEY IMPLICATIONS

- In Zimbabwe through 2019 less than a quarter (23%) of all seats operated were in the domestic market the vast majority were operated to international destinations outside of the country.
- Data for 2021 indicates that the domestic market in Zimbabwe has shrunk.

HARARE IS THE LARGEST SINGLE MARKET IN ZIMBABWE, WITH 3 CONSEQUENTIAL COMMERCIAL AIRPORTS IN THE COUNTRY OVERALL.



SCHEDULED AIRLINE CAPACITY FOR ZIMBABWE, 2021

Scheduled airline capacity 2016–2021 from Zimbabwe

Departing Airport	2016	2017	2018	2019	2020	2021
Harare	159,707	129,337	153,538	167,605	124,799	38,960
Bulawayo	85,540	79,426	104,549	108,350	88,310	22,700
Victoria Falls	93,838	92,187	98,233	71,967	47,030	32,515
RG Mugabe International						8,385
Kariba	16,508	572				
Joshua M. Nkomo International						5,400
Grand Total	354,593	301,522	356,320	347,922	260,139	107,960

KEY IMPLICATIONS

- Pre Covid-19, total scheduled airline capacity from Zimbabwe was 347,000 seats per annum, less than 1,000 seats a day with Harare the largest single market accounting for 48% of all capacity and Victoria Falls 21%.
- There are 3 commercial airports of any consequence in Zimbabwe and although services have been operated from Kariba, they stopped operating in 2017.

IN 2019 HRE WAS SERVED BY THIRTEEN AIRLINES OPERATING NON-STOP ROUTES TO ELEVEN DESTINATIONS.



ARLINES SERVING ROBERT GABRIEL MUGABE AIRPORT (HRE), 2019

HRE airlines and destinations, 2019

Airline Name	Airline Code	Airport Name	Airport Code	Country
Air Zimbabwe	UM	Johannesburg OR Tambo	JNB	South Africa
		Dar Es Salaam	DAR	Tanzania
British Airways	BA	Johannesburg OR Tambo	JNB	South Africa
Emirates	EK	Lusaka	LUN	Zambia
		Dubai	DXB	UAE
RwandAir	WB	Kigali	KGL	Rwanda
		Cape Town	CPT	South Africa
		Lusaka	LUN	Zambia
Malawian Airlines	3W	Lusaka	LUN	Zambia

KEY IMPLICATIONS

- HRE was served by 13 airlines operating to 11 non-stop destinations in 2019.
- Ten of the 11 destinations were in Africa with Dubai being the only intercontinental destination located in the Middle East.
- Many of the airlines operated with fifth freedom rights of which Lusaka, Zambia seems to be a popular stop-over destination.

VICTORIA FALLS ATTRACTS SEVERAL INTERNATIONAL SERVICES THAT CONNECT TO LONG-HAUL NETWORKS AND ALLOW THEM TO GENERATE LUCRATIVE TOURISM REVENUE.



SCHEDULED AIRLINE CAPACITY FROM ZIMBABWE AIRPORTS, 2019

Scheduled airline capacity from Zimbabwe airports, 2019

Destination Airport	Bulawayo	Harare	Victoria Falls
Addis Ababa		62,324	
Bulawayo		102,890	5,460
Cape Town		23,727	42,149
Dar Es Salaam		11,025	
Gaborone		70	52,020
Harare	102,890		66,507
Johannesburg O.R. Tambo International	95,036	373,278	136,757
Kigali		35,261	
Lilongwe		17,630	
Livingstone			4,834
Luanda		6,360	
Lusaka		258,495	
Nairobi Jomo Kenyatta International		71,414	16,521
Victoria Falls	5,460	64,715	
Windhoek Hosea Kutako International		7,484	12,386

KEY IMPLICATIONS

- With respect to destinations served from Harare, the table highlights the 2019 volumes from the three major airports of Harare, Bulawayo, and Victoria Falls.
- There are some 13 destinations served from Harare of which 11 are to international markets.
- Victoria Falls despite being third in terms of capacity ranking had 8 destinations in 2019 with Johannesburg the single largest destination and twice the size of capacity to Harare.
- There is no doubt that the tourism product in Victoria Falls attracts several international services that connect to airlines long-haul networks and allow them to generate lucrative leisure revenues.

FOLLOWING THE IMPACT OF COVID-19, ZIMBABWE IS AT MINUS 69% OF ITS 2019 LEVELS IN TERMS OF CAPACITY.



CAPACITY AND MARKET STRUCTURE

- With Covid-19 continuing to impact markets around the world and airlines trying to work through various travel restrictions imposed by authorities assessing the current situation from a capacity perspective is challenging.
- Zimbabwe is now at minus 69% of its 2019 levels; the Southern Africa market is at minus 53% so the country is performing below the market average.
- Looking purely at international capacity, the Southern Africa region is at 38% of the pre Covid 2019 level and Zimbabwe is at 54% of its previous level suggesting that international capacity has performed better than domestic.
- Analysis of capacity on its own is instructive but provides minimal insight into the actual volumes of bookings and how the market is structured.
- Capacity analysis is complementary to traffic analysis, and both constitute part of the analysis.
- Analyzing airline booking data is complex since no one source gathers all the global airline booking data and for commercial reasons airlines are very reluctant to share such information.

The Market Structure

- The data available is sourced from bookings made via the Global Distribution Systems (GDS's) around the globe who are allowed to share their booking and routing data with each other but crucially not their fares data.
- The data excludes all direct bookings made, either direct to a legacy airline website or all bookings made by low-cost airlines.
- It is a sample of data that varies in weight depending upon the market, how distribution is structured and who operates in the market.
- It should be viewed as indicative with relativity more important than actual numbers.
- To provide some worthwhile comparative analysis we have again had to use 2019 as a complete year data set given how challenging the market structure became from January 2020.

THE LARGEST SINGLE CONNECTING POINT FOR ZIMBABWE IS JOHANNESBURG FOLLOWED BY ADDIS ABABA.



MARKET STRUCTURE FROM ZIMBABWE, 2019

Market Structure From Zimbabwe, 2019

Connecting Market Structure	Bulawayo	Harare	Victoria Falls
Other (Point to Point)	231,264	769,837	270,206
Johannesburg O.R. Tambo International	26,813	162,925	90,794
Addis Ababa	0	109,578	29,971
Dubai International	0	80,763	0
Nairobi Jomo Kenyatta International	0	65,228	6,243
Kigali	0	31,358	
Harare	15,410		5,616
Lilongwe		12,660	
Bulawayo		7,550	
Lusaka		5,756	
Windhoek Hosea Kutako International		1,364	3,145
Dar Es Salaam		2,790	
Other Gateway	51	3,982	4,986
Total	273,538	1,253,791	410,961

KEY IMPLICATIONS

- The table shows how the market travelled from the 3 major Zimbabwean airports in 2019.
- Taking Victoria Falls as an example, there were some 410,961 bookings made of which 270,206 (65%) were point-to-point.
- This does not necessarily mean that those passengers were not connecting onwards but that they were not connecting within a 24-hour period of arrival which is the criteria the database applies.
- The single largest connecting point was Johannesburg with nearly 90,794 (22%) of the connecting market using this gateway and then in second place was Addis Ababa.

ZIMBABWE IS THE POOREST-PERFORMING OF ITS PEERS ON ENABLING ENVIRONMENT, WHEREAS IT RANKS RELATIVELY WELL ON NATURAL AND CULTURAL ASSETS.



OVERALL SUBINDEX SCORES

SUB-INDEX	ZIMBABWE	SOUTH AFRICA	NAMIBIA	BOTSWANA	ZAMBIA
Enabling Environment	125	105	100	99	115
Policy and Enabling Conditions	106	107	80	82	109
Infrastructure	113	60	62	93	119
Natural and Cultural Assets	65	17	70	67	64



KEY IMPLICATIONS

- Enabling environment remains a challenging sub-index for Zimbabwe with its rank on this measure being lower than its overall rank of 114.
- Infrastructure closely tracks its overall rank at 113, ahead of Zambia's 119.
- Natural and cultural assets are a relative strength for Zimbabwe by comparison, though South Africa far outperforms all 4 peers with a rank of 17 overall.

ZIMBABWE RANKS LOWEST OVERALL ON ENABLING ENVIRONMENT DRIVEN BY LOW RANKS ON BUSINESS ENVIRONMENT AND HUMAN RESOURCES.



GRANULAR ENABLING ENVIRONMENT BREAKDOWN

Market	Overall Enabling Environment	Business Environment	Safety and Security	Health and Hygiene	Human Resources/Labor Market	ICT Readiness
Botswana	99	34	87	118	92	94
Namibia	100	44	103	114	85	90
South Africa	105	57	132	113	81	75
Zambia	115	69	81	132	119	117
Zimbabwe	125	135	77	125	129	119

• The Enabling Environment sub-index captures the general conditions necessary for operating in a country and includes 5 pillars:

• Captures the extent to which a country has in place a policy environment conducive for companies to do business.

• Critical factors determining the competitiveness of a country's tourism industry.
• Tourists are likely to be deterred from travelling to countries or regions perceived to be unsafe, making it less attractive to develop the tourism sector in those places.

• Access to improved drinking water and sanitation
• The comfort and health of travellers.
• In the event that tourists do become ill, the country's health sector.
• Prevalence of HIV and malaria can also have an impact.

• How well countries develop skills through education and training and enhance the best allocation of those skills through an efficient labour market.

• The components of this pillar measure not only the existence of modern hard infrastructure (i.e., mobile network coverage and quality of electricity supply).
• he capacity of businesses and individuals to use and provide online services.

ZIMBABWE SHOWS A MIDDLING RANK ON POLICY AND ENABLING CONDITIONS AHEAD OF SOUTH AFRICA AND ZAMBIA, PERFORMING FAIRLY WELL ON PRICE AND OPENNESS.



GRANULAR POLICY AND ENABLING CONDITIONS BREAKDOWN

Market	Overall Travel & Tourism Policy & Enabling Conditions	Prioritization of Travel & Tourism	International Openness	Price Competitiveness	Environmental Sustainability
Namibia	80	65	98	38	68
Botswana	82	62	121	14	58
Zimbabwe	106	99	84	81	99
South Africa	107	83	109	53	124
Zambia	109	108	93	90	53

• The Policy and Enabling Conditions sub-index captures specific policies or strategic aspects that impact the T&T industry more directly and includes 4 pillars.

• The extent to which the government prioritizes The tourism sector - by making clear that the sector is of primary concern, the government can channel funds to essential development projects and coordinate the actors and resources necessary to develop the sector.

• The openness of the bilateral air service, which impacts the availability of air connections to the country, and the number of regional trade agreements in force, which proxies the extent to which it is possible to provide world class tourism services.

• Airfare ticket taxes and airport charges, which can make flight tickets much more expensive; the relative cost of hotel accommodation; the cost of living, proxied by purchasing power parity; and fuel price costs, which directly influence the cost of travel.

• Indicators such as the stringency and enforcement of the government's environmental regulations and variables assessing the status of water, forest resources and marine life, and extent to which the tourism industry is developed in a sustainable manner.

ZIMBABWE'S PERFORMANCE ON INFRASTRUCTURE CLOSELY TRACKS ITS OVERALL PERFORMANCE THOUGH IS DRIVEN DOWN BY AIR AND GROUND INFRASTRUCTURE.



GRANULAR INFRASTRUCTURE BREAKDOWN

Market	Overall Infrastructure	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure
South Africa	60	53	58	64
Namibia	62	67	65	52
Botswana	93	103	100	84
Zimbabwe	113	122	122	100
Zambia	119	124	117	117

• The Infrastructure sub-index captures the availability and quality of physical infrastructure of each economy and includes 3 pillars.

• Quantity of air transport, using indicators such as available seat kilometers.
 • The number of departures, airport density and the number of operating airlines.
 • The quality of air transport infrastructure for domestic and international flights.

• Efficient and accessible transportation to key business centres and tourist attractions.
 • Unpaved roads, which enable local connections, and to some extent, can proxy the existence of picturesque roads, which can, in some contexts, attract tourists.

• The availability of sufficient quality accommodation, resorts and entertainment facilities taking into account number of hotel rooms complemented by the extent of access to services such as car rentals and ATMs.

SOUTHERN AFRICAN COUNTRIES PERFORM WELL ON NATURAL AND CULTURAL RESOURCES WITH ZIMBABWE PERFORMING PARTICULARLY WELL.



GRANULAR NATURAL RESOURCES BREAKDOWN

Market	Overall Natural and Cultural Resources	Natural Resources	Cultural Resources
South Africa	17	15	23
Zambia	64	41	110
Zimbabwe	65	44	105
Botswana	67	47	115
Namibia	70	46	126

• The Natural and Cultural Resources sub-index captures the principal “reasons to travel” and includes 2 pillars: Cultural Resources and Natural Resources.

• Including the number of UNESCO natural World Heritage sites.
 • A measure of the quality of the natural environment which proxies the beauty of its landscape.
 • The richness of the fauna in the country as measured by the total known species of animals, and the percentage of nationally protected areas.

