SOUTHERN AFRICAN DEVELOPMENT COMMUNITY

SADC

TOWARDS A COMMON FUTURE

Tourism Market Development Strategy and Action Plan for SADC Transfrontier Conservation Areas

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TOURISM MARKET DEVELOPMENT STRATEGY AND ACTION PLAN FOR SADC TRANSFRONTIER CONSERVATION AREAS

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About SADC

The Southern African Development Community (SADC) is an organisation founded and maintained by countries in southern Africa that aim to further the socio-economic, political and security cooperation among its Member States and foster regional integration in order to achieve peace, stability and wealth. The Member States are: Angola, Botswana, Union of Comoros, the Democratic Republic of Congo, Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, United Republic of Tanzania, Zambia and Zimbabwe.

FOREWORD

It is with great pleasure that I present the SADC Transfrontier Conservation Areas (TFCAs) Tourism Market Development Strategy, an important milestone in our shared journey to harness the immense potential of Southern Africa's unique natural and cultural heritage through sustainable tourism development.

Transfrontier Conservation Areas are more than shared ecological landscapes; they are living symbols of cooperation, peace, and shared prosperity among SADC Member States. By working together across borders, we can safeguard biodiversity, promote cultural exchange, and create economic opportunities for communities living in and around these areas.

Tourism remains one of the most dynamic sectors of our regional economy, with the power to create jobs, diversify livelihoods, and stimulate inclusive growth. Yet, despite our rich endowment of world-class attractions, the SADC region continues to capture less than its fair share of global tourism flows. This strategy provides a roadmap for changing that reality.

Developed through extensive consultations with Member States, stakeholders, and international partners, the Strategy aligns with the SADC Tourism Programme 2020–2030 and responds directly to Goal 3: Developing Tourism in Transfrontier Conservation Areas. It sets out practical approaches to strengthen institutional capacity, build strategic partnerships, enhance marketing and branding, and diversify tourism product across TFCAs.

Our vision is clear: by 2030, tourism growth in TFCAs will not only exceed average regional growth levels but will also stand as one of the major sources of income and employment for local communities. Achieving this vision will require collaboration, innovation, and a steadfast commitment to sustainability.

I extend my sincere gratitude to all Member States, stakeholders, cooperating partners, the private sector, and community representatives, whose insights and expertise shaped the development of this Strategy. Together, we can ensure that our TFCAs become engines of conservation, regional integration, and shared prosperity.

Let us now move forward with determination to transform this Strategy into action, and unlock the boundless opportunities that lie within our Transfrontier Conservation Areas.

Thanking you.

H.E. Elias M. Magosi
EXECUTIVE SECRETARY, SADC SECRETARIAT

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ACRONYMS

AR	Ais-Ais Richtersveld
BSA	Boundless Southern Africa
C-NRM	Climate Resilience and Natural Resource Management
COM	Council of Ministers
COSO	Committee of Senior Officials
CTO	Caribbean Tourism Organisation
DEA	Department of Environmental Affairs, South Africa
EMP	Environmental Management Plan
ETC	European Travel Commission
FANR	Food, Agriculture and Natural Resources
GBP	British Pound
GL	Great Limpopo
GM	Greater Mapungubwe
GIZ	German International Cooperation
ICP	International Cooperating Partners
ICT	Information Communication Technology
IUCN	International Union for Conservation of Nature
KAZA	Kavango Zambezi Transfrontier Conservation Area
MAZA	Malawi-Zambia
M&E	Monitoring and Evaluation
MD	Maloti-Drakensberg
MICE	Meetings, Incentives, Conventions and Exhibitions
MoU	Memorandum of Understanding
NGO	Non-Governmental Organisation
NWR	Namibia Wildlife Resorts
PATA	Pacific Asia Tourism Association
PPF	Peace Parks Foundation
PR	Public Relations
RISDP	Regional Indicative Strategic Development Plan
SADC	Southern Africa Development Community
SANParks	South African National Parks
SDGs	Sustainable Development Goals
SMME	Small, Medium and Micro Enterprise
SPTO	Pacific Tourism Organisation
TCU	Tourism Coordinating Unit
TFCA	Transfrontier Conservation Area
TUPNR	Transboundary Use and Protection of Natural Resources Programme
TWG	Tourism Working Group
USA	United States of America
UNWTO	United Nations World Tourism Organisation
VAT	Value Added Tax
WHS	World Heritage Site

EXECUTIVE SUMMARY

This document serves as an integrated TFCA Tourism Market Development Strategy, as envisaged by Goal 3 of the SADC Tourism Programme 2020-2030. It focuses on a selected cross spectrum of seven TFCAs and was compiled through a consultative process involving stakeholder meetings, in-depth interviews and desk analysis.

Situation Analysis
The document provides an overview of existing frameworks for tourism development in TFCAs including the SADC TFCA Program (currently under revision) and the SADC Tourism Program and Costed Action Plan. It also reflects progress made by Boundless Southern Africa in promoting and developing tourism at an overarching SADC level, as well as tourism progress achieved in the individual TFCAs.

It presents the results of interviews and surveys conducted among 20 key TFCA stakeholders and 33 international and regional tour operators. In addition, the document draws on the findings of a benchmark study of five multi-destination, public and private sector tourism organisations, namely Vanilla Islands Tourism Organisation, Pacific Asia Travel Association (PATA), Caribbean Tourism Organisation (CTO), South Pacific Tourism Organisation (SPTO), Africa's Eden and the Classic Portfolio.

Based on these findings the following key opportunities and challenges are to be addressed in the market development strategy:

- Adapting marketing approaches to accommodate variations in TFCA tourism readiness and attractiveness.
- Acknowledging and addressing imbalances in tourism supply among and within TFCAs.
- Strengthening the capacity of SMMEs to tap into tourism value chains.
- Strengthening the focus on regional and domestic markets.
- Improving digital marketing tools and efforts at both BSA and TFCA levels.
- Acknowledging and addressing movement complications and restrictions.
- Promoting and branding TFCAs in a wider destination context.
- Improving private sector buy in and public-private tourism partnerships in TFCAs.
- Strengthening tourism capacity and organisation in TFCAs.
- Crowding in multiple financial and human resources.
- Establishing comprehensive tourism stakeholder and supplier databases.
- Formulating a transparent events strategy.
- Establishing the current nature and extent of tourism in TFCAs.
- Improving measurement and evaluation of marketing impacts.

Market Development Strategy
The document sets out the future direction for market development of TFCAs, including key global travel trends and implications, a market development vision, growth objectives and principles, a source market and market segmentation strategy, core market development goals to be addressed, as well as implementation strategies and activities.

Global tourism market trends and implications for TFCAs include the opportunity to capitalise on the fast-growing preference for sustainable and responsible travel and the demand for authentic, "off-the-beaten-track" experiences; acknowledging time restrictions of most visitors and reducing delays at immigration points and associated procedures; embracing digital, mobile technologies and the shared economy; prioritising visitors health and safety; capitalising on the growing demand for travel among millennials and Generation Z; and capitalising on increasingly segmented demand preferences and market shifts.

Based on the overall vision statement for tourism in SADC, the following tourism vision pertains to TFCAs:

> *"By 2030, sustainable tourism growth in TFCAs will exceed average regional growth levels and tourism will become a major source of income and job opportunities for local communities."*

The strategy is underpinned by *6 key principles*, namely sustainability as cornerstone; striving for partnerships and collaboration; where possible devolving tourism market development responsibilities to the local TFCA level; optimising digital solutions; engaging in targeted marketing and measuring outcomes.

In respect of *branding* of TFCAs, the strategy recommends the following:

- Expanding the overall TFCA brand to include tourism: it is proposed that the name "Transfrontier Conservation Areas" be adjusted to "Transfrontier Conservation and Tourism Areas" (TFCTAs).
- Further strengthening the "endorsed branding" strategy for individual TFCAs by strengthening the individual TFCA brands, while maintaining an association, or endorsement, with the TFCTA mother brand.
- Improving BSA's brand and communication clarity by adding a payoff line as an integral part of its brand identity, e.g.

"Boundless Southern Africa: Promoting tourism in Transfrontier Conservation Areas"; or "Boundless Southern Africa: Promoting Transfrontier Conservation and Tourism Areas".

Four source market target groups are identified, namely:

- Captive markets (Lower growth and value potential, but relatively easy and less costly to penetrate): Domestic Citizens and Residents in Member States and the SADC regional market.
- Core markets (with high growth and value potential, high affinity for travel to TFCAs and easier and less costly to penetrate): UK, Germany, Benelux, France, USA, South Africa.
- Invest markets (with high value and growth potential, more difficult and costly to penetrate): Italy, Scandinavia, India, Middle East, China.
- Opportunity markets (with lower value and growth potential, more difficult to penetrate): Japan, South America, Eastern Europe.

In respect of *target market segments and strategies*, the following market segments are profiled in respect of their characteristics, applicable promotional channels and product development opportunities. An in-depth profile of each of these segments is also provided as an Annexure to the main document.

- Luxury Adventurers: Low volume, high value (priced) tourists who require exclusive and personalised experiences, pampered luxury and unique accommodation and often fly-in to remote locations.
- Mid-market adventurers: Mostly mature, value conscious travellers in search of cautious, "soft" adventure in fulfilling the explorer spirit.
- Intrepid adventurers: Mostly younger travellers who are confident to engage in "hard" exploration and are looking for the authentic Africa. They are prepared to go off the beaten track to less visited places and sacrifice comforts to do so.
- Eco-enthusiasts: A collective segment of niche interest travellers, specialising in environmental and cultural immersion such as bird watching, specialist environmental photography, unique flora and fauna phenomena (e.g. wildlife behaviour,), history and heritage, rock-art, archaeology, astronomy, sport-fishing, etc.
- Adventure sport enthusiasts: A collective segment of small, niche adventurous outdoor sport activity enthusiasts engaged in activities where there is often a significant element of skill and risk involved, such as adventure cycling / mountain biking, multi-day hikes and cycling routes, adventure racing and motorbiking, extreme running, kayaking, triathlon/endurance racing, car rallies, adrenaline sports like paragliding, climbing, etc.

To ensure that product developments match market needs, the Destination Innovation Matrix[1] is applied, based on four key strategic approaches, namely:

- **Consolidation** (improving existing products and leveraging existing markets). Interventions could e.g. include improved border access and immigration procedures to improve ease of travel, expansion and improvement of existing viable events, quality improvements and maintenance of existing products, better marketing techniques to improve the return visitor rate through use of social media, loyalty programmes, special price offers and added value offers, etc.
- **Market Innovation** (using existing products and attracting new markets): Interventions could e.g. include a more aggressive and focused promotion approach, leveraging market linkages and co-packaging with other existing visitor experiences (e.g. key destinations and experiences in areas outside of the TFCAs) and marketing existing products to niche market segments (e.g. ecotourism, photographic tourism, archaeological and paleontological tourism, cultural tourism, adventure tourism, etc.).
- **Experience Innovation** (developing new products and leveraging existing markets): Interventions could e.g. include attracting investment in additional variety of accommodation and campsites, development of more cultural entertainment opportunities, staging additional events, development of new routes and trails, investment in eco and community-based experiences, attracting investment in adventure tourism options, training local specialist guides to offer a variety of experiences, etc.
- **Transformational Innovation** (developing new products and attracting new markets): Interventions could include e.g. an investment drive for the development of products that do not currently exist in some of the TFCAs (e.g. for luxury adventurer safari lodges, spa and wellness experiences; for intrepid adventurers camping sites, local guest houses and homestays; for adventure sport enthusiasts special events, routes and trails; for eco enthusiast eco-walks and routes, cultural excursions, walking safaris, night drives, canoe trips, adrenaline experiences, etc.) and promoting these aggressively to attract new markets and segments.

Based on the challenges identified and the vision and principles outlined above, the following market development goals, strategies and activities will be pursued.

Goal 1: Improving tourism institutional capacity

- **Strategy 1.1: Ensure effective planning:** Develop implementable tourism strategies and action plans for individual market-ready TFCAs; and research the profiles, preferences, purchasing behaviour, etc. of key potential TFCA market segments.

[1] Gardiner, S., & Scott, N. (2018). Destination Innovation Matrix: A framework for new tourism experience and market development. Journal of Destination Marketing & Management, 10, 122-131.

- **Strategy 1.2: Strengthen implementation capacity:** Appoint additional tourism expertise to support the implementation of tourism strategies for individual TFCAs; and appoint TFCA market representatives in key markets.
- **Strategy 1.3: Improve funding for market development:** Create a database of potential tourism funding sources and approach funders for strategy execution; leverage available TFCA tourism funds to establish funding partnerships; establish a joint marketing procedure and mechanism; and ensure suitable and transparent financial management systems.
- **Strategy 1.4: Improve stakeholder collaboration:** Establish strong and effective tourism working groups for TFCAs; and obtain the commitment of member country tourism authorities to actively promote cross-border tourism.

Goal 2: Increasing tourism demand

- **Strategy 2.1: Strengthen TFCA tourism brand awareness:** Tell the TFCA stories in the form of a television, podcast, radio or print publication series; and communicate exceptional nature and cultural events and phenomena in partnership with game rangers, tourism operators and guides.
- **Strategy 2.2: Improve marketing collateral:** Improve and expand the TFCA website portfolio i.e. improve the BSA website to act as a comprehensive, overarching website where each TFCA is fully represented, and populate and maintain separate websites where TFCA's secretariates or management structures have adequate capacity and resources to do so; set up and manage relevant social media platforms; and establish image and video libraries for each TFCA.
- **Strategy 2.3: Maximise digital marketing execution:** Establish links with third party websites, social media channels and other suitable online platforms; collaborate with content contributors and partners in each TFCA to write blog posts and make interesting posts on social media; develop and implement a social media engagement plan; identify and, where appropriate, host influencers (bloggers) in TFCAs; use geotargeting and other targeted advertising and messaging techniques; produce and distribute a quarterly TFCA tourism newsletter; and conduct selective digital advertising in outdoor and nature media as well as on social media channels.
- **Strategy 2.4: Ensure travel trade and media knowledge and coverage:** Establish and maintain a database of international and regional tour operators and media; initiate a marketing and sales training programme to prepare emerging enterprises and entrepreneurs in TFCAs for promoting their offers; host such enterprises on selective BSA exhibition stands; conduct sales visits to international and Southern Africa tour operators offices; arrange an annual TFCA tourism roadshow, alternating in core markets; arrange annual trade familiarisation visits that include lesser known TFCA areas; arrange media exposure visits to TFCAs; and partner with private operators to launch special promotions.

Goal 3: Strengthening product variety and quality

- **Strategy 3.1: Support selective events staged in TFCAs:** Conduct a comprehensive assessment of the status, relevance, impact and lessons learnt from past events staged in TFCAs; and based on the assessment, develop and implement a TFCA event strategy.
- **Strategy 3.2: Develop and execute a TFCA investment and business development strategy:** Develop an investment strategy and action plan covering all TFCAs; execute a 5-year TFCA investment action plan; develop an investor prospectus in attractive format; and develop an investment procedures manual.
- **Strategy 3.3: Plot and develop suitable travel circuits, routes and trails to and in TFCAs:** Identify opportunities for developing and promoting existing and potential circuits and routes; conduct an initial scoping and prioritisation of potential routes and circuits; conduct a detailed assessment of priority selected circuits and routes and formulate a tourism circuit, routes and trails development programme and action plan; establish route development forums for the priority routes; and develop and execute a circuit/route/trail development programme and action plan.
- **Strategy 3.4: Provide tourism support and capacity building for local entrepreneurs and communities:** Develop a SME business development strategy and action plan for TFCAs, to maximise backward (supply chain) and forward (marketing/sales) linkages and capitalise on the growing demand for sustainable tourism; and execute strategy and action plan at TFCA level, in association with BSA, ICPs, NGOs and other relevant partners.

Goal 4: Monitoring tourism performance

- **Strategy 4.1: Create a database of tourism supply in each TFCA:** Establish and populate a suitable digital database system and structure for collecting, recording and managing supply data; and establish a practical process and organisational arrangements to populate the baseline database and maintain and update it on a continuous basis
- **Strategy 4.2: Monitor tourism performance and satisfaction:** Identify and collect baseline and growth statistics regarding suitable indicators of tourism performance in TFCAs e.g. accommodation, employment, immigration, entrances, etc.; where appropriate and possible, conduct visitor and travel trade surveys; and based on the above, produce an annual tourism status and growth report.

Implementation

The market development initiatives for each TFCA should consider the market readiness of the TFCA and where it fits with the destination lifecycle stages. The TFCAs are evaluated and classified in three market-readiness categories, namely:

a) Those that are in the pre-development stages of the destination lifecycle (MAZA, GM), where the focus will mainly be on establishing the TFCA as a tourism destination and raising awareness of its existence and tourism offer.

b) Those that are in the transition from pre-development to development stages of the destination lifecycle (AR, GM, KT, L and MD) where the focus will mainly be on establishment/awareness with an incremental shift towards consolidation/conversion (towards visitor arrivals and booking transactions).
c) Those that have already entered the development stage of the destination lifecycle (KAZA and GL) where the focus will shift towards product consolidation (improved variety, spread and quality of services and activities) and improving conversion.

The implementation action plan summarises the goals, strategies and actions and, for each action:

- Indicates the priority that should be given to it.
- Sets a timeframe.
- Indicates which party should lead and support its execution.
- Sets a measurable success indicator(s).

1. INTRODUCTION

1.1 BACKGROUND

While tourism is a growing and important economic sector for SADC Member States, the region is yet to realise its full tourism potential. In 2019, prior to the outbreak of the Covid-19 pandemic, SADC Member States received less than 2% of global tourism arrivals[2].

SADC Transfrontier Conservation Areas (TFCAs) are home to impressive natural and cultural attractions such as the Kruger and Chobe National Parks, the Fish River Canyon, The Tsodilo Hills WHS, the Okavango Delta, the Victoria Falls, and ancient rock painting of the Maloti-Drakensberg Mountain Range. This creates a strong basis for the development of authentic tourism products that are unique to Southern Africa and as such, TFCAs are an ideal platform for promoting sustainable tourism growth in the region. Such growth will contribute to employment generation, women and youth empowerment, livelihood diversification and poverty reduction in rural and remote areas, especially in communities living adjacent to these major attractions. Additionally, since tourism growth contributes to an increase in livelihood options for local and rural populations, transboundary and multi-country tourism development for TFCAs and their surrounds has substantial potential to reduce the pressure on exploitation of natural and cultural resources.

1.2 STUDY SCOPE AND OBJECTIVES

TFCAs require marketing and investment promotion interventions that go beyond conventional marketing, towards market development which focuses on both supply and demand sides, and that adds value to the tourism experience in a manner that expands the benefits of tourism to more than one country. This approach is intended to complement individual country efforts, while diversifying SADC's tourism offerings.

The need for SADC TFCAs to adopt a strategic market development approach is justified by Goal 3 of the SADC Tourism Programme 2020-2030 and its related Costed Action Plan, both of which have been approved by the SADC Council. Goal 3 of the SADC Tourism Program, namely "Developing Tourism in Transfrontier Conservation Areas (TFCAs)", has "TFCA Tourism Market Development" as one of its implementation strategies. This includes the formulation of a well-researched strategy to expand TFCA marketing drive as a key implementation action.

As such, this document serves as a comprehensive, prototype TFCA Tourism Market Development Strategy as envisaged by Goal 3 of the SADC Tourism Programme 2020-2030. It aims to provide an overall approach and framework for marketing of TFCAs, with a focus on creating an overarching marketing strategy and action plan for seven targeted TFCAs (as per Table 1 below). These seven TFCAs offer sufficient product and services to be considered "market ready".

Table 1: The seven TFCAs that are the focus of the

1	Kavango Zambezi Transfrontier Conservation Area (Angola, Botswana, Namibia, Zambia, Zimbabwe)
2	Great Limpopo Transfrontier Conservation Area (Mozambique, South Africa and Zimbabwe)
3	Maloti Drakensberg Transfrontier Conservation Area (Lesotho and South Africa)
4	Lubombo Transfrontier Conservation Area (Eswatini, Mozambique and South Africa)
5	/Ai/Ais-Richtersveld Transfrontier Park (Namibia and South Africa)
6	Malawi Zambia TFCA (Malawi and Zambia
7	Greater Mapungubwe TFCA (Botswana, South Africa, and Zimbabwe)

More specifically the document includes:

- An analysis of the current tourism marketing situation in TFCAs.
- A strategic framework for tourism market development in TFCAs, including the marketing of existing products and the development of new ones.
- Proposed activities for expanding the TFCA marketing drive, including partnerships with the private sector.
- Proposals for developing and promoting cross-border routes and itineraries.
- Proposals for supporting the development and growth of cross-border events in TFCAs.
- An action plan with timelines and estimated costs.

[2] UNWTO, 2022. Tourism Barometer, December 2022

1.3 METHODOLOGY

The following methods were employed in drafting the report.

- **Primary market research and assessment, including:**
  - An online survey, on the SurveyMonkey platform, among 33 international tour operators and trade partners who offer multi-country tours in Southern Africa; of which 20 include TFCAs in their offers. The results of the survey are presented in Annexure B.
  - Opinion leader interviews with 20 key stakeholders, including TFCA coordinators and private operators. Key results of these interviews are presented in Annexure C.

- **Secondary research:** Secondary analysis was conducted as follows:
  - Desk research and analysis of available policy, planning and operational documents.
  - An in-depth market segment analysis, profiling the various target market segments and providing contact information for tour operators, media and social media channels relating to each of the target market segments; attached and Annexure A.
  - A benchmark study of the objectives and strategies of six comparator organisations namely the Pacific-Asia Travel Association (PATA), Caribbean Tourism Organisation (CTO), Vanilla Islands Tourism Organisation, Pacific Tourism Organisation (SPTO), Africa's Eden and the Classic Portfolio; attached as Annexure D.

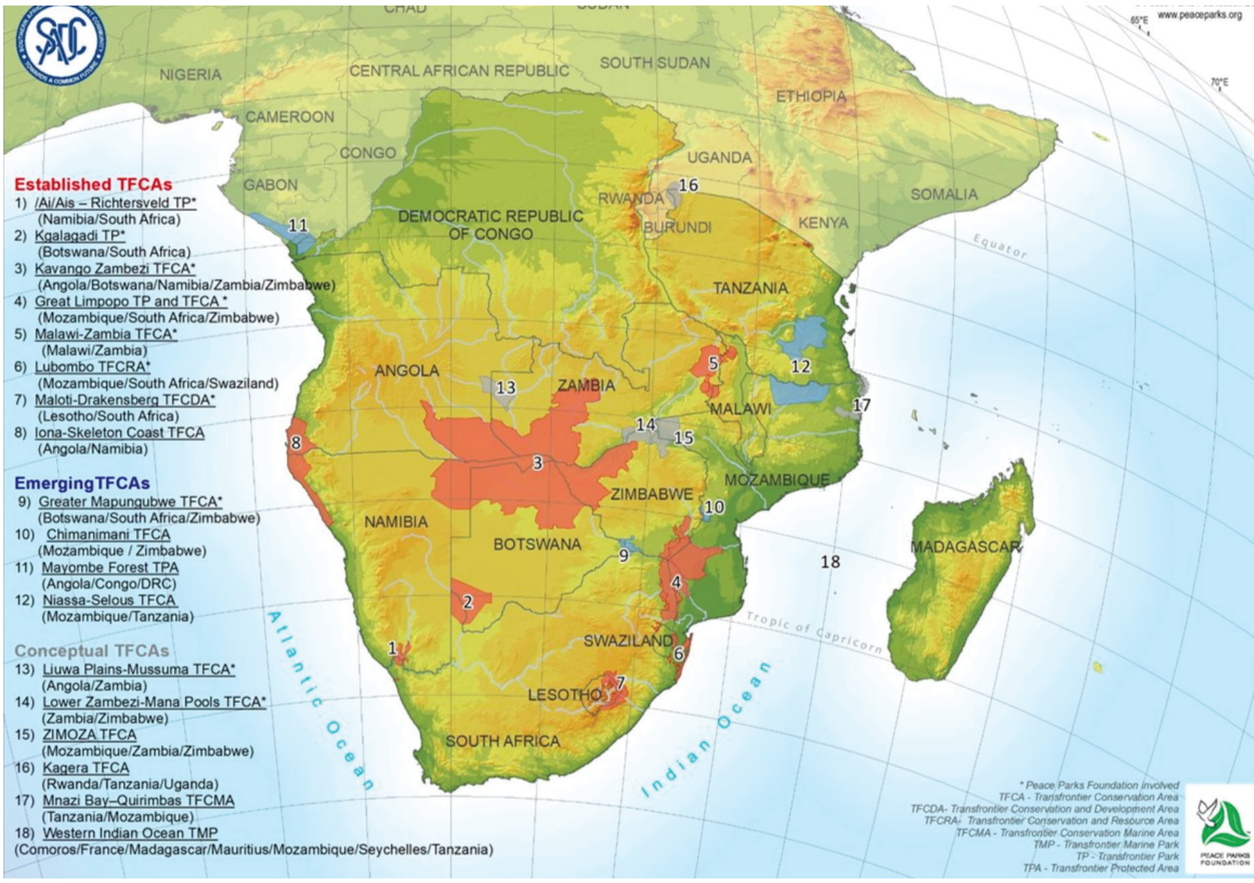
2. CURRENT SITUATION

2.1 GUIDING FRAMEWORKS FOR DEVELOPING TOURISM IN TFCAS

2.1.2 The SADC TFCA Programme and institutions

Currently there are 18 TFCAs in SADC, which are at various stages of development (see Figure 1 below). The TFCAs are of major importance to future tourism growth in SADC, since they envisage the creation of large conservation areas that, once functional will offer visitors a huge diversity of high-quality nature experiences, in both terrestrial and marine environments and including a range of World Heritage Sites. In addition, the development of tourism will provide communities in and adjacent to these areas various tourism-induced livelihood opportunities.

Figure 1: Status of TFCAs in SADC (2022)



The SADC TFCA Programme (2013[3]) has 7 key components with specific objectives, activities and outputs to be carried out at the regional, sub-regional and national levels. These include:

- Component 1: Advocacy and Policy Harmonisation across TFCAs in the region.
- Component 2: Enhancement of financing mechanisms for TFCAs, by initiating and supporting financial support from ICPs or through the establishment of a regional fund specifically for the development of TFCAs in the SADC region.
- Component 3: Capacity building for TFCA stakeholders.
- Component 4: Establishment of data and knowledge management systems.
- Component 5: Enhancement of local livelihoods, focusing on demonstrating TFCA benefits to local communities, increased private and public investments in cross border infrastructure and tourism projects and facilitating cross border access to local and regional markets that can further increase incomes. Key activities include, “To develop a portfolio of transboundary infrastructure, trade and tourism projects within TFCAs.” and “Convene investor conferences to encourage investment in these transboundary projects.”
- Component 6: Reducing vulnerability of ecosystems and people to the effects of climate change.
- Component 7: Development of TFCAs into marketable regional tourism products. Key activities include to “Develop and market regional flagship cross-border tourism products”, and to “Develop guidelines to facilitate equitable joint venture partnerships between local communities and the private sector.”

[3] Southern African Development Community, (2013): SADC Programme for Transfrontier Conservation Areas, SADC Secretariat, Gaborone, October 2013

The SADC TFCA Programme is implemented at three levels: (i) the SADC Secretariat; (ii) the national Member State level; and (iii) the TFCA level. At the SADC Secretariat level, the FANR Directorate will be responsible for the overall policy guidance, through various SADC protocols, and assist in the harmonisation of natural resources management and tourism development policies and legislation. Staffing consists of a TFCA Programme Officer (Head of TFCA Unit in FANR) and a TFCA Assistant Programme Officer: responsible for technical and administrative support.

At Member State level, national TFCA focal point persons are appointed by each Member State to deal with TFCA issues.

At TFCA level, only a few of the TFCAs (i.e. KAZA and GLTFCA) have established dedicated implementation capacity. KAZA now has a Secretariat with full time staff, while GLTFCA has appointed a full time TFCA Coordinator.

As explained in the section 2.1.3 below, tourism development and marketing of TFCAs has since 2022 become the responsibility of the Tourism Coordinating Unit (TCU) in SADC and the tourism component of the TFCA Programme will in future be addressed through the Tourism Programme.

In respect of Component 7 of the TFCA Programme (2013), i.e. the component dealing with tourism, as indicated in Table 2 below, the review found that:

- *Growth in tourism value and volume of sustainable tourism has been only partially achieved.* With reference to the question on cross-border movement being eased, 48% of the respondents indicated that this output had been respectively fully or partially achieved, while 52% regarded this output as having only been initiated or that no progress had been made.
- *Limited progress has been made with inculcating more equitable partnerships between private sector and communities in the tourism industry.* Regarding the establishment of sustainable private sector and community partnerships in tourism, two-thirds of respondents indicated that this had only been initiated or that no progress had been made.

Table 2: Assessment of TFCA Programme Component 7: Marketable regional tourism products

SADC TFCA Programme (2013) Component Objectives	Fully Achieved	Partially Achieved	Initiated	Limited Progress
7. Development of TFCAs into marketable regional tourism products				
7.1 Increase the value and volume of sustainable nature-based tourism flows to the region				
7.2 Inculcate more equitable partnerships between private sector and communities in the tourism industry				

The SADC TFCA Programme was under revision at the time of formulating this report[4]. Some initial tourism recommendations that have emerged from the review are:

- Pursue active public-private-community partnerships at the TFCA level
- Opportunity for collaboration of National Tourism Marketing Agencies to profile TFCAs
- Stronger focus on domestic and regional tourism, to build resilience against future shocks
- Increase the positive impact of the tourism sector at the local level, design clearer pathways for communities to increase their share, develop investable community/based and supported tourism products, access the tourism value chain and incorporate and integrate the culture and community aspects into the dominant nature offering more consistently and creatively
- Each TFCA to develop a clear unique selling proposition(s)
- More joint marketing and integrated tourism development approaches needed at transboundary levels
- Support to implement cross-border tourism product development, using the toolbox – set of tools and workshops and best practices

2.1.3 The SADC Tourism Programme and Costed Action Plan

The guiding frameworks for tourism at regional level in Southern Africa are the SADC Tourism Programme 2020 – 2030 and the associated Costed Action Plan (CAP), both of which have been approved by the Joint Meeting of SADC Ministers responsible for Environment, and Natural Resources, Fisheries and Aquaculture, and Tourism. Together they serve as a roadmap to guide and coordinate the development of a sustainable tourism industry in the region, and to facilitate the removal of barriers to tourism development and growth.

The SADC Tourism Programme will be (is being?) implemented in pursuance of five strategic goals which are to: (1) Stimulate visitor movement and flow to and within the region, (2) Improve and protect the tourism reputation and image of

[4] Piet Theron Consulting (2023): SADC TFCA Programme Review 2013, Situational Analysis Report, Towards a Revised Framework for the TFCA Programme

the region, (3) Develop tourism in Transfrontier Conservation Areas (TFCAs), (4) Improve the quality of visitor experiences and satisfaction levels, and (5) Maximise tourism partnerships and collaboration.

This assignment deals specifically with tourism in TFCAs and as such it responds to Goal 3 of the Tourism Programme. The following Strategies and Activities are included under Goal 3.

Table 3: Strategies and activities under Goal 3 of the SADC Tourism Program

Strategy	Programme Activities (Numbered as per Tourism Programme Document)
Goal 3: Developing Tourism in Transfrontier Conservation Areas (TFCAs)	
Strategy 3.1: TFCA Market Development	• Formulating a well-researched market development strategy for TFCAs
	• Expanding TFCA marketing drive and initiatives
	• Developing and promoting cross-border routes and itineraries
	• Supporting the development of events in TFCAs
Strategy 3.2: Investment Facilitation Programme	• Establishing and promoting a TFCA Investment drive
	• Promoting and implementing the SADC guideline on cross-border tourism product development in TFCAs
Strategy 3.3: Rural Economic Inclusion Programme	• Launching cultural tourism initiative for TFCAs
	• Promoting operational and standards guidelines for community product development

2.2 BOUNDLESS SOUTHERN AFRICA (BSA) TFCA MARKETING PROGRAMME

2.2.1 BSA establishment and rationale

The Boundless Southern Africa brand was developed as an umbrella brand for marketing TFCAs as tourist and investment destinations in a consolidated and coordinated manner. The brand was endorsed by Ministers of nine participating countries and was launched in May 2008. The Boundless strategy aims to increase the tourism potential of southern Africa by positioning TFCAs as preferred tourist and investment destinations in the region, through consolidating multi-national products into a comprehensive and marketable regional tourism product.

To give effect to concept of Boundless Southern Africa a TFCA Coordinating Unit was established within the South African Department of Environmental Affairs and Tourism (DEAT) in 2007. The strategy included a two-phased approach, namely:

- Phase I: The Boundless Southern Africa brand to focus marketing efforts on 7 TFCAs, these being: /Ai /Ais-Richtersveld, Kgalagadi, Kavango-Zambezi, Greater-Mapungubwe, Great Limpopo, Lubombo and Maloti-Drakensberg.
- Phase II: At the Joint meeting of SADC Ministers responsible for Environment and Natural Resources, Fisheries and Aquaculture and, Tourism held 23-24 November 2017, Ministers approved the implementation of Phase II of the TFCA Tourism Development Strategy, which would see the Boundless Southern Africa initiative cover all 18 TFCAs throughout SADC. Phase II would also be used to ensure the development and sustainability of all TFCAs across the region based on the following lessons learned:
    - the need to coordinate TFCA destination marketing efforts better and to use one common brand
    - the need to develop more cross-border tourism itineraries and routes through more TFCAs; and
    - the need to support work towards removing obstacles that hinder cross-border tourism development in TFCA.

During the Joint Ministers meeting of November 2017, Ministers approved the implementation of Phase II of the TFCA Tourism Development Strategy and directed the Secretariat to investigate the feasibility of and modalities of the proposal to incorporate Boundless Southern Africa's activities in RETOSA Strategy and the relocation of the Boundless Southern Africa in RETOSA.