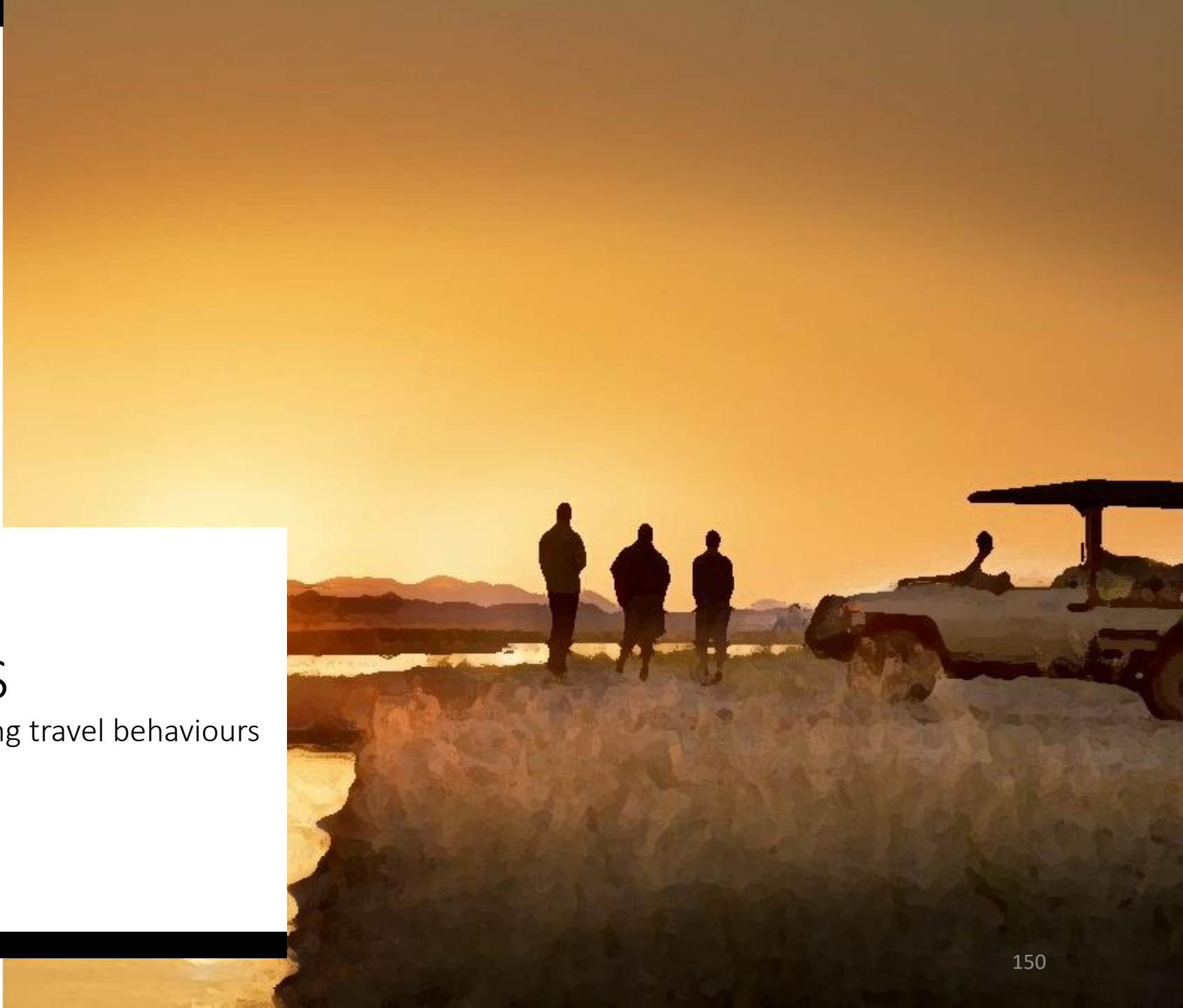
• Including the number of UNESCO cultural World Heritage sites.
 • The number of large stadiums that can host significant sport or entertainment events, and a new measure of digital demand for cultural and entertainment.



TRAVELLER ATTITUDES

Identifying attitudes and opinions driving travel behaviours

With the technical assistance of:



DESIRE FOR NEW EXPERIENCES, INTEREST IN ENRICHING KNOWLEDGE AND IN OTHER CULTURES ARE THE MOST WIDELY-HELD TRAVEL PREFERENCES.



ATTITUDES AND PREFERENCES CONNECTED WITH TRAVEL (% AGREE), 2021



DIFFERENT MARKETS ARE CHARACTERIZED BY DIFFERENT ATTITUDES – DESIRE FOR AUTHENTICITY IN POLAND, NOVELTY IN THE UK, AND ENRICHING KNOWLEDGE IN THE USA.



ATTITUDES AND PREFERENCES CONNECTED WITH TRAVEL – DEFINING ATTITUDES PER MARKET, BY THOSE INTERESTED IN SOUTHERN AFRICA, 2021

	France	Germany	Italy	Poland	Spain	UK	USA
1st	Like to make connections with new people (84%)	Enjoy experiencing and learning about other cultures and history (88%)	Enjoy experiencing and learning about other cultures and history (89%)	Seek out authentic experiences (87%)	Believe travel should be about enriching knowledge (93%)	Like to experience something completely new (86%)	Believe travel should be about enriching knowledge (89%)
2nd	Enjoy experiencing and learning about other cultures and history (83%)	Drawn to places with sunshine and warm weather (83%)	Believe travel should be about enriching knowledge (89%)	Like to experience something completely new (86%)	Like to experience something completely new (90%)	Before I go on vacation, I prefer to plan my trip in detail (85%)	Like to experience something completely new (88%)
3rd	Like to experience something completely new (82%)	Like to experience something completely new (82%)	Like getting a new perspective on the world and my place in it (87%)	Believe travel should be about enriching knowledge (86%)	Travel to new destinations, even when I don't understand local language (89%)	Like getting a new perspective on the world and my place in it (84%)	Enjoy traditional local festivals when I travel (88%)
4th	Like getting a new perspective on the world and my place in it (82%)	Believe travel should be about enriching knowledge (82%)	Travel to new destinations, even when I don't understand local language (87%)	Travel to new destinations, even when I don't understand local language (85%)	Enjoy experiencing and learning about other cultures and history (89%)	Quality and comfort of my accommodation and transportation are important (84%)	Like getting a new perspective on the world and my place in it (87%)
5th	When I travel, I like to support local communities and operators (82%)	Like getting a new perspective on the world and my place in it (81%)	Like to experience something completely new (85%)	Drawn to places with sunshine and warm weather (85%)	Like getting a new perspective on the world and my place in it (88%)	Believe travel should be about enriching knowledge (83%)	Enjoy experiencing and learning about other cultures and history (87%)

SECTION 1: INCEPTION REPORT

SECTION 2: MARKET SEGMENTATION

SECTION 3: PORTFOLIO ANALYSIS

SECTION 4: INVESTMENT ALLOCATION

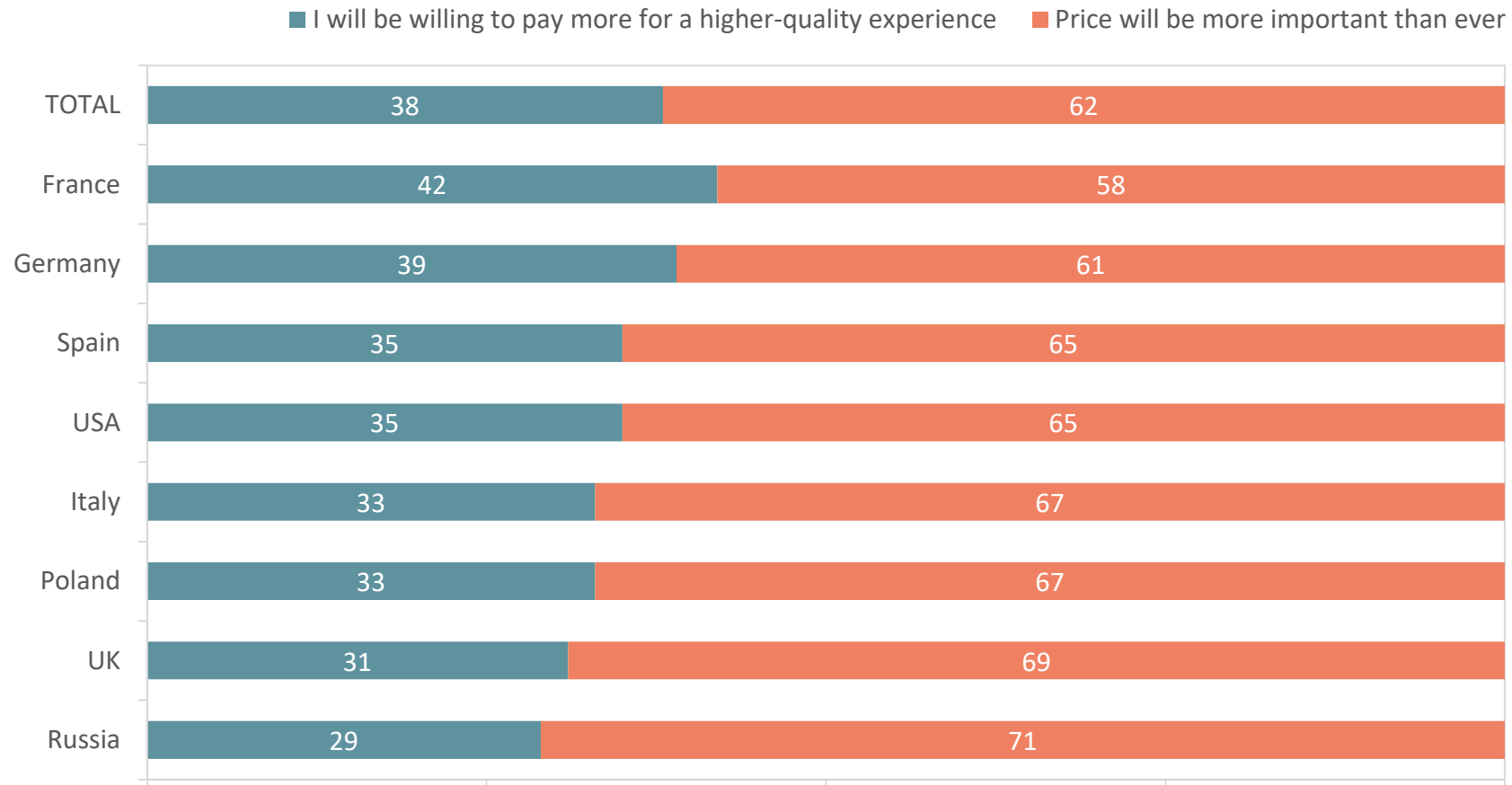
Source: Twenty31 Consulting Inc.

Base per country: France n=153, Germany n=129, Italy n=204, KSA n=329, Poland n=218, Russia n=151, Spain n=171, UK n=183, USA n=240
 Q31. How well do each of the following statements describe you? Move the sliders below to indicate to what extent each quality applies to you

TRAVELLERS EXPECT TO BE MORE FOCUSED ON PRICE POST-COVID, THOUGH SOME EUROPEAN MARKETS AND THE USA ARE WILLING TO PAY MORE FOR AN EXPERIENCE.



TRAVEL PRIORITIES AFTER COVID-19 PANDEMIC, 2021

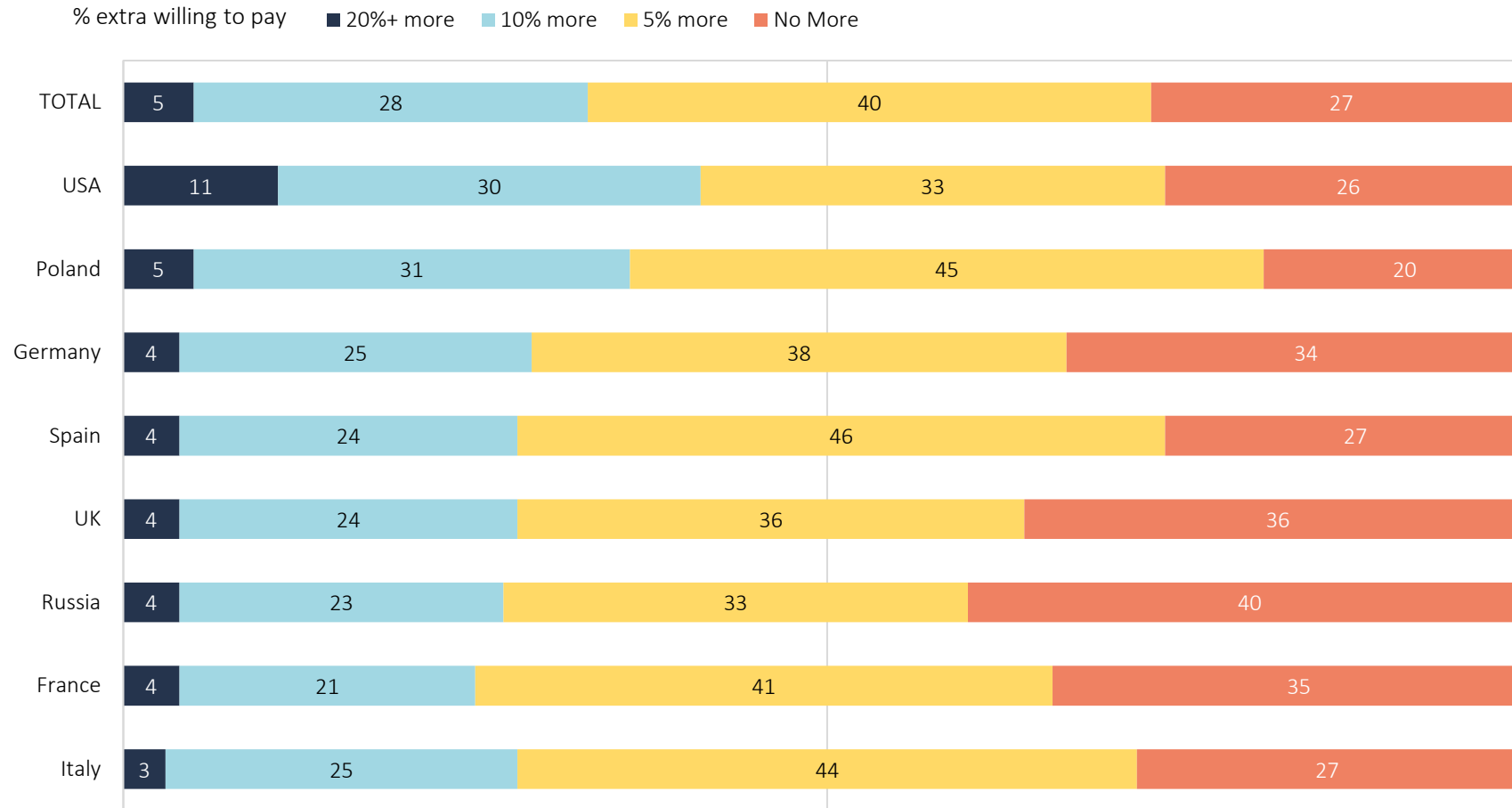


Source: Twenty31 Consulting Inc.