2.2.2 BSA Feasibility Study and Roadmap

However, following the winding up of RETOSA and pursuant to the adoption of the SADC Tourism Programme and Tourism Costed Action Plan the Joint Committee of SADC Ministers responsible for Environment, and Natural Resources, Fisheries and Aquaculture, and Tourism adopted a Boundless Southern Africa Feasibility Study and Roadmap.

The BSA Feasibility Study and Roadmap, among others, builds on the SADC Tourism Programme and outlines the activities and actions that BSA would be mandated to implement under Goal 3 of the SADC Tourism Programme and CAP.

The BSA Feasibility Study and Roadmap proposes the integration of BSA within the SADC Secretariat tourism unit.

This document deals with Strategy 3.1 of Goal 3 of the SADC Tourism programme, namely " TFCA Market Development". The following activities and actions relating to Strategy 3.1.

Table 4: Activities and actions of the TFCA Tourism Programme that deal with Strategy 3.1 "TFCA Market Development

Activities	Actions
16. Formulating a well-researched market development strategy for TFCAs	• Assess progress made and outcomes achieved in BSA Phase 1 strategy, identity gaps and successes and incorporate lessons learnt during Phase 1 in Phase 2.
	• Review the BSA Phase 2 strategy and formulate a well-researched, practical and implementable market development strategy for TFCAs, indicating: • A clear market positioning for each TFCA • market segments and products that will be promoted and developed • priority TFCAs that are ready to take to the market in respect of access, accommodation, amenities, attractions and activities • activities to be undertaken to maximise TFCA market growth
	• Present the strategy to relevant TFCA structures for adoption and sign-off and to the Committee of Tourism Ministers for approval
17. Expanding TFCA marketing drive and initiatives	• Develop suitable marketing tools at both the umbrella SADC TFCA level and for individual TFCAs, with an emphasis on digital marketing collateral but also including traditional marketing approaches such as exhibiting at suitable travel trade and consumer exhibitions and fairs.
	• Based on the recommendations of the TFCA market development strategy, conduct travel trade and media educational trips
	• Conduct a focused online media drive through social media (especially Instagram, YouTube, LinkedIn, TikTok and Facebook) showcasing exceptional, breath-taking scenes and nature and culture occurrences, sustainable tourism achievements, community involvement and conservation success stories to create viral traction of the attractiveness of TFCAs.
18. Developing and promoting cross-border routes and itineraries	• Establish a comprehensive database of regional tour operators and continuously advise them on itineraries and experiences that could be taken to market and by exposing operators to such potential itineraries through familiarisation trips
	• Appoint a service provider to research and formulate proposals for packaging and promoting maritime route developments among the Indian Ocean islands and linking mainland routes with maritime routes ("Bush-to-beach")
	• Map out suitable itineraries (routes, facilities, attractions, experiences) and: • ensure these are incorporated in digital (GPS) mapping systems • incorporate them on the regional website, tourism marketing websites of Member States, private partner websites and other digital platforms • where appropriate, print maps to distribute via tour operator partners, vehicle rental companies and as inserts in off-road magazines • Partnerships with travel guide and map development and publishing companies to create awareness and provide information on tourism in TFCAs, for example, Tracks 4 Africa maps of Southern Africa, Lonely Planet, Map Studio.
	• Conduct and communicate the results of a bi-annual survey among regional tour operators to assess the extent of route patronage, challenges encountered by tour operators and individual travellers on regional routes in respect of access, infrastructure, immigration, safety etc. and raise issues with SADC structures and Member States.

19. Supporting the development of events in TFCAs	•	Conclude the formulation SADC TFCA guidelines on the development of cross-border events, to guide decisions on the type of events to canvas, the kind of support SADC is able to offer and how the best possible publicity can be derived from events.
	•	Communicate the event development guidelines to stakeholders involved in the development and promotion of TFCAs
	•	Assist event organisers with access to authorities, understanding event regulations and approval regulations and procedures and obtaining the necessary approvals. Develop a proposed cross-border event application form and information database.
	•	Support events where possible through publicity coverage, online exposure and other possible channels and platforms.

2.3 PROGRESS WITH TOURISM MARKETING OF TFCAS

2.3.1 BSA marketing progress

Since its inception in 2007 the Boundless Southern Africa Coordinating Unit has worked in close coordination with the SADC TFCA Network and its Tourism Community of Practice, officials of relevant Member States, individual TFCA structures, private operators, International Cooperating Partners (ICPs) and civil society organisations, to implement interventions aimed at achieving the objectives of the TFCA Strategy for 2010 and Beyond.

2.3.1.1 Key activities since BSA inception

Progress has been recorded in several areas. The activities that have been launched since the inception of the programme includes the following:

Marketing, promotion and branding

- Development of the Boundless Southern Africa marketing brand for TFCAs
- Generic awareness raising of TFCAs as exciting cross-border tourist destinations
- Profiling innovative cross-border itineraries at the Inaugural Boundless Southern Africa Expedition in 2009 with Kingsley Holgate, and the Boundless Expedition to the UNWTO General Assembly held in Victoria Falls in 2013
- Exhibiting at relevant Travel Shows such as the annual Tourism Indaba in South Africa, Sanganai Regional Tourism show in Zimbabwe, Namibia Tourism Expo, Getaway shows, Meetings Africa, Festival of Africa and WTM Africa and ITB in Berlin
- Exhibiting at international tourism and conservation events such as the UNWTO General Assembly in Victoria Falls, the World Adventure Summit in Namibia and the VI IUCN World Parks Congress in Sydney and the CITES CoP17 in Johannesburg
- Hosting of tour operator and travel media familiarization tours to TFCAs
- Arranging media exposure of tourist attractions in TFCAs via different channels including National TV stations, CNBC Africa, Africa Magic and Print Media

Cross-border product development

- Supporting and marketing authentic cross-border tourism products and events in TFCAs such as the Nedbank Tour de Tuli, Desert Knights, Richtersveld and Mapungubwe Transfrontier Wildruns
- Identify critical infrastructure projects in TFCAs for inclusion into the TFCAs into SADC Regional Infrastructure Development Master Plan (RIDMP)

Investment promotion

- Developed a pipeline of bankable tourism investment opportunities in TFCAs
- Organise Boundless Southern Africa Investment Conference in 2008 and development of investment catalogue to promote tourism investment opportunities in TFCA
- Promotion of tourism investment opportunities to potential investors to secure funding for development and/or operation
- Coordinated the process of developing tourism concession guidelines for TFCAs in SADC (in collaboration with SADC/GIZ Transboundary Use and Protection of Natural Resources Programme)

Support to TFCA processes in SADC

- Supported the development of the SADC TFCA Programme which is aimed at supporting and guiding TFCAs planning and development processes as well as to coordinate mobilization of financial and technical resources.

- Coordinated the process of developing tourism concession guidelines for TFCAs in SADC (in collaboration with SADC/GIZ Transboundary Use and Protection of Natural Resources Programme)
- Supported the process for developing SADC TFCA cross-border event guidelines (in collaboration with SADC/GIZ Transboundary Use and Protection of Natural Resources Programme)

2.3.1.2Support to TFCA tourism by SADC/GIZ TUPNR

Since 2012, the Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH (GIZ) has supported the Southern African Development Community (SADC) Secretariat Food, Agriculture and Natural Resources (FANR) Directorate and Member States with the SADC/GIZ programme titled 'Transboundary Use and Protection of Natural Resources (TUPNR) in the SADC Region. In 2020 this project was followed up by the SADC/GIZ programme titled Climate Resilience and Natural Resource Management (C-NRM). The support is aimed at improving the implementation of SADC protocols and strategies for sustainable natural resource management by regional, national and local actors.

The Programme supports implementation of the Protocol on Wildlife Conservation and Law Enforcement and the Protocol on Forestry; the Protocol on the Development of Tourism; the SADC Law Enforcement and Anti-Poaching Strategy (2016-2021); as well as the SADC Transfrontier Conservation Areas Programme.

Tourism technical support projects funded through TUPNR have included:

- Support for development of events such as the Desert Kayak Trails and Lubombo Ecotrails
- Development of the SADC Guideline on Tourism Concessions in TFCAs
- Development of the SADC Tourism Programme
- Development of the SADC Guideline on cross-border tourism products in TFCA Guideline in TFCAs
- Support for a range of BSA marketing activities, as outlined below.

2.3.1.3 Recent BSA marketing activities and expenditure

During the period 2019 to 2022 various TFCA marketing activities were undertaken by BSA, mainly with the support of GIZ. These can be summarised as follows:

Table 5: Marketing activities conducted by BSA, 2019 onwards

	All	AR	KAZA	MAZA	GM	GL	L	MD
Digital media and marketing								
BSA Website	x							
Social media campaign						x	x	x
Travel Trade and Media Engagements								
Attendance of regional travel trade shows (7)	x							
Attendance of international travel trade shows ITB Berlin (11)	x							
E-learning programme for travel interme-diaries						x		x
Tour operator partnerships			x (15)			x (1)	x (1)	
Familiarisation and press trips		x	x (2)	x		x	x	x
Promotional materials								
TFCA promotional brochures		x	x	x (TBC)	x (in process)	x	x	x
Video and image library		x	x	x			x	
Travel map (Tracks4Africa)			x					
Support for outdoor and adventure events		x (2)			x			x
Technical support								
Database of tourism offerings		x	x			x	x	x
Analysis and report of Covid-19 impact			x			x		
Signage guidelines produced						x		

Table 6: Overview of TUPNR Workshops and Trainings Budget expenditure February 2019-March 2021[5]

Activity		Expenditure (Euro)
1	ITB 2019	1.582,07
2	Project Inception	3.299,44
3	ITB 2020	10.590,57
4	ITB 2021	3.772,03
5	Indaba 2020	
6	BSA Memberships	2.299,60
7	Other shows	9.514,57
8	Fam Trips	3.898,45
9	Press Trips / SMC	12.434,70
10	Website & Social Media	4.883,67
11	B2B & B2C Tools	2.627,99
12	Workshops	3.626,63
13	Other	26.455,80
	Sum	**84.985,52**
	Variance	**15,014.48[6]**

2.3.2 Marketing at Individual TFCAs level

BSA, through financial support of GIZ has pursued the above mentioned initiatives to the benefit of the various TFCAs. The following section provides and overview of tourism marketing initiatives that have been undertaken.

2.3.2.1 Branding and positioning

Six of the TFCAs, i.e. /Ai /Ais-Richtersveld Transfrontier Park (ARTP), Great Limpopo Transfrontier Conservation Area (GLTFCA), Kavango-Zambezi Transfrontier Conservation Area (KAZA), Kgalagadi Transfrontier Park (KTP), Lubombo Transfrontier Conservation and Resource Area (LTFCA) and Maloti-Drakensberg Transfrontier Conservation Area (MDTFCA) have designed logos, which are used on marketing materials such as the BSA website and promotional brochures. None of the TFCAs have developed comprehensive destination branding strategies, brand identities that reflect the brand promises and supportive brand application manuals.

Logos and brand guidelines are under development for Greater Mapungubwe and for Malawi-Zambia, while the KAZA Secretariat has awarded a contract for the development of a new brand strategy and visual identity.

Figure 2: TFCA current destination logos

[5] TUPNR Close out Report March 2021

[6] The remaining budget was spent during the project extension period on designing and producing brochures and a social media campaign covering 3 TFCAs

The following points are noted:

- The identities generally depict exceptional selling points of the various TFCAs, i.e.:
  - ARTP Natural landscape and Nama culture
  - GLTFCA Wildlife
  - KAZA Wildlife and nature
  - KTP Wildlife
  - LTFCA Landscape and ocean/water
  - MDTFCA Culture

- While "Transfrontier Conservation Area (TFCA)" is generally used as a collective term when referring to these areas, the terminologies used by the individual areas differ, e.g. Transfrontier Park (ARTP, KTP), Transfrontier Conservation Area (GLTFCA, KAZA), Transfrontier Conservation and Resource Area (LTFCRA), and Transfrontier Programme/Project (MDTFP).

2.3.2.2 Tourism marketing progress

The following Table 7 provides an overview of the current situation regarding marketing of the TFCAs. The following findings emerge:

- The TFCAs are well established with formal agreements and steering committees established.
- All the TFCAs have appointed coordinators, although for four of the TFCAs coordinators only represent one partner country.
- Dedicated and staffed implementation arrangements (secretariats) have been established for KAZA and Great Limpopo TFCAs. TFCA coordinators and focal points for the other TFCAs are staff of government ministries, with various responsibilities and reporting lines.
- Two TFCAs (KAZA and ARTP) have set up accounts (in TFCA Secretariates, partner organisations or member state parastatal organisations) to handle financial transactions on behalf of the TFCA.
- Only KAZA, Maloti-Drakensberg and Great Limpopo (recently) have established tourism working groups where the various tourism stakeholders meet to address tourism aspects. Only Maloti-Drakensberg and KAZA TFCA's tourism working groups are active and meet on a regular basis.
- None of the TFCAs have comprehensive tourism strategies to guide their tourism activities. A tourism strategy has been commissioned and is in process for Great Limpopo, while the Joint Management Plan for Songimvelo-Malolotja (a sub-TFCA of the Lubombo TFCA) contains a tourism section.
- Except for ARTP (due to the closure of Sendelingsdrift) and MAZA, visitors are able to cross borders through an official border post(s) within the boundaries of the TFCAs.
- None of the TFCA coordinating points have compiled a representative database of TFCA tourism accommodation capacity. However, except for MAZA all TFCA coordinators have indicated that the TFCAs offer both serviced and self-catering accommodation. It is clear that the actual accommodation capacity differs greatly among TFCAs in respect of accommodation volumes, quality and spread.
- Except for KAZA, where the Secretariat has invested in a website and recently launched various tourism marketing and branding initiatives, tourism marketing progress, preparedness and capacity is virtually non-existent at TFCA level.
- Member country tourism authorities are not actively promoting TFCAs and not including TFCA areas in their destination marketing initiatives.

Table 7: Summarised status of tourism progress in the TFCAs

Aspect	Indicator	AR	KT	KAZA	MAZA	GM	MD	GL	L
Organisational/ legal status	Treaty, MoU or agreement signed by all governments	√	√	√	√	√	√	√	√
	Active TFCA coordinating/steering committee with all countries represented	√	√	√	√	√	√	√	√
	Full time or part time, dedicated coordinator for the TFCA employed	X	X	√	Zambia Only	X	√	√	√
	Executive mechanism/Secretariat with legal powers established	X	X	√	X	X	X	√	X
	Secretariat or coordinating body has established a mechanism/account to transact, receive and spend funds	√	X	√	X	X	X	X	X
	Tourism working group formed and meets regularly (please provide minutes of last 2 meetings)	X	X	√	X	X	√	√(new)	X
	Tourism strategy developed?	X	X	X	X	X	X	Tourism Strategy in process	Only for Songimvelo-Malolotja
Access	Visitors are able to cross (all) borders by vehicle, while remaining within the boundaries of the TFCA	X	√	√	√	√	√	√	√ Partially
	There is a full-time operational border post(s) that allows visitors to cross borders between all countries while remaining within the boundaries of the TFCA	√ (Sendelingsdrift in process of reopening)	√	√	X	√	√	√	X
	Where no full-time operational border post, there is a working immigration arrangement in place that allows visitors to cross borders between all countries while remaining within the boundaries of the TFCA	X			X			√ Access facility in process	X
	There is a full-time, operational border post(s) very close to the boundaries of the TFCA that allows visitors to cross borders between all countries	√	√	√	√	√	√	√	√
	Large parts of the TFCA is accessible without four-wheel drive	√	X	√	X	√	√	X	√

Aspect	Indicator	AR	KT	KAZA	MAZA	GM	MD	GL	L
	Most parts of the TFCA is accessible with four-wheel drive	√	√	√	√	√	√	√	√
Accommodation	There is registered, serviced accommodation within the boundaries of the TFCA	√	√	√	√ Limited	√	√	√	√
	There is registered, self-catering accommodation within the boundaries of the TFCA	√	√	√	√ Limited	√	√	√	√
	There are official camping sites within the boundaries of the TFCA	√	√	√	X	√	√	√	√
Activities	Other than at lodges and resorts, there are tourism activity providers (e.g. nature and adventure guides and operators, cultural villages/ tour providers, etc.	X	X	√	X	√	√	√	√
Tourism marketing resources	A dedicated marketing plan has been formulated for the TFCA	X	X	X	X	X	X	X	X
	The TFCA has a dedicated tourism marketing budget	X	X	√	X	X	X	X	X
	Marketing initiatives, other than those by BSA, have been undertaken during the past year, or are being undertaken specifically to promote the TFCA in its totality	X	√	√	X	√	√	X	X
	The TFCA has a dedicated, up to date tourism website (indicate website address)	X	X	X	X	X	X	X	X
	The TFCA has a dedicated tourism brochure	√	X	√	X	X	√	√	√
	The TFCA has active social media channels	X	X	X	X	X	X	Not updated	X
	The TFCA is included in more than 3 tour operator programmes	√	√ SA	√	X	√ Bots	√	√	X
	The TFCA is being actively marketed by member country tourism authorities, e.g. it has a dedicated representation on the website, in brochures, on social media channels, etc.	X SANParks? NWR?	√ Bots and SANParks?	X	X	√ Bots	X	X	X

2.4 STAKEHOLDER VIEWS

As indicated in Section 1.3, two methods were employed to test stakeholder views regarding marketing of TFCAs, namely:

- Opinion leader interviews with key public and private sector stakeholders, with key results presented in Annexure C.
- An online survey among international tour operators (based internationally and in Southern Africa). Detailed survey results are presented in Annexure B.

2.4.1 TFCA stakeholders

A detailed report with results of opinion leader interviews conducted with 20 key TFCA stakeholders is attached as Annexure C. The main findings are summarised below.

Branding

- Boundless Southern Africa has some brand equity, but it lacks a clear focus and is under-resourced and not strategic in its marketing and communications approach. Broad support for it remaining as an umbrella organisation to market TFCA concept, and individual TFCAs, particularly due to its "neutrality".
- The diversity and differentiated offer with each TFCA requires each to have its own identity and brand.
- The appeal of existing destination brands should be leveraged and linked for the benefit of those that are lesser known.

Product packaging

- Linkages, circuits, and itineraries are key if the TFCA vision of people movement is to be ensured, but this will require work done to improve accessibility.
- One cannot market what does not exist – start with the fundamentals such as accessibility and product before you promise what cannot be delivered.

Promotion

- The overall view is that BSA should promote awareness of the TFCA concept and tourism possibilities, and differentiate between B2B and B2C strategies.
- The TFCAs should drive their own marketing strategies and tactics, with BSA providing support and guidance with e.g. technical planning, information, contact databases, possibly shared marketing services and other aspects of communal value to the TFCAs.
- A marketing strategy and plan for each is required to ensure that tactics are not run ad hoc.
- There is opportunity in leveraging special interest segments, such as adventure tourism, cultural tourism.
- Empower the private sector to promote the TFCA – they are the ones who can sell the destination.

Organisation

- Enrol the private sector and community in the vision of the TFCA – explaining the importance of the TFCA and the benefits of its success to them, and to individuals.
- The siloed approach has been hugely damaging to the success of TFCA tourism marketing. Each country, province or region needs to be equally invested and interested in promoting the TFCA – a joint marketing committee or marketing working group is required and each TFCA should have an active Tourism Working Group.
- For marketing to be effective, certain enabling factors must be fixed, most notably accessibility. Focus less on the long-term plays (establishment of a univisa) and more on the practical quick-win short-term plays (reducing costs and barriers of obtaining visas, access, infrastructure).

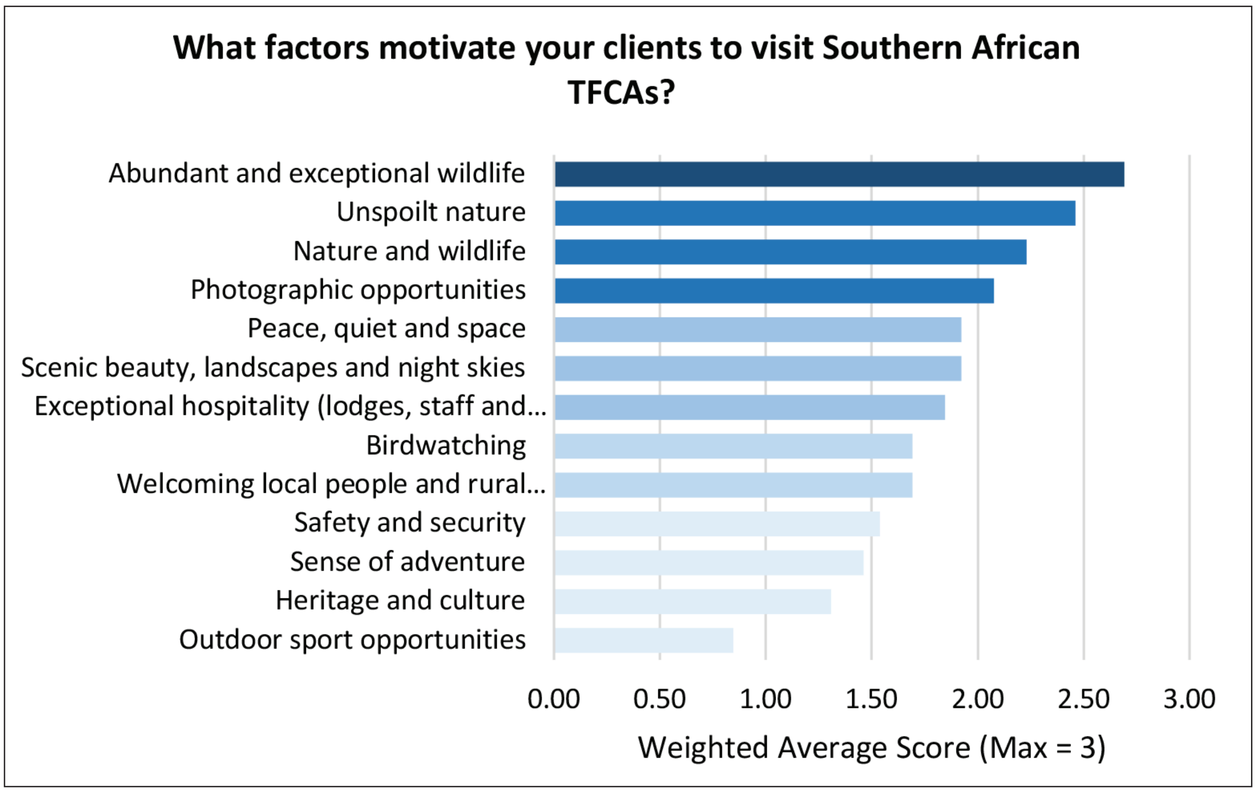
2.4.2 International tour operator views

A detailed report of an online survey among 33 international tour operators, of which 20 indicated that they were either "familiar", or "very familiar" with the concept of TFCAs is attached as Annexure B. Their views are summarised as follows:

- **Key concerns are economic value (pricing) and logistics:** The 3 issues that their customers are most concerned about in the current travel environment are a) poor economic conditions and rising cost of travel; logistical bottlenecks at airports, immigration, etc. and personal safety (44% of mentions)
- **Sustainable tourism management is of growing importance:** Sustainable tourism management is gaining increasing importance in terms of whether a customer chooses a destination or a provider.
- **Respondents are only familiar with the KAZA and Great Limpopo TFCAs.** Tour operators polled are most familiar with KAZA and Great Limpopo TFCAs, with low levels of familiarity with all of the remaining TFCAs.

- **Nature and wildlife are the main motivating factors for visiting TFCAs.** Concepts that come to mind when they think of TFCAs, are mostly related to nature, wildlife and associated photography.
- **Community based, cultural and adventure tourism are supportive, rather than primary motivators.** Community based tourism, local culture, local hospitality and adventure experiences scored low relative to nature, wildlife and scenery.
- **This puts some TFCAs at an advantage.** These findings show that perceptions of TFCAs among the travel trade and consumers remain highly linked to wildlife conservation, putting them at an advantage and posing a challenge for TFCAs like /Ai /Ais-Richtersveld, Maloti-Drakensberg and Lubombo TFCAs, where wildlife concentrations and migration is limited.

Figure 3: Factors that motivate respondents' clients to visit TFCAs



- The tourism growth potential for TFCAs is generally ranked high.
- In addition to self-drive explorers and luxury and mid-market safari travellers, TFCAs would appeal to special interest ecotourists (birders, photographers, anglers, etc.).
- Clients generally prefer to visit TFCAs as part of a cross-border Southern Africa itinerary with a day or two spent there.
- Key disappointments and challenges for clients visiting TFCAs include limited game density in some TFCAs, environmental degradation and deforestation and limited quality of community accommodation and services.
- The biggest barriers cited by tour operators surveyed for increasing sales to TFCAs include the lack of marketing, knowledge and exposure, logistical and access challenges, lack of coordination between partner countries in respect of immigration and other movement issues and a lack of understanding of industry business and pricing practices
- Respondents believe the best way to market tourism in TFCAs is to promote them as part of broader Southern Africa itineraries with only 15% believe they should be promoted and sold as specific end-destinations.

2.5 ORGANISATIONAL BENCHMARKS

An assessment was conducted of the marketing roles, functions and activities of six organisations that promote multiple destinations and/or products. These are:

- Vanilla Islands Tourism Organisation
- Pacific Asia Travel Association (PATA)
- Caribbean Tourism Organisation (CTO)
- South Pacific Tourism Organisation
- Africa's Eden
- Classic Portfolio

A detailed evaluation of each organisation is provided in Annexure D, together with a summary table of roles and activities. The following are key findings:

- The assessment reveals that such collective tourism organisations **vary in purpose, mandate and operations:**
  - *Two benchmarked organisation offer mainly marketing support and advisory shared services to members, with no or limited marketing execution:* Pacific-Asia Marketing Organisation (PATA) and Caribbean Tourism Organisation (CTO) are primarily focused on providing supportive marketing and product development services (e.g. policy advice, training, standards guidance, statistics, market research) to their members, with the members executing their own individual marketing and product development strategies.
  - *One benchmarked organisation offers mainly marketing support and advisory shared services to members, with some marketing execution on behalf of members:* Pacific Tourism Organisation (SPO) focuses mainly on providing marketing support services to members, while also conducting limited destination promotion execution with, or on behalf of member destinations, e.g. one arranging a trade show and another managing a trade education programme.
  - *One benchmarked organisation offers mainly marketing execution on behalf of membership collective, no or limited marketing support and advisory shared services:* Vanilla Island Tourism Organisation has destination promotion execution of the Indian Ocean Islands region as a core mandate, and offers limited shared supportive services to members.
- **Geographic communality is the key uniting factor:** Membership of all four of the above stems from geographic destination communality i.e. through the need to improve tourism demand and supply within destination regions (e.g. Caribbean, Asia-Pacific, Vanilla Islands, South Pacific).
- **The core marketing mandate remains with the individual members:** In all of the above instances, the core destination marketing mandate remains with the individual member destinations.
- **Collective value stems mainly from credible brand endorsement and savings and/or value add through shared services:** The main membership value lies in a) collective credible brand endorsement and strengthening (i.e. being part of a larger destination "family"), and b) the value created through communal and shared services.
- **Private membership organisations are mainly about conversion and sales:** While destination marketing underpins their marketing strategies, organisations with only private business members like Africa's Eden and the Classic Portfolio are highly focused on marketing conversion for their business members and most of their activities are focused on providing tactical marketing opportunities and representation for members, primarily on a B2B basis. Africa's Eden's sphere of operation is destination (geography) based in the Kavango-Zambezi area, while Classic Portfolio's membership is segment (theme) based mainly in the high-end lodge accommodation segment in various destinations.
- **The website and social media channels are the most common collective communication and marketing channels**, irrespective of the target audience and mission, with links to individual member sites and channels, rather than fully covering member information and messaging on the collective website.
- **Traditional (i.e. non-digital) marketing execution is mostly conducted through business-to-business platforms** (i.e. creating opportunities for members to connect with travel trade and media clients). From a marketing execution perspective, activities like attendance of fairs, familiarisation and PR are mostly conducted on a trade (business-to-business) basis.

2.6 SUMMARY OF KEY MARKETING OPPORTUNITIES AND CHALLENGES

In summary, the following opportunities and challenges face tourism marketing of TFCAs.

Adapting marketing approaches to accommodate variations in TFCA tourism readiness and attractiveness. The TFCAs differ substantially in respect of their unique tourism assets, linkages and integration with existing tourism destinations and circuits, nature and extent of tourism services, management arrangements and partnerships, tourism access conditions, community tourism engagement and other tourism development and marketing factors. One-size-fits-all marketing will not work for TFCAs. The TFCA stakeholders tourism development plans and objectives also need to be taken into consideration to ensure BSA's marketing efforts support the plans of the stakeholders. For example, Richtersveld is not a focus area for SANParks and how can BSA support African Parks tourism development plans in Kafue.

Acknowledging imbalances in tourism supply among and within TFCAs. Some TFCAs, like KAZA, Great Limpopo and Maloti-Drakensberg (especially on the South African side) offer a range of well-developed tourism products and experiences while tourism supply is very limited or spread out in others, such as MAZA, ARTP, GMTFCA . Tourism imbalances also exist within TFCAs, with tourism being well-developed in some sections, and poorly developed in others. Imbalances in supply often occur between country sections of the TFCAs. Generically marketing the TFCA concept and areas, without segmented and targeted interventions that could benefit all parts of a TFCA, could create and perpetuate imbalances in existing tourism demand and skew tourism benefits emanating from the TFCA concept.

Strengthening the capacity of SMMEs to tap into tourism value chains. Maximising backward and forward tourism linkages in the tourism value chain could reduce economic leakages and present local communities and entrepreneurs with opportunities to benefit from tourism. A special focus is required to build and strengthen the capacity of Small, Medium and Micro Enterprises (SMMEs) in agriculture, services, handicrafts and other sectors to tap into the supply chains of larger businesses and sell goods directly to visitors.

Clarifying the differentiated selling propositions of TFCAs. While the overall cross-border conservation proposition of TFCAs is clear from a resource conservation perspective i.e. combining special conservation areas, national parks and reserves of neighbouring countries to create larger and ecologically sustainable conservation areas, the tourism proposition is not so clear for most of the TFCAs. Most TFCAs have not clearly defined their differentiated selling proposition that sets them apart and creates a clear "hook" for drawing in visitors. This situation is perpetuated by tourism market perceptions of TFCAs being all about wildlife experiences. The name "Transfrontier Conservation Areas" in itself one-sided with little indication of a tourism invitation.

Adequate focus on regional and domestic markets. While the majority of SADC efforts and resources for promoting TFCAs have been allocated to marketing initiatives in Europe, demand patterns during the COVID-19 pandemic have demonstrated the vulnerability of relying entirely on overseas visitors and the resilience of the domestic and regional markets, especially for adventurous travel destinations. In addition, suitably equipped domestic and regional travellers can pave the way for international travellers and investors to enter underdeveloped areas. An appropriate share of resources should be allocated to promoting the TFCAs in the local markets.

Improving digital marketing tools and efforts at both BSA and TFCA level. Effective digital marketing are the most cost-effective marketing channels for covering the customer journey, from raising destination awareness and interest, through to conversion and bookings. While BSA has developed a website and social media channels, these could be improved in respect of their target audiences (travel trade, consumers, partners and stakeholders) and communication strategy and messaging. While the recently launched social media campaigns should be lauded, BSA social media channels are not strategically managed and updated on a continuous basis. While KAZA has launched a website, it is largely conservation focused with links only to websites of the member country tourism authority sites. None of the other individual TFCAs have a dedicated website and social media channels. Collaboration between NTO's, national park authorities and park management should be developed to provide shared responsibility for content development and social media management.

Acknowledging and addressing movement complications and restrictions. Kgalagadi Transfrontier Park is the only fully integrated TFCA for tourism purposes, without any fences and border restrictions inside the park and with a single entrance fee payable. This allows visitors to move freely within both the Botswana and South African sections of the park while enjoying the tourism experiences offered in both countries. Such integrated tourism experiences are not possible in other TFCAs. The reasons for restricted tourism movement vary, including:

- No seamless movement within TFCAs: All TFCAs, except KTP require visitors to clear immigration when crossing country borders within the TFCA (at the minimum having a passport stamped, with citizens of some countries requiring a visa to enter).
- Lack of border posts within some TFCA boundaries: There are no operational borders within the boundaries of some TFCAs, which means that visitors have to exit and re-enter the TFCA through a border post outside of the TFCA.
- Fragmentation of TFCA land areas: Some TFCAs like Lubombo, Great Limpopo and Greater Mapungubwe are spread out and fragmented, making it difficult to clearly package and promote them as integrated travel destinations.

Promoting and branding TFCAs in a wider destination context. TFCAs are not tourism "islands"; while they could be end-destinations for some market segments (e.g. visitors traveling to the TFCA for a specific local experience or interest, domestic and regional visitors on short breaks, event participants), visits to TFCAs (especially by international visitors) are often part of, or an extension to wider itineraries. To attract such visitors they need to be promoted as integral parts and options in itineraries, circuits and country destinations – linking TFCAs together in itineraries, as is already happening in practice. This requires participation by and partnerships with a variety of public and private sector stakeholders.

Improving private sector buy in and public-private tourism partnerships in TFCAs. To operate effectively the tourism value chain requires a combination of public and private sector interventions. The same goes for marketing of TFCAs – the value derived from attending travel trade shows, media fam trips and promoting TFCAs via digital media will remain limited unless these involve an active partnership with private sector tourism operators, who are able to drive such exposure from mere awareness to actual (measurable) conversion and visitation. Moreover, many private sector participants in TFCAs conduct their own product marketing within the context of a destination and strong public-private partnerships in destination marketing could leverage both public and private sector marketing investment.