Base per country: France n=1002, Germany n=1000, Italy n=1003, KSA n=1002, Poland n=1021, Russia n=1004, Spain n=1000, UK n=1005, USA n=1001. Total n=10054
 Q32. Which of these statements comes closest to your view about your travel priorities once the COVID-19 pandemic is over?

MOST ARE RESISTANT TO PAYING A SIGNIFICANT PREMIUM FOR RESPONSIBLE TRAVEL, THOUGH THERE IS GREATER WILLINGNESS IN THE USA.

WILLINGNESS TO PAY PREMIUM FOR RESPONSIBLE TRAVEL, 2021





VICTORIA FALLS: CONNECTIVITY AND CAPACITY ANALYSIS

Analysis of transport connectivity and access to Victoria Falls

With the technical assistance of:



VICTORIA FALLS IS A MAJOR TOURISM DESTINATION ON MANY MULTI-STOP ITINERARIES IN SOUTHERN AFRICA.



VICTORIA FALLS AS A TOURISM HUB, 2019

Connecting Destinations from Victoria Falls via Major Gateways, 2019

Connecting From Victoria Falls via to>	Johannesburg O.R Tambo International	Addis Ababa	Dubai International	Nairobi Jomo Kenyatta International	Grand Total
London Heathrow	27,586	19,893	11,896	11,321	70,696
Cape Town	33,245	44		562	33,851
Durban King Shaka International	25,095	0	5,676	12	25,107
Beijing Capital International	1,560	7,030		140	14,406
Gaborone	12,117	4	3,346		12,121
Manchester	2,177	5,979		597	12,099
Dubai International	835	5,618		5,050	11,503
Paris Charles de Gaulle	4,387	3,648	336	1,922	10,293
Frankfurt International	4,919	4,317	292	226	9,754
Birmingham	866	48	7,361	586	8,861
Maputo	8,290	28		80	8,398
London Gatwick	666	992	5,468	812	7,938
New York JFK	5,202	95	1,212	1,328	7,837
Port Elizabeth	7,709				7,709
Dar Es Salaam	1,283	575	4	5,747	7,609
Entebbe	316	1,160	4	5,899	7,379
Mumbai	92	3,106	984	3,108	7,290
Perth	5,995	176	580	12	6,763
Amsterdam	3,588	292	868	1,892	6,640
Guangzhou	456	2,683	2,133	1,185	6,457

KEY IMPLICATIONS

- The adjacent table analyzes the four major connecting airports from Victoria Falls and then lists the largest 20 connecting markets based upon the major connecting airport of Johannesburg.
- In 2019, the largest single connecting point across the four connecting airports was London Heathrow with some 70,696 bookings of which 27,586 (40%) were routing via Johannesburg.
- This gives a good overall indication of Victoria Falls' position as a multi-node regional hub by comparison with other Zimbabwean and even Southern African airports.

THERE WERE MORE CONNECTING PASSENGERS FLOWING FROM VICTORIA FALLS VIA JOHANNESBURG THAN THERE ARE WITH CONNECTING VIA HARARE.



COMPARING VICTORIA FALLS AND HARARE AS TRANSPORT HUBS, 2019

Connecting Destinations from Harare via Major Gateways in 2019

Connecting From Harare Falls via to>	Johannesburg O.R Tambo International	Addis Ababa	Dubai International	Nairobi Jomo Kenyatta International	Grand Total
London Heathrow	15,645	17,705	11,896	11,115	56,361
Cape Town	19,591	44		558	20,193
Durban King Shaka International	19,377	0		12	19,389
Beijing Capital International	1,054	5,554	5,676	108	12,392
Gaborone	11,080	4			11,084
Dubai International	212	5,366		4,998	10,576
Manchester	630	5,823	3,346	533	10,332
Birmingham	326	48	7,361	582	8,317
London Gatwick	170	988	5,468	780	7,406
Maputo	6,951	28		80	7,059
Entebbe	120	980	4	5,663	6,767
Mumbai	32	2,629	984	3,048	6,693
Dar Es Salaam	791	395	4	5,391	6,581
Guangzhou	432	2,587	2,133	1,137	6,289
Port Elizabeth	4,884				4,884
New York JFK	2,511	91	1,212	988	4,802
Perth	3,813	172	580	12	4,577
Geneva	609	1,763	1,260	680	4,312
Hong Kong International	1,683	1,378	1,064	32	4,167
Accra	1,973	1,443	36	688	4,140

KEY IMPLICATIONS

- In most cases the gateway airport has a commercial link to the national airline or dominant carrier in the market; for instance, via DXB the majority of connecting traffic is carried by Emirates, via Addis Ababa.
- Johannesburg – London Heathrow is perhaps the only market with a choice of carrier, three airlines were operating the route in 2019 and perhaps surprisingly based on the data Virgin Atlantic had the largest share with some 10,420 bookings or a 37% share, SAA were in second place with British Airways holding the smallest share of the direct service carriers.
- This contrasts with connectivity flows via Harare which show London Heathrow as the number one market via a gateway point with 56,361 bookings in the year.
- Interestingly, there were more connecting passengers flowing from Victoria Falls via Johannesburg than there are with connecting via Harare; a ratio of 1:25 to 1:00.

IN 2021 VICTORIA FALLS WAS SERVED BY SEVEN AIRLINES OPERATING NON-STOP ROUTES.



AIRLINES SERVING VICTORIA FALLS, 2021

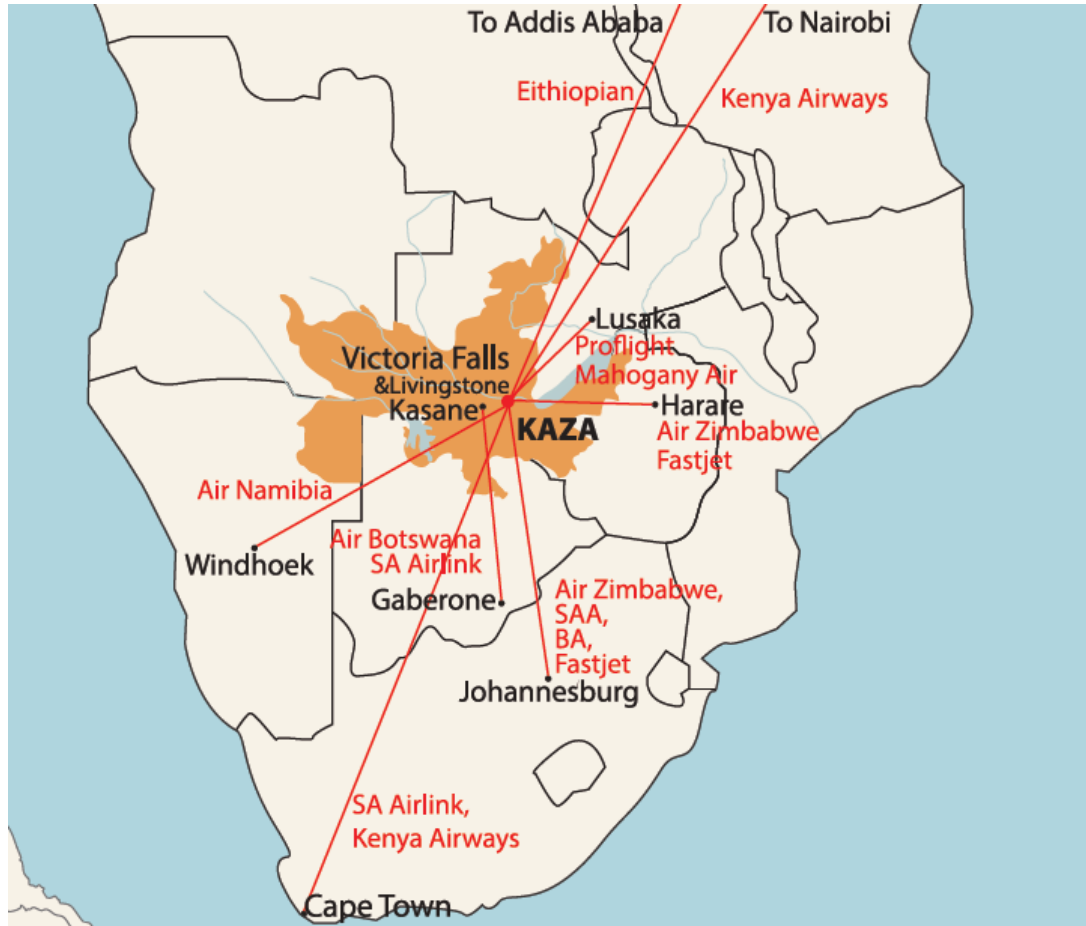
VFA airlines and destinations, 2021

Airline name	Airline code	Airport name	Airport code	Country
Airlink	4Z	Cape Town	CPT	South Africa
Ethiopian Airlines	ET	Gaborone	GBE	Botswana
		Addis Ababa	ADD	Ethiopia
Eurowings Discover	OCN	Frankfurt	HHN	Germany
Mack Air	MKB	Maun	MUB	Botswana
Kuva Air	N/A	Harare	HRE	Zimbabwe
Fastjet Zimbabwe	FN	Johannesburg OR Tambo	JNB	South Africa
Kenya Airways	KQ	Nairobi Jomo Kenyatta	NBO	Kenya
		Cape Town	CPT	South Africa
South African Airways (temporarily suspended)	SA	Johannesburg OR Tambo	JNB	South Africa

VICTORIA FALLS IN THE KAZA REGION INCLUDES TWO WORLD HERITAGE SITES, 36 NATIONAL PARKS, AND 60% OF THE REMAINING WORLD ELEPHANT POPULATION.



VICTORIA FALLS' CONNECTION TO KAVANGO-ZAMBEZI TRANSFRONTIER CONSERVATION AREA (KAZA TFCA)



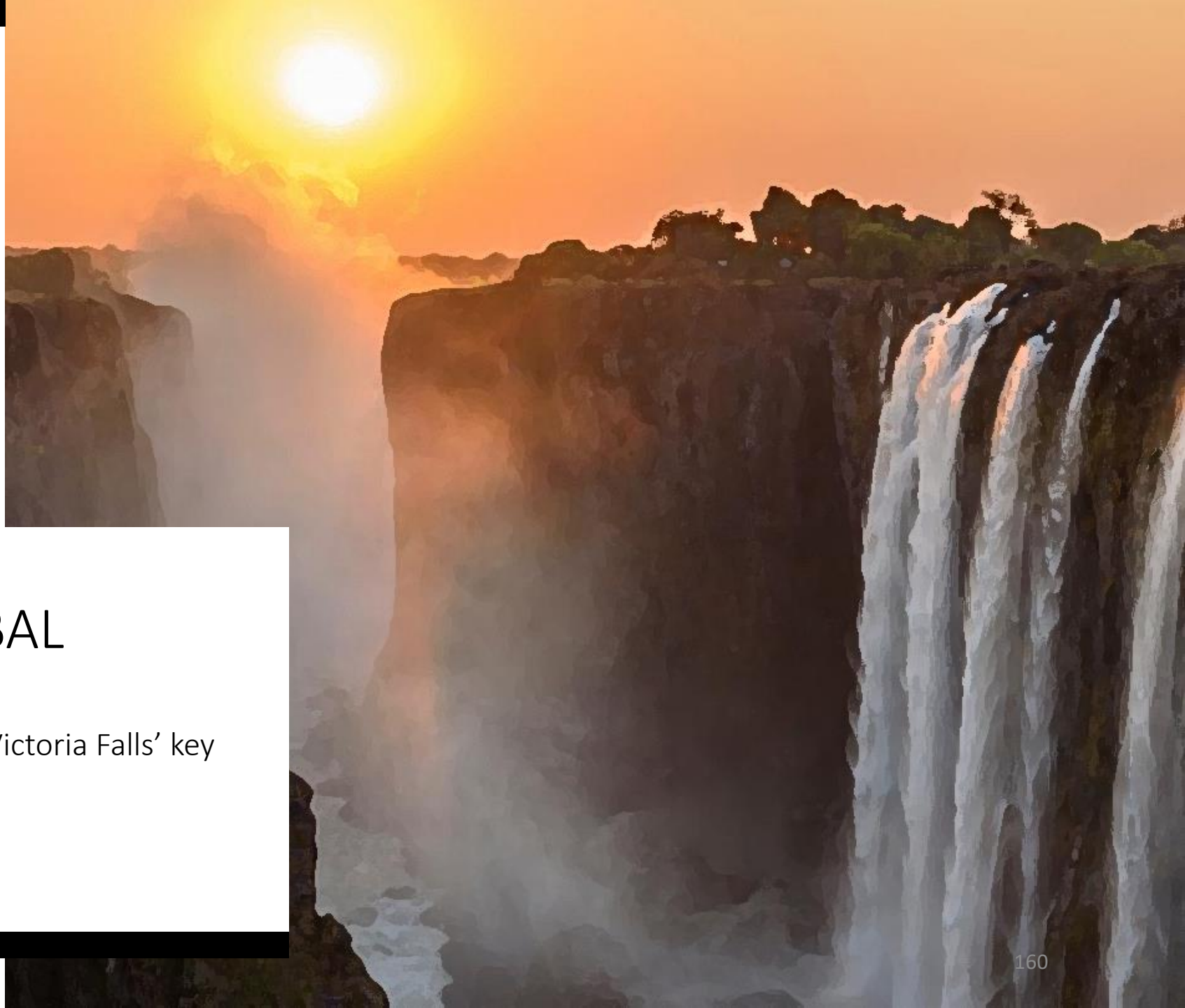
KEY IMPLICATIONS

- Victoria Falls is located at the center of the Kavango-Zambezi Transfrontier Conservation Area (KAZA TFCA).
- The KAZA TFCA is located in Southern Africa and lies in the Kavango and Zambezi River basins where Angola, Botswana, Namibia, Zambia and Zimbabwe converge – all partners in the initiative.
- The KAZA TFCA, commonly known as KAZA, is the world’s largest TFCA at approximately 520,000km.
- It includes the Upper Zambezi River and Okavango basins and Delta, the Caprivi Strip of Namibia, the south-eastern region of Angola, south-western Zambia, the northern wildlands of Botswana and western Zimbabwe.
- Victoria Falls is at the center of the KAZA region and can be regarded as the ideal air gateway into the KAZA region since it can receive a larger class of wide-body aircraft.
- It includes 2 World Heritage Sites, 36 National Parks, and 60% of the remaining world elephant population.

Source: VF HRE Air Service Development Plan TWO 2022



Zimbabwe
A World of Wonders



VICTORIA FALLS' GLOBAL TOURISM MARKETS

Secondary and proprietary analysis of Victoria Falls' key
markets

With the technical assistance of:



twenty•31
tourism by design

VICTORIA FALLS' TOURISM MARKET OVERVIEW: SUMMARY



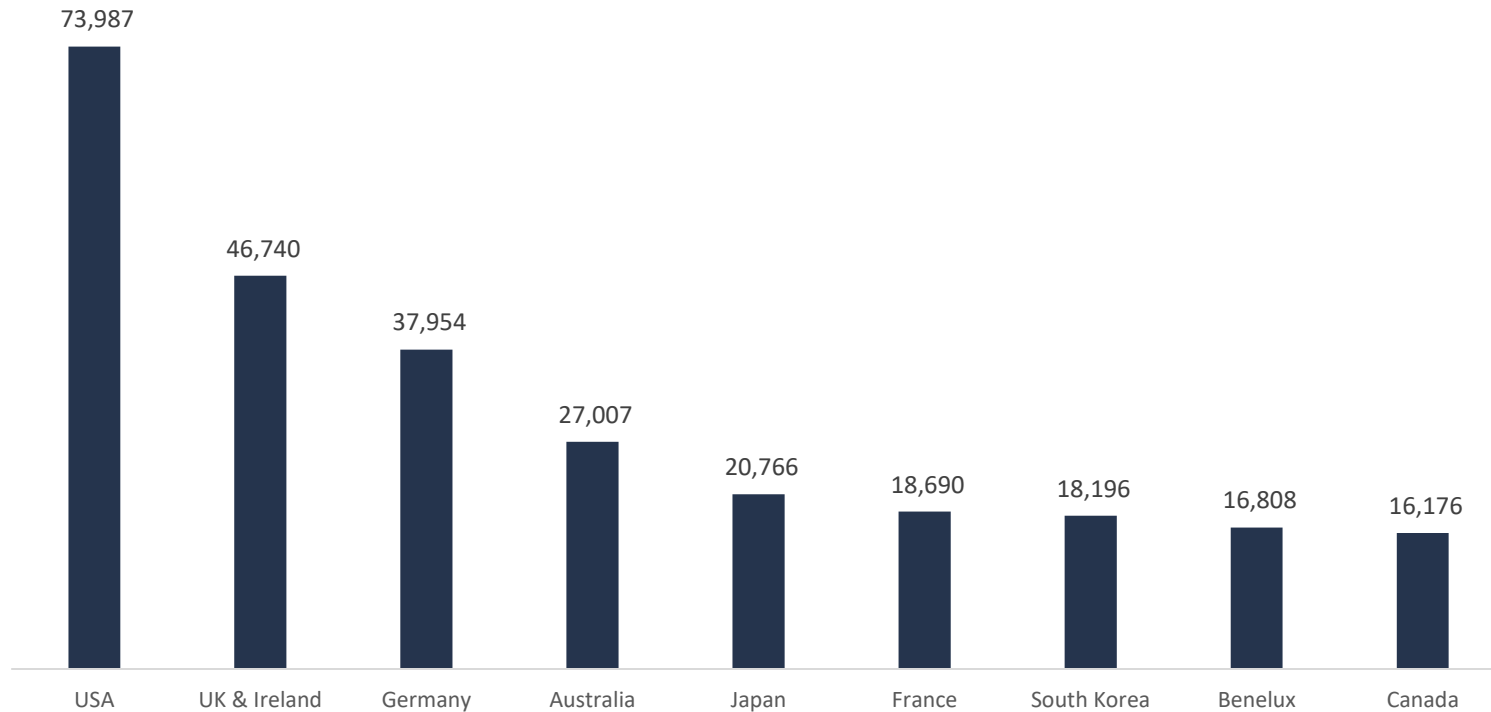
SUMMARY

Insight	Details	Takeaway/ Recommendation
USA is the largest overseas market	In terms of overseas markets, the USA is the dominant market, followed by UK & Ireland, Germany, and Australia.	<ul style="list-style-type: none"> Consumer segmentation and marketing will need to cater to these markets in order to restore pre-COVID levels of visitation.
Japan, UK, Australia, and France are growth markets	According to pre-COVID projections, the UK, Australia, France, and Japan have all shown encouraging growth and the challenge of recovery will be restoring these growth curves.	<ul style="list-style-type: none"> These growing overseas markets are demonstrative of a growing international profile for Victoria Falls, the restoration of which should be a major priority for tourism recovery.
Victoria Falls can be a major hub for overseas visitors	Looking at inbound visitation alongside Harare, Victoria Falls competes closely despite Harare containing the main international airport.	<ul style="list-style-type: none"> Given the overall size of Zimbabwe and Victoria Falls' centrality to many major tourism attractions as well as its border with Zambia, there is a major opportunity to develop it as an international tourism hub.
Smaller groups and couples will dominate the market	Smaller groups and couples are seen as the major future travel contingents with little emphasis on solo travel and large groups (however overlanding tours are likely to remain an important form of tourism).	<ul style="list-style-type: none"> Boutique and high value offerings tailored to couples, families, and smaller groups can help facilitate the development of high value tourism.
Nature-based experiences in wilderness areas are paramount for growth	In-line with global trends around the growth of nature-based tourism, offerings of this kind are majorly emphasized as critical for Victoria Falls' development. Victoria Falls is well-placed to leverage its natural assets, as well as its centrality in the KAZA region.	<ul style="list-style-type: none"> In terms of marketing, the assets of Victoria Falls need not be marketed in isolation but as a central hub with routes and itineraries reflecting the variety and customizability of travel options within the region.
'We are Victoria Falls' is seen to have considerably boosted confidence in the destination, A marked jump since 2020.	Among operators, the 'We are Victoria Falls' campaign is considered to have boosted confidence in booking the destination considerably. This is indicative of Victoria Falls' increasing establishment as a world class destination.	<ul style="list-style-type: none"> This boost in confidence is indicative of an opportune moment for Victoria Falls to mobilize, leveraging its relationships with operators as intermediate advocates for the destination among their client-base.

OVERSEAS VISITORS TO VICTORIA FALLS CONSIST PRIMARILY OF USA, UK & IRELAND, AND GERMANY.

TOTAL OVERSEAS VISITORS TO VICTORIA FALLS BY SOURCE MARKET, 2019

Total arrivals to Victoria Falls by country of origin, 2017

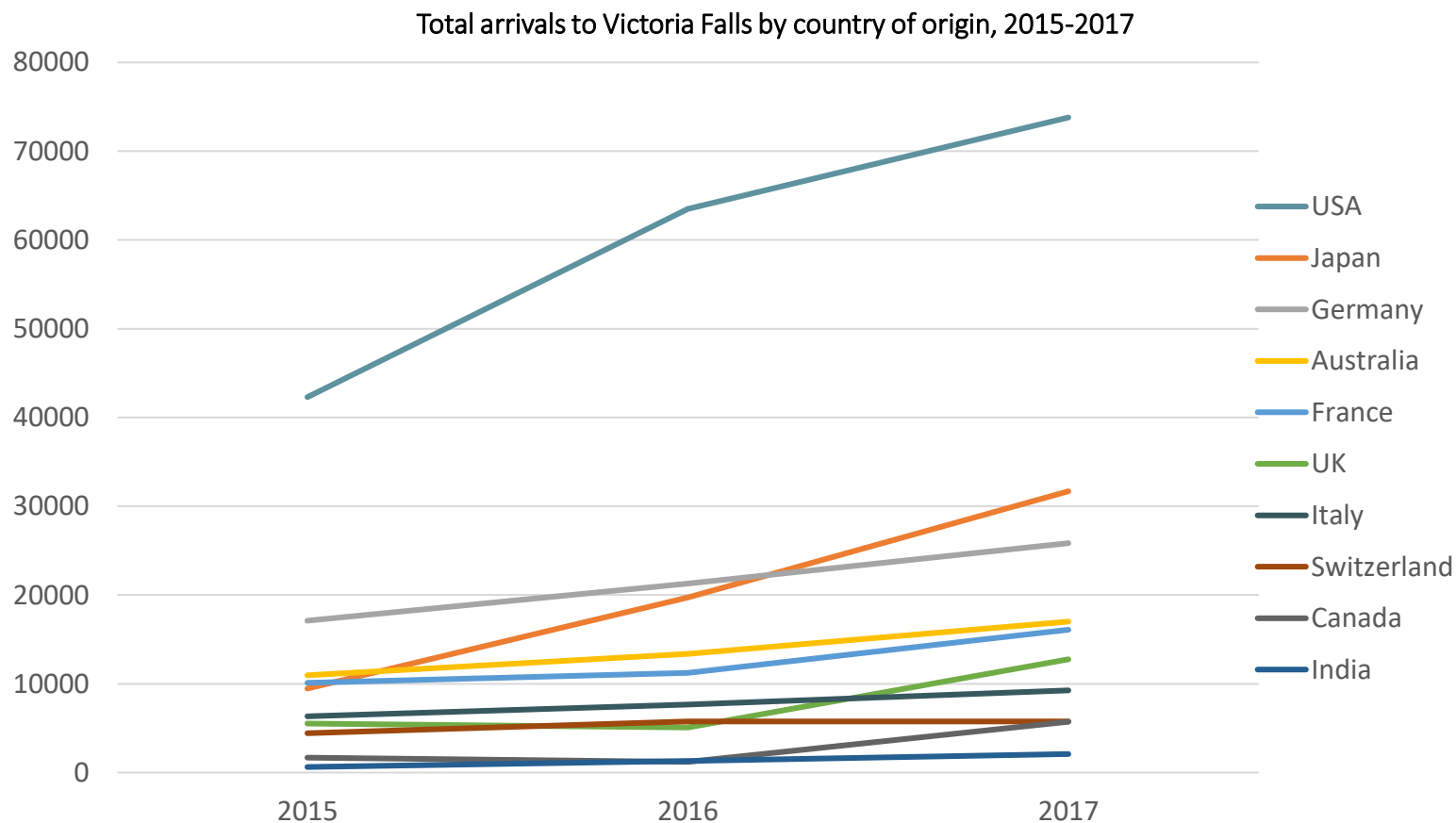


KEY IMPLICATIONS

- In terms of overseas markets, the USA constitutes a healthy contingent of Victoria Falls’ visitor market.
- The UK & Ireland ranks as the second-highest overseas market followed by Germany and Australia.
- Japan, France, and South Korea show similar inbound numbers to Victoria Falls.
- Canada represents a relatively small contingent of the overseas market by comparison but could be further developed as a major source market for both Victoria Falls and Zimbabwe.

PRE-COVID DATA SHOWS AN UPTICK IN OVERSEAS VISITORS SINCE 2015, PARTICULARLY FROM JAPAN, UK, AUSTRALIA, FRANCE, WITH THE USA MAINTAINING A HEALTHY LEAD.