Strengthening tourism capacity and organisation in TFCAs. TFCA organisational structures and strategies have (rightfully) been spearheaded with a conservation vision, with participation by mainly environmental management stakeholders. As a result tourism expertise, capacity and organisational arrangements are either non-existent or thinly spread in TFCAs. This situation has curbed tourism promotion and development in TFCAs and needs to be addressed as a matter of urgency. Requires greater involvement of NTOs in TFCA tourism market development and representatives of the NTOs to sit on TFCA TWG – for example, SA Tourism and Dept. of Tourism have very little involvement in TFCA tourism market development in TFCAs which SA is a member state, as this role has been left to DFFE.

Crowding in multiple resources for tourism marketing. Funding and in-kind contributions for marketing of TFCAs has largely come from the GIZ-funded TUPNR and C-NRM funding allocations, channelled through BSA. Other important tourism stakeholders like national and provincial tourism ministries and tourism authorities, conservation authorities, private operators and other donors have contributed very little or nothing to the promotion of most TFCAs.

Establishing comprehensive tourism stakeholder and supplier databases. None of the TFCA coordinating offices have composed an up-to-date database of private and public sector stakeholder in the TFCA areas and as such there is no clarity regarding the scope and scale of available tourism supply and demand capacity. Tourism stakeholder mapping per TFCA should be undertaken.

Formulating a transparent events strategy. While outdoor sport events have played an important role in profiling some TFCAs like ARTP, GMTFCA and others, staging them requires substantial and specialised resources, which is not within the scope of the SADC tourism programme. However, BSA could continue partnering event organisers with supportive marketing activities, within a clear strategy that sets out criteria for selecting supportive events for BSA's involvement, types and levels of support provided, application procedures, etc.

Establishing the current nature and extent of tourism in TFCAs. There exists currently no baseline statistic regarding the nature and extent of tourism demand and supply for the majority of TFCAs. This makes it very difficult to establish a baseline for measuring and monitoring tourism progress achieved in TFCAs.

Improving measurement and evaluation of marketing impacts. To ensure effective marketing and get the best return on investment, measurement and evaluation of tourism returns achieved from marketing investments is key. Such returns are both direct (in terms of media value achieved, growth in digital following, joint marketing agreements reached, trade contacts built, etc.) and indirect (in terms of brand recognition, growth in tourism arrivals and expenditure, job-creation through tourism, etc.)

3. Market Development Strategy

The following section sets out the future direction for market development of TFCAs, including key global travel trends and implications for TFCAs, a market development vision, growth objectives and principles, a source market and market segmentation strategy, the core market development goals to be addressed, as well as implementation strategies and activities.

3.1 RELEVANT GLOBAL TRAVEL TRENDS

The section below outlines the global tourism market trends and implications for the TFCA market development strategy.

Table 8: Some important global travel trends and implications for TFCAs

Global Trend	Implications for TFCAs
Fast-growing preference for sustainable and responsible travel Environmental awareness is growing exponentially. Avoidance of "overtourism" destinations with a growing focus on outdoor experiences, low-impact destinations and socially responsible travel. 83% of global travellers responding to Booking.com's Sustainable Travel Report (2022) think sustainable travel is vital, 63% of travellers want to make more effort in the next year to travel more sustainably (up 10% from 2021) and 46% are more determined to make sustainable travel choices when they travel now than a year ago.	Although TFCAs offer more than only nature, their tourism offers are mainly embedded in their natural heritage. They are well-positioned to capitalise on the trend towards sustainable tourism and all efforts should be made to advance and promote sustainable tourism management in the destination, post-COVID and in the era of addressing climate change. Sensitive management of vulnerable environmental assets in parks, cultural sites and other sensitive ecosystems is crucial, to avoid overtourism and associated negative environmental, cultural and market impacts.
Authenticity and "getting off the beaten track" are increasingly valued Travel has become a commodity – people have been everywhere, and "specialness" is a relative concept. Special attention, authentic experiences and tailored service offerings that give travellers "bragging" rights are increasingly expected and valued.	Mapping, describing and promoting unusual travel routings and experiences in TFCAs, accompanied by adequate visitor information could open up new areas. Hospitality skills development should be promoted and cultural tourism interactions with local communities encouraged and facilitated.
Time as a travel currency Leisure time is increasingly precious with "money-rich, time-poor" travellers demanding transparency and ease of travel planning, booking transport, removal of border restrictions, etc.	Seamlessness of immigration, better and more affordable air access to TFCAs (including to remote destinations), should be continuously improved. The KAZA-visa and other measures to reduce the costs of visas and improve visa processing are positive steps and should be further expanded. However, seamless tourist movement between Member States and its neighbouring countries remains constrained by various events.
Mobile technology and payment rules travel Visitors use mobile phones at all stages of the travel journey. Connected travellers could be our best or worst marketers and an attractive product or experience will promote or demote itself.	Easy and affordable Internet connectivity should be improved outside of lodges, at least at key tourist tourism congregation points. Providing visitors with easy access to local SIM cards and affordable data options could provide various marketing advantages.
Personal health and safety are key travel deal breakers In the aftermath of COVID-19 and a growing global alertness to terror and crime, visitor safety, security and health are paramount decision-factors in travel planning	Utmost priority should be given to ensuring visitors safety, as well as diligent implementation of health and hygiene protocols. Better provision of modern medical care, notably accident and emergency services, is essential.

The Millennial and Gen Z travel bug Millennial travel is growing throughout the world but is especially fast growing in emerging Asian markets. Millennials live for the "now": share it now and look for instant gratification. Generation Z is fast emerging as a market force in tourism.	Suitable products and special value offers should be developed for younger, adventurous and experiential travellers who are keen to engage hands-on with nature, local people, cultural traditions and adventure activities. The creative industries and safe nightlife zones should be enhanced.
Growth of the shared economy Technological disruptions in accommodation, transport, dining and other sectors are common and destinations that embrace these evolutions have competitive advantage, but they can come with associated challenges.	TFCAs could embrace the shared economy as a mechanism for SME advancement, in areas where there is proper internet access. It will facilitate market access, especially to community-based and new attractions and experiences, which may not be feasible to promote through the mainstream tour operator channels.
Increasingly segmented markets As people become more widely travelled the search for experiences that suit their specific tastes and interests increases – experiences need to be finely tuned in line with segment needs.	BSA and its public, private and community sector tourism leaders should be well versed in understanding the needs of existing and emerging market segments and incorporating these in travel offers and in development policies.
Geographic market shifts The USA has been a major growth market for safari tourism in Africa. Although Covid-19 and the Russia-Ukraine war have recently restricted tourism demand from Asia, these markets offer growth potential in the medium and longer term.	BSA should further strengthen and enhance marketing relationships and partnerships in such growth markets. Tourism authorities should draw on available market research to capitalise on market shifts and collaborate with relevant partners.

3.2 VISION

The vision of the SADC Tourism Programme 2020-2030, namely that "growth in cross-border, multi-destination travel in SADC will exceed average global tourism growth levels", provides a foundation for setting a market development vision for tourism in TFCAs.
Based on this overall vision statement for tourism in SADC, the following tourism vision pertains to TFCAs:

By 2030, sustainable tourism growth in TFCAs will exceed average regional growth levels and tourism will become a major source of income and job opportunities for local communities in TFCAs.

3.3 GROWTH OBJECTIVES

While a quantitative baseline of tourism supply and demand remains to be established, the strategy will aim at above-average growth in:

- The annual number of visitor nights spent in TFCAs.
- Annual tourist expenditure in TFCAs.
- The number of registered tourist beds and camping sites in TFCAs.
- Sustainable job opportunities for members of local communities.
- Number of tourists crossing border-posts within the TFCAs?

3.4 MARKET DEVELOPMENT PRINCIPLES

The following principles underpin the strategy:

Sustainability as cornerstone
All marketing and product development initiatives will emphasise sustainable tourism development as a cornerstone of tourism expansion in TFCAs. Market development initiatives will aim at attracting lower-volume visitor segments and product investments that strive to achieve the lowest possible carbon footprint, address climate change mitigation, conserve the environment, respect cultural heritage and encourage community engagement in tourism.

Striving for partnerships
The strategy recognises that tourism marketing and development of TFCAs will only succeed through a strong and committed partnership effort between Government, private tourism operators and communities on the ground. Such partnerships are

required to ensure maximum leverage of available financial and human resources, delivery of high-quality tourism services, adequate infrastructure and access conditions, visitor and investor safety, and other key delivery factors.

Devolution of tourism market development responsibilities
While BSA has played an important role in laying the basis for market awareness of TFCAs, the ownership and implementation of a market development strategy should reside at the level of the individual TFCAs. As already indicated, the TFCAs vary considerably in respect of almost all tourism market development aspects. In addition, there are virtually no links between tourism marketing and delivery partners in the various TFCAs (including public tourism authorities, private tourism operators, conservation organisations, local communities and others).

Optimising digital solutions
The BSA marketing mix has relied heavily on face-to-face marketing, i.e. exhibiting at trade shows and arranging familiarisation visits to TFCA areas for prospective tour operators/agents and travel media. While such initiatives could play an important role as components in an integrated marketing mix, they should be applied strategically as they are extremely costly and have a heavy carbon footprint, among others. On the other hand, digital technologies increasingly cover the entire marketing mix, including destination promotion, product packaging and investment promotion, pricing of trips and maximising distribution and booking channels.

Targeted marketing
With limited marketing resources at hand, every effort will be made to achieve the best return on BSA's marketing investment. This requires a targeted marketing approach, i.e. identifying and prioritising potential market segments that offer growth potential for the TFCA and which the TFCA is ready to host and implementing a mix of promotional and product development initiatives to attract them. Product development in TFCAs to attract identified target markets? For example, Desert Kayak Trails and Desert Knights Mountain Bike Tour were developed to try and grow adventure travel in the area.

Measuring outcomes
Without measuring the marketing impact and outcomes of marketing investment, BSA and TFCAs will not be able to adapt their strategies to achieve the best outcomes, convince funders of the value of their contributions and, even more important solicit participation and marketing partnerships from stakeholders.

3.5 TFCA TOURISM DIFFERENTIATION AND BRANDING

Three levels of tourism differentiation and branding are relevant for the promotion of TFCAs, namely i) for the overall concept of TFCAs, ii) for the individual TFCAs and iii) for Boundless Southern Africa as promotor of tourism in TFCAs . The following branding approaches are recommended:

3.5.1 Expanding the overall TFCA brand to include tourism
While the term "Transfrontier Conservation Areas" clearly communicates the cross-border conservation vision of the TFCA initiative, it does not do justice to the expansive and varied tourism experiences created through transfrontier conservation.

> *To ensure clear and effective communication of the tourism value of TFCAs, it is proposed that the name "Transfrontier Conservation Areas" be adjusted to "Transfrontier Conservation and Tourism Areas" (TFCTAs).*

3.5.2 Further strengthening the "endorsed branding" strategy for individual TFCAs.
Although individual TFCAs derive tourism benefit from BSA's efforts to raise awareness of the existence and overall tourism value of TFCAs, they differ hugely in respect of their tourism offer, potential and selling propositions. As such, each of the TFCAs should be promoted as a unique brand within the TFCA network.

> *An endorsed brand strategy[1] is most suitable, i.e. the different TFCAs being positioned individually in support of the "Transfrontier Conservation and Tourism Areas" mother brand, while maintaining an association, or endorsement, with the TFCTA mother brand.*

Most of the established TFCAs have already made progress with implementing such endorsed brand strategy, by developing visual brand identities (logos) to display their key characteristics, while underwriting these with the term "Transfrontier Park" or "Transfrontier Conservation Area". This approach should be further strengthened by promoting the individual TFCA brands more prominently, in line with the above-mentioned market development principle of devolving market development responsibilities to the level of individual TFCAs.

In addition, each individual TFCA should clearly define its differentiated brand promise and marketing messages, images, product development proposals, etc. should be tailored to communicate it. BSA should also promote the variations and diversity offered by the range of TFCA brands. This should be outlined in the individual brand guidelines recommended to be developed for each TFCA.

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[1] https://www.mbabrief.com/what_is_endorsed_branding_strategy.asp

3.5.3 Clarifying the Boundless Southern Africa's mandate

BSA has over the years taken on a role similar to a "tourism board" for promoting TFCAs. As such it is an institutional concept, with a mandate that reads as follows: *"Boundless Southern Africa is a regional tourism marketing and investment promotion initiative that supports and facilitates sustainable tourism development in Southern Africa's Transfrontier Conservation Areas"*.

BSA is non-commercial in nature and should not be confused with being a private tour operator or a tourism company that trades in tourism in TFCAs.

To improve BSA's brand and communication clarity it is proposed that a payoff line be added as an integral part of its brand identity, e.g.

"Boundless Southern Africa"
Promoting tourism in Transfrontier Conservation Areas
or
Promoting Transfrontier Conservation and Tourism Areas

3.6 TARGET MARKET AND PRODUCT EXPANSION STRATEGY

The following section sets out the potential target market profiles, promotional channels, product opportunities and product expansion approaches for TFCAs.

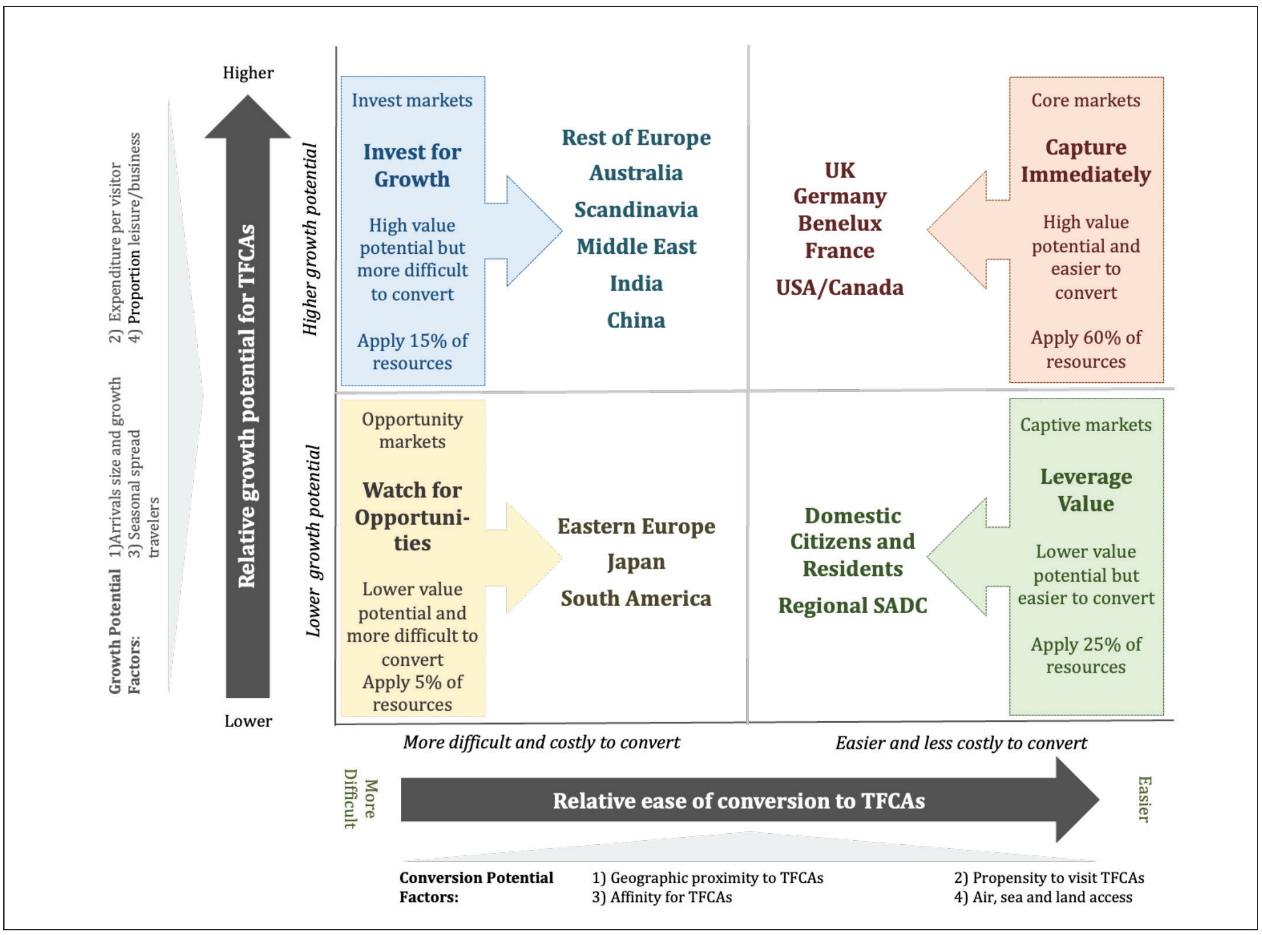
3.6.1 Target source markets

Potential source markets were analysed to develop a target market strategy in terms of both:

- Their tourism value potential (outbound market size, extent and growth of holiday travel, demand for experiential travel and new destinations, travel expenditure per day and per trip) and
- The relative ease of attracting and converting potential visitors to Southern Africa (air access, travel time from source countries, language compatibility, affinity for and ties to Southern Africa).

The conclusion is as follows, as presented in Figure 4 below:

Figure 4: Target source markets and approaches for the next three to five years



The promotional implications of the target source market strategies outlined in Figure 4 are as follows:

Table 9 : Target source market strategy and promotion approach

Priorities	Countries	Strategy	Promotion approach
Captive markets Lower growth potential, but relatively easy and less costly to penetrate	Domestic Citizens and Residents in Member States SADC regional market	**Leverage value** Focus some promotional activities here Aim at leveraging "easy" more return trips and increased spend Apply 25% of marketing resources	Tactical (price) promotions with a focus on bookings and extended length of stay: • Dedicated promotional campaign and special offers for domestic and regional markets • Online drive through, mainly suitable social media channels and social media groups • Providing SADC-focused and special interest travel trade with special offers • Strengthening existing travel trade relations to ensure expansion and deepening of packages
Core markets High growth potential, high affinity for travel to TFCAs and are easier and less costly to penetrate	UK Germany Benelux France USA South Africa	**Capture immediately** Focus international promotional activities here Aim at conversion (increased bookings) in the short and medium term Apply 60% of marketing resources	Apply the full promotion mix including: • Tourism dedicated market representation • A major PR and media drive • Extensive digital advertising and social media focus • Selective consumer advertising, where done as advertorial • Selected attendance of travel trade and consumer fairs • Major trade education and joint promotions drive with operator partners
Invest markets High growth potential, more difficult and costly to penetrate	Italy Scandinavia India Middle East China	**Invest for growth** Focus promotional activities here on creating awareness of TFCAs as tourism destinations. Aim at growing these into the core market portfolio in medium to longer term Apply 15% of marketing resources	Targeted brand awareness drive, including: • Major online destination awareness drive including website language content expansion (at least French, German), videos and storytelling through suitable social media channels • Selective travel trade and media education and familiarisation program • Selective travel trade joint promotions and education with inbound and foreign operators
Opportunity markets Lower growth potential, more difficult to penetrate	Japan South America Eastern Europe	**Watch for opportunities** Leverage ad-hoc marketing opportunities Use spare resources only to support partners	Marketing activities will depend on the nature and extent of opportunities that emerge at limited or no cost to BSA

3.6.2 Target market segments, marketing channels and product opportunities

The following target markets, promotion channels and product opportunities could be pursued when marketing TFCAs. These target market segments are further elaborated in respect of their profiles and suitable marketing channels to reach them, in **Annexure A.**

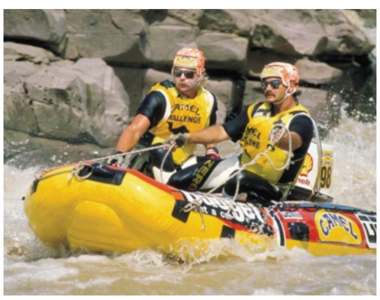
Table 10: Summarised market segments profiles, promotion channels and product opportunities

Target market segments	Profile, motivation and expectations	Promotion channels and product opportunities
Luxury Adventurers  Source: Art of Safari  Source: Go2Africa  Source: The Ant Collection	• Low volume, high value (priced) tourists who require exclusive and personalised experiences, pampered luxury and unique accommodation and often fly-in to remote locations. • Accommodation in luxury lodges (4* to 5*). • Expect a high-quality, exclusive wildlife and/or nature experience in pristine environment with unique species, usually with all or most of the Big 5 to be seen. • Includes romantics e.g. honeymooners, weddings (couples and guests), renewal of vows, anniversaries, etc. • USA and Europe as core markets. • Mostly 40 -70 years	*Promotion and distribution channels* • Awareness raising through word of mouth, social media networks, loyalty programmes, international tour operators, nature tourism publications and electronic media • Reservations and booking mostly through high-end tour agencies or directly with lodge management companies. • Trip preparation through tour agency information, destination websites and other digital information channels *Product opportunities* • Suitable for areas and zones with exceptional quality and variety of unique wildlife (ideally the Big 5), scenic or cultural phenomena • Launching luxury lodge concessions • Added value activities such as guided canoeing, walking and horseback safaris, game fishing, balloon safaris, etc.

Target market segments	Profile, motivation and expectations	Promotion channels and product opportunities
Mid-market adventurers  Source: African Budget Safaris  Source: Legacy Hotels  Source: Mowana Safari Lodge  Source: Major Adventures	• Large growth segment. • Cautious "soft" adventure in fulfilling the explorer spirit. • Expect value for money at accommodation, with all the standard luxuries, good food, catering, spa facilities, guiding, etc. important. • Medium volume, mid-priced (US$150 to US$350 per room night, 3*/4* accommodation). • Main target markets: Europe and USA. • Mature travellers, 35-70+ years, some families but mostly couples and groups traveling without children. • Well-travelled, environmentally and culturally conscious and always looking for new places to explore, although considering risks. • Primary interests are scenery, photography and "soft" outdoor activities like nature hikes, canoe and boat trips, game drives, etc. • Secondary interests are local culture, history and heritage and soft adventure (e.g. cultural entertainment, night walks, horse rides, short bike rides, community walks, balloon flights, etc.).	*Promotion and distribution channels* • Destination awareness through travel and outdoor press, social media networks and word of mouth. • International bookings mainly through tour operators and travel agents; regional and domestic visits mostly self-arranged. • Once booked, further research into the destination done on the internet. *Product opportunities* • Suitable for areas that are easily accessible with good game viewing, exceptional scenery or cultural phenomena. Adequate quality and variety of accommodation are important factors • Mid-market (2*to 4*) accommodation, 5 to 40 rooms • Soft adventure activities like game drives, birdwatching excursions, cultural and nature walks, village tours, handicraft shopping, cultural performances, boat trips and similar activities

Target market segments	Profile, motivation and expectations	Promotion channels and product opportunities
Intrepid Explorers  Source: Selfdrive4x4.com  Source: Drifters  Source: Semonkong Lodge  Source: Afristay	• Confident "hard" exploration - looking for the authentic Africa and will be prepared to go off the beaten track to less visited places and sacrifice comforts to do so. • Across age groups, 30-70 years. Travelers from international markets tend to be younger while regional travellers are mainly middle aged (45-65 years) • Budget to mid-priced accommodation (2* to 3*) and camping. Hygiene and safety standards remain important. • Mostly self-drive (also by motorcycle) and independently arranged, with some packaged "overland" touring. Main target markets: Southern Africa region and Europe (especially Benelux, Germany). • Sustainable management of tourism experiences generally very important. • Primary interests are adventure touring, camping and outdoors, adrenaline activities, wildlife engagement and photography, cultural engagement and environmental interaction.	*Promotion and distribution channels* • Leaning heavily towards online channels and independent arrangements. • Engage through online reservations, information from websites, social media/word of mouth, influencer channels and online forum groups. • GPS and online maps (e.g. Track4Africa) key for self drive and 4x4 • Guidance by inbound operators, knowledgeable friends and relatives and online forums used to arrange itineraries. *Product opportunities* • Suitable for areas that are off the beaten track, less developed and less frequented by luxury and mid-market adventurers, and which require a special effort to reach by off-road touring in equipped vehicles • Quality campsites (also for groups) • Guest houses, B&Bs and homestays • Budget self-catering accommodation on cross-border routes • Adrenaline activities like ziplines, bungy, white water rafting, mountain-biking, etc.) • Community-based responsibly managed experiences (local food and cooking, attending local ceremonies, horse and donkey trips, etc.), especially among international travellers.

Target market segments	Profile, motivation and expectations	Promotion channels and product opportunities
Eco enthusiasts  Source: NatureTTL  Source: Drifthook  Source: University of Utah	• A collective segment of niche interest specialising in environmental and cultural immersion, including bird watching, specialist environmental photography, unique flora and fauna phenomena (e.g. wildlife behaviour,), history and heritage, rock-art, archaeology, astronomy, sport-fishing, etc. • Lower volume, mid- to higher priced. • Interests across age groups but for traveling mostly 35 years upwards • Both self-arranged, self-drive and packaged through specialist operators • For some general sightseeing, wildlife safaris and culture will be extensions to a special-purpose trip.	*Promotion and distribution channels* • Word of mouth and recommendations from peers drive demand. • Engagement on social media platforms with others who have similar interests • Special interest magazines and online publications • Booked directly with specialist accommodation providers, guides or as a package with specialist tour operators *Product opportunities* • Suitable for areas that offer exceptional and/or unique nature tourism experiences e.g. unique and sought after species, archaeology, landscapes, dark sky areas, etc. • Specialist lodges and camping facilities in areas with unique resources, catering for needs of the segment • Training of specialists community guides and investment in equipment for community based ventures

Target market segments	Profile, motivation and expectations	Promotion channels and product opportunities
Adventure sport enthusiasts  Source: Northern Cape Tourism  Source: Wild@Heart  Source: ActivityZone  Source: SA Venues	• A collective segment of small, niche adventurous outdoor sport activity interests. There is often a significant element of skill and risk involved. • Lower volume, mid- to budget priced. • 25-55 Years • Key motivation is the particular activity. Key segment to consider are adventure cycling / mountain biking, multi-day hikes and cycling routes, adventure racing and motorbiking, extreme running, kayaking, triathlon/endurance racing, car rallies, adrenaline sports like paragliding, climbing, etc. • Charity and teambuilding component to some trips.	*Promotion and distribution channels* • Word of mouth and recommendations from peers drive demand. • Engagement on social media platforms with others who have similar interests • Participation and following of adventure sport events • Special interest magazines and online publications • Booked directly with specialist accommodation providers, guides or as a package with specialist tour operators or event organisers *Product opportunities* • Suitable for areas that offer challenging, less discovered and beautiful landscapes and features that lend themselves to ultimate adventure sport experiences • Specialist lodges and camping facilities in areas with unique resources, catering for needs of specific niche segments • Development of sport events • Development of routes, signage, sport infrastructure and launch areas • Training of specialists community guides and investment in equipment for community-based ventures

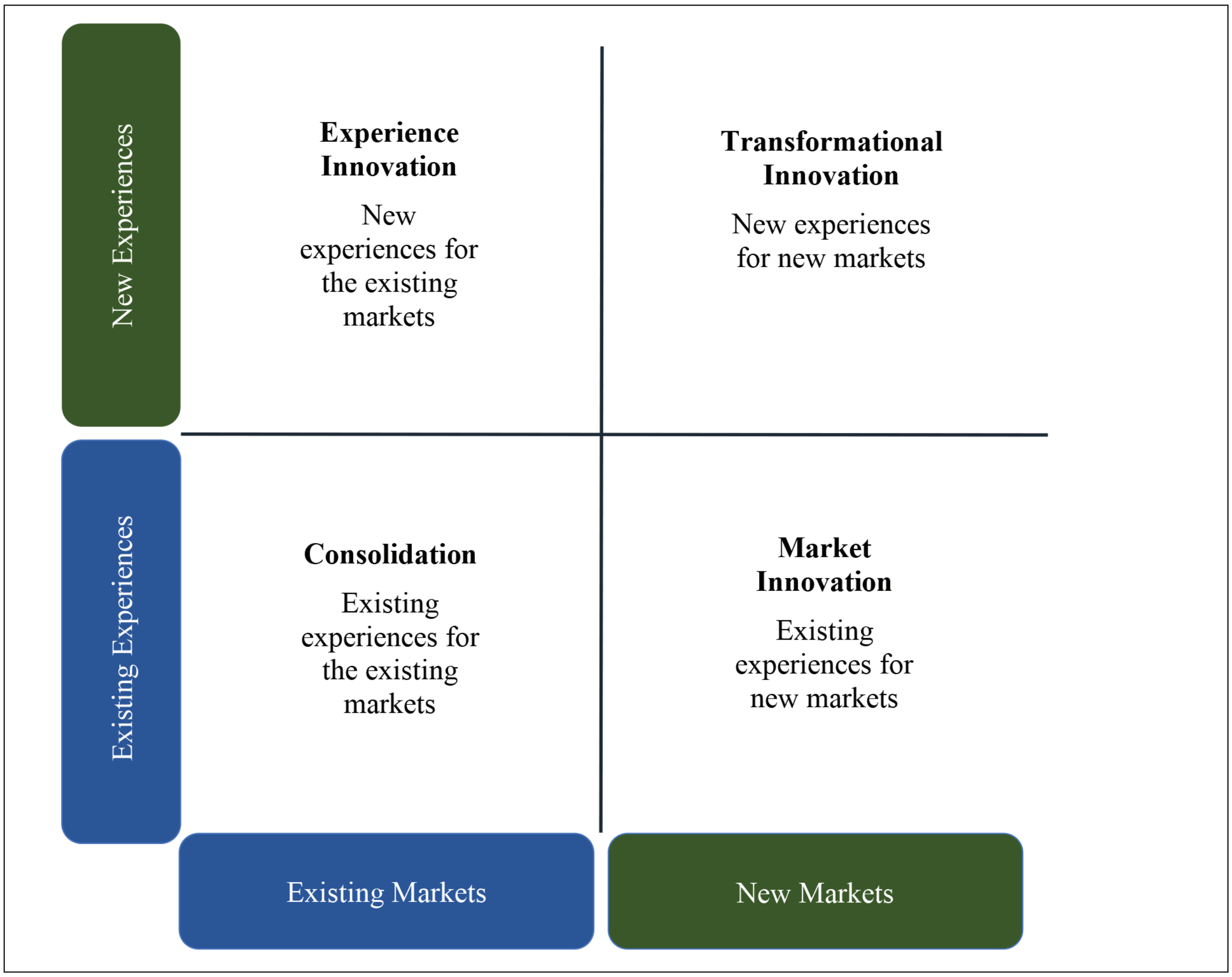
3.6.3 Product expansion approaches

Gardiner and Scott adapted and applied Ansoff's Product-market Expansion Matrix[2] to tourism destinations and called it the Destination Innovation Matrix. This matrix could be applied to scope out product development and marketing growth opportunities in the individual TFCAs, as follows[3]:

2 Ansoff, H.L. (1965) Corporate Strategy. McGraw-Hill, New York

3 Gardiner, S., & Scott, N. (2018). Destination Innovation Matrix: A framework for new tourism experience and market development. Journal of Destination Marketing & Management, 10, 122-131.

Figure 5: Destination Innovation Matrix (Gardiner and Scott, 2018)



Consolidation (Existing Products-Existing Markets)

This option is the most simple and least risky. Rather than trying to develop a new idea, TFCAs can find new ways to make the existing product offer more appealing and successful within the current visitor market; or increasing marketing in existing markets and segments.

The key focus is on attracting more visitors and yielding more value from market segments that already frequent the destinations, without major expansion and investment in completely new experiences, products and services.

> *Interventions could include: Improved border access and immigration procedures to improve ease of travel, expansion and improvement of existing viable events, quality improvements and maintenance of existing products, better marketing techniques to improve the return visitor rate through use of social media, loyalty programmes, special price offers and added value offers, etc.*

Market Innovation (Existing Products-New Markets)
This can include promoting existing experiences and products in TFCAs to new growth source markets and segments.

The key focus is on attracting visitors from markets and segments that do not yet frequent the destination, without major expansion and investment in new experiences, products or services.

> *Interventions could include a more aggressive and focused promotion approach, optimising digital marketing tools and interventions, leveraging market linkages and co-packaging with other existing visitor experiences (e.g. key destinations and experiences in areas outside of the TFCAs) and marketing to niche market segments (e.g. ecotourism, photographic tourism, archaeological and paleontological tourism, cultural tourism, adventure tourism, etc.).*

Experience Innovation (New Product-Existing Markets)
This option is also called product or service expansion, i.e. adding new products and experiences for existing markets and segments to increase visitor revenue, length of stay and expenditure.

The key focus is on attracting investment in new, innovative experiences, products and services that could yield more value from market segments that already frequent the TFCAs.

Interventions could include: attracting investment in additional variety of accommodation and campsites, development of more cultural entertainment opportunities, staging additional events, development of new routes and trails, investment in eco and community-based experiences, attracting investment in adventure tourism options, training local specialist guides to offer a variety of experiences, etc.

Transformational Innovation (New Product-New Markets)
This option requires innovation through attracting investment in new experiences to attract new visitor markets and segments.

Interventions could include: an investment drive for the development of products that do not currently exist in some of the TFCAs (e.g. for luxury adventurer safari lodges, spa and wellness experiences; for intrepid adventurers camping sites, local guest houses and homestays; for adventure sport enthusiasts special events, routes and trails; for eco enthusiast eco-walks and routes, cultural excursions, walking safaris, night drives, canoe trips, adrenaline experiences, etc.) and promoting these aggressively to attract new markets and segments.

3.7 MARKET DEVELOPMENT GOALS AND STRATEGIES

Based on the challenges identified and the vision and principles outlined above, the following market development goals and strategies will be pursued.

3.7.1 Goal 1: Improving tourism institutional capacity

The goal is to strengthen public and private sector capacity to promote and develop tourism at the level of the individual TFCAs. The following strategies will be pursued:

3.7.1.1Strategy 1.1: Ensure effective planning

A well-considered tourism strategy and action plan is a prerequisite for effective tourism promotion and development of individual TFCAs. This aspect is lacking for the majority of TFCAs. As can be seen from Table 7 in Section 2.3.2.2 a dedicated tourism strategy exists only for Great Limpopo TFCA (currently in process) and none of the TFCAs approach tourism marketing and development based on an approved tourism plan – TFCAs we currently support would likely welcome the development of a tourism strategy. While the nature and extent of tourism strategies will differ depending on the tourism potential and market readiness of the individual TFCAs, tourism strategies will be developed for all Established TFCAs.

The following activities will be conducted in support of this strategy:

- *Develop implementable tourism strategies and action plans* for individual TFCAs, in support of this overall TFCA market development strategy.
- *Research* the profiles, preferences, purchasing behaviour, etc. of key potential TFCA market segments and implications for TFCAs and apply these in drafting and implementing tourism strategies.

3.7.1.2 Strategy 1.2: Strengthen implementation capacity

As is evident from Table 7 in Section 2.3.2.2, only KAZA and Great Limpopo TFCAs have secretariat/executive offices with full time staff, tasked with managing the execution of integrated TFCA programmes. Among these two , only KAZA employs staff with tourism knowledge and background (currently no dedicated tourism, marketing or communications person). Where TFCA personnel have in the past participated in marketing initiatives such as exhibitions and familiarisation trips, they were mainly non-tourism experts. Tourism implementation capacity should clearly be strengthened at TFCA level.

The following activities will be conducted in support of this strategy:

- *Appoint additional tourism expertise to support the implementation of tourism strategies for individual TFCAs.* Such expertise could be outsourced, internally appointed, and/or shared among more than one TFCA.
- *Appoint TFCA market representatives in key markets* (Europe and possibly USA) to consistently promote TFCAs among the travel trade, media and consumer groups in accordance with TFCA tourism marketing plans.

3.7.1.3 Strategy 1.3: Improve funding for market development

Table 7 in Section 2.3.2.2 indicates that only KAZA TFCA has a dedicated tourism marketing budget. The TFCAs have relied entirely on BSA for marketing resources. Since this strategy proposes a devolved marketing approach with individual TFCAs developing and implementing dedicated marketing plans, funding sources will be put in place to finance these. BSA will strive in all instances to finance marketing activities on a co-funding basis.

The following activities will be conducted in support of this strategy:

- *Create a database of potential tourism funding sources and approach funders* to join in a collaborative funding initiative to promote and develop tourism in TFCAs.
- *Leverage available TFCA tourism funds to establish funding partnerships* with public and private sector stakeholders involved in TFCAs and to stretch the available budgets for implementing tourism strategies.
- Devise a SADC TFCA tourism budget that allows for *funding of tourism projects at both collective and individual TFCA levels.*
- *Establish a joint marketing procedure and* mechanism whereby BSA will invite tourism operators in TFCA to partner it in joint promotions, e.g. with BSA providing and funding the destination promotion platform (e.g. show stand, advertising template, campaign identity, etc.) and individual products "piggy backing" on such initiatives at an agreed cost.
- *Ensure suitable and transparent financial management systems* for managing collective partnership funding for implementing TFCA tourism strategies.

3.7.1.4 Strategy 1.4: Improve stakeholder collaboration

As can be seen from Table 7 in Section 2.3.2.2, while tourism working groups have been formed for four of the TFCAs, only the tourism working group of the Maloti-Drakensberg TFCA has been active. The tourism working groups of the Great Limpopo and Greater Mapungubwe TFCAs are in the early stages and are yet to undertake specific projects. Little evidence exists that the member state tourism marketing authorities are explicitly promoting the TFCA concept and the notion of cross border tourism. Private sector participation in TFCA marketing initiatives has been very limited and the TFCAs concept has received little support and involvement from major regional tourism operators. The recent establishment of the SADC Business Council and its special Tourism Committee are steps in the right direction and may pave the way for improve private sector participation in promoting TFCAs.

The following activities will be conducted in support of this strategy:

- *Establish strong and effective tourism working groups for TFCAs*, to guide the implementation of tourism strategies. All TFCAs should establish Tourism Working Groups (TWGs) consisting of TFCA coordinators, relevant country and provincial tourism authorities, private sector, community and other tourism stakeholders. The TWGs should devise, guide and where possible raise funding for the implementation of the TFCA tourism strategies. All TWGs should operate in accordance with a tourism strategic plan, should have at least 2 meetings per annum where progress is reported and monitored and should keep proper records of progress made.
- *Obtain the commitment of member country tourism authorities to actively promote cross-border tourism.* Through the SADC Tourism Ministerial Committee, obtain the commitment of tourism boards, conservation bodies, investment organisations and other relevant bodies to collaborate in and explicitly promote cross-border tourism possibilities and routes to and in TFCAs.

3.7.2 Goal 2: Increasing tourism demand

The goal is to promote TFCAs as effectively and efficiently as possible and to achieve optimal growth in tourism arrivals, expenditure and community benefits at TFCA level. The following strategies will be pursued:

3.7.2.1Strategy 2.1: Strengthen TFCA tourism brand awareness

The nature and extent of the TFCA concept is not well understood and known among the travel trade and consumers. While some TFCAs like the Kgalagadi, Great Limpopo and KAZA (lately) have received substantial media coverage, communication has focused largely on conservation achievements. In addition, some parts of various TFCAs, e.g. World Heritage Sites, well developed national parks and private conservation areas are known as travel destinations, tourism awareness of cross border, multi-country experiences remains limited. Since the lesser developed areas could potentially derive most additional value from cross-border tourism, consistent and sustainable awareness raising of the cross border tourism potential and possibilities of TFCA is required.

- *Tell the TFCA stories* – how it came about, what makes each TFCA special, wildlife migrations, unique cultural heritage, undiscovered areas and attractions. This could be in the form of a television, podcast, radio or print publication series. A good start has been made with the production of 4 high quality videos profiling ARTP, LTFCA, KAZA, MAZA. This could be extended to include other TFCAs in future marketing/outreach initiatives.
- *Communicate exceptional events and phenomena* – use viral marketing and media partnerships to showcase exceptional cultural and natural occurrences e.g. traditional festivals, wildlife migrations, weather conditions, botanical splendour, personalities, etc. Deploying webcams, soliciting the participation of game rangers, tourism operators and guides to film and report unique occurrences and other suitable and innovative methods could be considered.

3.7.2.2 Strategy 2.2: Improve marketing collateral

Although BSA has made some progress with producing marketing materials to promote TFCAs, i.e. development of a BSA website and production of high-quality brochures for four TFCAs, more should be done to provide and distribute appropriately packaged, relevant and factually correct information to specific target markets and segments, for each TFCA. Such tools should be mainly in digital format. At regional level the BSA website requires a more strategic structure, navigation and contents and social media channels should be set up and regularly maintained. Digital marketing tools are virtually non-existent at TFCA level. Many areas in TFCAs require off-road navigation and having travel routes correctly and fully represented on mapping software such as Tracks4Africa and others, develop hiking and cycling maps in the relevant TFCAs to promote these activities (MDTFCA, LTFCA and ARTP)

The following activities will be conducted in support of this strategy:

- *Improve and expand the TFCA website portfolio, including:*
  - The BSA website to act as a comprehensive, overarching website where each TFCA is fully represented. This could include expanded pages for each TFCA, designed to act as comprehensive sub-sites that promote the main features and with easy links to activities, attractions, accommodation, amenities, experiences, mapped routes, gallery and booking links. Each TFCA should promote the sub-domain of the specific TFCA, within the overall site.
  - *Populate and maintain separate websites with dedicated domains in instances where TFCA's secretariates or management structures have adequate capacity and resources* to do so. These could be developed and linked to the overall BSA website.
- *Map TFCA routes and attractions in TFCAs.* Self-drive visitors is an important market segment for blazing the trail in less developed areas, since self-drive vehicles are usually equipped for camping with minimal facilities. Self-drive visitors mostly navigate using GPS maps such as Google Maps and Tracks4Africa and unchartered areas. TFCA managers should liaise with the producers of these system to ensure that all information and routes are correctly recorded. In addition, self-drive visitors often prefer to carry paper maps and consideration should be given to producing such maps for the TFCAs. Tracks4Africa is currently producing a paper map for KAZA TFCA.
- *Set up and manage relevant social media platforms,* including Facebook, Instagram, YouTube and possibly Telegram and WhatsApp groups. Central TFCA channels should be managed by BSA covering all the TFCAs. In instances where TFCA's secretariates or management structures have adequate capacity and resources to do so, they should set up separate channels and share content to the BSA accounts and other relevant partner accounts.
- *Establish image and video libraries for each TFCA,* containing and bank of superb images and video footage that can be used in digital promotions.

3.7.2.3 Strategy 2.3: Maximise digital marketing execution

Digital marketing channels have proven to be the most cost-effective for targeting both consumer segments (see market segmentation) and the travel trade dealing with them. A targeted digital promotion campaign will employ a balanced promotion mix consisting, among others, of strategic and regular social media posts, email/chat-marketing, blogging, links with special interest group channels on Facebook and other social media, influencer fam trips, and selective digital advertising.

The following activities will be conducted in support of the strategy:

- *Establish links with third party websites, social media channels* and other suitable online platforms managed by appropriate nature- and outdoor online media, self-drive discussion forums and groups, digital reservation systems. Through agreement, share KAZA content and invitations to the KAZA website and social media platforms, to increase awareness and following.
- *Collaborate with content contributors and partners in each TFCA,* to write blog posts and make interesting posts on KAZA social media, focusing especially on video image and video contents relating to specific nature or culture events. BSA to coordinate and moderate contents and placements.
- *Develop and implement a social media engagement plan* with a schedule of monthly topics and contents to post on social media channels to cover natural and cultural phenomena, events, stories, new commercial facilities and products, etc.
- *Identify and, where appropriate, host influencers (bloggers)* in TFCAs with a specific and exceptional following in the target market segments identified (both general adventure segments and special interest niche segments). Such influencers may include nature photographers, nature television and radio program hosts, well known culture and nature adventurers and explorers, film stars with particular nature or cultural sponsorships or passions, adventure sport celebrities and others.
- *Use geotargeting and other targeted advertising and messaging techniques* to promote lesser visited areas to visitors who are already in TFCA areas or who intend travelling to TFCAs.
- *Produce a quarterly TFCA tourism newsletter and distribute* the contents via website blog and social media channels.
- *Conduct selective digital advertising* in outdoor and nature media as well as on social media channels (e.g. Facebook, Instagram, YouTube) to cover the main attractions, routes, cross border access facilities, sport and cultural events and unique visitor accommodation and facilities on offer in TFCAs.

3.7.2.4 Strategy 2.4: Ensure travel trade and media knowledge and coverage

A targeted travel trade and media strategy should strive for strong marketing partnerships with Southern Africa inbound tour and accommodation operators, selected international outbound tour operators and selected media that deal with target market segments. Such partnerships could include innovative packaging of marketable itineraries in TFCAs, familiarisation visits to TFCAs, virtual sales and information sessions, visits and workshops by appointed international representatives, consumer promotions with tour operator databases, promotions and competitions with outdoor travel publications, etc. Attendance of travel trade shows will only be considered (and then preferably in a "roaming" capacity), if attendance is essential for concluding marketing partnerships that are of direct benefit to TFCAs, or where a BSA stand could serve as a platform for more than 3 private operators that deal primarily with TFCAs. In selected trade shows (e.g. Indaba) a BSA stand may serve the purpose of promoting community based tourism operators and facilities and exposing such operators to international marketing practices.

The following activities will be conducted in support of the strategy:

- *Establish a database of international and regional tour operators and media* and categorise it in terms of:
  - International outbound operators in key markets and inbound DMCs in Southern Africa that:
    - Currently offer cross border programmes covering the TFCAs.
    - Offer multi-country programmes in Southern Africa and may extend their programmes to include TFCAs.
  - *Relevant nature and outdoor media publications and journalists* in key markets and in Southern Africa. Appointed market based representatives will be expected to research and identify the most relevant publications and journalists and to build relationships with them.
- Promote TFCAs, with an emphasis on lesser known TFCA destinations, products and *experiences that struggle with market access* (e.g. underdeveloped and lower demand areas of TFCAs, community-based products and experiences, etc.) *to the international and regional travel trade*, with the objective of extending current tour operator programmes to include such areas and products. Such initiatives will include:
  - *Initiating a marketing and sales training programme* to prepare emerging enterprises and entrepreneurs in TFCAs for promoting their offers during travel trade shows, familiarisation visits, workshops and meetings with the international travel trade.
  - *Hosting such emerging enterprises on a BSA exhibition stands* at regional trade shows such as Indaba and/or WTM Africa.
  - *Sales visits to international and Southern Africa tour operators offices* by market-based representatives, to promote the entire TFCAs and especially areas and products that require more exposure.
  - *Arranging an annual TFCA tourism roadshow,* alternating in core markets (e.g. the South Africa [for Southern Africa inbound operators], USA, German speaking Europe, UK) where TFCA tourism stakeholders and operators can showcase their areas and products to selected tour operators.
  - *Arranging annual trade familiarisation visits that include lesser known TFCAs and areas in TFCAs*, for carefully selected DMCs and representatives of international tour operator companies that have shown interest in and commitment to promoting the TFCAs.
- *Based on the contact database, arrange media exposure visits to TFCAs* for suitable outdoor and adventure media representatives and freelance journalists. i.e. those with a significant readership or following in specific target market segments and niche markets.
- *Partner with private sector operators to launch special promotion and competitions through selected outdoor and adventure media,* to create awareness of lesser TFCAs, routes and experiences.

3.7.3 Goal 3: Strengthening product variety and quality

The goal is to facilitate and support the development of suitable tourism attractions, amenities, accommodation, activities and ancillary services, especially in the lesser developed areas of TFCAs, to cater for the potential growth in tourism demand. The following strategies will be pursued:

3.7.3.1 Strategy 3.1: Support selective events staged in TFCAs

There is no doubt that sport and cultural events can do much to raise awareness of areas and bring visitors to destinations. Successful events are primarily privately owned and managed, given the specialised financial and human resources required to stage them. Events are able to provide substantial short term economic injections to marginalised areas and their potential communication value could raise awareness of such areas. BSA has in the past supported and even launched events in some TFCAs and this strategy will be further pursued. The nature and extent of such support should be based on an objective evaluation of the destination branding value of the event, its potential direct and indirect economic contribution, the measurability of its potential impact and other factors. Directory of events (past and present – cultural and community) taking place in TFCAs should be developed to identify key events to support, develop and partner with.

The following activities will be conducted in support of the strategy:

- *Conduct a comprehensive assessment* of the status, relevance, impact and lessons learnt from events staged in TFCAs and BSA's past event support programmes before engaging in any event endorsements or support. The assessment should among others:
  - *Describe the event's status,* including location, theme, business model (sponsorship, entrance fees, other funding streams) objectives, participation history, ownership, age, regularity and other factors.
  - *Analyse the nature and extent of BSA's involvement* in the event.
  - *Document the measurable outcomes and impacts of the events staged,* including number of visitors (segmented by participants, spectators, crew, media, other) financial results, event and visitor expenditure in the area, measurable destination marketing and media coverage, participation and involvement of local entrepreneurs and communities, local and external job creation and other relevant impact indicators.
  - *Extract the key lessons and potential policy guidelines* relating the BSA's involvement and participation in the events.
- *Based on the above, develop and implement a TFCA event strategy* that will maximise the potential value of nature and culture-based outdoor and adventure events. The strategy should, among others:
  - *Outline in detail BSA's potential support for events,* including possibly:
    - Financial sponsorship or co-sponsorship of major events, to be considered only in exceptional instances, e.g. where the event has already achieved, or has the potential to achieve national or international competitive status with large scale participation, media coverage and audience viewership.
    - Limited financial sponsorship specifically for marketing the event and with it the destination, to be considered in instances where the event fits with the TFCA positioning and target market segments and could have significant positive financial, employment or marketing impact on the TFCA in the short to medium term. Such contributions will be based on a suitable, measurable marketing plan.
    - In-kind support with staging and promoting the event, e.g. through BSA event endorsement, incorporating the event in BSA digital and print marketing initiatives, facilitating community and public sector contacts, etc.
  - *Research, identify and prioritise existing and potential* nature, culture, outdoor and adventure sport events that would fit the marketing focus and resources of each TFCA and identify potential level of support for these. Criteria for prioritising events could include e.g. proven potential economic impact, job creation, local business opportunities, domestic and international marketing exposure, involvement of women and youth and other key factors. Evaluation criteria should, where possible, be measurable and quantifiable.
  - *Map out a process and action plan to attract prioritised events* by:
    - Proactively approaching event organisers of priority events to discuss and agree BSA's involvement in the events.
    - Receiving and evaluating unsolicited approaches for support from event organisers.

3.7.3.2 Strategy 3.2: Develop and execute an investment and business development strategy

As indicated the range and quality of accommodation, activities and amenities vary substantially among the TFCAs and also within the individual TFCAs. Some TFCAs and parts of TFCAs are severely limited in visitor facilities. As a result market demand will remain skewed in favour of particular areas (which is often liked to particular TFCA Member State territories). In addition, due to limited business services and local skills in some areas, tourism supply chains are poorly developed, resulting in a high level of importation and economic leakages. To ensure balanced growth and spread of demand, the additional marketing initiatives outlined above should be complemented by expanded tourism capital investment and business development, especially in lesser developed TFCA areas.

The following activities will be conducted in support of the strategy:

- *Develop and execute an investment strategy covering* each TFCA, among others including the following elements:
  - *A contact list of key institutions and relevant contact persons* with whom BSA could collaborate in promoting tourism investments in TFCAs including Member State investment organisations, conservation authorities (e.g. SANPARKS, NWR and ANAC, who have all put out investment opportunities in the last year).
  - A database and portfolio of potential priority investment projects in each TFCA, supported by relevant pre-feasibility information for each opportunity (this may require site visits and gathering of market information).
  - An analysis of factors that limit or prevent investment in TFCAs and proposals for addressing these.
  - An investor prospectus to showcase in attractive format, the various investment opportunities, land tenure arrangements, investor privileges, and available investment incentives.
  - An investment procedures manual that clarifies investment application and approval procedures, license requirements and contact details of the various authorities to be consulted.
- Develop and execute a 5-year TFCA investment action plan that includes:
  - Policy, regulatory, institutional and other measures to be instituted to facilitate investment growth.
  - Contact lists and profiles potential investors.
  - An investment marketing plan and promotional mix to be executed.
  - Measurable success indicators to monitor progress and impacts of the strategy.

3.7.3.3 Strategy 3.3: Plot and develop suitable travel circuits, routes and trails to and in TFCAs

Growth in tourism visitation to TFCAs will to a large extent depend on how the TFCAs are integrated and linked with surrounding local, national and regional tourism destinations and attractions. While some niche market travellers may choose TFCAs as end destinations (e.g. eco and adventure special interest followers, event participants, off-road enthusiasts and other focused segments), many others will visits TFCAs as part of a broader tour or itinerary. In both instances travellers should be guided in respect of potential routings and itineraries to maximise their experiences, ensure access to areas and spread visitation through TFCAs.

The following activities will be conducted in support of the strategy:

- In collaboration with Tourism Working Groups and other selected stakeholders, identify opportunities for developing and promoting existing and potential circuits and routes including:
  - Regional and national TFCA travel circuits by linking up TFCAs with main tourism centres and destinations in SADC. Such circuits could be linked up by air, sea or road travel.
  - TFCA access and through routes by linking TFCAs with surrounding visitor destinations via TFCA entrance points and cross border immigration points.
  - TFCA internal routes and trails, by linking up various attractions and experiences within TFCAs, which may not be located on the main access and through routes. Such internal routes and trails could be geographic (i.e. linking locations and attractions in a logical flow) or thematic (e.g. birding, hiking, biking, 4x4 travel, heritage/culture etc.).
- Conduct an initial scoping and prioritisation of potential routes and circuits in respect of their potential attractiveness, importance for tourism growth in the TFCA, economic and employment impact and probability practicality of success.
- Conduct a detailed assessment of priority selected circuits and routes including.:
  - Determine and collect information regarding the main attractions, activities, commercial products, communities and other important assets
  - Identify access and infrastructure gaps including air, sea and road access services and facilities; immigration facilities and arrangements; safety and emergency services; signage and interpretation; visitor facilities like sanitation, hides, walkways, etc.
  - Identify and document critical stakeholders involved in developing and promoting the circuit or route including public sector bodies, private businesses, NGOs and CBOs.
  - Identify and document marketing initiatives and skills status of participants on the route and gaps in this regard.
- Establish route development forums for the priority routes including public, private and community based representatives.
- Develop and execute a circuit/route/trail development programme and action plan including access and infrastructure improvements, quality and skills development initiatives, marketing initiatives and other required actions, with a clear indication of stakeholder roles, resources and funding.

3.7.3.4 Strategy 3.4: Provide tourism support and capacity building for local entrepreneurs and communities

A major objective of the TFCA programme is to ensure that the economic benefits derived from cross-border conservation accrue to local communities living in and around TFCAs. This, in turn with encourage custodianship of resources by locals. Currently local supply chains and business partnerships are weak in most TFCAs, with the result that most goods and services used for constructing and maintaining tourism enterprises are imported, with major economic leakages and high operating costs. A business support and capacity building programme is urgently required to ensure effective market development.

The following activities will be conducted in support of the strategy:

- Develop and execute an SME business development strategy for TFCAs, to maximise backward (supply chain) and forward (marketing/sales) linkages with businesses in TFCA areas, in particular community-based entrepreneurs, farmers and small business suppliers to the tourism industry. The objective should be to reduce dependencies on external suppliers and associated economic leakages. The strategy should, among others, contain:
  - A database of emerging entrepreneurs in tourism and related suppliers in each TFCA, including their size, financial status, current outputs, markets/segments attracted, skills availability and gaps and other indicators of their development status.
  - An identification of the main gaps in their business operations and ability to participate and benefit from tourism growth in TFCAs.
  - Proposals and measurable success indicators for addressing such gaps.
  - An action plan indicating activities, timeframes, responsibilities, costs and success indicators.

3.7.4 Goal 4: Monitoring tourism performance

The goal is to ensure adequate research and data gathering to be able to monitor and evaluate progress and outcomes of the market development strategy. The following strategies will be pursued:

3.7.4.1 Strategy 4.1: Create a database of tourism supply in eah TFCA

Currently there exists no comprehensive and consolidated baseline databases of tourism supply for any of the TFCAs, covering entire TFCAs (accommodation capacity, activities, employment and other supply elements). A comprehensive, consolidated supply databased is required to effectively measure, monitor and manage the success and impacts of interventions through indicators such as visitor numbers, visitors expenditure, occupancy levels, growth in investment, employment generation, community engagement and other factors.

The following activities will be conducted in support of the strategy:

- Establish a suitable digital database system and structure for collecting, recording and managing supply data. Such a system should ideally by compatible with suitable GIS software and have the ability to be fed through remote data recording in the field. The database should cover all aspects of tourism supply, including public, private and community owned assets as well as land and other assets that not yet operational and available for tourism development.
- Establish a practical process and organisational arrangements to populate the baseline database and maintain and update it on a continuous basis.

3.7.4.2 Strategy 4.2: Monitor tourism performance and satisfaction

The well-known fact that one "cannot manage what you are unable to measure" holds true also for tourism development of TFCAs. A suitable measurement system is required for monitoring and evaluating tourism performance in TFCAs.

The following activities will be conducted in support of the strategy:

- Identify and collect baseline and growth statistics regarding suitable indicators of tourism performance in TFCAs, which may, among others include:
  - Accommodation guest numbers, occupancies and growth rates.
  - Employment numbers and growth rates, including youth and female employment.
  - Entrance and visa numbers through border posts, by nationality.
  - Entrance figures for national parks and conservation areas.
  - Other suitable indicators
- Where appropriate and possible, conduct visitor and travel trade surveys to establish visitor travel patterns, expenditure and satisfaction levels and travel trade awareness of TFCAs.
- Based on the above, produce a bi-annual tourism status and growth report on tourism impacts and growth in TFCAs

4 Implementation

4.1 IMPLEMENTATION PRIORITIES

Given the varying tourism status' of TFCAs and the extent of market development strategies and task, a phased and prioritised implementation approach is required.

4.1.1 Market and product readiness of TFCAs

The current demand and product status' of the various TFCAs provide an indication of suitable approaches that could be considered for prioritising the proposed interventions.

Table 11: Evaluation of current supply and demand conditions in TFCAs

Tourism Readiness Factors/TFCAs	AR	KT	KAZA	MAZA	GM	GL	L	MD
Current Supply Conditions								
Nature and extent of accessible visitor attractions								
Variety and extent of accommodation and activities								
Spread/balance of accommodation and activities throughout TFCA								
Cross-border road access within or in proximity to the TFCA								
Air access to key TFCA entry point								
Current Demand Conditions								
TFCA collaborative marketing initiatives and partnerships to promote TFCA								
Volume of visitors attracted								
Proximity and connectivity to established tourism destinations, routes and entry points								
Visitor spread and balance throughout TFCA								
Variety of market segments attracted, balance of Southern Africa-International visitors and extent of inclusion in tour operator programmes								
		=High			=Average			=Low
Readiness Score (where High=3; Average=2; Low=1)	17	20	28	11	18	25	21	22

The following findings emerge from the evaluation and should assist in prioritising and phasing of market development interventions :

- The TFCAs vary greatly in respect of their market readiness.
- Regarding overall market readiness:
  - Two TFCAs, namely KAZA and Great Limpopo have a high market readiness (>80%) overall, scoring high in terms of both in respect of demand and supply conditions. These TFCAs should be able to benefit from and absorb both developmental and marketing interventions. Expansive market development programmes would be appropriate for these TFCAs, covering both product development and marketing interventions.
  - Three TFCAs, namely KTP, LTFCA and MD have a medium market readiness (>66%) overall and all three are in a better position regarding tourism supply than demand. Selective market development programmes would be appropriate for the TFCAs, with a focus on marketing interventions that match the available supply capacity, and staged development interventions to build and improve capital investment and human capacity.
  - ARTP and GM TFCAs have a marginal market readiness mainly due to its remoteness and limited visitor facilities and amenities. Focused market development interventions would be most appropriate, i.e. targeted marketing, with product development interventions that match the needs of specific, targeted visitor segments.
  - MAZA could be considered as not being market ready yet and the focus should be mainly on supply development before engaging in substantial marketing.
- Demand and supply is highly skewed or highly skewed geographically in all TFCAs, in favour of specific parts of the TFCA. This is a factor that impacts on both demand and supply conditions, indicating that all TFCAs are in need of both tourism development and marketing is specific geographic parts or areas.
- The more remote TFCAs like ARTP, KTP, MAZA and GMTFCA are not as market-ready as those that are more centrally located in respect of existing tourism routes and destinations. Improving air links among TFCAs is critical for the longer term tourism growth of these TFCAs.
- Overall, TFCAs are in a better position from a supply, than from a demand perspective, indicating a need for increased marketing and exposure.

4.1.2 Implementation approaches

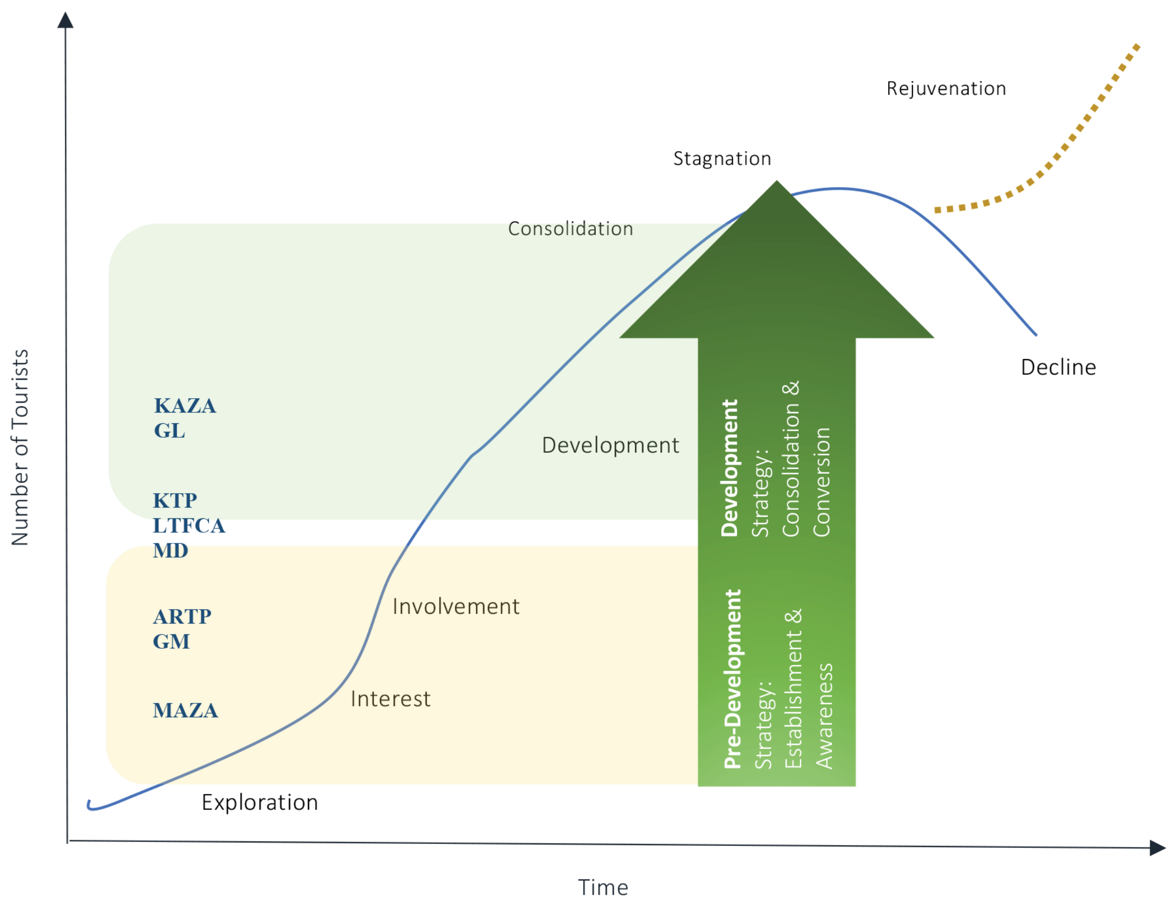
It is recommended that the market development initiatives implemented and plans produced for each TFCA should consider the market readiness of the TFCA and where it fits with the following destination lifecycle stages.

- Pre-development stages: Destination Exploration, Interest and Involvement, i.e. when the TFCA emerges as a tourism destination and stakeholders start exploring tourism options and become interested and involved in developing the area for tourism.
- Development stages: Destination Development and Consolidation, when the destination has a substantial tourism product and is fairly well known, and stakeholders are keen to experience financial returns and benefits.

Figure 6 below provides a conceptual indication of Depending on the market readiness and lifecycle stage of the TFCA, two strategies are recommended:

- For those TFCAs that are in the pre-development stages of the destination lifecycle (MAZA, GM), the focus should mainly be on establishing the TFCA as a tourism destination (securing basic tourism services and activities) and raising awareness of its existence and tourism offer.
- For those TFCAs that have already entered the development stage of the destination lifecycle (KAZA and GL) the focus should shift towards product consolidation (improved variety, spread and quality of services and activities) and improving conversion (visitor arrivals and booking transactions).
- For those TFCAs that are in the transition from pre-development to development stages of the destination lifecycle (AR, GM, KT, L and MD) the focus should be on establishment/awareness with an incremental shift towards consolidation/conversion.

Figure 6: Position of the TFCAs in the Tourism Destination Life Cycle



4.2 Implementation roles and responsibilities

A concurrent implementation approach that harnesses the resources and mandates of both the SADC Secretariat's Boundless Southern Africa (BSA) unit and the Tourism Working Groups (TWGs) of the individual TFCAs in a true partnership, is most suitable for implementing the market development strategy.

While a flexible approach is most suitable in allocating roles and responsibilities between these two parties, the following outline should serve as a guideline.

4.2.1 SADC Secretariat, BSA unit

BSA is mainly responsible for the following:

- Arranging and manging meetings of the SADC Tourism Working Group for TFCAs, which functions under the SADC Tourism Programme and where national tourism representatives of the SADC Member States meet to advise senior officials and tourism Ministers on tourism in TFCAs.
- Leading the execution of the TFCA Market Development Strategy.
- Initiating, steering and ensuring partnerships with Tourism Working Groups and other parties in executing the majority of activities of the Market Development Strategy.
- Monitoring and reporting on progress achieved with implementing the Market Development Strategy.
- Ensuring that Tourism Working Groups are set up for each TFCA.
- Regularly liaising and communicating with coordinators and Tourism Working Groups of individual TFCAs, in executing the Market Development Strategy.
- Gathering, managing and distributing information and knowledge on tourism best practices, market trends, TFCA performance and other matters.
- Soliciting and executing funding and funding partnerships for executing the Market Development Strategy.

The BSA unit in the SADC Secretariat has a small staff complement and its success in leading the implementation the market development strategy will be highly reliant on its ability to:

- Select and focus on a manageable and prioritised portfolio of activities at any given time.
- Engage and strike up partnerships with representative Tourism Working Groups in individual TFCAs to "stretch" implementation capacity and resources, and ensure that all persons and institutions with a TFCA tourism mandate fulfil their responsibilities.

- Outsource, through a transparent tendering process, support for the execution of high level activities.
- Develop capabilities and excellence in knowledge management and digital technologies for adding value to and communicating with the widest possible spectrum of stakeholders and audiences.