OVERSEAS VISITOR ARRIVALS BY COUNTRY OF ORIGIN, 2017

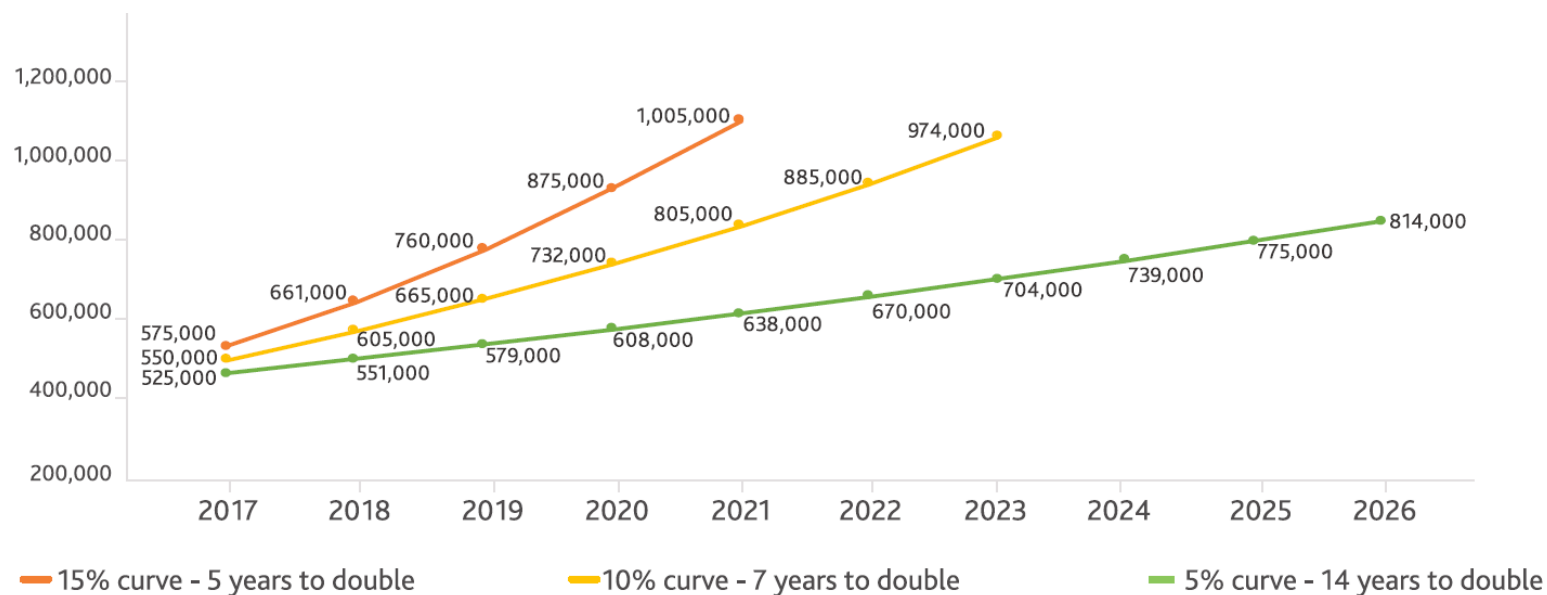


KEY IMPLICATIONS

- Most markets show long-term growth prior to COVID, particularly the USA, Japan, Germany, Australia, France, and the UK.
- While not the largest markets in absolute terms, Japan, the UK, Australia, and France show notable upward spikes leading up to 2017.
- While these trends are undoubtedly severely disrupted by the pandemic, these long-term trends represent are instructive in prioritizing markets for long-term recovery.

PRIOR TO THE PANDEMIC, PROJECTIONS SUGGEST VICTORIA FALLS WAS HEADED FOR PERIOD OF GROWTH EXCEEDING 15%.

VICTORIA FALLS GROWTH SCENARIOS, 2017



KEY IMPLICATIONS

- According to pre-COVID projections, the area is likely on a long-term growth trajectory just below a 10% curve.
- However, the Zimbabwe side saw compound growth in arrivals exceeding 20% during the 90s for 6 consecutive years.
- Prior to COVID, there was a distinct possibility for Victoria Falls to hit a period of growth similar or exceeding 15% doubling visitor numbers in 5 years.
- This would also have a knock-on benefit to both the Livingstone and KAZA areas.

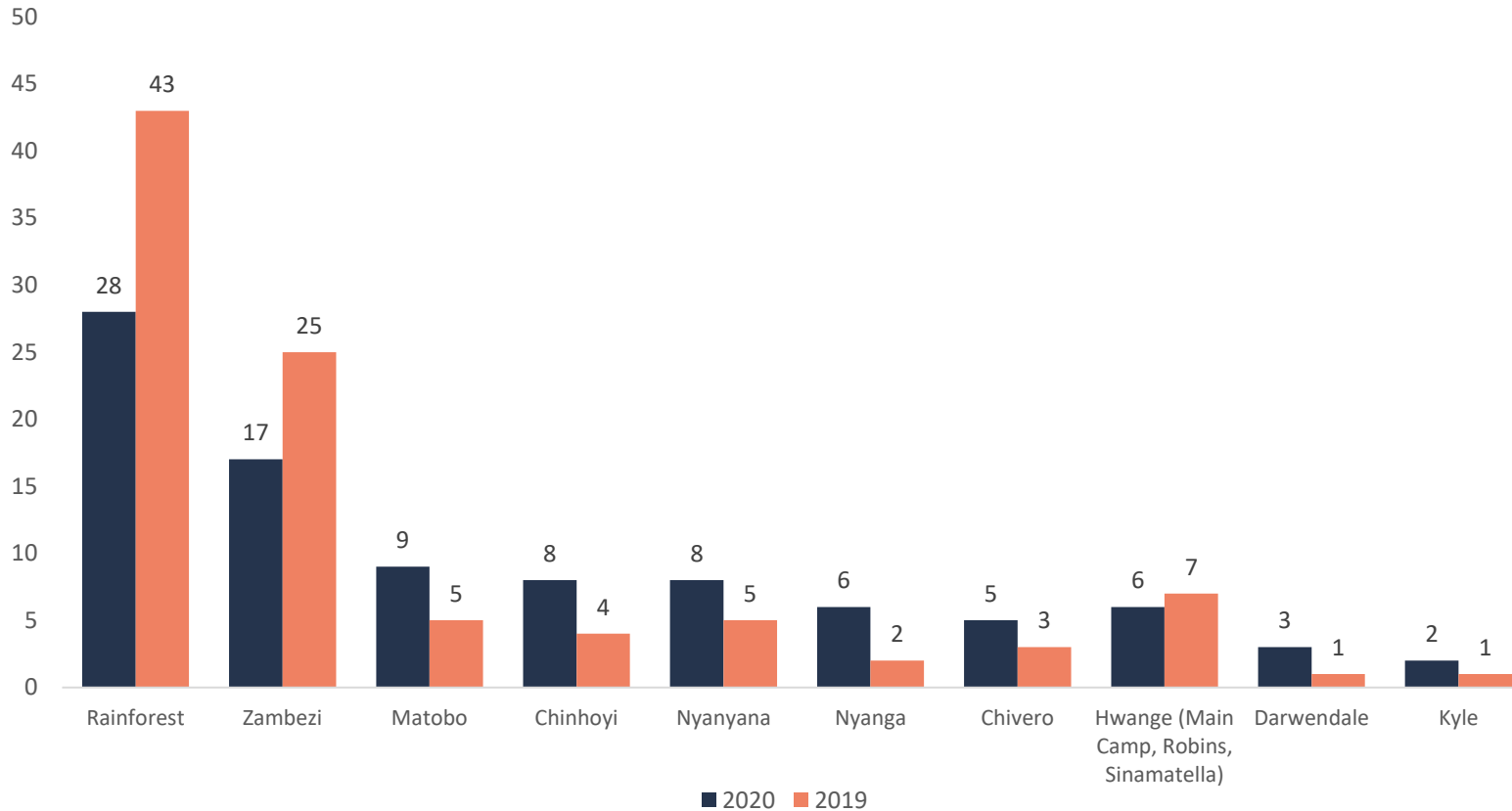
Source: Africa's Living Soul, 2017

RAINFOREST AND ZAMBEZI PARKS' OVERALL MARKET SHARE, DESPITE DRAMATIC DROPS IN VISITOR ARRIVALS ARE TESTAMENT TO VICTORIA FALLS' ONGOING DOMINANCE.



VISITOR MARKET SHARE OF TOP 10 NATIONAL PARKS, 2019-2020

Percentage distribution of visitors by national parks, 2019-2020



KEY IMPLICATIONS

- The Rainforest in Victoria Falls, Zambezi and Matobo retained top 3 position in 2020 contributing 28%, 17% and 9% of all arrivals respectively.
- Owing to the fact that Victoria Falls is the most popular tourist destination in Zimbabwe, the Rainforest and Zambezi National Park are usually visited by international visitors.
- As a result of the severe fall in foreign visitors in 2020, the market share of these two also fell dramatically.

LOOKING AT DESTINATIONS WITHIN ZIMBABWE, HARARE SHOWS ONLY SLIGHTLY HIGHER VISITOR NUMBERS THAN VICTORIA FALLS, LIKELY DUE TO THE INTERNATIONAL AIRPORT.



COMPETITOR DESTINATIONS WITHIN ZIMBABWE, 2015/16

Places visited within Zimbabwe by percentage vs. average nights spent, 2015/16



KEY IMPLICATIONS

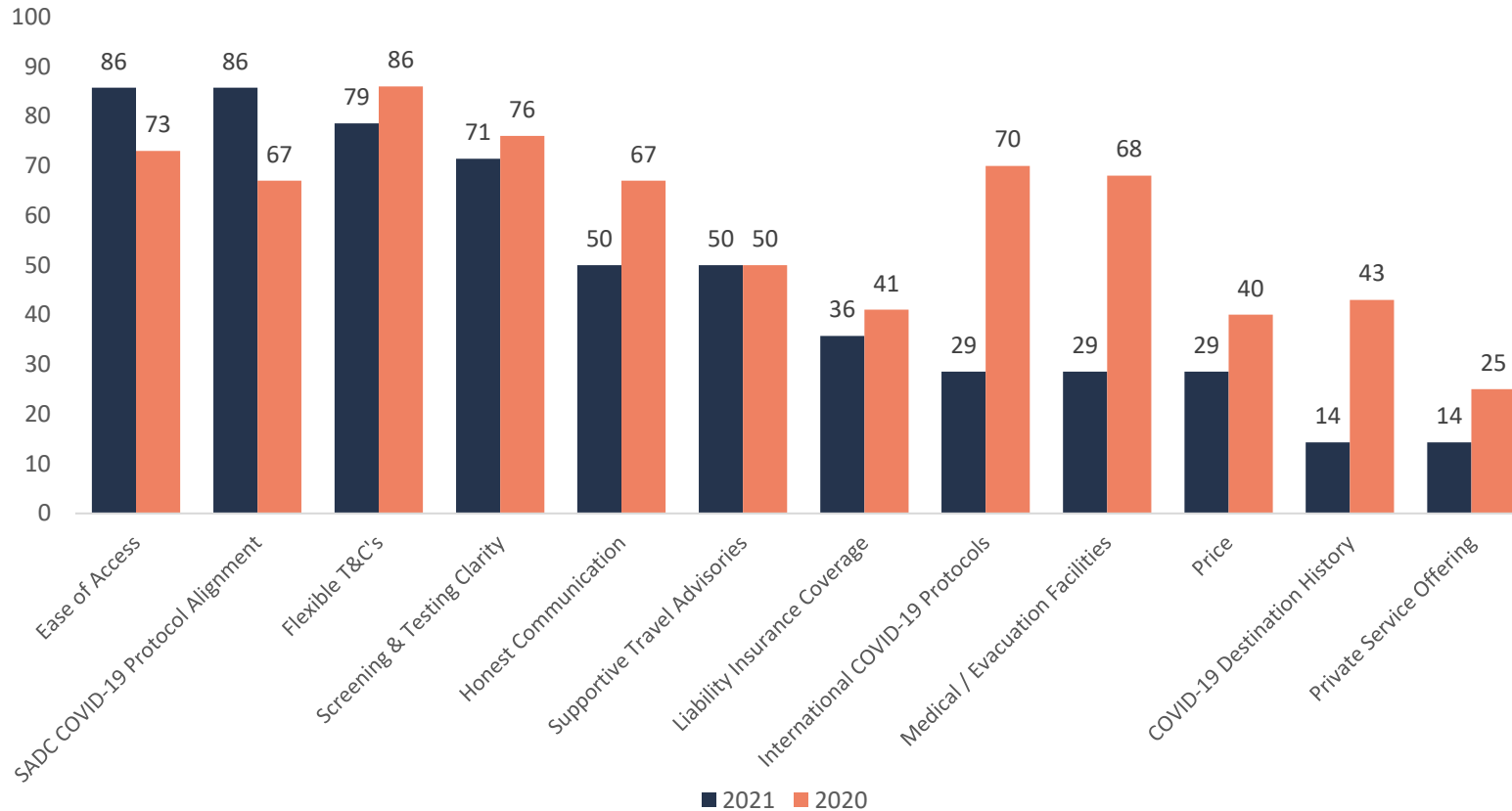
- The places visited most were Harare (29.1%) followed by Victoria Falls (27.9%) and Bulawayo (22.6%).
- Although Chiredzi was amongst the least visited places, it had the highest average nights spent (8.2 nights). Average nights spent in Harare were 7.4, Bulawayo 6.1 and in Gweru 5.8.
- Victoria Falls was the second most visited destination, however the average length of stay was only 2 nights.
- This is not necessarily a negative indicator for Victoria Falls, as it serves as a local hub for further travel with the fewer nights relative to overall visitation indicative of its use as both an entry point and stop-off for longer trips within Zimbabwe and the region.
- However, as Victoria Falls seeks to attract visitors from more distant markets, it should seek to market attractions and offerings that incentivize longer stays.

EASE OF ACCESS AND SADC COVID PROTOCOL ALIGNMENT ARE CONSIDERED PRIORITIES TO ENCOURAGE THE RETURN OF TRAVELLERS TO THE REGION.