4.2.2 TFCA Tourism Working Groups

TFCA Tourism Working Groups are essential for ensuring that market development activities and successes permeate to the level of individual TFCAs and that implementation is able to capitalise on the resources and capacity of the widest possible of stakeholders involved in TFCAs. Tourism Working Groups should, among others, include representatives of the following stakeholders:

- TFCA coordinators and/or secretariates
- National Destination Management Organisations (DMOs) of Member States where the TFCA falls.
- Provincial of Regional Destination Management Organisations (DMOs) of Member States where the TFCA falls.
- National and local Parks Board and other conservation authorities of Member States where the TFCA falls.
- Relevant government ministries and departments that are relevant to tourism development in the TFCA e.g. immigration, law enforcement, roads, civil aviation and other relevant authorities.
- Private sector tourism organisations that have members in the TFCA.
- Private tourism businesses that operate in the TFCA.
- Other relevant private businesses that operate in the TFCA.
- Community projects and representatives.
- NGOs, CBO's and other non-profit tourism and conservation bodies operating in TFCAs.

The roles of the TWGs are, among others, the following:

- Developing a tourism strategic plan and, where applicable, supportive tourism plans and strategies for the TFCA.
- Working closely with and supporting BSA in executing the Market Development Strategy and linking their local TFCA plans to the SADC market Development Strategy.
- Harnessing the resources and participation of all relevant stakeholders in implementing the Market Development Strategy and other activities.
- Attending to and managing tourism crises and other events that require attention in TFCAs.
- Ensuring that all relevant stakeholders are well informed and kept up to date with progress an activities in the TFCA.

4.3 Action plan

The following action plan summarises the proposed goals, strategies and actions, provides an indication of priorities and indicates if whether actions fit with the establishment/awareness stage of the consolidation/conversion stage.

Goals and Strategies	Actions (details in text)	Priority (High / Medium / Low)	Focus on TFCAs in Pre-Development Stages Establish & Raise Awareness	Focus on TFCAs in Development Stages Consolidate & Improve Conversion	By When? (Years) Yr 1-3	Yr 4-6	Yr 7-10	Responsible Lead	Support	Success Indicators
Goal 1: Improving tourism institutional capacity										
Strategy 1.1: Ensure effective planning	Develop implementable tourism strategies and action plans for individual market-ready TFCAs		√	√	X	X		TWGs	BSA	All market ready TFCAs have tourism strategies
	Research the profiles, preferences, purchasing behaviour, etc. of key potential TFCA market segments			√		X	X	BSA	Tourism Agencies	Annual or by-annual tourism surveys conducted
Strategy 1.2: Strengthen implementation capacity	Appoint additional tourism expertise to support the implementation of tourism strategies for individual TFCAs			√	X	X	X	BSA	TWGs	External tourism marketing representatives appointed for selected TFCAs
	Appoint TFCA market representatives in key markets			√	X	X	X	BSA	TWGs	Market representation appointed in RSA, UK, German speaking Europe
Strategy 1.3: Improve funding for market development	Create a database of potential tourism funding sources and approach funders for strategy execution		√			X	X	BSA	TWGs	Active fundraising programme established and additional funders attracted
	Leverage available TFCA tourism funds to establish funding partnerships			√	X	X	X	BSA	TWGs	At least 2 joint (co-funded) market development projects executed per annum
	Establish a joint marketing procedure and mechanism			√	X	X	X	BSA	TWGs	Joint market policy, procedural guidelines and mechanism established
	Ensure suitable and transparent financial management systems			√		X	X	TWGs	BSA	Appropriate financial and governance systems set up for financial management

Goals and Strategies	Actions (details in text)	Priority (High / Medium / Low)	Focus on TFCAs in Pre-Development Stages: Establish & Raise Awareness	Focus on TFCAs in Development Stages: Consolidate & Improve Conversion	By When? (Years) Yr 1-3	Yr 4-6	Yr 7-10	Responsible: Lead	Support	Success Indicators
Strategy 1.4: Improve stakeholder collaboration	Establish strong and effective tourism working groups for TFCAs		√	√	X			BSA	TFCAs	All TFCAs have working groups established
	Obtain the commitment of member country tourism authorities to actively promote cross-border tourism		√	√	X	X	X	TWGs	BSA	Co-marketing agreements signed between TFCAs, BSA and country tourism authorities, for all TFCAs
Goal 2: Increasing tourism demand										
Strategy 2.1: Strengthen TFCA tourism brand awareness	Tell the TFCA stories in the form of a television, podcast, radio or print publication series.		√			X	X	BSA	TWGs	Digital storytelling series published to convey the vision, phenomena and exceptional experiences offered in TFCAs
	Communicate exceptional nature and cultural events and phenomena in partnership with game rangers, tourism operators and guides		√			X	X	TWGs	BSA	Ongoing social media posts of exceptional occurrences
Strategy 2.2: Improve marketing collateral	Improve and expand the TFCA website portfolio:									
	Improve BSA website to act as a comprehensive, overarching website where each TFCA is fully represented		√		X	X	X	BSA	TWGs	BSA website revamped and contents updated
	Populate and maintain separate websites where TFCA's secretariates or management structures have adequate capacity and resources to do so			√	X	X	X	BSA	TWGs	Joint market policy, procedural guidelines and mechanism established
	Map TFCA routes and attractions in TFCAs			√	X	X		TWGs	BSA	Routes and trails maps produced and promoted in at least 5 TFCAs

Goals and Strategies	Actions (details in text)	Priority (High / Medium / Low)	Focus on TFCAs in Pre-Development Stages Establish & Raise Awareness	Focus on TFCAs in Development Stages Consolidate & Improve Conversion	By When? (Years) Yr 1-3	Yr 4-6	Yr 7-10	Responsible Lead	Support	Success Indicators
	Set up and manage relevant social media platforms.	High	√		X	X	X	BSA	TWGs	BSA social media platforms set up and maintained
	Establish image and video libraries for each TFCA	High	√		X		X	TWGs	BSA	Image and video libraries set and maintained for all TFCAs
Strategy 2.3: Maximise digital marketing execution	Establish links with third party websites, social media channels and other suitable online platforms	High		√	X	X	X	BSA		BSA and other websites widely linked to third party websites
	Collaborate with content contributors and partners in each TFCA, to write blog posts and make interesting posts on social media	Medium	√		X	X	X	BSA	TWGs	Bi-monthly blog posts published sourced from stakeholders in TFCAs and published on BSA blog and other channels
	Develop and implement a social media engagement plan	Medium	√		X	X	X	BSA		Social media engagement plan drafted (timing, media, content) and implemented
	Identify and, where appropriate, host influencers (bloggers) in TFCAs	Low		√		X	X	BSA	TWGs	Bloggers researched, carefully selected and hosted on rotation basis
	Use geotargeting and other targeted advertising and messaging techniques	Low		√			X	BSA	TWGs	Geotargeting used to extend visitor activities and length of stay
	Produce and distribute a quarterly TFCA tourism newsletter	High	√		X	X	X	BSA	TWGs	Newsletter produced and distributed to database
	Conduct selective digital advertising in outdoor and nature media as well as on social media channels	Low		√	X	X	X	BSA	TWGs	Digital advertising campaign launched and results tracked

Goals and Strategies	Actions (details in text)	Priority (High / Medium / Low)	Focus on TFCAs in Pre-Development Stages: Establish & Raise Awareness	Focus on TFCAs in Development Stages: Consolidate & Improve Conversion	By When? (Years): Yr 1-3	Yr 4-6	Yr 7-10	Responsible: Lead	Support	Success Indicators
Strategy 2.4: Ensure travel trade and media knowledge and coverage	Establish and maintain a database of international and regional tour operators and media	High	√		X	X	X	BSA	TWGs	Comprehensive trade and media database populated and maintained
	Promote TFCAs, with an emphasis on lesser known destinations in TFCAs, to the international and regional travel trade, by:									
	Initiating a marketing and sales training programme to prepare emerging enterprises and entrepreneurs in TFCAs for promoting their offers	Medium		√	X	X	X	BSA	TWGs	Marketing and sales training programme launched and executed
	Hosting such emerging enterprises on BSA exhibition stands, where these happen	Medium		√	X	X	X	BSA	TWGs	Limited number of market ready enterprises hosted on BSA stand at Indaba
	Conducting sales visits to international and Southern Africa tour operators offices	High		√	X	X	X	BSA	TWGs	At least 3 sales trips p.a. to promote TFCAs
	Arranging an annual TFCA tourism roadshow, alternating in core markets	Medium		√		X	X	BSA	TWGs	Annual tourism roadshow executed involving all market ready TFCAs
	Arranging annual trade familiarisation visits that include lesser known TFCA areas	High	√		X	X	X	BSA	TWGs	Travel trade familiarisation trips organised for at least 30 agents with a focus on lesser known areas
	Based on the contact database, arrange media exposure visits to TFCAs	High	√		X	X	X	BSA	TWGs	At least 3 media educational visits arranged to TFCAs
	Partner with private sector operators to launch special promotion and competitions	Low		√		X	X	BSA	TWGs	At least 2 slow-season promotions per annum arranged by BSA and TFCA working groups

Goals and Strategies	Actions (details in text)	Priority High / Medium / Low	Focus on TFCAs in Pre-Development Stages Establish & Raise Awareness	Focus on TFCAs in Development Stages Consolidate & Improve Conversion	By When? (Years) Yr 1-3	 Yr 4-6	 Yr 7-10	Responsible Lead	 Support	Success Indicators
Goal 3: Strengthening product variety and quality										
Strategy 3.1: Support selective events staged in TFCAs	Conduct a comprehensive assessment of the status, relevance, impact and lessons learnt from past events staged in TFCAs		√	√	X			BSA		Events impact study completed and lessons applied
	Based on the assessment, develop and implement a TFCA event strategy			√	X	X	X	BSA	TWGs	Event strategy formulated, launched and executed
Strategy 3.2: Develop and execute a TFCA investment and business development strategy	Develop an investment strategy and action plan covering all TFCAs		√		X			BSA		Investment strategy formulated and launched
	Execute a 5-year TFCA investment action plan			√	X	X	X		TWGs	Market representation appointed in RSA, UK, German speaking Europe
	Develop an investor prospectus in attractive format		√		X			BSA		Investment prospectus produced and embedded on website and other relevant channels
	Develop an investment procedures manual		√			X	X	BSA		Investment procedures manual approved and used as a guide for soliciting, awarding and managing tourism investments

Goals and Strategies	Actions (details in text)	Priority High / Medium / Low	Focus on TFCAs in Pre-Development Stages Establish & Raise Awareness	Focus on TFCAs in Development Stages Consolidate & Improve Conversion	By When? (Years) Yr 1-3	 Yr 4-6	 Yr 7-10	Responsible Lead	 Support	Success Indicators
Strategy 3.3: Plot and develop suitable travel circuits, routes and trails to and in TFCAs	Identify opportunities for developing and promoting existing and potential circuits and routes		√		X			BSA	TWGs	
	Conduct an initial scoping and prioritisation of potential routes and circuits		√		X			BSA	TWGs	Opportunities for current and potential tourism circuits, routes and trails scoped, identified, evaluated and prioritised
	Conduct a detailed assessment of priority selected circuits and routes and formulate a tourism circuit, routes and trails development programme and action plan		√		X				BSA	Priority circuits, routes and trails assessed and development programme and action plan approved
	Establish route development forums for the priority routes		√			X	X		BSA	Route development forums established for priority circuits, routes and trails
	Develop and execute a circuit/route/trail development programme and action plan			√		X	X		BSA	At least 3 sales trips p.a. to promote TFCAs
Strategy 3.4: Provide tourism support and capacity building for local entrepreneurs and communities	Develop a SME business development strategy and action plan for TFCAs, to maximise backward (supply chain) and forward (marketing/sales) linkages and capitalise on the growing demand for sustainable tourism			√		X		BSA	TWGs	SME development strategy and action plan formulated and approved
	Execute strategy and action plan at TFCA level, in association with BSA, ICPs, NGOs and other relevant partners					X	X		BSA	

Goals and Strategies	Actions (details in text)	Priority (High / Medium / Low)	Focus on TFCAs in Pre-Development Stages: Establish & Raise Awareness	Focus on TFCAs in Development Stages: Consolidate & Improve Conversion	By When? (Years) Yr 1-3	Yr 4-6	Yr 7-10	Responsible: Lead	Support	Success Indicators
Goal 4: Monitoring tourism performance										
Strategy 4.1: Create a database of tourism supply in each TFCA	Establish and populate a suitable digital database system and structure for collecting, recording and managing supply data	High	√		X			BSA	TWGs	Supply database constructed and populated
	Establish a practical process and organisational arrangements to populate the baseline database and maintain and update it on a continuous basis	Medium	√		X	X	X	BSA	TWGs	Database continuously updated and maintained
Strategy 4.2: Monitor tourism performance and satisfaction	Identify and collect baseline and growth statistics regarding suitable indicators of tourism performance in TFCAs e.g. accommodation, employment, immigration, entrances, etc.	Medium	√			X	X	TWGs	BSA	Suitable statistics collection system set up, maintained and published on an ongoing basis
	Where appropriate and possible, conduct visitor and travel trade surveys	Low		√		X	X		BSA	Appropriate travel trade surveys conducted and results published
	Based on the above, produce a annual tourism status and growth report	Low	√				X	BSA	TWGs	Consolidated TFCA tourism status report published

ANNEXURE A: TARGET MARKET PROFILES

Source Markets
Southern Africa's top source markets hail predominantly from North America and Europe, and in the case of the latter particularly from Germany, the United Kingdom, the Netherlands and France which accounted for almost 50% of European trips to developing countries before COVID-19 lockdowns[1].

According to CBI (2019), European markets typically seek out sea and beach tourism (25.1%) and visiting friends and relatives (23.3%), however in third and fourth place respectively are the pursuit of nature tourism (13.3%) and cultural tourism (9.8%) which bode well for Southern Africa in terms of the region's assets.

While demand from the United States, and the luxury segment therein, has been strong for most of the pandemic period and beyond, it is important to highlight that travel originating from the European markets are greatly affected by such external factors as geopolitical and trade tensions and the global economic slowdown[2].

Destinations depending on inbound travel from Asian source markets such as China which have been closed to travel since the early stages of the pandemic and have yet to reopen. This could change in 2023, with 65% of Chinese travel companies anticipating that the outbound travel market will recover in a year or less[3].

Reviewing the key source markets for Southern Africa below:

SADC (Domestic and Regional)
A source market of significant potential for the TFCAs is that of domestic and regional travellers (predominantly self-drive and special interest niche market segments such as 4x4 enthusiasts) from the SADC region. This is both in terms of travelling to conservation areas within their own country and cross-border (regional) travel into the conservation areas in neighbouring countries.

The culture of travel amongst much of the regional population is limited – driven predominantly by retail, trade and business travel. Within the leisure market segment, VFR remains the most popular reason for travel within domestic borders.

South Africa Tourism describes pure leisure travel in Africa as being in an emerging phase, suggesting that distinct leisure-driven segments are not clearly defined with leisure travel and are likely to be bundled together with other activities, e.g. business travel[4].

South African Tourism's guide to "Marketing to Land-Based Markets in Africa" highlights the Top 10 activities undertaken by country, with wildlife and visiting natural attractions being a small percentage across all land markets compared with other activities such as trading, beach and business[5].

Further, the economic environment in Southern African countries, some of which have high levels of low-income earners, impacts negatively on domestic tourism development. In terms of highest tourism spend potential within SADC, Botswana and South Africa have the highest potential, followed by Namibia.

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[1] CBI (2019) What is the demand for outbound tourism on the European market? Click here.
[2] UNWTO (2020) World Tourism Barometer 2019. Click here
[3] ITB (2022) China Travel Trends Report. Click here.
[4] SA Tourism (2010) Marketing South Africa in Africa land-based countries. Click here.
[5] Ibid.

Southern African Development Community Population, Annual GDP and GDP per Capita

Country	Population	Annual GDP	GDP per Capita
Angola	34.5m	$75,179m	$2,179
Botswana	2.59m	$17,61m	$6,805
eSwatini	96,000	$55,351m	$577
Lesotho	2.28m	$2,465m	$1,080
Mozambique	32.1m	$15,777m	$492
Namibia	2.55m	$12,307m	$4,826
South Africa	60.1m	$418,907m	$6,965
Zambia	19.5m	$21,313m	$1,094
Zimbabwe	15.99m	$28,371m	$1,774

Source: Countryeconomy.com

Coupled with the low spend potential is the fact that regional destinations are often priced for international visitors based on their traditional low volume, high value model (sometimes entirely dollar based). These are therefore often prohibitive for domestic travellers to access.

There may also have been a perception in the past that national parks are "not exciting for young people" and that "… wildlife is for white people" which reinforced the narrative that national parks are the exclusive preserve of the wealthy[6]. Consequently, domestic tourists visiting nature-based attractions make up a small proportion of visitors.

In Botswana, for example, entrances to the National Parks and Reserve indicate that Botswana citizens (about 14%) and residents (about 3%) comprised 17% of park entrances in 2019. In Zambia, domestic tourism (Zambian nationals plus resident ex-pats) some 69% of visitors to the Victoria Falls and 39% of visitors to the five major national parks were local, according to data sourced the DNPW.

The picture is different in South Africa, albeit likely a consequence of Covid. According to the South African National Parks (SANParks) 2022 Annual Report[7], 87.3% of guests hailed from South Africa in 2021/22 compared with 51.2% in 2019/2020. Illustrating the impact of Covid travel restrictions on international travel to South Africa, the percentage of international visitation to South Africa's national parks shifted from 47.2% from other countries pre-Covid to 11.9% in 21/22. A very small percentage of visitation both pre and post Covid (0.8% in 21/22 and 1.7% in 19/20) was by SADC nationals.

There is widespread (albeit anecdotal) agreement among the travel trade that the domestic and regional markets for regional tourism product grew substantially during Covid and this trend has continued following the pandemic. There is arguably a greater awareness amongst and culture of local and regional travel experiences, with parks boards like Namibia Wildlife Resorts actively courting SADC and domestic visitors through revised accommodation rates and a rewards programme[8].

A growing middle class and younger population further fuels the demand for leisure travel, with sun and beach holidays, adventure and sports holidays and city breaks being the main reasons for holiday travel. Key factors that drive destination choice include affordability, accessibility, friends and family recommendations and social media influence[9].

Seasonality is another driver for domestic and regional travel. In the case of the South Africa, almost 35% of all holiday trips occur during December and further travel activity is equally spread during the months of April and July – school holidays[10].

6 Morupisi and Mokgalo (2017) Domestic Tourism Challenges in Botswana: A stakeholders' perspective. https://www.tandfonline.com
7 SANParks (2022) 2022 Annual Report - (https://www.sanparks.org)
8 Economist (2022) Wildlife Resorts introduces new revised accommodation rates (https://economist.com.na)
9 Global Data (date unknown) South Africa tourism source market analysis - (https://www.globaldata.com)
10 Leechor and Fabricius (2004) Developing tourism in Botswana: Progress and challenges.

In addition to the special interest market segments hailing from the region, e.g.: birders, 4X4 enthusiasts, cyclists, etc., there is a lucrative expat market segment returning to their countries of origin to visit friends and relatives combined with a leisure holiday to iconic destinations in the region.

Characteristics[11]

- Growing middle class, but largely budget conscious
- Youthful population
- High numbers of low-income earners
- Highly influenced by access and price
- Shorter stays – 3.5 days on average[12].
- Low spend – South Africa average spend per trip is R3,000[13].
- Seasonality – travel during school holidays

Travel experiences and activities

- Happy with no-frills, budget accommodation
- Travel regionally predominantly for trade, retail and business
- Leisure travel mostly VFR driven
- Holidays driven by beach, city breaks and entertainment

Travel decision-making and booking

- Generally direct FIT business (not through trade unless it is special interest – birding)
- Sources for early planning include digital platforms (forums), word-of-mouth referrals from friends and family and radio
- Low reliance on traditional travel channels, such as travel agents and tour operators.
- When selecting a holiday destination, the most important factors include value for money and access
- Marketing channels need to provide practical information about accessibility, costs, and travel information.
- Mobile phone penetration high

Channels to reach the market

Tour operators

- **Thompsons Holidays:** South African based tour operator specialising in domestic and regional holidays.
- **Falcon Africa:** South African based tour operator specialising in domestic and regional holidays.
- **Air Holidays:** South African based tour operator specialising in domestic and regional holidays.
- **Live the Journey:** South African based tour operator specialising in domestic and regional holidays.
- **Peaks of Africa:** South African based tour operator specialising in domestic and regional holidays.
- **Richters Safari:** South African based tour operator specialising in domestic and regional holidays.
- **MoAfrica Tours:** South African based tour operator specialising in domestic and regional holidays.
- **Roof of Africa Tours:** South African based tour operator specialising in domestic and regional holidays.
- **Tour Operators specialising in self-drive across Southern Africa:**
    - **Kalahari Tours**
    - **Simba 4x4 Tours**
    - **Catz Tours**
    - **Travel Adventures Botswana**
    - **Umkulu Adventures**
    - **Trans Africa Self Drive Adventures**
    - **Touraco**
    - **Discover Africa**
    - **uDrive 4x4**
    - **African Bush Safaris**
    - **Drive South Africa**
    - **Protea 4x4**

Associations

- Each of the member states has an array of private-sector associations – at national and regional level that can be leveraged:
    - National Level: **SATSA, TATO, TBCSA, HATAB, TCBZ, TCZM, HAN, HOTAES, Lesotho Hotels and Hospitality Association,** etc.
    - Regional Level: **GotoVictoriaFalls, Africa's Eden Tourism Association, Livingstone Tourism Association,** etc.

11 Wesgro (2017) Germany Tourism Market Insights Click here
12 South African Tourism (2023) Domestic Tourism Dashboard. Click here
13 Ibid

Shows

- **Indaba** – Southern Africa's largest travel trade show held in Durban, South Africa.
- **World Travel Market Africa** – Held in Cape Town as part of Africa Travel Week, this travel trade show extends to global exhibitors
- **Namibia Travel Show**, held in April in Windhoek
- **Zambia Travel Expo** (ZATEX), held in Lusaka
- **Zimbabwe Travel Expo Sanganai**, held in Harare
- **2023 Caravan Show** – Held in Johannesburg, aimed at the self-drive travel and camping market
- **Outdoor Expo and Adventure Travel Show** – Held in Gauteng and aimed at consumer audience.
- **Great Outdoors Expo** – Hosted in Durban, this expo focusses on off-road travel experiences.
- **OutdoorX** – Touts itself as the #1 Lifestyle Expo in South Africa, including travel, camping, 4X4, etc.
- **kykNET Buite Expo** – Held on the outskirts of Cape Town and touted as a premier outdoor lifestyle expo.
- **The Fishing Expo** – Targeting anglers and recreational fishermen; Africa's largest fishing and outdoor expo.

Media

- **Getaway** – Consumer magazine, both online and in print, focussing on tourism destinations in the region.
- **Go! / Weg!** – Competitor to Getaway in both English and Afrikaans, as well as online and in print.
- T**ourism Update** – Online tourism trade publication aimed at tour operators and DMCs selling the Southern African region.
- **Go! Drive and Camp** – Special interest publication published in South Africa targeting self-drive and camping segment.
- **Travel News Namibia** – Travel trade publication based in Namibia, covering travel industry news for travel agents and tour operators.
- **This is Namibia** – A Travel News Namibia initiative aimed at the consumer and including multimedia, such as video and podcasts.
- **Go! Namibia Travel Guide** – Comprehensive annual guide about Namibia created by Media24.
- **360 Mozambique.com** – Online lifestyle publication for consumers in Mozambique – has a travel section.
- **RoveSA** – South African lifestyle and travel magazine for consumers. They have an "into Africa" section on their website.
- **Africa Geographic** – Describes itself as a travel conservation company; publishes a glossy print magazine.
- **Explore SA** – Describes itself as a travel publication, but the content is more consumer focused. Available in print and online.
- **Travel Ideas** – Consumer travel magazine published in South Africa; includes international and regional destinations.
- **CaravanSA** – South Africa's most loved camping and outdoor adventure news platform and forum
- **African Birdlife Magazine** – Bimonthly magazine run by Birdlife SA
- **SA 4x4 Overland Adventure** – Forum for 4x4 enthusiasts including news.
- **Tracks4Africa** – Blogsite with destinations, tips and overland trip information.

Online forums

- **Club of Mozambique**: Facebook page on behalf of an online magazine in Mozambique with a good following.
- **4x4 Community Forum**: Online forum for off-road enthusiasts. There's also a Facebook page.
- **Fortuner 4X4**: Online forum specifically set up for Fortuner owners
- **Landy Forum**: Online forum specifically set up for Land Rover owners
- **Africa Wild Forum**: Online forum focussing on conservation areas and sustainable travel to these areas
- **The Botswana Traveller**: Facebook Group offering advice to people travelling in Botswana
- **Offroad Maniacs BW**: Facebook Group for offroad enthusiasts in Botswana
- **Botswana Camping and 4X4 Resorts**: Facebook Group set up by Outdoor Legends
- **Botswana Top Travel Info**: Facebook Group offering travellers to Botswana advice
- **Travel South Africa**: Facebook Group for travellers visiting South Africa
- **Travel Zimbabwe**: Facebook Group to find tours, lodges, and activities around Zimbabwe
- **Wild Camping Africa**: Facebook Group for those who love to explore unknown destinations in Africa
- **Southern African National Parks and Game Reserves**: Facebook Group for fans of the regions conservation areas
- **Southern African Birding**: Facebook Group for birders in Southern Africa.
- **Wild Camping Africa**: Facebook Group for campers
- There are Facebook Groups dedicated to self-drive advice – **DriveBots, DriveNam, DriveMoz, DriveZam.**
- There are Facebook Groups specific to countries' national parks or TFCAs: **Zimbabwe National Parks & Game Reserves, Friends of Zimbabwe National Parks & Game Reserves, Southern Africa National Parks & Reserves, Kgalagadi Transfrontier Park sightings.**

Germany

The largest source market within the EU in terms of its travel potential (based on size of population and health of the economy), Germany remains an attractive target market for Southern Africa, particularly as German travellers desire the tourism assets offered by the region.

Travel is considered a necessity among Germans: A means to escape everyday stresses and routine and a reward for a year of hard work. Moreover, travelling and seeing the world reinvigorates Germans, providing them with a sense of achievement and an opportunity to expand their horizons and gain a deeper understanding of people and cultures in other parts of the world[14].

While German travellers favour sunny beach holidays, illustrated by their travel demand for countries like Spain, Italy, Turkey, and Croatia which consistently rank amongst the most popular travel destinations[15], they also favour active holidays and nature tourism[16], again a good match for SADC's tourism offer.

Importantly, German travellers are averse to uncertainty and do a great deal of research before visiting a destination. Southern African countries wishing to attract German tourists should therefore ensure that the region's reputation is favourable and that there is sufficient information and detail available regarding its tourism offerings.

Characteristics[17]
- Large market of single-person households
- Low average number of children per home
- Rapid population ageing
- Sizeable middle class
- Largest demographic segment of travellers aged between 50 and 64
- Take at least one international holiday per year – 33 days of annual leave
- Average duration of travel was 12.2 days in 2021[18].
- Influenced by perceptions of safety, exchange rates, conflict, large-scale events
- Germans are very price savvy and look for the best value
- Highly digitalised households
- Tend to travel as couples or groups of four

Travel experiences and activities
- The selection of activities on offer is the most important consideration.
- High importance is placed on once-in-a-lifetime experiences, feeling pampered and cultural experiences that allow them to gain new perspectives on people and places around the world.
- German travellers are active and seek outdoor experiences.
- Reconnecting with nature is a priority post-lockdown.
- Immersive and unique experiences that allow travellers to expand their horizons are preferred.

Travel decision-making and booking
- When planning, most German travellers will decide between two or more destinations.
- Sources for early planning[19] are, firstly, friends or relatives who have visited the destination previously, followed by travel or guidebooks, and lastly, an Internet search, reflecting their risk-averse nature.
- While Internet penetration and usage are high in Germany, it is interesting to note that traditional media consumption, i.e., television, radio and print media, continues to be high.
- There is a high reliance on traditional travel channels, such as travel agents and tour operators. A low percentage of travellers book directly via a supplier website, although the use of OTAs is increasing.
- Travel time to a destination is not as critical in decision-making as travel costs, accommodation and activities.
- When selecting a holiday destination, the most important factors include safety and security, value for money, world-class nature and aquatic and coastal experiences.
- Marketing channels need to speak to sightseeing opportunities and the experiences and activities of the destination.

Channels to reach the market

Tour operators
- **African Dream Travel** Tour operator specialising in Africa, including several Southern African destinations.
- **Karawane Reisen** Tour operator which sells Southern Africa and the world.
- **Venter Tours** Specialist tour operator for Southern and Eastern Africa.
- **AST Reisen** Specialist East and Southern Africa tour operator.
- **Abendsonne Africa** Specialist Africa tour operator, selling several Southern African destinations.
- **Private Safaris** Also based in South Africa, with representation in German-speaking countries.
- **Eberhardt Travel** Well established travel agency group, selling the world and Southern Africa

14 Singapore Tourism Board (2016) STB Market Insights Germany
15 The German travel market of 2021 (2022) Link
16 CBI (2019) What is the demand for outbound tourism on the European market? Click here
17 Wesgro (2017) Germany Tourism Market Insights Click here
18 The German travel market of 2021 (2022) Link
19 Tourism Australia (2016) Understanding the German Market Click here

- **Taruk** Generalist tour operator selling the world, including Southern Africa
- **Best4Travel** Specialist Africa tour operator
- **Bush Legends** Specialising in safaris in Africa
- **Chameleon** Tour operator selling the world, including Southern Africa
- **Akwaba Afrika** Specialist tour operator for Africa.
- **My African World** Specialist tour operator for Africa, selling several southern African destinations.
- **Evaneos** Global tour operator with a few southern African countries on their destination list.
- **Journaway** Global tour operator with a few southern African destinations offered.
- **Diamir** Global tour operator featuring some southern African destinations.
- **Natuerlich Reisen** Group and individual travel options focusing on nature, with several southern African destinations offered.
- **Ivanowski's Reisen** Well-known Africa specialist in Germany
- **Ikarus Tours** tour operator offering global destinations, including southern Africa.
- **Kalahari Afrika** Tour operator offering African destinations, including southern Africa.
- **Studienreisen.de** Specialist operator offering specialist academic tours to global destinations.
- **Ivory Tours** Tour operator specialising in Africa travel
- **Madiba.de** Specialist in Southern Africa

For more tour operators specialising in selling Southern Africa, visit the Annerkante Spezialisten für Afrika Reisen association

Associations

- **Annerkante Spezialisten für Afrika Reisen** – an association of tour operators and agencies which specialise in travel to Africa
- **Die Reisewirtschaft (DRV)** – association of tour operators, travel agents and tourism service providers
- **Allianz Selbstandiger Reiseunternehmen Bundesverband (ASR)** – represents medium-sized tour operators and travel agents. ASR welcomes members from international operators that support the goals of the association

Shows

- **ITB Berlin** leading travel trade show. ITB attracts more than 113,500 trade visitors and 10,000 exhibitors from more than 180 countries
- **F.re.e Die Reise- und Freizeitmesse** (Munich) – the largest exhibition for recreation and travel in southern Germany (B2C)
- **GTM Germany Travel Mart** (Wiesbaden) – the largest workshop for inbound travel professionals for destination Germany (B2B)
- **Reisen Hamburg** – travel trade show.
- **TourNatur** (Dusseldorf) – travel show for outdoor enthusiasts in the segments of hiking, biking and nature experiences (B2C)
- **CMT Die Urlaubsmesse** – held in Stuttgart in January, this show touts itself as the "world's largest tourism and leisure exhibition".

Media

- **INFOX** is a German information logistics organisation that generates mailing for 15,000 travel agents and tour operators. INFOX can prepare and print mailing, handling most business electronically.
- **fvw** is a travel-trade publication based in Germany. It covers travel industry news for travel agents and tour operators.
- **Voice 4 Afrika** – run by KPRN, a PR agency with several African clients, Voice4Afrika provides news and destination promotions for Africa.
- **Reise Reporter** – consumer online publication dedicated to travel and destinations.

Online forums

- **Alrad und Fernreisefreunde**: Facebook group for German travellers seeking travel advice.
- **Reisen in Afrika**: Facebook group for German travellers seeking travel advice for Africa.
- **Südafrika Reise Forum**: Facebook Group for German travellers seeking travel advice for South Africa
- **Südafrika Reisen**: Facebook Group for German travellers seeking travel advice for South Africa
- **Südliches Afrika für Alleinreisende** Facebook Group for German travellers seeking travel advice for Southern Africa
- **Südafrika-Land Deiner Träume** Facebook Group for German travellers seeking travel advice for South Africa
- **Südliches Afrika Reiseempfehlungen** Facebook Group for German travellers seeking travel advice for Southern Africa

United Kingdom
With a population of 68 million[20], the United Kingdom is the second-largest economy in Europe and the fifth-largest economy in the world[21]. A relatively high per capita income, coupled with its strong currency, has historically translated into a strong propensity for international travel.

As such, travel forms a significant part of the lives of UK citizens. Travelling not only allows them to recharge and escape their daily routine but also to discover new experiences. While they tend to look for immersive experiences at destinations, hygiene factors such as accessibility, convenience, and safety remain baseline expectations[22].

UK travellers are generally experienced. Although short-haul regional trips form most of their travel experiences, long-haul international trips are important but less frequent and take longer to plan.

It is important to note that the UK's recent departure from the European Union and the impact of the COVID-19 lockdown on the British economy is expected to significantly impact British consumers' spending habits in the short term.

Characteristics[23]
- British passport holders enjoy one of the highest rates of visa-free travel globally, with a broader range of connections with regional and global destinations. This means there's a fair amount of competition for their attention.
- Domestic tourism is a well-established trend in the UK, with "stay-cations" gaining popularity.
- European countries are the most popular outbound markets, with France, Spain, Germany and Italy ranking as top destinations of choice[24].
- The British traveller enjoys 38 days of annual leave
- January to March and September to November are peak booking times, while British travellers tend to travel between December and March.
- British tourists that visit developing countries are mostly aged between 18 and 44, with the largest group being 25 to 34-year-olds, reflecting a strong youth market driven by leisure travel.

Travel experiences and activities
- Activities rank amongst the top factors which influence final decisions.
- Visiting natural attractions and watching wildlife are popular activities.
- Learning about the cultures of other countries allows travellers to understand their own culture and feel more connected to the world.
- British travellers seek immersive experiences to learn about authentic local customs and ways of life, values, etc.

Travel decision-making and booking
- Buying travel is a highly considered process.
- Most start planning a trip with more than one destination in mind, while 46% begin with only one destination.
- Africa ranks as the 5th-highest region in searches.
- Travellers are digitally savvy and spend a significant amount of time engaging with travel-specific content online via online travel agencies (OTAs).
- OTAs have the most significant reach in the UK and can strongly influence destination decisions.
- Travel information sites such as Tripadvisor.com and Nationalgeographic.com follow OTAs in popularity.
- Despite the heavy reliance on online content, traditional media is still an integral part of UK media consumption, including TV (96% watch TV regularly for about four hours a day, and two-thirds listen to the radio at least once a week).
- Family and friends also rank as significant offline resources for travellers.
- The most influential factor in destination selection is cost.
- Safety and security, value for money, good food and wine, friendly and open citizens and rich history and heritage play an important role in choosing a destination.
- Additional factors include the weather, reviews, activity options and travel duration.

Channels to reach the market

Tour operators
- **Scott Dunn Travel** Travel company specialising in tailormade holidays, incl. to Africa
- **Audley Travel** Travel company with a strong Southern African programme
- **Enchanting Travel** Operator covering the globe, including Southern Africa

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20 Worldometer (2022) UK population.
21 CBI (2019) What is the demand for outbound tourism on the European market?
22 Singapore Tourism Board (2016) STB Market Insights UK
23 Wesgro (2017) United Kingdom Tourism Market Insights
24 Future Market Insights (2022) UK Outbound Travel Market Outlook

- **Exclusive Africa Tours** Operator focussing on Africa
- **KE Adventure Travel** Specialist adventure operator with tours to Southern Africa
- **Mo Afrika** Tours Specialist East and Southern Africa operator
- **Abercrombie & Kent** Global luxury operator with programmes in Southern Africa
- **Llama Travel** Initially set up to focus on Latin America, now also offering Southern Africa
- **Responsible Travel** Specialist tour operator focusing on holidays with a sustainable tourism angle, including destinations in Southern Africa.
- **Aardvark Safaris** Specialising in travel across Africa
- **Trailfinders** Global tour operator, including Southern African destinations.
- **Red Savannah** Luxury travel in Southern Africa.
- **Wilderness Travels** Specialises in adventure travel in 75 countries, including Southern Africa.
- **Africa Travel** Tour operator specialising in Africa.
- **Intrepid Travel** Specialising in small group travel across the globe.
- **Madventure** Expedition travel, including trans-Africa expeditions.
- **Oasis Overland** Expedition travel across Africa, South America and Asia.
- **Peregrine Adventures** Themed travel – groups and FITs to many destinations, including Africa. Has a distinct adventure focus.
- **Travel talk Tours** Tour operator with tours worldwide, including Africa.
- **Undiscovered Destinations** Small group tours and tailor-made holidays in 60 countries, including Southern Africa.
- **Wild Frontiers** Specialist adventure tour operator with global destinations, including sub-Saharan Africa destinations.
- **Naturetrek** Specialist tour operator focusing on wildlife and nature.

Associations
- **ABTA – The Travel Association**: the UK's largest travel association, representing 1,200 travel agents and tour operators.
- **African Travel & Tourism Association (Atta)**: member-driven trade association that promotes tourism to Africa. More than 600 members, including European and UK tour operators listed on the site
- **Association of Independent Tour Operators (AITO)**: travel association for specialist tour operators listed here.

Shows
- **World Travel Market (WTM)** – an annual B2B show for the global travel trade hosted in London. WTM attracts more than 50,000 international travel professionals from 190 countries and regions (B2B).
- **Destinations**: (London, Manchester) and the **Adventure Travel Show** (London) – two leading consumer shows aimed at the adventure travel segment, where many leading specialist tour operators have a presence (B2C).
- **Dive Show**: (Birmingham) – an annual show aimed at scuba divers, dive operators, resorts and destinations (B2B and B2B).
- **GEM (Global European Marketplace**) – a trade fair for global tour operators and travel buyers (B2B).
- **Experience Africa** – a B2B travel event bringing together buyers from the UK and Europe and suppliers from Africa.

Media
- The **Travel Trade Gazette (TTG)** is the UK's weekly travel trade newspaper covering many aspects of the travel trade.
- **Travel Weekly** is a competitor to TTG, offering weekly Travel Trade news.
- **Travel Africa Magazine** is a B2C publication focusing on outbound travel to Africa.
- **Africa Geographic** is a B2C publication focusing on nature-based travel to Africa.

Online forums
- **Safaritalk.net**: Online community for wildlife environment communities.
- **Art of Travelling**: Online community on Facebook spanning the globe, including the UK.
- **The Travel Bucketlist**: Online community on Facebook for travel
- **Africa Travel Community**: Private Facebook group for Backpackers
- **Travel to Africa** Public Facebook group for consumers interested in Africa
- **Explore Southern & Eastern Africa** Public Facebook group for consumers interested in Southern and Eastern Africa
- **Southern Africa Tour Operators** Public group for operators who are involved in travel within Southern Africa
- **Africa traveling, backpacking, hiking and tour activities** Public Facebook group for consumers interested in Africa
- **Beautiful Africa (Tourism and Travel)** Public Facebook group for consumers interested in Africa
- **AFRICA Travel Community** Public group for operators who are involved in travel within Africa

The Netherlands

The Netherlands has a population of 17.2 million[25] with a high population density of 508 people per km2, 90% of which live in cities[26], making it one of the world's most densely populated nations.

The Netherlands has enjoyed a robust economic outlook for many years. However, the COVID-19 pandemic disrupted the economy, with only a fractional recovery underway. There are signs of tough times ahead[27], with a rising energy prices due to ongoing geopolitical tensions, and consumer confidence having fallen due to rising living costs.

The COVID-19 pandemic heavily impacted tourism in the Netherlands. Research conducted by the Netherlands Board of Tourism & Conventions (NBTC) showed that in 2020 39% fewer Dutch residents planned to take a long summer vacation (one week or longer), either in the Netherlands or overseas, compared to 2019.

However, the Dutch are experienced travellers. They have sound leave policies in the workplace, and in a pre-COVID-19 Euromonitor Lifestyle survey, the figures indicated that approximately 67% of the sample went overseas (for leisure) once a year.

They enjoy cycling tours, wildlife and adventure, nature, and theme parks and enjoy relaxation as part of their holiday experience. They are proud of their "gezeligheid" (being sociable) and enjoy cultural interaction and the friendliness and warmth of a variety of cultures and people (Wesgro 2021).

Characteristics

- They travel predominantly for leisure[28] (84.1%)
- There's a good spread in terms of age profile of traveller (in years): 18-24 (14.7%); 25-35 (25.9%); 35-44 (17.1%); 45-54 (14.4%); 55-64 (16.8%); 65+ (11.2%)
- Annual leave is generally 29 days per year.
- Average length of stay is 19 nights – longer than other source markets.
- The top outbound destinations for Dutch travellers are France, Germany, Italy, Austria, Belgium, and Spain[29].
- They are happy to pay for curated holiday experiences.

Travel experiences and activities

- The Dutch are keen international travellers; according to a survey pre-COVID-19, around 67% went overseas for leisure at least once a year.
- They want to travel for relaxation (32%) and to experience natural beauty. They also enjoy local culture and seek out cultural experiences – arts & culture[30].
- Over 35 000 people from The Netherlands visited South Africa in 2020. 59.1% of their holiday focus was on wildlife, beaches, theme parks and natural attractions.
- Adventurous and often independent travellers, keen on arts, heritage and immersion in local culture. When it comes to food, they like to try new things (exotic meats, local beer and restaurants).
- Curated and immersive experiences work well for this market. The Dutch are always looking for something unique, wanting to participate in an experience rather than just being an observer.

Travel decision-making and booking

- Internet-savvy customers use the web as a source of information for comparisons, travel arrangements and client communication[31].
- Most holidays are booked through the Internet. Two out of three people booked online, and 73% booked their stay at the start of the holiday.
- More than 1 in 10 holidays were booked personally via a travel agency or tour operator.
- Holidays abroad are generally booked via a travel agency (41%)
- 11.6% made personal bookings; 9.6% booked by email, SMS or WhatsApp; and 6.7% booked via telephone.
- There is a high awareness of South Africa but low familiarity with what the country offers[32].

Tour Operators

- **Afrikayatours** Specialist tour operator focusing on Southern Africa
- **TUI** Large travel retailer selling the world, including Southern Africa
- **Afrika Plus** Specialist Africa tour operator
- **Cape Tracks** Tour operator focusing on destinations in Southern Africa

25 Worldometer (2022).
26 Wesgro (2021) Netherlands: Tourism Market Insights.
27 Singapore Tourism Board (2016) STB Market Insights UK
28 Wesgro (2021) Netherlands: Tourism Market Insights.
29 Euromonitor International (2021)
30 SAT Concierge Booklet (2011)
31 South African Tourism (2010) Marketing SA in the Netherlands
32 Ibid

- **African Travels** Tour operator focusing on Africa travel
- **Untamed Travelling** Broad portfolio destinations but includes Southern Africa
- **Outsight Travel** Started with New Zealand and Peru, but now offers Southern Africa
- **Fairmundo Travel** Focus on Southern African destinations
- **Go Africa** Tour operator specialising in Africa
- **Van Verre** Broad portfolio, but have quite a few Southern African destinations
- **Pangea Travel** Broad portfolio, but strong Southern African focus
- **Out in Africa** Almost exclusively focussing on Southern Africa
- **All over tours** Broad portfolio, but strong Southern African focus
- **Charlies Travels** Tour operator focussing on East and Southern Africa
- **All for Nature** Specialist operator focussing on nature, incl. Southern Africa
- **AV Tours & Safaris** East and Southern Africa specialist
- **NRV** Offers broad portfolio, including Southern Africa
- **Djoser** Broad portfolio, including Southern Africa
- **Qas Holidays** Broad portfolio, including Southern Africa
- **Go Zuid-Afrika** Focus on Southern Africa
- **Sable Tours** Focus on Southern and East Africa
- **Oryx** Promising travel beyond the extraordinary incl. Southern Africa
- **Impala Tours**: Netherlands tour operator offering fly-in safaris in Africa
- **Van Bommel Safaris**: Photographic safaris in Southern Africa for individuals and small groups.
- **Reisbrigade**: Tours to Africa. Specialising in a number of African countries, including South Africa, Madagascar, Mauritius and Namibia.
- **Zuid Afrika Specialist**: Specialists in tours to Southern Africa.

Associations
- **ANVR**: the Dutch Association of Travel Agents and Tour Operators. A representative body for the travel industry.

Shows
- **Vakantiebeurs** –A leisure and travel fair held in Utrecht.
- **Horecava** – the largest trade show in the Benelux presenting the latest developments in the hospitality industry.
- **The Independent Hotel Show** – a look at the luxury boutique hotel industry.
- **Passenger Terminal EXPO** – the world's leading international airport conference and exhibition held in Amsterdam.
- **Fair for Special Journeys** – held in Amsterdam in January

Media
- **TRAVMagazine**: the Dutch market leader within the Travel Industry of B2B media. TravMagazine is one of the most important means of communication within the Dutch travel industry.
- **Explore Africa**: Consumer travel "magazine" focussed on Africa travel
- **Afrika.nl**: Forum, listing and blog for anyone looking for Africa travel resources

Online Forums
- **Zuid Afrika en Vrienden** Private Facebook group for Dutch-speaking lovers of South Africa
- **Ontdek Zuid Afrika** Private Facebook group for Dutch-speaking lovers of South Africa

United States

The United States ranks as the world's second-highest tourism spender, with a robust economy and strong demand for travel[33]. The country enjoys a strong domestic market, largely due to its size and its variety of tourist locations, resulting in its residents often choosing to explore their own country instead of travelling overseas. This is exacerbated by the fact that only an estimated third of US residents have passports.

Those who choose to travel overseas are cultural explorers seeking authentic experiences that provide a clear sense of travelling away from home and immersion in a foreign environment and culture. Furthermore, US travellers seek open spaces, outdoor activities, and experiences in nature to rejuvenate – all of which can be easily provided in Southern Africa[34]. It is important to note that Americans value good hygiene and modern comforts that provide safe and comfortable travel experiences[35].

The USA is an attractive source market for Southern Africa. According to The Tourism Academy, Americans take 93 million international outbound trips and spend US$156.3 billion on international travel annually[36].

33 Wesgro (2017) United States: Tourism Market Insights.
34 Tourism News Africa (2022) Wesgro launches US Tourism Campaign.
35 Singapore Tourism Board (2016) STB Market Insights United States of America.
36 The Tourism Academy (2021) U.S. Travel & Tourism Statistics 2020-2021.

However, a considerable constraint to long-haul travel for the US market is the limited number of vacation days (an average of 10 days annually) and strong work culture[37]. As a result, over half of US citizens' outbound travel is to neighbouring countries, followed by the UK, Dominican Republic, France, Italy and Germany[38].

The US outbound market is also heavily influenced by the country's economic performance, which affects people's disposable income and the affordability of overseas travel. Before COVID-19, the strength of the dollar meant that outbound trips taken by Americans were on the increase[39] and this has only continued post-pandemic.

Characteristics

- Nearly 80% of trips are for leisure purposes.
- Most trips are undertaken alone or with a partner.
- Peak months for travel are generally between June and August, with a second peak in December.
- Travel costs rank as the most critical component in decision-making. Hotel/accommodation is ranked as the second most influential factor, followed by activities.

Travel experiences and activities

- US travellers are engaged, adventurous, exclusive and curious[40].
- Americans look for dramatically different cultures and environments in their chosen destinations, often seeking authentic local experiences not found in their home country .
- While they are cultural explorers, US travellers prefer to travel safely and comfortably.

Travel decision-making and booking

- Leisure travel planning is influenced by various sources and heavily driven by background perceptions of the destination. These beliefs about a particular destination tend to arise from word-of-mouth, often through friends, colleagues, and family members who have travelled to the country[42].
- US travellers are flooded with information when planning their travel and tend to consult several sources to help them choose a destination - the average US traveller visits 140 Travel sites.
- While researching, planning and booking, travellers spend a significant amount of time engaging with travel content online.
- 35% of US travellers are still considering multiple destinations when they start their travel booking journey, which is typically three to six months prior to travel.
- Search engines and recommendations from friends and family rank highest when travellers begin searching for information. When booking, US travellers use OTAs, airline sites and hotel sites.
- US travellers also rely on traditional travel agents for information, especially when planning to travel to a destination with relatively poorer infrastructure
- When selecting a holiday destination, the most important factors include safety and security, hygiene and modern comforts, nature and wildlife, food and wine, value for money, and friendly and welcoming locals.

Channels to reach the market

Tour operators

- **Ker and Downey Africa** Tour operator specialising in luxury travel to Southern and East Africa
- **Explore Inc** Specialist tour operator selling travel across Africa
- **Rothschild Safaris** Selling luxury travel globally, including Southern Africa
- **Lion World Travel** Luxury travel packages across Africa
- **African Travel Inc** Operating travel in East and Southern Africa
- **Adventure World** Broad portfolio focussing on travel with purpose, incl. Southern Africa
- **Jacada Travel** Broad portfolio including Southern Africa
- **Wilderness Travel:** Pioneer adventure Travel tour operator offering tours in 75 countries, including southern Africa
- **Micato Safaris** Focus on Southern Africa travel
- **Karell Africa** Operator focussing on Southern Africa travel
- **Adventures Africa** Operator focussing on packaged tours across Southern Africa
- **Africa Endeavours** Operator focussing on Southern Africa safari
- **African Portfolio** Focus on East and Southern Africa
- **Continent Tours**: Specialist Tour operator for Africa - including southern African travel
- **Adventures Abroad**: Global tour operator with southern Africa destinations featured

37 Singapore Tourism Board (2016) STB Market Insights United States of America.
38 European Commission (2017) USA: The main traditional international market.
39 Skift (2020) Will American Outbound Travel ever be the same?
40 We are Africa (2018) Why the US market is key for African tourism.
41 Singapore Tourism Board (2016) STB Market Insights United States of America.
42 Ibid

- **GeoEX**: Tour operator featuring unusual destinations and authentic cultural experiences
- **Original World**: Group tours, including custom tours in southern African destinations
- **Adventure Life**: Specialist adventure travel operator featuring some southern African destinations
- **African Mecca Safaris** Specialist operator with broad Southern Africa portfolio.
- **Goway**: Offices in both USA and Canada – comprehensive Africa program.
- **Explore!**: Experts in adventure travel with a global program.
- **G Adventures**: Head office in Canada but based globally. Small group tours with soft adventure, nature and socio-economic contribution at their core

Associations

- **Adventure Travel Trade Association (ATTA)**: a community of more than 1,300 tour operators, tourism boards, specialty agents and accommodation providers from 100 countries.
- **African Tourism Association**: a Global Trade Association promoting travel and tourism to Africa.
- **Association for the Promotion of Tourism to Africa**: a non-profit, volunteer association of travel professionals promoting Africa.
- **ASTA**: the American Society of Travel Agents is the umbrella association looking after the interests of the travel agency community in the USA.
- **USTOA**: United States Tour Operators Association with an active database online to search for members focussed on Africa.
- **African Tour Operators** Association of specialist tour operators for Africa.

Shows

- **Travel Adventure Show** – B2C shows held across the USA with a focus on adventure and travel
- **IPW** – Pow Wow, as it is referred to – is a B2B show for global travel professionals.
- **New York Times Travel Show** – B2C show held annually to promote global travel.
- **Africa Showcase** – Privately run workshop in North America conducted by On Show Solutions

Media

- **Travel Weekly** is a weekly travel trade publication for US-based tour operators and travel agents. Run news on Africa.
- **Afar** – consumer facing magazine focussing on travel; includes Africa-based destinations and news.
- **Go World Travel** – consumer facing magazine focussing on travel; includes Africa-based destinations and news.
- **Global Traveler** - consumer facing magazine focussing on travel; includes Africa-based destinations and news.
- **Travelmag** – consumer facing magazine focussing on travel; limited focus on Africa.

Online forums

- **National Geographic Wild**: Private Facebook Group focused on exposing the hidden nature of the world.
- **Travel Divas**: Private Facebook group focused on the shared travel experiences of black women.
- **Travel Addicts Life**: Facebook Group for travel lovers – global destination focus.
- **Lonely Planet Travelers Group**: Private Facebook Group for the Lonely Planet community.
- **Must Do Travels Group**: Private Facebook group for adventure seekers in the US and Canada.
- **Fodors**: Online forum for travellers hosted by guidebook writer, Fodors.
- **Rick Steves Travel Forum**: Online forum hosted by Rick Steves, but crowdsourcing responses.

Market Segments

The market segments selected for investigation align with the strategic objective of brand development and promotion of Southern Africa's transfrontier conservation areas, based on its competitive advantage – diverse and untouched landscapes, as well as its cultural and natural heritage.

Adventure Tourism

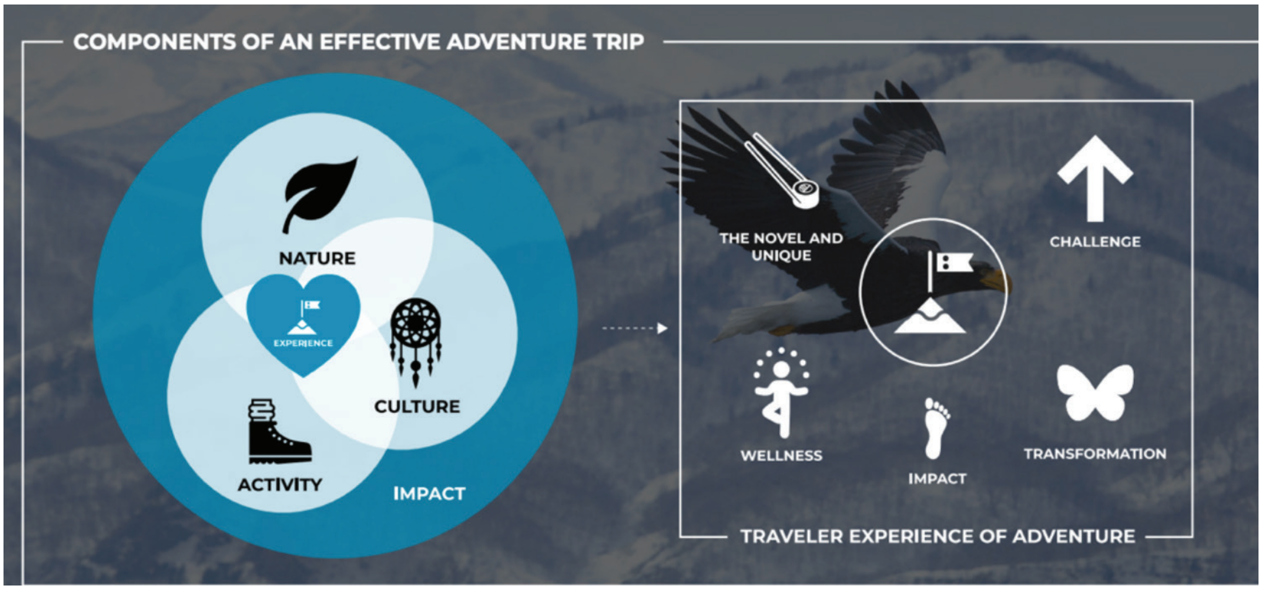
Market segment

The broad definition of adventure tourism means this market segment is both large and lucrative for destinations. This is especially noteworthy considering that the adventure travel segment was predicted to recover faster than other market segments[43] in the post-Covid era. Included within the definition of adventure tourism are experiences that involve physical activity, natural environment, and cultural immersion[44]. For travel to be considered 'adventure travel', it must fit at least two of the three elements[45].

43 CBI (2021) The European market potential for adventure tourism.

44 Ibid.

45 Ibid.



Source: ATTA

Research also indicates that adventure travel is motivated by a variety of desires that influence how travellers consume and emotionally process their trip. Travellers are seeking mental and physical wellness, novel and unique experiences, challenge – whether physical or cultural – and often, ultimately transformation. Travellers are also keenly aware of their impact and have a desire to have a positive impact on the environment and communities they visit[46].

Perceptions of 'adventure' are always shifting. Adventure can be both hard and soft, from birdwatching, joining a research expedition and engaging with locals (soft) to white-water rafting, caving and mountain trekking (hard).

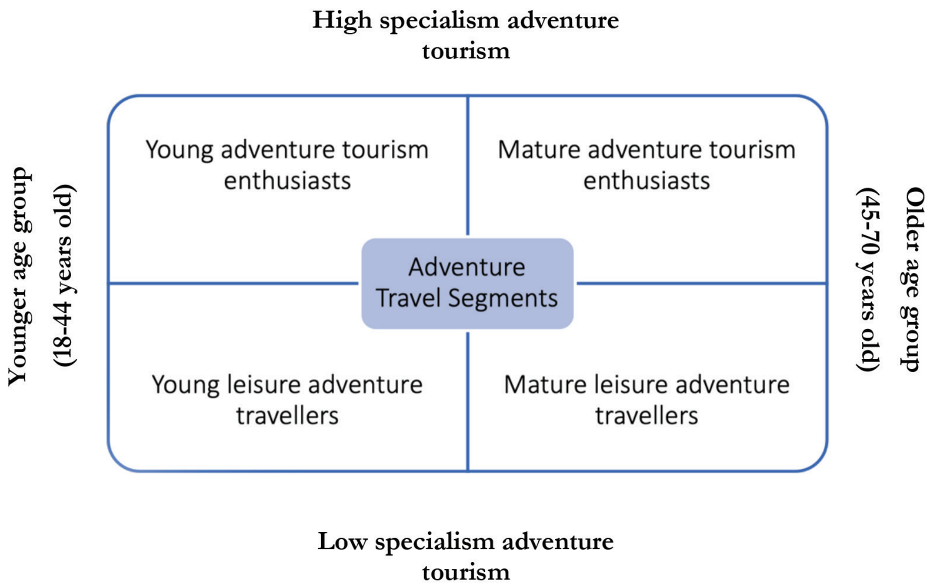
Further, the UNWTO Global Report on Adventure Tourism[47] describes two types of adventure tourists:

- **Adventure enthusiasts**, i.e., cyclists, bird watchers and kayakers who become progressively more skilled at a specific outdoor or athletic activity. These enthusiasts are passionate about a certain sport or activity, tending to pursue the same activity after the trip, seeking new and exciting destinations in the process.
- **Extreme adventurers**, i.e., a much smaller segment that adventure enthusiasts such as base jumpers or those who run 100km races. They seek out locations that are difficult to access and often camp or provide their own transport.

Travel behaviour
Travellers who fall within the adventure travel segment are curious about a destination's cultural and natural heritage and have a greater sense of social and environmental responsibility. They are generally well educated, well-travelled (over 70% have a valid passport) and high value with much of their travel expenses spent on location (65% according to ATTA). They are also willing to pay a premium for exciting and authentic experiences[48].

The Centre for the Promotion of Imports (CBI) characterises four adventure travel market segments based on age and level of enthusiasm:

46 ATTA (2020) ADTI 2020 Report
47 UNWTO (2014) Affiliate Members Global Report, Volume 9 – Global Report on Adventure Tourism
48 Ibid.



Source: CBI (2021)

Low specialism adventure travellers generally opt for a range of soft adventure tourism activities and alternate these with such activities as cultural excursions. They are the largest segment within adventure travel. High specialism adventure travellers generally have a clear focus on one, often hard tourism activity.

Adventure travellers are primarily motivated by looking for new experiences, going off the beaten track, and travelling like a local[49]. Other factors, such as relaxation, exploring new places, time with family and learning about new cultures are also key aspects to their overall travel experience.

Channels to reach the market

Adventure travellers are typically savvy tourists who spend time researching and planning their ideal experiences in combination with using professional services.

Destination choices are influenced predominantly by opinions from family and friends, the web and travel magazines[50]. Social media is another important influence.

While they are capable of sourcing their own information online, they are likely to use professional services, such as guides, instructors and specialist tour operators, to help them plan their trip and come up with personalised, authentic itineraries[51].

While social media is a major media influence for this segment – according to ATTA, Instagram, Facebook, WhatsApp, YouTube and LinkedIn are the top 5 platforms – email is also a popular way to reach customers[52]. Further to this, the most 'helpful' marketing and sales tactics, ATTA says are:

Special-interest publications such as National Geographic, National Geographic Traveller[53], Adventure Travel Magazine, Wanderlust and Adventure World Magazine are popular sources of inspiration, and for adventure travellers with a specific niche interest there are a range of online and print titles per niche segment available (see below). The most popular online booking platforms for adventure travel are Facebook, Tripadvisor, Viator, and TourRadar[54].

The high proportion of adventure travellers doing online research emphasizes the importance of maintaining a strong web presence and online marketing strategy. Adventure travellers also post prolifically on their own social media accounts. This means they can be important promoters for destinations and activities, recommending travel to their friends and family through social media and posting reviews online.

49 Adventure Travel Trade Association (2022) Adventure Travel Industry Snapshot.

50 Skift (2014) Profile of the Adventure Traveller: Smart and Not Afraid

51 Ibid.

52 Adventure Travel Trade Association (2022) Adventure Travel Industry Snapshot.

53 Adventure Travel Trade Association (2013) Adventure Tourism Market Study

54 Ibid.

Niche segments within adventure tourism
Southern Africa is well-positioned to tap into adventure tourism due to its abundance of untouched natural assets, many of which fall into the region's protected areas, national parks and transfrontier conservation areas.

As such, the niche market segments identified for southern Africa include **birding, trekking, luxury safaris, mountain biking, beach-bush combination (with Indian Ocean islands); high-end safari, mid-market safari, off-road 4 x 4 self-drive market – split between regional and international and community-based cultural** which are explored in-depth in the following sections.

Birding

Market segment
Southern Africa has already earmarked birdwatchers, or avitourists as they are sometimes referred to, as a desired market segment and wishes to position itself as a leading birding destination in the region[55].

Bird watchers travel to long-haul destinations to spot new bird species they cannot see in their own region. These birder types are categorised as follows[56]:

- **Committed twitchers**: Maintain a life-list of birds they have seen during their travels, where adding new species to this list is their core priority.
- **Enthusiasts**: Broad-based nature lovers whose interest often extends to all aspects of natural history, flora and fauna.
- **Casual birders**: Enjoy a sense of discovery and interaction with nature through birds.

The UK, the Netherlands, US and Canada, Scandinavia and South Africa are all identified as priority markets for the diverse niche groups within avitourism.

However, the UK is arguably the most significant source market, home to the largest bird conservation organisation in Europe, the Royal Society for the Protection of Birds which has more than a million members, representing mainly committed twitchers and enthusiasts.

The Netherlands is also a promising source market for birdwatching tourism. The Netherlands Society for the Protection of Birds has 141,000 members.

The total number of active avitourists resident in South Africa ranges from 13,000 to 24,000, who spend between US$32m and US$59m annually on their hobby.

Travel behaviour
Birders are frequent travellers, travelling on average three times a year and over 17 days for birding[57].
Birders tend to prefer an independent travel programme as opposed to an organised birding tour and generally travel either as a couple or part of a group[58].

Avitourists are described as educated, wealthy and conservation-supporting. These tourists also have a high potential to contribute to local communities, educate locals about the value of biodiversity and create local and national incentives for the preservation of natural areas.

In their pursuit of observing, identifying and studying birds in their natural habitat, avitourists travel to locations that are often overlooked by other tourists[59].

Marketing additional non-birding attractions to avitourists may increase their length of stay in a destination[60]. As such, an opportunity exists to cross-sell avitourism activities with other tourist activities.

Product requirements
Important product requirements for birders include safety, quality, availability and variety of birdlife, birding accessibility and infrastructure, and knowledgeable guides who advise them on the potential location and physical attributes of a particular species as this increases the chances of seeing rarer species[61].

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55 Horwath HTL (2021) Integrated Avitourism Report
56 Conradie, N (2010) International market potential of Avitourism in South Africa
57 CBI (Date Unknown) Product Fact Sheet Birdwatching tourism by EU residents
58 Ibid
59 South African Department of Trade and Industry (2010) Avitourism in South Africa
60 SA Department of Trade and Industry (2010) Avitourism in South Africa
61 CBI (2013) Product Fact Sheet Birdwatching tourism by EU residents

Birders rate the following as their top considerations for selecting one avitourism destination over another:

1. Detailed information on birding
2. Walking trails
3. Friendly and helpful local population
4. Safety and security
5. Access to Internet
6. Quality accommodation more important than price

Channels to reach the market
Birdwatchers are a small community and many people run into each other during birdwatching, either at home, on a birdwatching event or during a holiday.

Avitourists are likely to be members of local bird or nature organisations and use birding books and magazines, birding organisations and peer recommendations when deciding where to go.

Birders generally have access to Internet and e-mail facilities and are comfortable with planning their trip on the Internet[62].

International avitourists have a high degree of preference for specialist birding tour operators and are less inclined to use travel agencies and general tour operators to organise their trips[63].

Birding shows and fairs

- **Birdfair**: Europe's largest annual bird watching fair, held annually in August, in Rutland.
- **The African Bird Fair**: Organised by BirdLife South Africa and run as a virtual event in 2020
- **Pannonian Bird Experience**: 3-day trade show for bird watching held in Austria.

Online forums, associations and publications

- **Surfbirds**: Offers listings of international tour operators specialising in birding in international destinations.
- **Bird Forum**: touted as the Internet's largest birding community and forum
- **Birding**: A birding community in the UK.
- **Birdwatch**: A monthly magazine for birdwatchers.
- T**he Association of Independent Tour Operators (AITO)**: Offers a listing of tour operators specialising in birding.
- **Bird Watching Magazine**: Claiming to be Britain's best-selling bird magazine.
- **Birding Magazine**: Distributed by the American Birding Association.
- **BirdWatching**: North America's premier magazine about wild birds and birding.

Birding associations and clubs

- **African Birdclub**: A British-based club for birders with a common interest in African bird species.
- **American Birding Association**: Represents the North American birding community.
- **Association of German Avifaunists** (Dachverband Deutscher Avifaunisten or DDA): The union of all national and regional ornithological associations in Germany.

Tour operators

- **Birding Tours**: German tour operator offering a variety of birding packages.
- **Ivory Tours**: German tour operator, specialising in sustainable African travel
- **Bird Holidays Limited**: UK-based tour operator specialising in birdwatching holidays, birding tours, wildlife safaris and wildlife cruises.
- **Birdfinders**: Worldwide birdwatching holidays to the best birding destinations on every continent.
- **Birding Africa**: Recommended as one of the top 5 most recommended bird tour companies in the world.
- **BirdQuest Tours**: Easy-going bird and wildlife adventures.
- **Avian Adventures**: One of the leading UK-based bird watching tour companies.
- **Eagle Eye Tours**: US-based offering high-quality tours to worldwide destinations.
- **Sunrise Birding**: US-based small group bird watching tours and wildlife safaris worldwide.

62 Ibid.
63 Ibid.

- **Wings**: US-based offering birding tours worldwide.
- **Greentours**: Provides Wildlife, Alpine Flower, Mammal Tours, Bird Watching and much more throughout the UK, Europe, Africa, Americas, Asia, Australia.
- **Ornitholidays**: touted as the first birdwatching tour company in the world.
- **Rainbow Tours**: Pioneers of responsible travel, Rainbow Tours specialise in tailor-made holidays and small group tours to Africa, Madagascar and Latin America.
- **Rockjumper Birding Tours**: One of the world's longest established and most highly regarded birding tour companies.