PRIORITIES TO ENCOURAGE THE RETURN OF TRAVELLERS TO VICTORIA FALLS, 2021

Development priorities to encourage return of travellers to Victoria Falls, percentage, 2020-2021



KEY IMPLICATIONS

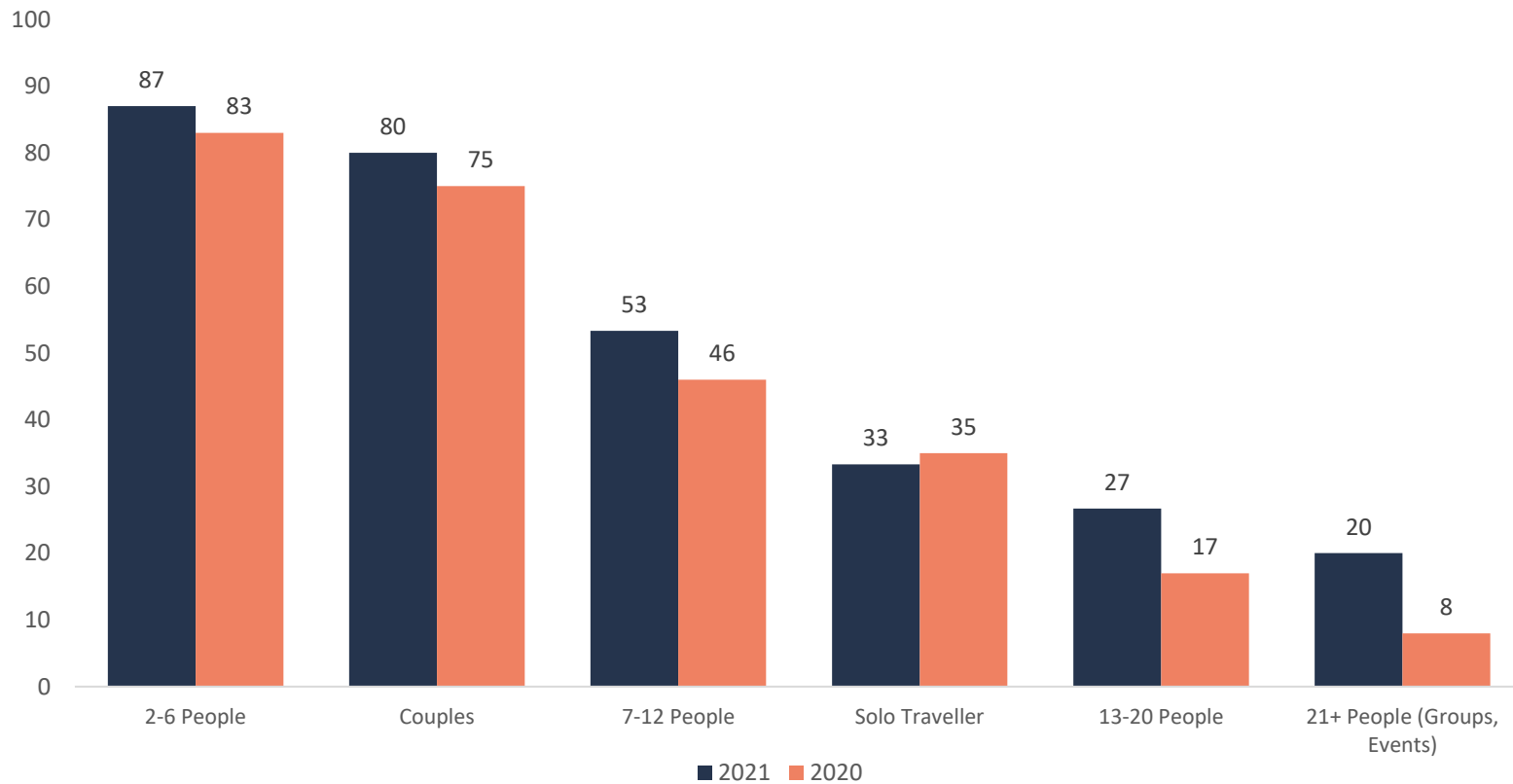
- Ease of access remains a limiting factor on the recovery of the tourism sector in Victoria Falls although the recent introduction of new access options in 2022 should begin to alleviate this.
- Clarity, transparency and alignment with SADC countries for COVID-19 screening and testing protocols are considered to be important.
- Greater flexibility of terms & conditions, especially with regards to deposit and cancellation policies is the most important factor to encourage a return of travellers to Victoria Falls, according to 79% of respondents.
- Honest communication and supportive travel advisories are both cited by 50% of respondents, indicating that more could be done to inform operators and the traveller population and foster more of an open dialogue to close what appears to be a communication gap.

GROUPS OF 2 TO 6 PEOPLE, FOLLOWED BY COUPLES, ARE CONSIDERED THE MOST COMMON COMPOSITION AMONG VISITORS TO VICTORIA FALLS.



PARTY SIZE OF FUTURE TRAVELLERS TO VICTORIA FALLS, 2021

Perceived future group sizes Victoria Falls will be primarily catering to, percentage, 2020-2021



KEY IMPLICATIONS

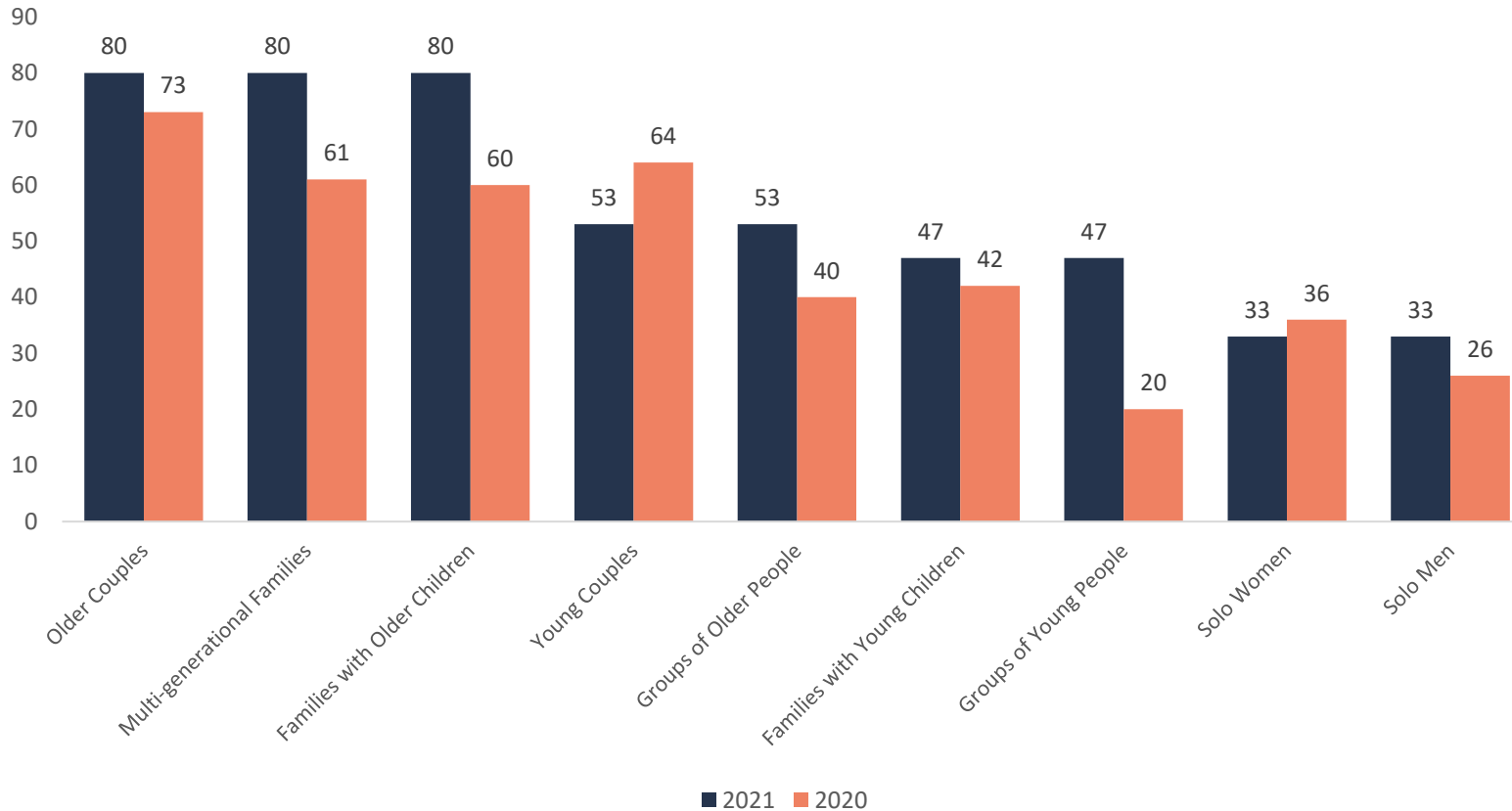
- According to 83% of the respondents, smaller groups of between 2 and 6 people, as well as couples, will continue to dominate the market.
- Large groups, incentives, events and overlanders are likely to be less common choices among travellers in the next five years.
- Solo travellers have been slightly de-emphasized since 2020.

OLDER MORE AFFLUENT COUPLES, MULTIGENERATIONAL FAMILIES, AND FAMILIES WITH OLDER CHILDREN ARE SEEN AS THE MAIN TRAVELLER GROUPS IN THE NEXT 5 YEARS.



GROUP COMPOSITION OF FUTURE TRAVELLERS TO VICTORIA FALLS, 2021

Perceived future group composition Victoria Falls will be primarily catering to, percentage, 2020-2021



KEY IMPLICATIONS

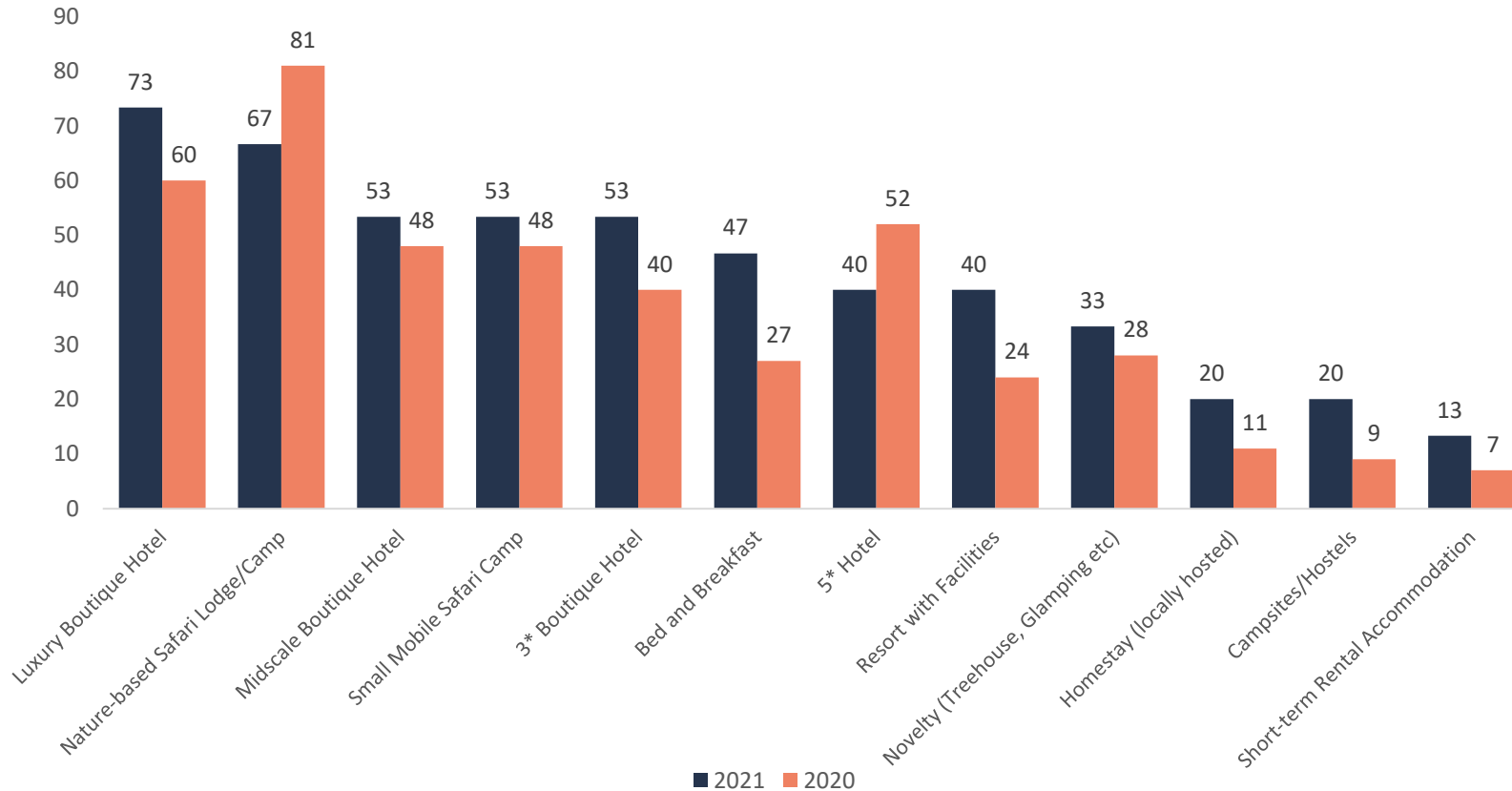
- 80% of respondents believe that future travellers in the next five years are most likely to be older, more affluent couples; multi-generational families or families with older children.
- Solo travellers (both men and women) are not seen as a major contingent of future travellers to the destination.
- Families with younger children are emphasized considerably less than those with older children.
- This may be due to a number of influential factors including the logistics of getting there with small children and/or the emphasis on hard adventure activities not suitable for smaller children.
- Groups of young people have jumped considerably in emphasis since 2020.

LUXURY BOUTIQUE HOTELS AND NATURE-BASED SAFARI LODGES ARE SEEN AS THE MAIN PREFERRED ACCOMMODATION FOR TRAVELLERS TO VICTORIA FALLS.



FUTURE ACCOMMODATION CHOICES IN VICTORIA FALLS, 2021

Perceived accommodation choices for Victoria Falls in the next 5 years, percentage, 2020-2021



KEY IMPLICATIONS

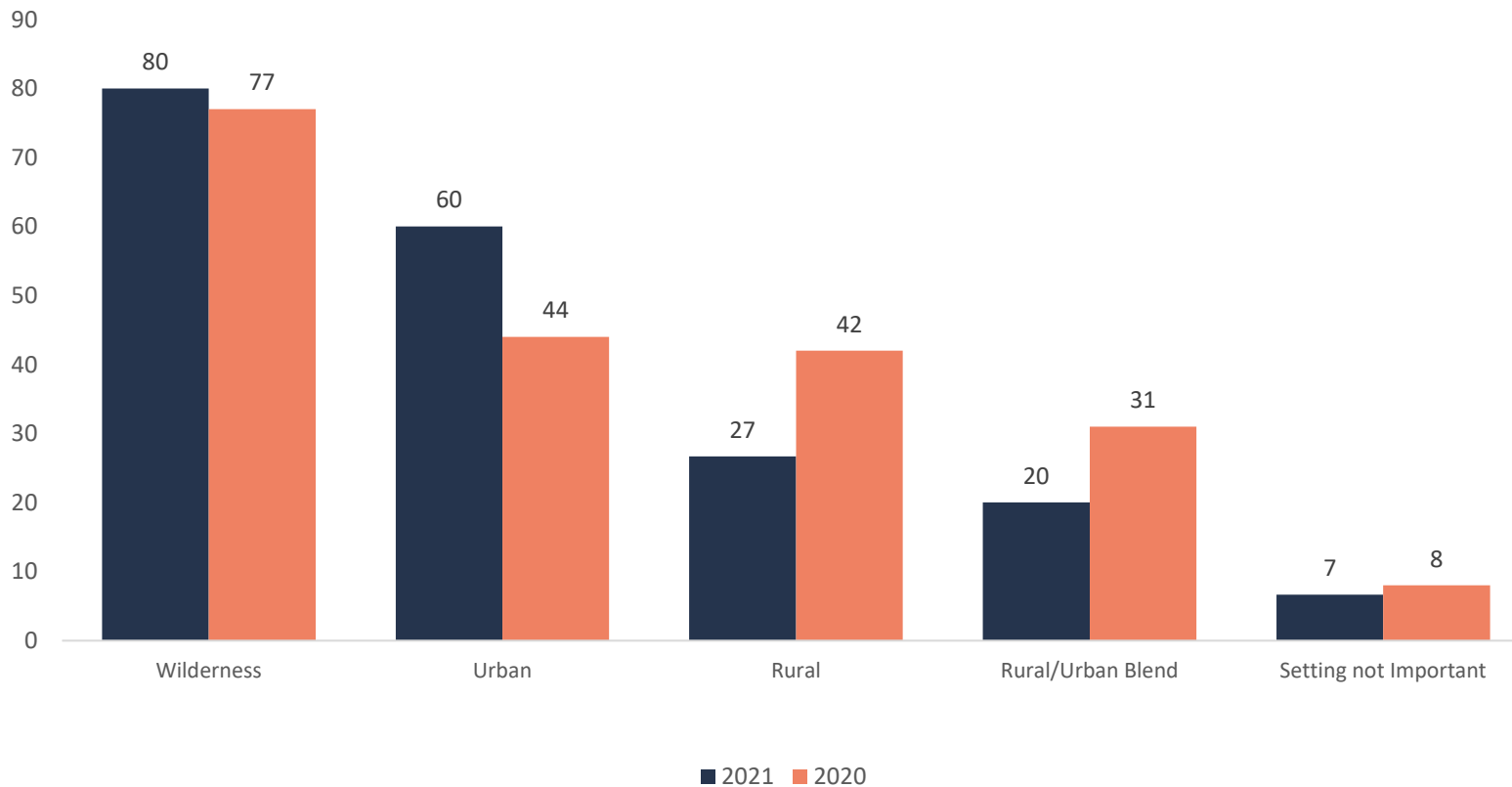
- Over 73% of respondents confirmed that luxury boutique hotels will be the preferred accommodation choice of travellers in the next five years.
- 67% of respondents indicate nature-based safari lodges or camps will also be more of a preference for future travellers.
- However, nature-based safari lodges have been de-emphasized since 2020.
- Both bed and breakfasts and resorts with facilities have seen a jump in emphasis since 2020, possibly indicating growing confidence in these smaller businesses.
- Midscale boutique hotels and small mobile safari camps also feature high on the list for future travellers.
- Respondents indicate that future travellers may be moving away from large 5-star hotels and resorts.

PROPERTIES IN WILDERNESS AREAS ARE SEEN AS THE FUTURE PREFERENCE FOR TRAVELLERS CONSIDERING VICTORIA FALLS.



PREFERRED ACCOMMODATION SETTINGS FOR FUTURE TRAVELLER TO VICTORIA FALLS, 2021

Perceived accommodation settings of choice for visitors to Victoria Falls, percentage, 2020-2021



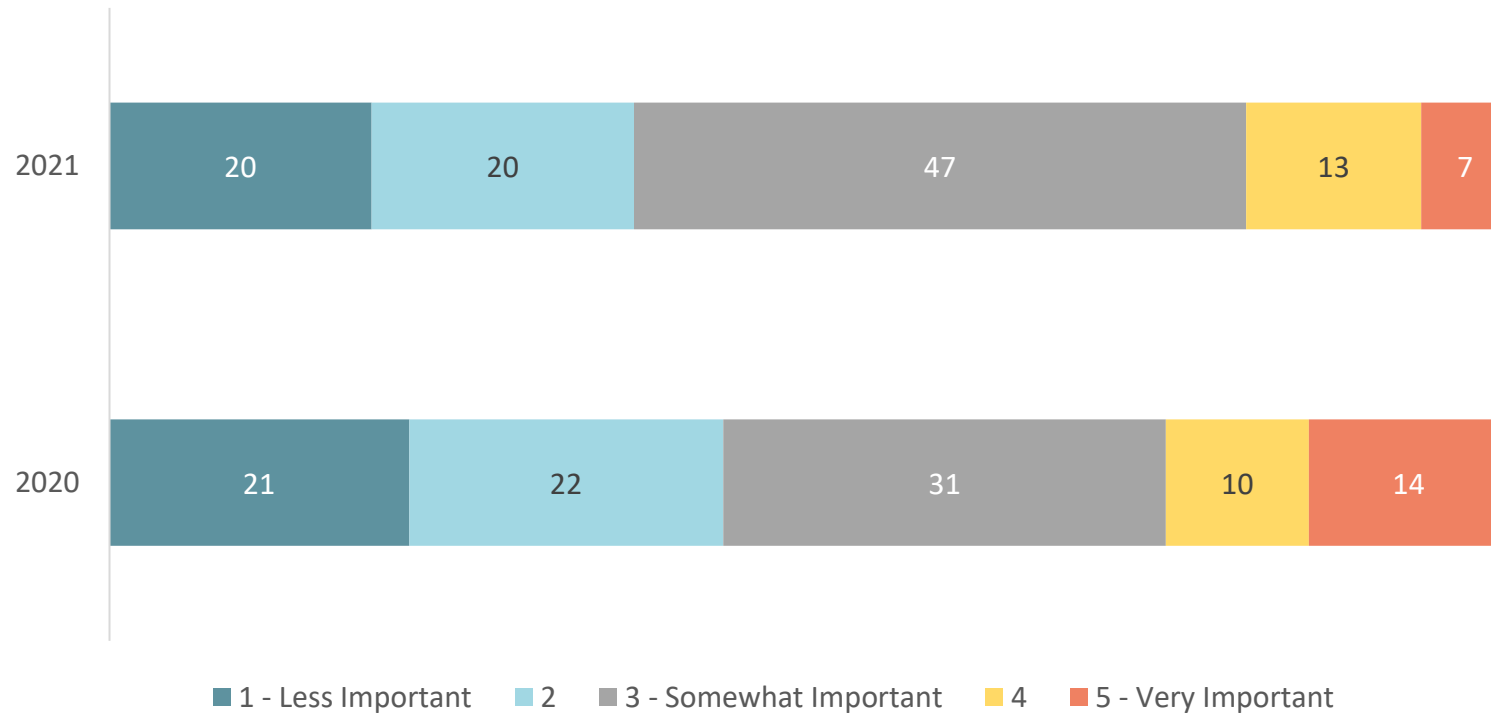
KEY IMPLICATIONS

- Results show an above 80% preference for properties located within wilderness areas for both those already booking and those considering booking Victoria Falls.
- Urban areas have seen a considerable jump in emphasis since 2020 while rural areas and rural/urban blends have both been de-emphasized.
- A small contingent see the setting of properties as unimportant, somewhat less so than in 2020.

INTERNATIONALLY RECOGNISED ACCOMMODATION BRANDS ARE LARGELY SEEN AS OF MIDDLING IMPORTANCE FOR FUTURE TRAVELLERS TO VICTORIA FALLS.

IMPORTANCE OF INTERNATIONALLY RECOGNISED ACCOMMODATION BRANDS, 2021

Perceived importance of an internationally recognized accommodation brand, percentage, 2020-2021



KEY IMPLICATIONS

- The importance of internationally recognised accommodation brands was of some importance for both respondents who already book Zimbabwe and for those who are considering booking Zimbabwe in the future.
- For those not yet booking, it is proportionally of slightly higher importance overall.
- Those who consider internationally recognized accommodation brands as “very important” have declined since 2020.

Source: Future Traveller Sentiment Report, 2022

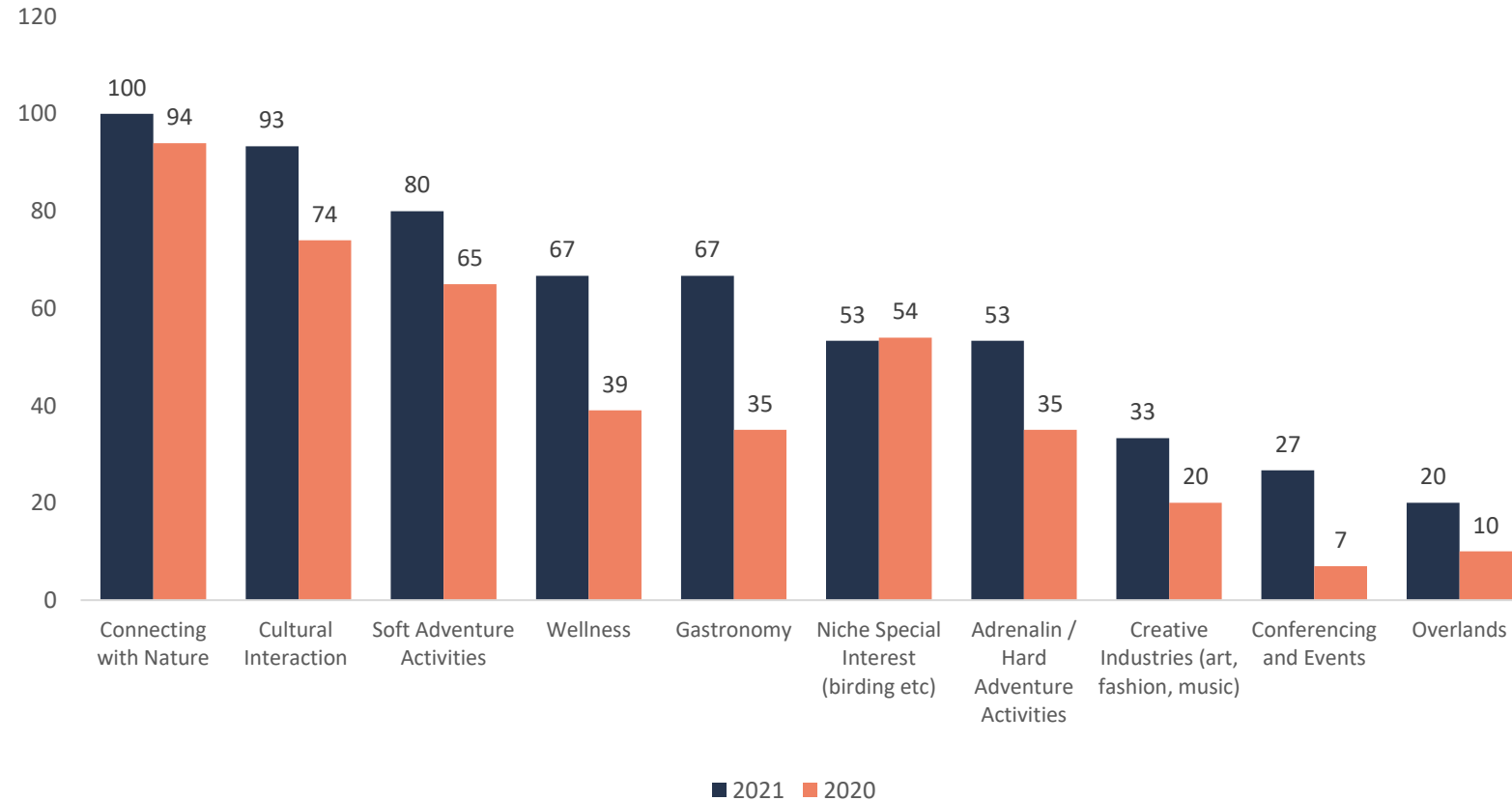
For the accommodation preferences above, how important is an international or regional brand?

NATURE AND CULTURAL EXPERIENCES ARE SEEN AS GROWING IMPORTANCE FOR VISITORS TO VICTORIA FALLS WITH A GROWING EMPHASIS ON WELLNESS AND GASTRONOMY.



PREFERRED EXPERIENCES SOUGHT BY TRAVELLERS TO VICTORIA FALLS, 2021

Perceived experiences of importance to travellers to Victoria Falls, percentage, 2020-2021



KEY IMPLICATIONS

- 100% of respondents believe that future travellers will be looking to 'connect with nature' on their holidays in the future.
- This is consistent with other findings around demand shifts in the global intrepid traveller market that informed the market segments.
- Cultural interaction or immersion and niche or special interest experiences were each ranked highly by the survey respondents.
- For respondents who do not yet book Zimbabwe, there was proportionally higher interest in in the experiences of gastronomy and the creative industries, indicating an opportunity to capture new markets in future.
- Both wellness and gastronomy have seen a considerable jump in emphasis since 2020.

Source: Future Traveller Sentiment Report, 2022

To improve our destination over the next five years, which of these factors below should Victoria Falls address as a priority?

IMPROVED DIRECT ACCESS AND REDUCED VISA COSTS ARE SEEN AS IMPORTANT DEVELOPMENTAL FACTORS FOR VICTORIA FALLS.