Hiking / Trekking

Market segment
Within the adventure tourism segment, trekking is designated as a hard adventure tourism market[64]. It involves exploring a destination on foot – through mountains, forests or other natural landscapes.

Coinciding with the rise in 'slow travel', interest in trekking holidays has grown in recent years and demand is high in key source markets. Seven out of the ten largest markets for trekking travel retail sales are found in Western Europe (UK, Switzerland, Germany, France, Italy, Austria and the Netherlands)[65].

Trekking travel can be further segmented into categories based on age (young 18-44 to mature: 45-70 years old) and the level of specialism they seek (leisure trekker to enthusiast).

Travel behaviour
Trekkers are hardy and well-travelled. They travel with greater purpose to ensure they have authentic experiences, connect with local people, and use tour operators and establishments that align with their own values. They therefore are savvy with their spendings and are willing to forego comfort for a sustainable trekking experience in truly remote and pristine surroundings.

While they tend to spend less per day, they stay in destinations for longer than the average tourist and contribute to more remote local economies[66]. They are also more flexible than non-adventure travellers and view travel as more a 'way of life' than a holiday.

Especially for lesser-known destinations and technical or more challenging activities, trekkers are likely to use the services of specialised tour operators and guides[67]. Trekkers generally travel either as a couple or part of a group, although solo trekking is increasing gradually.
Trekking experiences often overlap with other nature and wildlife tourism opportunities, such as community-based tourism, and can therefore be packaged together (despite the vastness of East Africa).

Product requirements
Trekkers are looking for a travel experience that pushes them physically and mentally – the degree to which depends on their age and level of specialism. They value experiences in untouched natural surroundings and therefore, sustainability and environmental conservation are priorities for them[68]. Community-based tourism and eco-tourism are often complementary products to trekking for these reasons.

Like most travellers, knowing what to expect ensures trekkers are prepared and therefore, more likely to enjoy their experience. A trek grading system to rate the difficulty, maps, itinerary, kit list, etc. are all useful in this regard.

A good English-speaking guide can make or break the experience. Trekking tourism providers can add value to their treks by having good guides who are able to tell interesting facts and stories about the trek they are doing[69].

Channels to reach the market
Trekkers primarily research and plan travel online through peer review sites, travel forums and social media. Images and videos of natural landscapes and remote locations have high appeal as trekkers plan their trips.

64 CBI (2013) CBI Product Factsheet: Trekking tourism from the Europe to Asia
65 Ibid.
66 UNWTO (2014) Global report on Adventure Tourism.
67 CBI (2013) CBI Product Factsheet: Trekking tourism from the Europe to Asia

Trekking shows

- **Adventure Travel Show**: An adventure travel event for consumers held in London.
- **The Telegraph Outdoor Adventure & Travel Show**: Another consumer adventure travel show held in London.
- **Travel & Adventure Show**: Held in several cities across the United States.
- **The Outdoor Adventure & Travel Show**: Held in several cities across Canada from February to April.
- **Adventure Travel World Summit**: Organised by the Adventure Travel Trade Association for adventure tourism stakeholders including tour operators.
- **Tour Natur**: A walking and trekking trade fair held in September in Dusseldorf.
- **Pure Life Experiences**: A new show focusing on the 'evolved' traveller seeking experiences.

Online forums, associations and publications

- **Adventure Travel Trade Association (ATTA)**: A global trade organisation for the adventure travel industry with a full list of specialist adventure travel tour operators.
- **Mountain IQ**: A club that unites active and adventurous travellers from all over the world.
- **London Adventure Group**: London-based group that organises adventure travel trips in the UK and overseas for its members.
- **Adventure Collection**: A partnership of the world's best adventure travel companies.
- **Travel Africa Magazine**: International magazine dedicated to exploring and travel to Africa.
- **Adventure World Magazine**: Covers a range of adventure sports including trail running, trekking and general adventure travel.
- **Wanderlust Magazine**: Wanderlust is a British travel magazine, covering adventurous, cultural and special-interest travel.
- **Active Traveller**: Guide to activity and adventure holidays in the UK and abroad.
- **Backpacker Magazine**: Source for backpacking gear reviews, outdoor skills information and advice, and destinations.
- **Live for the Outdoors**: Britain's two best-selling monthly walking titles – Trail Magazine and Country Walking Magazine.
- **Trek & Mountain**: UK based magazine featuring trekking destination guides and reports.
- **German Alpine Club**: the world's largest climbing association and the eighth largest sports union in Germany. The Club is the responsible body for sport and competition climbing, hiking, mountaineering, hill walking, ice climbing, mountain expeditions as well as ski mountaineering.
- **Other alpine hiking clubs:**
    - Austria: Österreichischer Alpenverein (ÖAV)
    - France: Club Alpin Francais (CAF)
    - Italy: Club Alpino Italiano (CAI)
    - Switzerland: Schweizer Alpen-Club / Club Alpin Suisse (SAC)

Tour operators

- **Intrepid Group**: World's largest provider of adventure travel experiences.
- **Footprint Adventures**: Adventure holidays in Asia, Africa, and South America.
- **360 Expeditions**: Adventure travel, holidays, extreme expeditions and charity challenges.
- **Exodus**: The original activity and adventure holiday company.
- **Explore**: Small group adventure holidays including walking and trekking tours
- **KE Adventure Travel**: Boasts a strong collection of worldwide trekking holidays.
- **Macs Adventure**: Specialise in walking holidays, cycling holidays, and tailor-made adventures in the UK, Europe, and around the world.
- **Travel the Unknown**: Promising worldwide active tours, including trekking.
- **Walks Worldwide**: Independent specialist for trekking and walking holidays.
- **Boundless Journeys**: Touted as one of the "Best Adventure Travel Companies on Earth" offering hiking and trekking.
- **Adventures Within Reach**: Adventure travel trips with activity, culture, and nature, which are customizable, flexible, and affordable.
- **World Expedition**: International tour operator specialising in small group trekking and adventure travel holidays and vacations since 1975.
- **Rei Adventures**: Active vacations, weekend getaways, family adventures, and volunteer expeditions for all levels of experience.
- **G Adventures**: small group adventure tour operator with a focus on focus on responsible travel and partnership with the National Geographic Society.

Beach and Bush

Market segment
The combination of bush and beach tourism experiences has wide appeal for travellers, and both are offered in Southern Africa, where travellers can combine safari with coastal options, e.g., combining a visit to the Kruger National Park and Mozambique's Bazaruto Archipelago.

Sun and beach tourism[70] has wide appeal for the Europe market segment, as does wildlife and eco-tourism, so combining the two is a win-win for travellers and operators who want to build a layered itinerary with lots of options. The casual wildlife traveller[71] is a good candidate for beach and bush tourism as they are looking for a variety of options when planning a trip.

Tourism KwaZulu Natal's[72] segmentation strategy describes this traveller segment as the: "Beach Brigade and Game & Bush Lovers".

Travel Behaviour
Those travellers seeking bush-and-beach combined experiences are generally more adventurous and like some form of independence and flexibility when it comes to organising itineraries. Fully Independent Travelers (FITs) are looking for variety for their long-haul destination itineraries.

It's a competitive market, in competition with other destinations around the world, so the drawcard needs to be, "What can I do in SADC that I can't do anywhere else?" They generally travel in small groups, or alone or as couples/pairs, and don't like group excursions or any activities that are too touristy. They avoid "mass tourism" but want to see the highlights of a destination[73]. They generally gravitate towards "unique" experiences that are different and exciting.

Product Requirements
This traveller is looking for exciting, unique activities that include the best of the wildlife and safari experience with relaxation and beautiful beaches. While luxury accommodation is not a major necessity, unique and interesting accommodation options would be of interest, i.e., sleeping in a cave; overnight in a treehouse; rustic accommodation close to the beach.

Research suggests sustainability is key in product offerings to this selective market, particularly when it comes to coastal resorts. Community-based tourism excursions and immersive experiences are a key focus using responsible, sustainable local businesses[74].

Dining options should also be different and inventive – beach picnics on a private stretch of beach, foraging for dinner, dining out in the bush. Independence is a priority for this traveller, thus building in an element of choice is necessary.

Activities for this type of traveller could include walking safaris, game drives, and photographic safaris. Ocean-going adventure options could be snorkelling, diving, kayaking, and fishing or boating excursions.

Travellers from Europe are seeing destinations that have good sustainability credentials: including: i) using recycled and renewable materials in building practices using the services of local suppliers; ii) using sustainable energy resources (wind, solar and use of natural light); iii) sound waste disposal practices and an awareness around plastic usage and consumption; and iv) locally sourced menu items[75].

Channels to reach the market
This segment likes to design their itineraries and travel plans and will get inspiration from the Internet, where they will do most of their research. Inspiration comes from (online) travel magazines, online travel platforms, visual stories (videos) and online reviews, as well as social media. It's important to have a strong web presence so that those travellers seeking exclusive bush and beach experiences can easily find you.

Many mainstream tour operators, media and forums provide for the combination of beach and bush, with some even creating special packages appealing to this market segment. Thus, all the channels offered for safari would be applicable, in addition to:

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70 CBI (2022). The European market potential for sun and beach tourism.
71 CBI (2022). The European market potential for wildlife tourism.
72 TKZN (2021) Segmentation approach
73 CBI (2022) The European market potential for free independent traveller tourism.
74 CBI (2022): The European market potential for nature and ecotourism.
75 CBI (2022): The European market potential for nature and ecotourism.

Online Forums Associations, Publications and Social Media

- **African Safari blog**: travel tips and advice, news and latest reviews.
- **Wanderlust Magazine**: Wanderlust is a British travel magazine covering adventurous, cultural and special-interest travel.
- **African safari journals**: trip reviews and up to date reports.

Tour Operators

- **Timbuktu** – specialised beach and bush packages in Southern Africa.
- **DiscoverAfrica** – tailormade trips combining safari and ocean adventures.
- **GILTEDGE travel** – South Africa and Mozambique.
- **Rhino Africa Safaris** – good selection of combination offerings
- **Sense of Oceans**: Wildlife and beaches.

Anglers

Market Segment
Recreational fishing is a major tourism activity defined as "fishing by those who do not rely on fishing to supply a necessary part of their diet or income"[76] unlike subsistence fishing where securing food is the primary purpose of fishing. Fishing tourists are either anglers travelling with the main or sole purpose of angling, or a tourist on a trip spending time on angling, but not as their main purpose for the stay. Angling tourism also provides non-marketed social benefits to the anglers like relaxation, exercise and experience of nature[77].

The fishing tourism market is poised to reach a valuation of US$78.5bn in 2022, with strong growth expected at 12.5% CAGR elevating the market to US%254.9bn by 2032, largely driven by the rising demand for fishing tourism out of such markets as the MEA countries[78]. Currently, the Asia Pacific region holds the largest market share (37%), with fishing in the sea the most preferred amongst tourists within this segment.
Moreover, recreational angling is the most popular outdoor activity in the USA[79]. In Europe, it has been estimated that nine million people or 1.6% of the population participate in marine recreational fishing, spending almost six billion a year, and fishing for around 77 million days per year[80].

Fishing tourists have a "high-willingness" to pay for recreational fishing[81]. Further, when a dedicated angler plans his/her vacation, the fishing possibilities often will be a decisive factor for his/her choice of destination. Often a whole family's vacation destination will be decided by fishing opportunities if just one member of the family is a dedicated angler. In that case destinations, which can offer good fishing and other interesting experiences for the non-fishing members of the family will be preferred[82].

Another point of interest is that since the establishment and common practice of catch-and-release fishing within the majority of angling activities, angling tourism can be considered as a type of ecotourism, because it is seen as a means to advance conservation and sustainably develop local and regional economies[83].

The European Anglers Alliance splits fishing tourism into two main components:
1. **Commercial fishing-related tourism**: activities conducted by commercial fishermen using their own fishing vessels, with tourists paying for a trip to see or take part in fishing activities with various kinds of fishing gear.
2. **Recreational fishing-related tourism**: can either be recreational tourism fishing from a charter or hired boat or non-boat marine and freshwater recreational tourism fishing.

In terms of segmenting fishing tourism market segments, Tourism Victoria offers five different segments[84] with varying attributes outlined in the table below:

76 Food and Agricultural Organisation of the United Nations (2012)
77 European Anglers Alliance (date unknown) Angling Tourism
78 FMI (2022) Fishing Tourism Market projected to reach US$254.9 bn by 2032
79 Hoogendoorn (2014) African Journal of Hospitality, Tourism and Leisure Vol 3 (2) Click here
80 C. Michael Hall (2021) Tourism and fishing, Scandinavian Journal of Hospitality and Tourism, 21:4, 361-373, DOI: 10.1080/15022250.2021.1955739
81 Butler, Childs, Saayman and Potts (2020) Can fishing tourism contribute to conservation and sustainability via ecotourism?
82 Ibid.
83 Zwirn, Michael & Pinsky, Malin & Rahr, Guido. (2005). Angling Ecotourism: Issues, Guidelines and Experience from Kamchatka. Journal of Ecotourism. 4. 16-31. 10.1080/14724040508668435.
84 Tourism Victoria (2021) Victorian Recreational Fishing Tourism Strategy

Market Segment	Basic attributes	Experiences sought	Communication preferences
Novice Fisher	Complete beginner – fished when they were kids or simply never fished before.	Fishing events and safe places to learn are required, or charter operators who take care of all the messy bits like baiting jooks. Gear shops and curated assistance is required.	How to fish – an important piece of knowledge for this group
Casual Fisher	Fished a few times and keen to try more combined with other holiday experiences. The fishing experience may need to be curated as they may not have the equipment or knowledge. Will fish from piers and jetties.	Want an introductory experience and to catch a fish. May be a family with kids who want to try fishing. Range of accommodation preferences based on family's needs. Cafes and restaurants nearby will be important. Rental equipment, guiding boat hire and gear shops will be required.	Gear shops and commercial operators are important to help this group enjoy fishing. As fishing is an add on to the holiday, travel decisions will be based on campaigns, deals and other trade and industry channels inspiring general travel.
Recreational Fisher	Fishes regularly and keen to try new fishing spots and species. May travel occasionally for fishing trips and combine with other experiences, but fishing is not the primary driver. May include families, but also groups of men or couples. Equipment is generally owned but may need gear shops.	Happy to go for bigger fish, but generally any fish will do. Catch and release is an option, generally after keeping enough for a meal. Will seek out accommodation and services, but not dedicated necessarily to fishing. Look for destination that has a range of experiences, not just fishing, e.g. golf, camping, dining.	Word of mouth will be important, as will social media fishing reports. Will use a variety of online sources.
Sports Fisher	Looking for specific fishing experiences and will dedicate holiday to the experience. Happy to spend money achieving it. Owns equipment and predominantly male	Targeting species that offer hero moments – trophy fishing. Events and competitions are important this market. Accommodation and other experiences may be aligned to prime purpose of fishing.	Will seek out experiences through fishing circles. Communicate through trade and direct channels, including gear shops, fishing mags and operators. Social media and word of mouth are important. Will watch fishing TV shows and view expert forums.

High-value Fisher	Seeking personalised luxury and wants a high-end small-scale experience such as a personal guide and fishing lodge. Two sub-segments defined: high-value couple seeking exclusive luxury experience of which fishing is a component or group travellers (friends, predominantly male) seeking an exclusive fishing experience to lure prized species – an annual 'friends' fishing getaway.	Couple: Looking for an all-inclusive, exclusive and remote luxury experience incorporating a range of activities, including fishing, dining, local produce and immersion in cultural and natural activities. Group: Bragworthy fishing experiences, including target fish species. Exclusive, remote locations that cannot be accessed by just anyone.	Will use social media platforms, travel agents and specialist tour operators, expos, and word of mouth to source their fishing getaway.

Source: Tourism Victoria

Product Requirements

- Access to well sign-posted fishing locations is important
- Boat ramps, fish-cleaning tables, fishing platforms and other infrastructure to support fishers is important
- A wide variety of supporting commercial infrastructure is important depending on the sub-segment, including bait and tackle shops, boat charters, fishing guides, as well as hotels and restaurants
- Ease of booking through websites, email or phone
- Packaging with other operators offering transport services, accommodation, food and beverage
- Good information about seasonality, weather, infrastructure offered, fishing opportunities, etc.

Channels to reach the market

Tour Operators

- **Beyond Adventures** Based in the USA with set departures
- **Classic Africa** Based in the USA, featuring destinations across Southern and East Africa
- **Flame of Africa** Offering Tiger fishing on Chobe or Zambezi River
- **Hunter Fisher** Located in South Africa, offering fishing safaris in Southern Africa
- **GILTEDGE** Also runs Ichingo Lodge in Chobe focussed on fishing safaris
- **Wildman Fishing Co** Fishing Safaris in Southern Africa
- **Go Fishing Worldwilde** UK-based specialist fishing holiday provider
- **Aardvark McLeod** Tailor-made high-quality international fly fishing trips
- **Fish Travel** International Fishing Trips Booking Service
- **World's Best Fishing Trips** Boasting a trip for every angler
- **Angler Adventures** Full-service agency run by fishing and travel experts

Online forums, associations and publications

- **Bait your hook** Listing for outdoor enthusiasts seeking best fishing trips worldwide
- **The Fly Fishing Forum** Online forum for fly fishermen
- **2 Cool Fishing** Online discussion forum
- **Bass Resource** The ultimate bass fishing resource guide
- **The Ultimate Bass** online Bass fishing forum
- **iFish.net** Boasting 72k members and 6.7 m posts
- **Troutnut.com** Online forum for trout fly fishing
- **Fishing Travelers** Facebook group for fishing travellers
- **Fishing & Travel** English edition of a French-language sister edition talking all things angling and travel
- **Sport Fishing** Fishing guide experts talk about their best fishing trips around the world
- **H20 Magazine** Distributed at exclusive lodges and fishing clubs worldwide
- **Fly Fisherman** Online magazine and forum, along with magazine dedicated to fly fishing
- **Catch Magazine** Focussed around fishing destinations
- **Trout and Salmon Magazine** Touted as Britain's biggest selling game fishing magazine
- **Angling Times** Tips, tactics, hints and gifts for readers
- **Improve your Coarse Fishing Magazine** Aimed at making you a better fisherman
- **Anglers Talk** Online fishing mag based in South Africa

- **Game and Fish** Online magazine and listing
- **Fishing TV** Online fishing channel

Associations

- **International Game Fish Association** NPO committed to conservation of game fish
- **International Women's Fishing Association** Established to promote women's fishing
- **European Fishing Tackle Trade Association** To support travel trade industry
- **Angling Trades Association** Protecting and representing the angling trade
- **American Fly Fishing Trade Association** Representing businesses operating in fly fishing industry
- **American Sportfishing Association** Representing businesses operating in fly fishing industry

Shows

- **Great American Outdoor Show**
- **ICAST International Convention of Allied Sportfishing Trades**
- **European Fishing Tackle and Trade Exhibition**

Luxury Safari

Market segment
Luxury safari is a growing trend aimed at travellers seeking to experience African wildlife and local cultures without compromising their comfort.

Apart from modern lodgings and other luxury amenities, the main attractions of luxury safaris include viewing wildlife (such as lion, leopard, elephant, rhino, buffalo and hippo) in their natural habitat, wildlife photography and hiking.

Luxury has evolved to become experienced-focused, and luxury travellers are looking for exclusive experiences. The shift has in values is from material experiences to experiential elements. They are not looking for pre-packaged experiences that appear too contrived. The emphasis on unique experiences[85] that strike an emotional chord with travellers. There is also an element of wellness to this luxury travel sector – spa treatments and on-site wellness centres/rooms are a plus.

These tourists are typically concerned with sustainability and environmentally friendly practises and want their money to be reinvested into the community[86].

Travel behaviour
- Luxury safari tourists are usually well-educated and well-informed travellers looking for a personalised and memorable safari experience.
- They are usually wealthy and either used to a high standard of living or want to celebrate a special occasion, such as a marriage proposal, honeymoon or mother-daughter trip. Typically, they travel in small groups, such as families or couples[87].
- Wildlife enthusiasts tend to stay in an area for 5-7 days, often travel independently from tour operators, and "plan as they go". More casual wildlife tourists stay for shorter periods and hire tour operators and guides to enrich their experience[88]. Luxury tourists, in general, do a lot of online research[89].

Product requirements
Luxury safari tourists look for authentic, exclusive experiences. If they are celebrating a special occasion, they value personalisation, such as tailored itineraries and menus.

Activities that interest these guests include guided game drives, guided walks, cycling, ziplining, canoeing, kayaking or river cruises (especially on traditional transportation), hot air balloon safaris, glider trips[90], and wellness experiences, such as yoga classes[91]. Sustainable and environmentally friendly practices will also stand out to this market segment.

Guided tours are popular with this market segment. Knowledgeable, English-speaking guides can elevate an experience to the next level. Once again, guided tours should be tailored to guests' personal interests. Wildlife enthusiasts, for example, will be interested in learning more about animals, especially rare wildlife, and are often interested in photography. However, more casual wildlife tourists are interested in iconic animals, such as "The Big 5". These guests will also be interested in activities unrelated to wildlife, especially if travelling together with a wildlife enthusiast[92].

85 The European potential for wildlife tourism (2021)
86 What are the opportunities for luxury tourism from Europe? (2018)
87 The European potential for wildlife tourism (2021)
88 The European potential for wildlife tourism (2021)
89 What are the opportunities for luxury tourism from Europe? (2018)
90 The European potential for wildlife tourism (2021)
91 What are the opportunities for luxury tourism from Europe? (2018)
92 The European potential for wildlife tourism (2021)

Personal safety and the safety of belongings are important requirements. Comfortable and reliable transport is also a must.

Channels to reach the market
Luxury safari travellers primarily research and plan travel online through peer review sites, travel forums, online travel agencies, tour operators and social media. Images and videos of wildlife, natural landscapes and luxury accommodation have high appeal[93].

Online forums, associations and publications:

Review online forums, associations and publications provided within source markets for additional contacts. The below represent a tiny sample offering luxury safari information across the globe.

- **Safari talk**: info, debates, expert interviews and featured videos on African safaris.
- **African safari journals**: African safari journals: safari reviews and trip reports.
- **Discover Africa blog**: travel stories and blogs about Africa.
- **African Safari blog**: safari stories, travel tips and advice, conservation matters, and news.
- **African Safari magazine**: cover a wide range of African tourism topics with the main aim of promoting African tourism.
- **African Wildlife Foundation**: Africa-based global conservation organisation.

Tour operators

Review tour operator lists provided within source markets for additional contacts. The below represent a tiny sample of operators offering luxury safaris across the globe.

- **Impala Tours**: Netherlands tour operator offering fly-in safaris in Africa.
- **Encompass Africa & beyond**: Australian tour operator offering tailor-made safari experiences in Africa.
- **Extraordinary Journeys**: experts in custom private travel.
- **Dazzle Africa**: offer unique safaris in Africa, while making sure money goes back to the communities visited.
- **Alluring Africa**: specialise in luxury African safaris.
- **Travel Beyond**: offer luxury safari experiences and custom travel planning in Africa.
- **Rothschild Safaris**: award winning travel consultants.
- **The Luxury Safari Company**: Unrivalled luxury safaris to Southern Africa.
- **Go2Africa**: Safaris in Africa since 1998.

Social media

- **Lonely Planet Facebook group**: Facebook group replacing the thorn tree forum.
- **African Safaris Facebook group**: UK-based Facebook group with African Wildlife Photos, Photographic Safaris, travel, eco-tourism and conservation related posts.

Mid-market safari

Market Segment
This mid-market segment of tourists from the core source markets are generally experienced international travellers. They are well-informed and don't fall within a specific age range. They don't want to travel in large groups and prefer smaller groups or to travel as a family or a couple.

They are not looking for high-end luxury; middle-of-the range accommodation options that are comfortable and value for money will satisfy this customer. They are well-read and interested in a variety of animals and wildlife experiences. They have an interest in the local predators and they have concerns for the wellbeing of wildlife, so ethical tourism is a focus.

Travel Behaviour

Two types of traveller feature strongly in this market segment[94]:

93 What are the opportunities for luxury tourism from Europe? (2018)
94 CBI (2022). The European market potential for wildlife tourism.

The **wildlife enthusiast** wants a more wildlife-focused experience. They are less interested in other optional activities but want to get out into the bush and see the wild animals. They usually spend up to seven days at one destination. Independent travellers, who often bring along family members (who fall into the casual wildlife tourist category), prefer to seek out local activities rather than take part in group trips or activities. Not particularly focused on seeing the "Big 5".

Casual wildlife tourists are typically interested in the iconic "Big 5". They are happy to learn about wild animals on the surface but aren't particularly interested in the details. They are also keen on activities not related to wildlife, so giving them a few broader options for fun activities would make sense – kayaking, walking safari, zip-lining, etc. This group tends to stay for a shorter time than the serious wildlife enthusiasts.

Product Requirement
Accommodation needs to be comfortable and good value for money. For wildlife enthusiasts, going out on game drives or on game walks will be very important. They want access to the bush and bush activities without the distractions of other side-line activities. It's important that this traveller has access to wildlife experts and there is quite a bit of flexibility in terms of how often he/she goes out into the bush.

The casual wildlife tourist would want to go on at least one or two game drives during their stay but would also want to have some cultural and social interaction, so this traveller would be perfect for cultural excursions. They would also like to experience different attractions and activities – a bush picnic, walking trails, visit a cultural museum or local village, etc.

Channels to reach the market
Social media has had a big influence on marketing of safari destinations and experiences, particularly for the younger generations. Tour operators and travel companies also make use of the impact of social media by posting eye-catching visual content of wildlife. Content marketing on websites/blogs is shared via social media, creating interest, and marketing a variety of products and experiences.

Online forums, associations, and publications:

Review online forums, associations and publications provided within source markets for additional contacts. The below represent a tiny sample offering luxury safari information across the globe.
- **African Travel & Tourism Association (Atta)**: member-driven trade association that promotes tourism to Africa. More than 600 members, including European and UK tour operators listed on the site.
- **Safaritalk**: online wildlife forum.
- **African Conservation News**: conservation forum.

Tour operators:

- **Wilderness Travels** specialises in adventure travel in 75 countries, including Southern Africa.
- **Intrepid Travel** Specialises in small-group travel across the globe.
- **Impala Tours**: Netherlands tour operator offering fly-in safaris in Africa.
- **Africa Travel**: Tour operator specialising in Africa.
- **Gadventures.com**: Southern African adventures.
- **ThompsonsAfrica**: a variety of safari experiences and options.
- **AfriCamps**: boutique glamping.
- **Natural Habitat Adventures**: Specialist in nature travel

Mountain Biking

Market segment
Mountain bike tourism is defined as "trips of at least 24 hours away from a person's home environment for which active participation in mountain biking for recreational purposes is the primary motivation and determining factor in destination choice"[95].

Mountain bikers are nature-enthusiasts who seek experiences that offer an escape, thrill or challenge. Their preference is to cycle through rough terrains and on trails and gravel/dirt or unpaved roads[96]. However, within this large niche are seven defined passion groups[97]:

94 CBI (2022). The European market potential for wildlife tourism.
95 Moularde (2016) Mountain bikers' attitudes towards mountain biking tourism destinations
96 Journal of Vacation Marketing (2019) A case study of the US mountain bike tourism market
97 CBI (2022) The European market potential for cycling tourism.

1. Cross country: Long-distance trails with loops and natural obstacles
2. Single-track riding: Cycling on narrow tracks
3. Gravel biking: Focus on exploring different types of terrains
4. All mountain: Takes place in mountainous areas
5. Downhill: Descending steep and technically challenging tracks
6. Free riding: Involves very challenging or unclear tracks
7. Dirt jumping: Involves shorter circular trails with ramps and opportunities for tricks

They are well educated, experienced cyclists, are typically male and generally between the ages 26 and 45. Further, they typically have higher-than-average household income.

They are driven by the quality of trails and riding opportunities in terms of destination selection, and for the more serious riders the destinations are evaluated as they seek to collect new experiences that align with their skills level[98].

Travel behaviour
On their travels, mountain bikers will typically cycle for a few hours, leaving them with spare time after their mountain biking to do other activities. They enjoy simplicity and are not very demanding regarding their accommodation or food[99].

Mountain bikers tend to travel in small groups of 2-3 people[100], they tend to travel to destinations within a half day or day away from home or base for the majority but will travel further for unique experiences or competitions. They will expect a relatively high level of trail infrastructure and associated services at MTB destinations and will typically ride once to 2-3 times per week.

They cite features such as fitness / exercise, technical challenge, spectacular scenery, local culture, and accessibility as important factors when selecting destinations.

A study of the US mountain bike tourism market reveals the following interesting insights[101]:

- Mountain bike travel market in the US is characterised by frequent, short breaks: 4.53 mountain bike-specific trips on average annually with a mean trip duration of 2.7 nights
- Mountain bikers travel mostly to destinations within driving distance (only 9.77% of mountain bike-specific trips involved air travel
- Younger mountain bikers (18-34 years) preferred campground accommodation, while those aged between 35 and 54 are more likely to stay in hotels or resorts
- Those aged between 55-64 years have a longer length of stay (3.50 days) compared with their younger counterparts (25-34 years: 2.44 days and 35-44 years: 2.72 days)
- Most mountain bikers indicate that they 'never' hire local mountain bike guides
- Preferred supplementary activities include post-ride food and beverage. Thus, they are likely to visit bars, cafés or restaurants in conjunction with a ride

Product requirements[102]
According to the Mountain Bike Tourism Profile for Tasmania (2008), primary motivators for mountain bikers centre around three key factors:

- **Convenience / accessibility**: Most independent mountain bikers seek out day-ride destinations
- **Trail quality**: Diversity of terrain, trail features and amount of single track, as well as quantity of riding available in an area
- **Iconic experience**: Riding in a unique, natural landscape setting, with high scenic value

Channels to reach the market
Mountain bikers generally access information about a destination through word of mouth or the Internet[103]. They are experience driven and educated, thus likely to respond to innovative media.

98 Ibid.
99 Ibid.
100 Tourism Tasmania (2008) Mountain Bike Tourism Market Profile for Tasmania
101 Ibid.
102 Buning, Cole and Lamont (2019) A case study of the US mountain bike tourism market.
103 Ibid.

Mountain biking events

- **Crankworx**: Multi stop series of mountain bike festivals
- **Global Bike Festival**: Long-weekend cycling and après ride experience
- **Bike Fest**: Cycling's biggest weekend, held in the Western Cape
- **Megavalanche**: Marathon descent in the Alps
- **Sea Otter Classic**: Largest gathering of cycling enthusiasts in North America
- **Tour de Tuli**: Mountain bike adventure through Greater Mapungubwe Transfrontier Conservation Area
- **Zambezi Cycle Challenge**
- **Swazi Frontier**
- **Lesotho Sky Stage Race**
- **Sani2C**
- **The Freedom Circuit**

Online forums, associations and publications

- **Bike Rumor**
- **Bike Mag**
- **Cycling Weekly Mag**
- **MBR Magazine**
- **Cyclocross Magazine**
- **Cyclist Magazine**
- **Mountainflyer Magazine**
- **Bicycling SA**
- **Vital MTB**
- **Single Tracks**
- **Live2ride**
- **Bike Club**
- **MTB Project**
- **Two Wheeled Wanderer Blog**

Tour operators

- **MBT South Africa:** South Africa
- **Mountain Bike Worldwide:** USA
- **Escape Adventures:** USA
- **Big Mountain,** USA
- **Sacred Rides,** USA
- **Trek Travel,** USA
- **Saddle Skedaddle,** UK
- **African Bikers,** South Africa
- **TDA Global Cycling,** Canada

Off-road Safari

Market segment
Off-roading involves travelling on unsurfaced roads or tracks or over natural terrain. It is a versatile recreational sport that can be anything from cruising down flat desert trails in a four-wheel-drive (4WD) vehicle to climbing over steep, rocky obstacles in an All-Terrain Vehicle in the middle of a forest[104].

Safari off-road travel, specifically, is attractive to those seeking to venture off the beaten track to experience raw, untouched wilderness. Specialised vehicles with 4WD are required to travel in such parks, and there are a huge number of blogs, clubs and associations dedicated to sharing advice regarding buying and renting cars, trailers and camping setups for such trips.

Travel behaviour
Off-road safari tourists are nature and wildlife enthusiasts. Like other off roaders, they enjoy the challenge of traversing rough terrain. However, their primary purpose for adventure is to experience the bush without the crowds, rather than the thrill of going through muddy, sandy or rocky terrain. Trips like these can range from weeks to months depending on individual preferences and regions.

104 Overland Discovery (2019) Overlanding vs. Off-Roading: What's the Difference?

They are prepared to travel the extra miles to get to special, remote parks, and are willing to sit in the car for up to 8h per day.

Those that prefer the self-drive option are often frequent travellers and skilled drivers. They will usually do their own research and travel in groups of a few families or couples, each in their own vehicles, rather than travelling with a guide. Time spent in an area depends on the area and individual preference. At least one in the group will have knowledge around mechanics and most will have fair knowledge about fauna and flora.

Those that take their own vehicles will usually be older, more wealthy individuals that live in Africa. Whereas those renting will be tourists from Europe or America or younger couples or families from Africa.

They are mostly happy with a basic, rustic holiday and will therefore choose to camp rather than stay in chalets. Consequently, they will spend money on renting a reliable 4x4 and/or trailer or making sure their own 4x4 vehicle is in good condition; updating their camping setup; and other expenses like park fees and GPS gadgets.

Those that prefer the guided options are less experienced off-road travellers, more elderly couples, or groups that want a more luxury experience. Depending on the tour package, tourists will rely on tour operators to plan the trip and on guides to navigate, do car maintenance, share knowledge about local fauna and flora, cook meals and setup tents, if camping.