IMPORTANT DESTINATION DEVELOPMENT FACTORS FOR VICTORIA FALLS, 2021

Perceived priority destination development factors in the next 5 years, percentage, 2020-2021



KEY IMPLICATIONS

- While 40% of International trade still feel that Victoria Falls products are overpriced, 80% of respondents now feel that improving the direct access to the destination is an important development factor.
- The cost and process required to obtain a visa for Zimbabwe, as well as general access is flagged as the next highest requirement for improvement.
- 40% of respondents feel that the destination should prioritise improving the medical and evacuation facilities although much fewer respondents feel there is a health and safety issue compared to 2020.
- Reduced overall destination costs as well as awareness-raising are also seen as vital factors.

Source: Future Traveller Sentiment Report, 2022

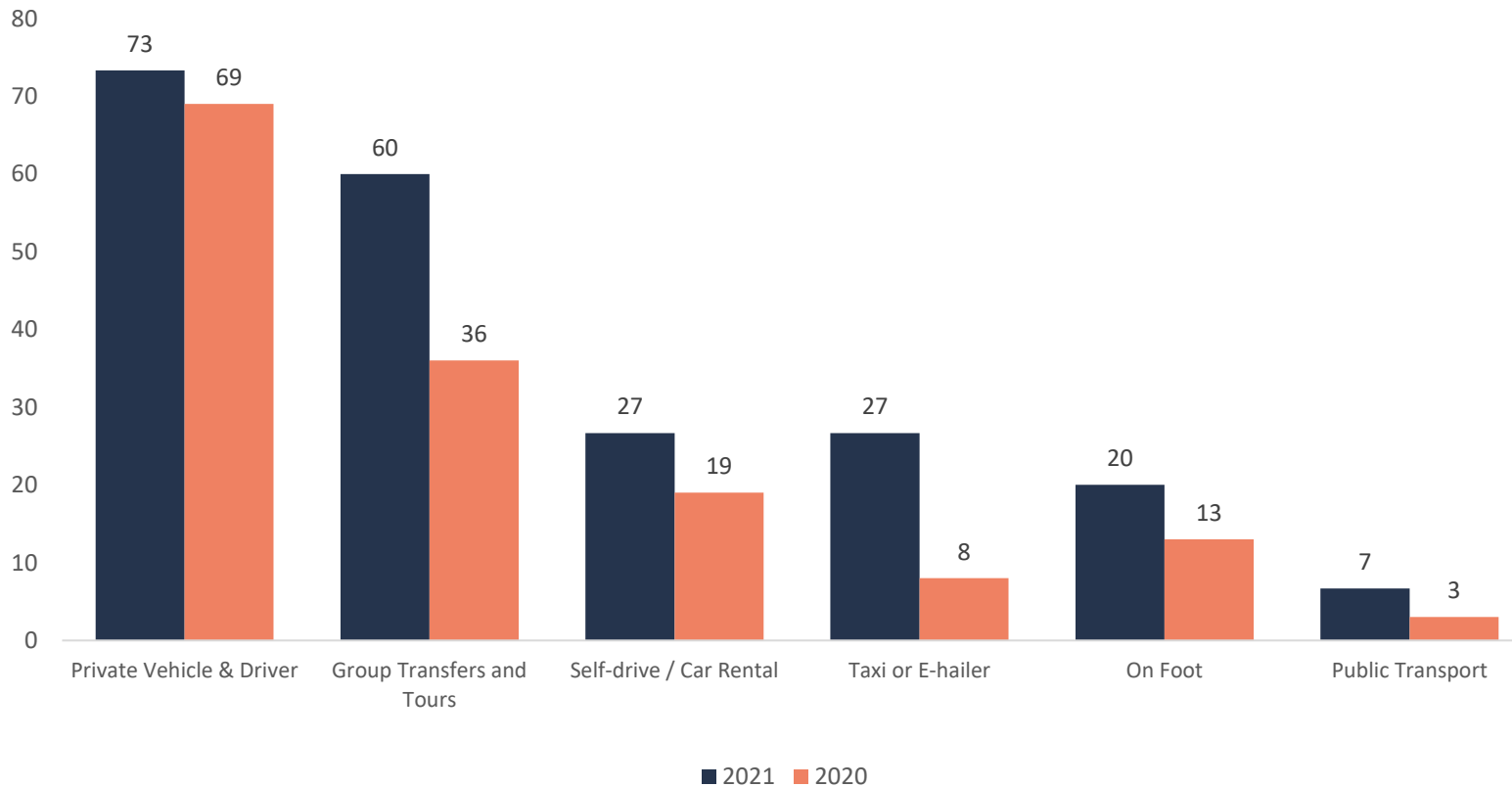
To improve our destination over the next five years, which of these factors below should Victoria Falls address as a priority?

PRIVATE VEHICLES ARE SEEN AS THE CONTINUING PREFERRED MODES OF TRANSPORT WHILE GROUP TRANSFERS AND TOURS ARE OF GROWING IMPORTANCE.



FUTURE PREFERRED MODES OF TRANSPORT, 2021

Perceived preferred modes of transport for Visitors to Victoria falls over the next 5 years, percentage, 2020-2021



KEY IMPLICATIONS

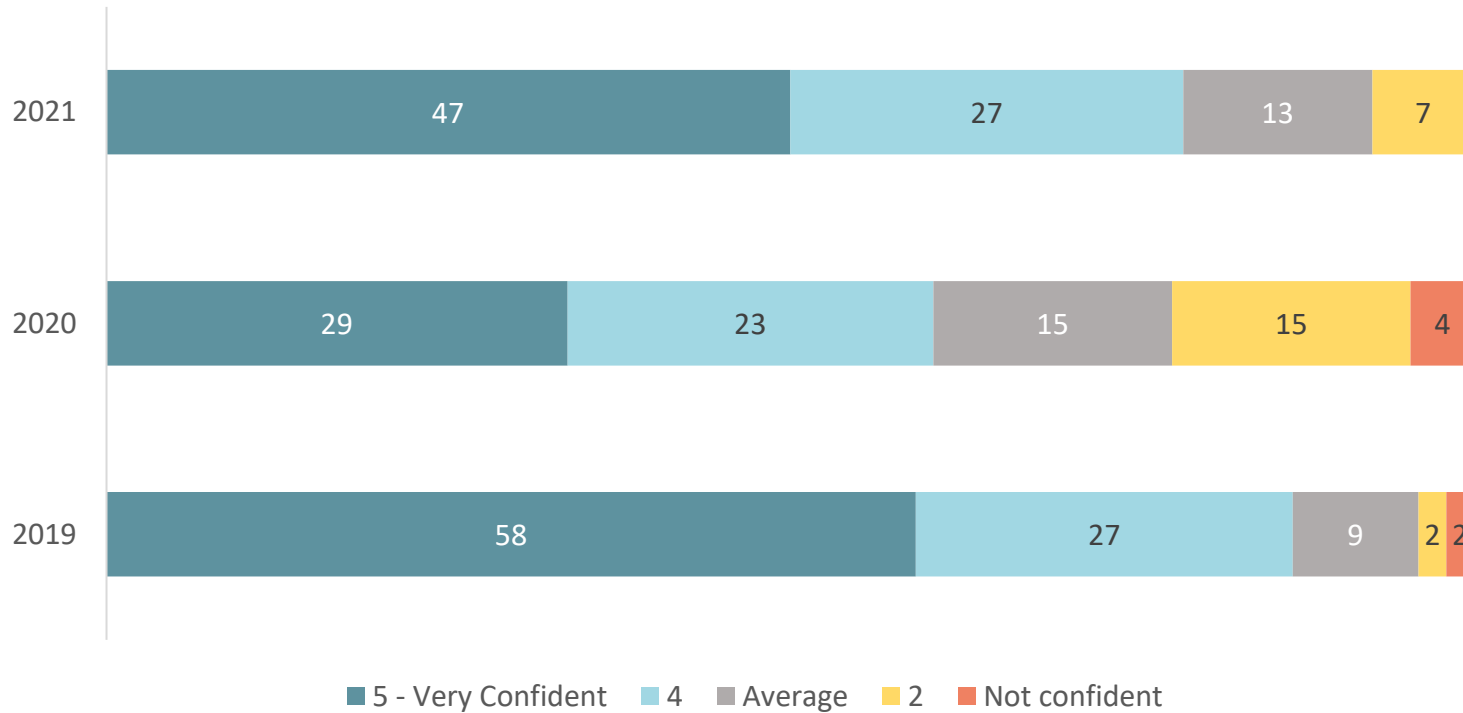
- In line with the need for more private or intimate accommodation and experience offerings, it is predicted that future travellers will prefer private vehicles over the more traditional group or shared options.
- The survey reflected growth in terms of self-drives and utilizing taxi services or exploring the destination on foot compared with sentiments expressed in 2020 which indicates improved confidence and greater independence of travellers.
- Public transport was the least preferential mode of transport for whilst in destination.

THERE IS GROWING CONFIDENCE IN VICTORIA FALLS AS A DESTINATION AMONG TRAVEL OPERATORS, REFLECTING ITS INCREASING ESTABLISHMENT AS A DESTINATION OF CHOICE.



CONFIDENCE IN BOOKING VICTORIA FALLS AMONG OPERATORS, 2021

Confidence among operators in booking clients to Victoria Falls, percentage, 2019-2021



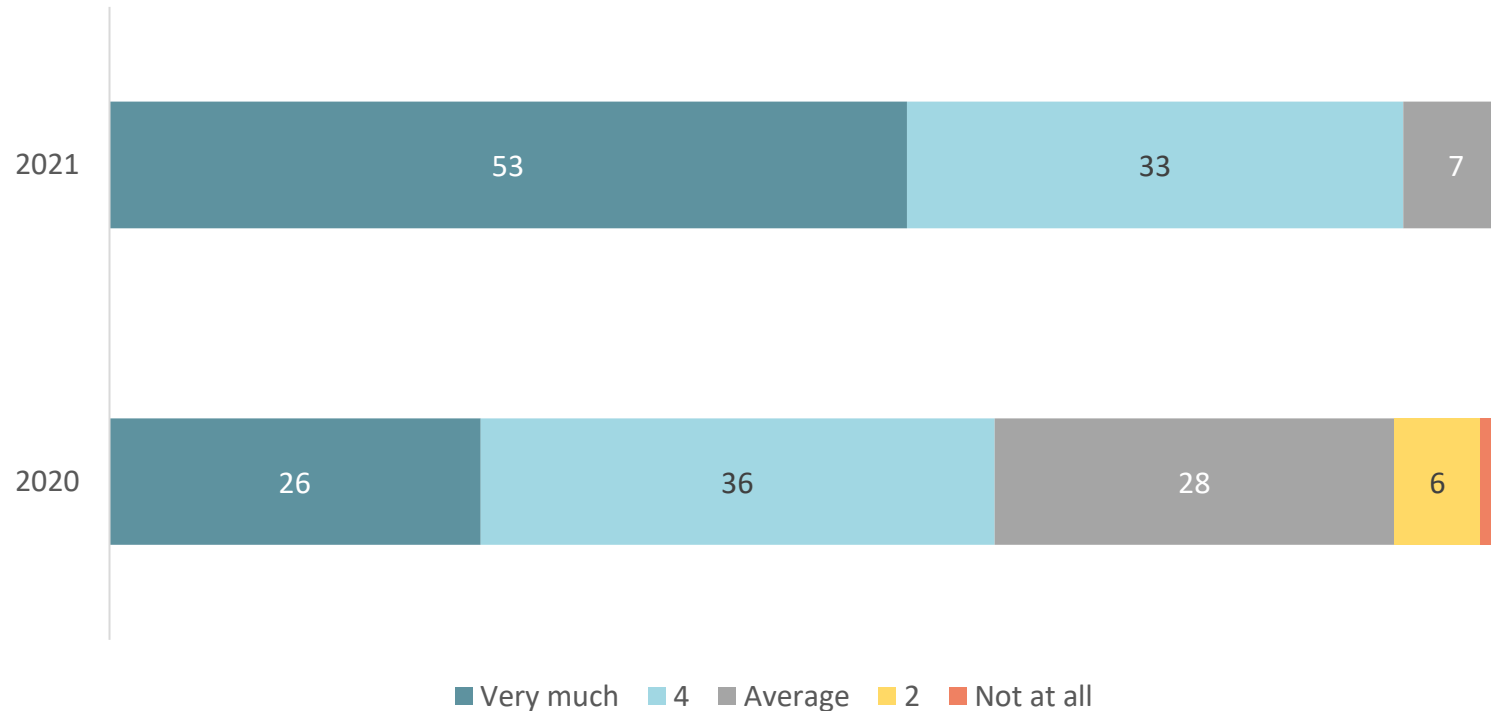
KEY IMPLICATIONS

- In terms of confidence with booking Victoria Falls, the data show increasing confidence in Victoria Falls as a destination between 2020 and 2021.
- Whilst the market is still not as confident as they were in 2019, the current trend points to accelerated recovery from the impacts of the pandemic.

'WE ARE VICTORIA FALLS' IS SEEN TO HAVE CONSIDERABLY BOOSTED CONFIDENCE IN THE DESTINATION, A MARKED JUMP SINCE 2020.

IMPACT OF 'WE ARE VICTORIA FALLS' ON IMPROVED CONFIDENCE, 2021

Perceived impact of "We are Victoria Falls" outreach initiative on operator confidence in booking Victoria Falls, percentage, 2019-2021



KEY IMPLICATIONS

- The survey respondents were asked to indicate to what extent the 'We Are Victoria Falls' outreach initiative had improved their confidence in booking the destination.
- 87% of respondents feel that the We Are Victoria Falls initiative has been impactful in maintaining or improving confidence in the destination, an increase of 33% confidence since 2020.
- This includes existing trade partners as well as potential future trade partners.



ZIMBABWE DESTINATION DEVELOPMENT PROGRAM

A market analysis report: markets and segments of focus and optimal marketing budget allocation

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