Product requirements
The goal of an experience like this is to visit unspoilt places and wilderness areas that cannot be reached on tarred roads and to learn and hone off-roading skills[105].

General requirements for a safari off-roading experience include reliable vehicles and trailers; traversable roads; routes that are clearly marked; accurate and user-friendly maps; and information pamphlets regarding the rules of wildlife parks and other necessary information like whether any vaccinations are needed to enter the region.

Some requirements for guided off-roading experiences include planned itinerary and routes; assistance at border control; an experienced guide that is physically fit, has offroad experience, has travelled the specific route before, know best game spots and areas to avoid, knows local laws, customs and cultures, is able to do vehicle maintenance; and the option for guides to plan and cook meals[106].

Some services that might add value to an experience include: the option to rent two-way radios for vehicles; option to rent satellite phones and GPS gadgets; and the option to buy safety kits, such as medicine kit or tire repair kit.

Channels to reach the market
Offroad safari adventurers primarily research and plan travel through online research. There are a huge number of blogs, clubs and associations dedicated to sharing advice for off-roading trips – from tips on camping setups and favourite travel routes to advice on which vehicles, rental facilities and tour companies are most reliable.

Online forums and publications

- **4x4 Africa: website with advice for off-road travelling and trail driving**
- **4X4 Magazine: UK 4x4 and Pickup Magazine**
- **UTV Action Magazine : all-terrain vehicle information magazines**
- **Four-Wheeler Print Magazine : oldest off-road magazine**
- **Wikiloc Off Road Trails: discover and share offroad trails**

Offroading associations and clubs

- **Overland Africa**
- **Overlanding Association**
- **4x4 Action group South Africa**
- **SA4x4: Everything 4x4 for the 4x4 enthusiast**
- **4x4 Africa**
- **United Four Wheel Drive Associations**
- **Tread Lightly**
- **All Wheel Drive Club UK**

105 4×4 Offroad Adventure Club – Bringing together those who enjoy the outdoors.
106 4x4 Africa (2022) Tag-along Tours & Overland Safari Operators.

Off-road vehicle and trailer hire

- **Kubu 4x4**
- **Bushlore Africa**
- **Treadlite 4x 4 hire**
- **Bushtrackers**
- **Kalahari 4x4**
- **Britz**
- **Drive South Africa 4x4**
- **Offroad Africa**

Tour Operators

- **Asilia Africa**
- **Africa Expedition Support**
- **Encompass Africa**
- **Flash Mctours**
- **Jenman Safaris**
- **Kalahari Safaris**
- **Bushlore Africa**
- **Africa Expedition Support**
- **Encompass Africa**
- **Impi Safaris**
- **SA Overland**
- **Selfdrive 4x4**
- **Protea 4x4**

Extreme Sports Market

Market Segment
Extreme sport, otherwise referred to as shock tourism, includes activities where there is a high degree of risk to the participant. A certain level of skill, or an experienced instructor, is required for this type of travel and often it is on a whim, rather than part of an extreme sports holiday.

Extreme sport tourists chase the thrill of adventure and want to push themselves to the limit. But more than that, they seek the feeling of freedom and the intense euphoria that comes with being entirely immersed in one single moment[107].

Examples extreme sports adventures include bungee jumping, paragliding, kiteboarding, land yachting, hang-gliding, caving, mountaineering, white-water rafting and coasteering. Furthermore, it can also include non-extreme sports in extreme conditions, such as scuba-diving in the Arctic[108].

Travel Behaviour
Extreme sport adventurists are typically well educated and well-travelled individuals between the ages 20 and 35, and predominantly male. However, increasingly gap year students as well as individuals over 55 are showing increasing interest in this niche[109]. The main source markets include United States, United Kingdom, Germany, Italy, Scandinavia, Australia, New Zealand and Canada[110].

Extreme sport travellers can be divided into two groups. The first is a high-income group which books luxury trips in small groups. These travellers would be interested in, for example, ecotours to Antarctica. The second group has a more average income, and comprises largely of young, gap year students and travellers engaging in extreme sports on a whim[111].

Consumers in both groups are highly influenced by trends and fads, and consequently, the extreme sports activities chosen by tourists can change very quickly[112]. There are thousands of extreme sport influencers on Instagram and other social media platforms that have a large role to play in influencing these fashions and trends[113].

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107 Musten, J. (2018) Extreme Sports: History, Marketing, and Why You Can't Get Enough.
108 One Caribbean (date unknown) Extreme Sports.
109 One Caribbean (date unknown) Extreme Sports.
110 Ibid.
111 Weihermüller, L., Jentzsch, F. (2011). Sport & extreme tourism. In: Papathanassis, A. (eds) The Long Tail of Tourism.
112 Ibid.
113 Travel Daily News (2018) New rush of adrenaline: Extreme sports tourism in Japan.

Those that do plan extreme sport adventures in advance usually choose to organise their holiday themselves instead of making use of a travel agency. Furthermore, there are not many tour operators that specialise in extreme sports, so these activities are mostly booked through broad adventure tour companies[114].

Product Requirements
Extreme sport tourists are people who want to be challenged. They are also looking for the thrill of a high-risk adventure and often want to escape from their normal life to experience something extreme and to stimulate themselves. Therefore, undertaking an extreme adventure in a pristine natural setting or setting with a beautiful view will add significant value to their experience.

The most important product requirements for this niche are those related to safety - experienced English-speaking instructors and coaches and safe, well-maintained gear can make or break an experience. It is also important for these tourists to know exactly what to expect, to avoid unnecessary accidents. Round the clock emergency services are preferred.

Extreme sports adventurists are also interested in nature and cultural experiences, which shows the potential for packaged experiences[115].

Channels to reach the market
Most participants are likely to book through more broad-ranging adventure travel specialists that include extreme sports in their programmes.

Tour operators

- **Explore!**: UK based tour operator
- **G Adventures**: tour operator based in Toronto
- **Adventure Sport Holidays**: Booking agent for adventure holidays that places focus on promoting eco-friendly and sustainable activities
- **Tour Beaver**: tour operator offering extreme adventures worldwide
- **Trail Tuned Tours**: Cape Town based specialising in extreme sports

Online Forums, Magazines and Publications

- **United Kingdom: British Parachute Association**
- **May Contain Nuts**: Extreme sports social network
- **X3M People**: Social adventure network.
- **Adventure Sports Directory**
- **Adventure Travel Trade Association**

Shows and Exhibitions

- **DEMA Show**: International trade fair for diving, action water sports and adventure travel industries in US

Triathlons

Market Segment
Triathlons, an endurance sporting event including three disciplines: swimming, cycling and running[116], have gained popularity on a global scale over the past few decades.

The most popular types of triathlon events include:

- Starter "Try-a-thons" with shorter distances

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114 Ibid.
115 Ibid.
116 Wicker, Hallman, Prinz, Weimas (2012) Who takes part in triathlon? An application of lifestyle segmentation to triathlon participants.

- Sprint events which take 1 to 2 hours
- Standard or "Olympic" distance which take 2 to 4 hours
- Middle distance or "half-Iron" races which take 4 to 8 hours
- Full Ironman which consists of a 3.5km swim, 180km cycle and 42.2km run and could take you 8 to 16 hours to complete[117].

Travel Behaviour
A triathlon is a very select sport that attracts specific participants, seeing that constant training is necessary to improve fitness and skill in the three different disciplines.

Research has shown that triathletes participate mainly for the personal challenge and sense of achievement afterwards, and to get or stay in shape[118].

Triathletes are usually well-educated and relatively wealthy, as the sport requires one to purchase specialised gear, such as lightweight bikes, running shoes, helmets, wetsuits, etc. They will usually travel specifically for their triathlon event, accompanied by their club and coach, and often with friends and/or family to cheer them on. In terms of length of stay and preferred accommodation, a study estimated that 37% of triathletes are going to increase their spending on triathlon trips and are willing to travel longer distances to events[119]. From this, we can assume that more and more triathletes will be interested in sightseeing, relaxing and cultural activities with friends and families, post-event[120].

Product Requirements
Triathletes seek out experiences that challenge them and offer something to work towards and stay fit for.

For a triathlon event to be successful, a destination needs long enough running, cycling and swimming routes; excellent road surfaces, varying terrain and scenic routes[121]. As triathlon events entail a strong contact with the surrounding physical setting, a beautiful, pristine natural setting could be a key attribute to the enjoyment and success of the overall event[122].

Other product requirements for a triathlon include information about routes so athletes know what to expect; well-marked routes; safety precautions, such as medical crew on standby to help with any injuries; snacks and drinks as well as food stalls for after the race[123]. Requirements include the right gear and apparel for the destination (wetsuit, bike, helmet, running shoes) and a coach, club or support crew[124].

Channels to reach the market

Tour Operators

- https://gowithest.com/
- https://www.tritravel.com.au/
- https://www.triathlon-holidays.com/
- https://www.healthandfitnesstravel.com/
- https://lovevelo.co.uk/triathlon-holidays/
- https://embracesports.co.uk/

Media

- https://www.triathlete.com/
- https://www.active.com/
- https://www.220triathlon.com/
- https://triathlonmagazine.ca/
- https://www.slowtwitch.com/

117 Petethevet (2019) Why do people do triathlons? Plus a race report from the Two Provinces Triathlon.
118 Wicker, Hallman, Prinz, Weimas (2012) Who takes part in triathlon? An application of lifestyle segmentation to triathlon participants.
119 Ibid.
120 Jurica website (2015) Triathlon and sport tourism a big opportunity for Croatia.
121 Ibid.
122 Raggiotto, Masonm, Michela, Moretti, Ciani (2016) The Triathlon sport consumer. A segmentation proposal.
123 Trigearlab (2022) Triathlon distances.
124 Ibid.

Online forums and clubs

- https://trichat.boards.net/board/3/triathlon-discussion
- https://beginnertriathlete.com/discussion/category-view.asp
- https://forum.220triathlon.com/
- https://trinationtri.com/community/
- https://www.bikeforums.net/triathlon/

SAVE (Scientific, academic, volunteer and educational)

Market Segment
The SAVE tourism segment comprises scientific, academic, volunteer and education tourism, with the two latter types comprising the largest segments within this niche market. These are visitors who use travel to learn, explore, help and grow[125] focussed on cultural and natural heritage preservation efforts and contributing to the improvement of local communities. Europe dominates the global SAVE tourism market[126].

Globally, there has been enormous growth within the SAVE travel industry[127]. The range of volunteer projects is large and diverse, including building homes and schools, caring for wildlife, providing medical aid, teaching children, and restoring architecture, etc.

CBI defines the different forms of SAVE tourism as:

Scientific Tourism

Scientific Tourism helps destinations with knowledge and support to protect the environment, fostering global development and positively impacting communities. Travellers hail from research institutions, universities, non-profit organisations, medical organisations, etc., and are looking for ways to advance science and help with the acquisition of knowledge about the world.

Since this type of research takes time, travellers falling within his sub-segment tend to stay longer and have a greater economic footprint. These types of travellers also tend to hire local workers, live in the communities, eat local food, use local transportation and buy local goods which in turn leads to positive economic impacts in surrounding communities.

In addition, scientists gather information on valuable destination assets, cultures, etc. and preserve or present this information. This helps raise the profile of local assets and the destination.

Academic Tourism

This encompasses travel by professors, researchers, and students for academic purposes, including studying abroad programs, thesis research, visiting scholarships, school trips and academic exchanges.

The intention of these travellers is to participate in experiential learning activities leading to credit for formal degree programs or courses offered by higher education institutions. They have a tendence to visit more remote places in the interest of study and are more willing to interact with local communities, nor do they require sophisticated facilities and services.

In most cases, academic travellers travel in groups and often for extended periods of time, which is linked to economic benefits for local communities. They also have the power to raise awareness on the importance of a destination's assets.

Volunteer Tourism

Also known as 'voluntourism', this is travel which is concerned with volunteering and is often linked to personal or professional development, with individuals and groups participating in activities that better society. Voluntourists are mainly motivated by an interest in environmental conservation, community tourism projects and community development.

125
126 Allied Market Research (2019) SAVE Tourism Market by Type.
127 USAID (Date Unknown) SAVE Travel Connecting Responsible Travellers with Sustainable Destinations.

Voluntourists often spend a long period of time at the destination without needing sophisticated facilities and services. Depending on their background and skills, they can also contribute to the capacity building of local communities and other stakeholders, as well as help with product development, physical improvement of areas, and other elements of developing destinations.

There is strong interest in voluntourism all over the world, but South America tops the list, followed by Africa with almost as much interest. Although many voluntourists were interested in travelling abroad for over a month, affordability is important. Voluntourists are also concerned about where their money is being used.

Educational Tourism

Educational tourism offers travellers learning experiences with opportunities for self-improvement, job development, career enhancement, self-actualisation, or acquiring new or improving knowledge. This includes language courses, traditional craft workshops, experienced-based learning and school trips, among others.

These individuals or groups travel to enhance their personal knowledge, rather than for academic credit. They tend to stay longer and spend more on value-added activities, which directly benefits the local community.

Travel behaviour
The SAVE Tourism Market is dominated by youth travel, which has a high focus on experiential travel. Millennials and Generation Z travellers are keen to try new things and engage in skills-based learning while travelling[128].

SAVE travellers are driven by the desire to engage in travel experiences involving close interaction with the nature, culture and people of the destination in ways that advance knowledge (their own or that of others) or that involves contribution to the enhancement of the destination[129]. SAVE travellers also place high value on the natural, social and cultural assets of the place they visit and adhere to the principles of sustainable tourism.

For SAVE travellers, a lack of development can be an attraction in itself as they enjoy off-the-beaten-track unique experiences where infrastructure is lacking.

For a country with underdeveloped infrastructure and a poorly trained tourism workforce, SAVE travellers can play an important role in nurturing tourism development. They tend to travel to places that others avoid, tolerate and even enjoy rustic conditions, and don't mind delays and inconveniences.

SAVE travellers also enjoy being immersed within local communities and/or activities in peri-urban and rural areas, ensuring that the economic benefits and opportunities generated by this form of travel are more broadly distributed than those that arise from mass tourism.

Product requirements
While they are more tolerant than other segments, SAVE travellers do expect a minimum level of safety and security, as well as access to basic medical facilities. There must also be adequate transportation networks to bring tourists to and from the destination. Finally, a favourable regulatory environment, e.g., Visa regulations, volunteer regulations, etc., must exist.

SAVE travellers need a compelling reason to choose a destination, choosing to travel with a purpose, whether to further scientific knowledge, enhance their education, volunteer to help others, or some other way of travelling to do good.

Examples of potential SAVE initiatives in TFCAs are volunteer nature conservation research (e.g. game and bird species counts, alien vegetation eradiation, assisting with elephant deterrent initiatives, etc.), community conservation and tourism awareness teaching, community medical support, hosting post-graduate students, and other similar initiatives.

Channels to reach the market

- **Africa Foundation**: Non-profit which funds community and conservation projects in 70 countries.
- **GoEco**: Voluntourism operator with programs in Africa, including Ghana.
- **ELI Abroad**: Voluntourism operator with programs in Africa, including Ghana.
- **GVI SA**: Voluntourism operator with programs in Africa, including Ghana.
- **Projects Abroad**: Voluntourism operator with programs in Africa, including Ghana.
- **A broader view**: Voluntourism operator with programs in Africa, including Ghana.
- **Globe Aware**: Voluntourism operator with programs in Africa, including Ghana.

128 CBI (2020) SAVE Tourism Market Potential
129 Ibid

- **International Volunteer HQ**: Voluntourism operator with programs in Africa, including Ghana.
- **Cross Cultural Solutions**: Voluntourism operator with programs in Africa, including Ghana, also offers high school and gap year programs.
- **Volunteers for Peace**: Voluntourism operator with programs in Africa, including Togo.
- **Health Volunteers Overseas**: Voluntourism operator focusing on healthcare professionals.
- **WWOOF**: is a worldwide network of organisations in 132 countries that offers travellers the opportunity to live, work and learn in an organic farm in another country.
- **SAVE Travel Alliance**: (USA) a network designed to connect responsible travellers to sustainable destinations, which also provides information on how to create travel experiences.
- **World Strides Educational Student Travel**: US-based school programs including travel to Africa.
- **Smithsonian Journeys**: Rich culture and natural sciences focus for niche tours.
- **EXPLORE INC**: US-based tour operator focusing on educational tours, with Africa program.

Community based / Cultural Tourism

Market Segment
At least 40% of all tourists worldwide could be considered cultural tourists[130] and cultural tourism, according to the UNWTO is indeed the largest and fastest-developing global tourism market. These travellers are increasingly attracted by intangible factors such as the atmosphere of a place, its association with famous people, ideas or events, i.e., a place's culture, history and traditions, including "contemporary culture".

The UNWTO continues: "… travelling to experience the culture of others also means gaining a direct appreciation of cultural diversity, establishing new cultural ties and helping to keep our cultural heritage alive".

Culture is often a "primary motivation for tourists to visit a destination, but it can also be important as a secondary motivation[131] ". There is a core market of tourists who travel primarily for culture, but there is an even larger market of visitors who are interested in undertaking cultural activities, even though this is not their primary reason for travel.

There have been several classifications within cultural tourism to define different market segments. The UNWTO explains that a study for the European Commission divided the market into specific and cultural tourists – the former seeing cultural tourism as serious leisure, whereas the general cultural tourist makes a hobby of visiting cultural locations.

Different levels of cultural motivation[132] have also been developed by Bywater (1993), who identified culturally motivated, culturally inspired and culturally attracted segments of the tourism market; and Silverberg (1995) who developed a model covering four levels of cultural tourism involvement[133], ranging from the greatly motivated (1) tourists travelling especially for culture to the partly culturally motivated (2), the accidental cultural tourists (3) and finally the non-cultural tourists (4).

This was later developed into more multidimensional approaches[134] based on the importance of culture in the decision to visit the destination and the depth of experience sought, resulting in a matrix with five main types of cultural tourists:

1. **The purposeful cultural tourists** (high centrality/deep experience), for whom learning about other's culture or heritage is major reason for visiting a destination
2. **The sightseeing cultural tourist** (high centrality/shallow experience), seeking a more shallow, entertainment-oriented experience
3. **The casual cultural tourist** (modest centrality/shallow experience); for whom cultural tourism plays a limited role in the decision to visit
4. **The incidental cultural tourist** (low centrality/shallow experience), where cultural tourism plays a small role in the decision to travel, but who participates in cultural tourism activities
5. **The serendipitous cultural tourist** (low centrality/deep experience), who although not motivated by culture to visit but who has a deep cultural experience in the destination.

Moreover, involving local communities is vital for sustaining cultural heritage and making cultural tourism experiences more engaging, which is where community-based tourism comes into play. In this sphere, local communities are directly involved in "designing, organising tours and showing tourists aspects of their lives in the area they live in"[135] through homestays, visits to villages or communities, local festivals, learning local crafts and participation in community life[136].

130 UNWTO (2014) Tourism and Culture Synergies
131 Ibid.
132 Bywater, M. (1993), 'The market for cultural tourism in Europe', Travel and Tourism Analyst, volume. 6, pp. 30–46.
133 Silberberg, T. (1995), 'Cultural tourism and business opportunities for museums and heritage sites', Tourism Management, volume 16, pp. 361–365.
134 McKercher, B. and Du Cros, H. (2002), Cultural Tourism, Haworth Press, New York.
135 Ibid.
136 CBI (2021) The European market potential for cultural tourism

Importantly, for these types of enterprises to achieve any level of significance and impact, they will need to be supported with BDS (Business Development Support) services including skills training, mentoring, coaching, access to market, access to finance, etc...

In part, community-based tourism originates from the fact that many tourists now want to travel like locals, and to immerse themselves in the culture, traditions and language of a place. As people grow increasingly bored with resorts and standard holidays, there has been a shift towards wanting to see the 'real' and authentic side of the destinations they visit. In addition, there is a growing concern about the sustainability of the trips people take. This has resulted in tourists wanting to bring welfare to a local community without harming it[137].

A goal of community-based tourism is to achieve sustainable social, cultural, environmental and economic development in order to improve the living conditions of local people without damaging the environment. Some of the diverse benefits that community-based tourism offers communities are[138]:

- enabling quality job creation (coordinator, local tour guide, homestay family, food department, craftmanship, sales)
- generating local economic development
- helping eco-friendly tourism development
- enabling community empowerment
- preserving the traditional values of the local community.

While economic benefit is derived from this activity, some cross cultural exchange between visitors and the local people is also developed. Operated through the criteria of ownership of the activities undertaken and equitable distribution of the income generated are underlying factors of the programme. It is people tourism that enables tourists to experience the local people's way of life, offering insights into the values, beliefs and traditions in the host communities' own environments.

While community-based tourism seekers share many of the features of adventure travellers and FIT, a key motivation is the feel-good factor of an immersive cultural experience and making a difference to local lives. Therefore, these travellers are willing to pay more for the experience, when this contributes to the local economy.

The CBI defines sub-segments of community-based tourism based on age groups: baby boomers, Gen X and millennials:

Baby boomers (born 1945-1965)

Baby boomers are the largest target group for community-based tourism. These are looking for the trip of a lifetime and are mostly willing to pay for it. They are well-educated, travel frequently, have a good travel budget and often like to combine authenticity with luxury. They usually travel as couples or in small groups.

Baby boomers are also mostly retired and have time on their hands, hence they often take frequent or extended holidays. With the right products, TFCAs could be the ideal destinations for this market.

Gen X (born 1965-1980)

They are looking for authenticity, but are more price-conscious. Their main motivation is to see how other people live and to give something back. They are generally well-educated and well-travelled, but because most of them have full-time jobs, they have less time than baby boomers. They usually travel as couples or as a family.

Millennials (born 1980-1995)

Their goals when travelling and engaging in community-based tourism are to learn new things, develop themselves on a personal level and support the local communities they visit. They are also well-educated, but since many millennials are students or are on a gap year, they have the smallest budgets of the three groups. They usually travel solo or in groups.

137 CBI (2020) The European market potential for community-based tourism
138 Ibid.

Travel behaviour[139]

- Cultural tourists are more likely to travel by air and tend to stay longer than regular tourists
- Attracted by major cultural sites and attractions
- Travel to enjoy a destination's history and heritage, culture, lifestyle, traditions, art, music, literature, architecture and religion
- Seek artisanal, craft and handmade (tangible) products and unforgettable, inspiring experiences that touch them emotionally and connect them with a specific place, people and culture (intangible)
- Seeks a real immersion into the culture of the place, and an experience that is original and authentic – either in a product, service or experience, or a sense of it within themselves. They want to get 'involved'. They want to self-improve.
- Want to avoid high-tourist density; choice away from mainstream activities and experiences that are tourist 'hotspots'
- Seeks an opportunity to learn, particularly within special interests like art, history, architecture, music, theatre.

Product requirements

- Marketing and promotion of cultural assets done sensitively – involving local communities.
- Ensuring appropriate use of cultural assets by tourists to ensure their authenticity and sustainability
- Capacity building for the stakeholders since it will have a big impact on the community and cultural asset
- Understand there is a big difference in the degree of 'reality' tourists are seeking. For many travellers a day visit is enough.
- Include activities for kids as travellers will often travel with their family, i.e. teach kids about the way their counterparts play
- Ensure there's a good English-speaking guide, who is also a very good translator so that the tourists can engage with the locals.
- Establish product close to tourism destinations or tourism routes because travellers want to travel efficiently and use their limited time effectively.
- Availability of basic features like running water and suitable toilets is important.
- Interesting, fun and safe activities within the local community that the tourists can get involved in easily, e.g., tasting local food, watching products being made and participating if possible.

Channels to reach the market

A number of specific types of marketing and promotional strategies can be employed to reach cultural tourists, including communication through targeted websites and social media, improved market segmentation, development of cultural routes, theming and cultural storylines, improved interpretation, and awareness building with local communities[140].

Tour Operator

Cultural tours and community-based tourism is fairly mainstream in Southern Africa. While the below offer specific tours for these, many mainstream tour operators will include both cultural tourism and community-based tourism opportunities in their tours.

- **G Adventures**
- **Wild Frontiers**
- **Intrepid Travel**
- **The Blue Yonder**
- **Better Places**
- **Responsible Travel**
- **Regenerative Travel**
- **Joro Experiences**
- **Seven Travel**
- **National Geographic Expeditions**
- **Imaginative Traveller**
- **The Culture Trip**
- **Unforgettable Travel Company**

Media, Associations and Online Forums

- **World Responsible Tourism Awards**

139 CBI (2021) The European market potential for cultural tourism
140 Ibid.

- **Ethical Traveler**
- **Wanderlust**
- **National Geographic**
- **Go World Travel**
- **Out There**
- **Epicure and Culture**
- **Outlook Travel**
- **Verge Magazine**
- **World Tourism Association for Culture and Heritage**
- **World Cultural Tourism Association**
- **Association for Cultural and Tourism Exchange**
- **Planeterra**
- **Visit Communities**

ANNEXURE B: RESULTS OF SURVEY AMONG INTERNATIONAL TOUR OPERATORS

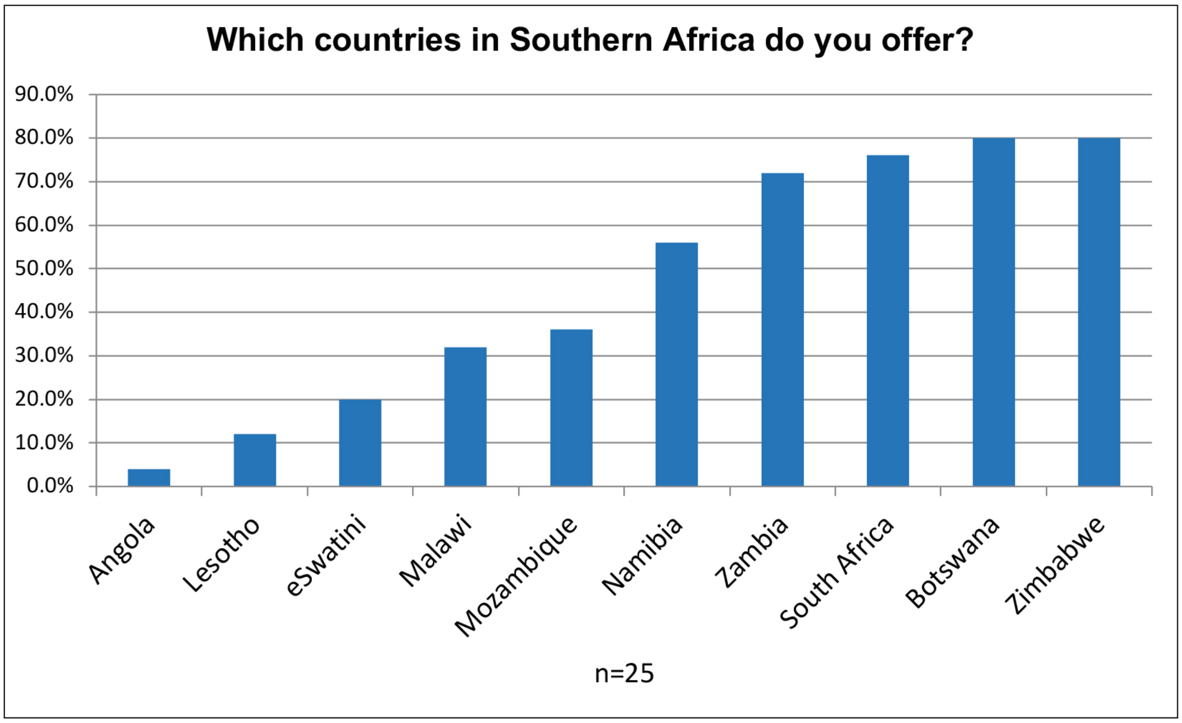
The results of an online survey conducted among 33 international tour operators (12% overseas-based and 88% Southern Africa-based).

Of these, 28 indicated that they sell tours to countries in Southern Africa, including the following Southern African countries and were allowed to proceed with the survey.

Views of all respondents that offer tours to Southern Africa

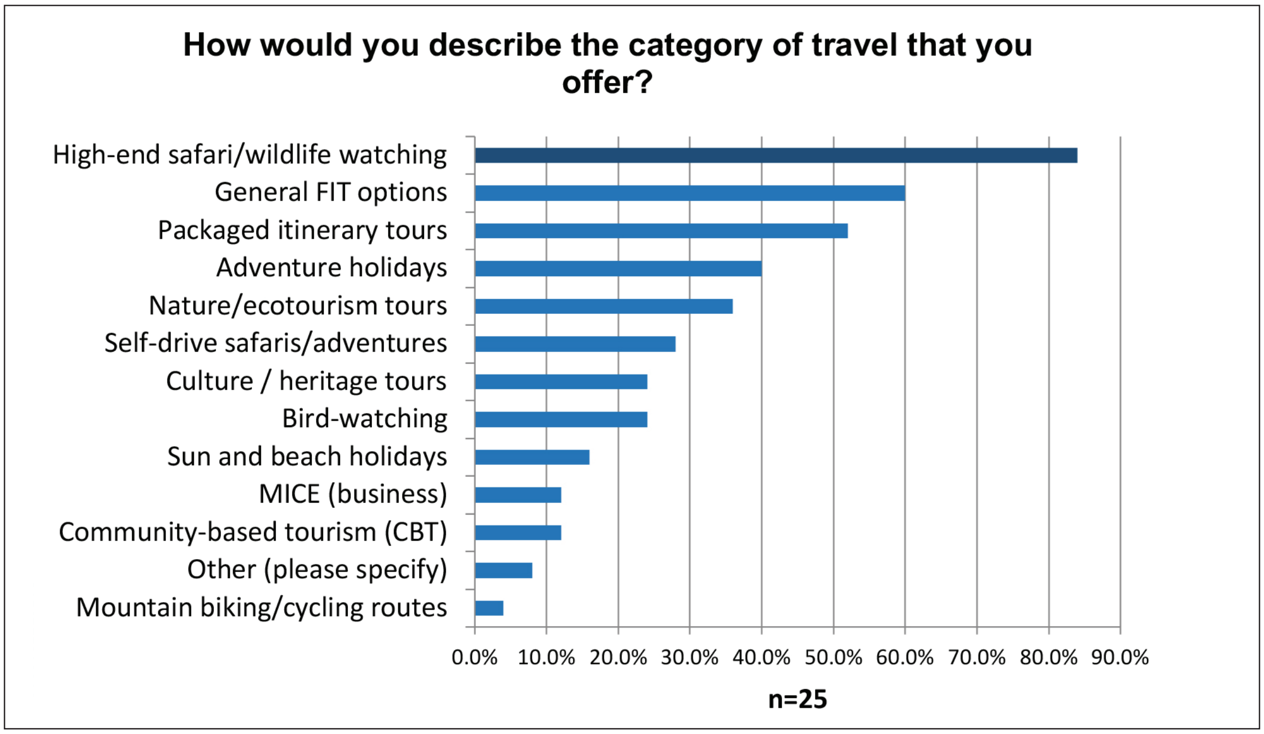
Countries offered

The majority of operators who partook in the survey include mainly countries of the KAZA TFCA in their programmes.



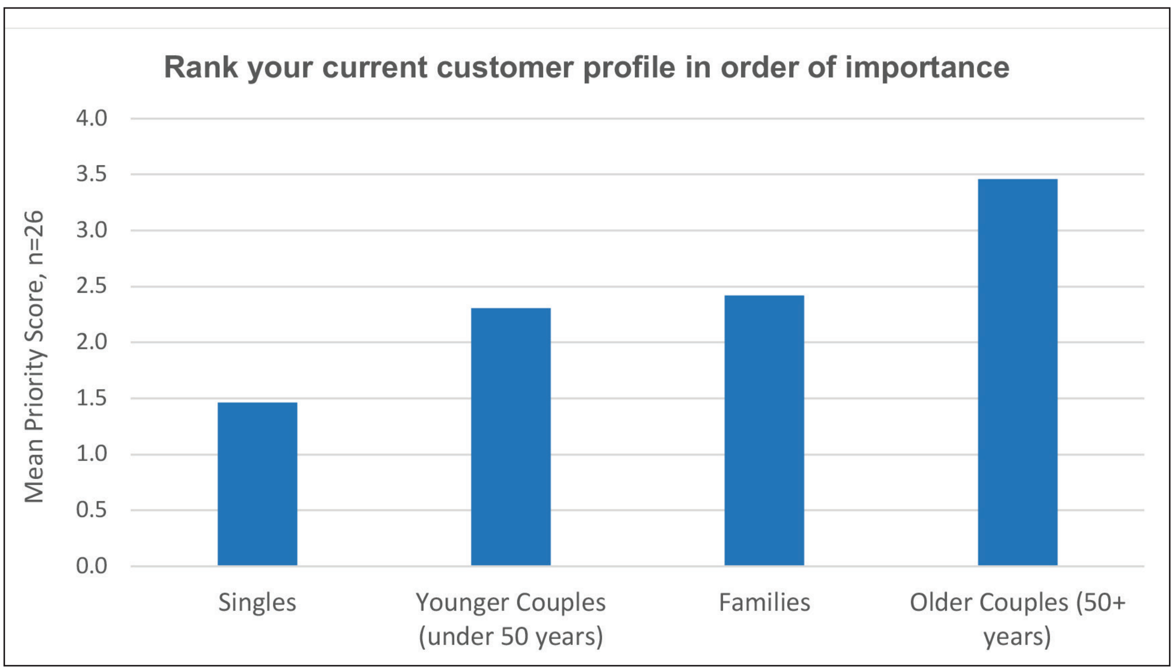
Travel segments targeted

The category of travel most sold is high-end safari and wildlife watching, followed by general FIT options, then packaged itinerary tours. The breakdown of travel categories is as follows:



Tour operators indicate that their clients are predominantly in the older age group, although this is closely followed by families. In terms of customer profile in order of importance, tour operators indicated:

1. Older Couples (50+ years)
2. Families
3. Younger Couples (under 50 years)
4. Singles



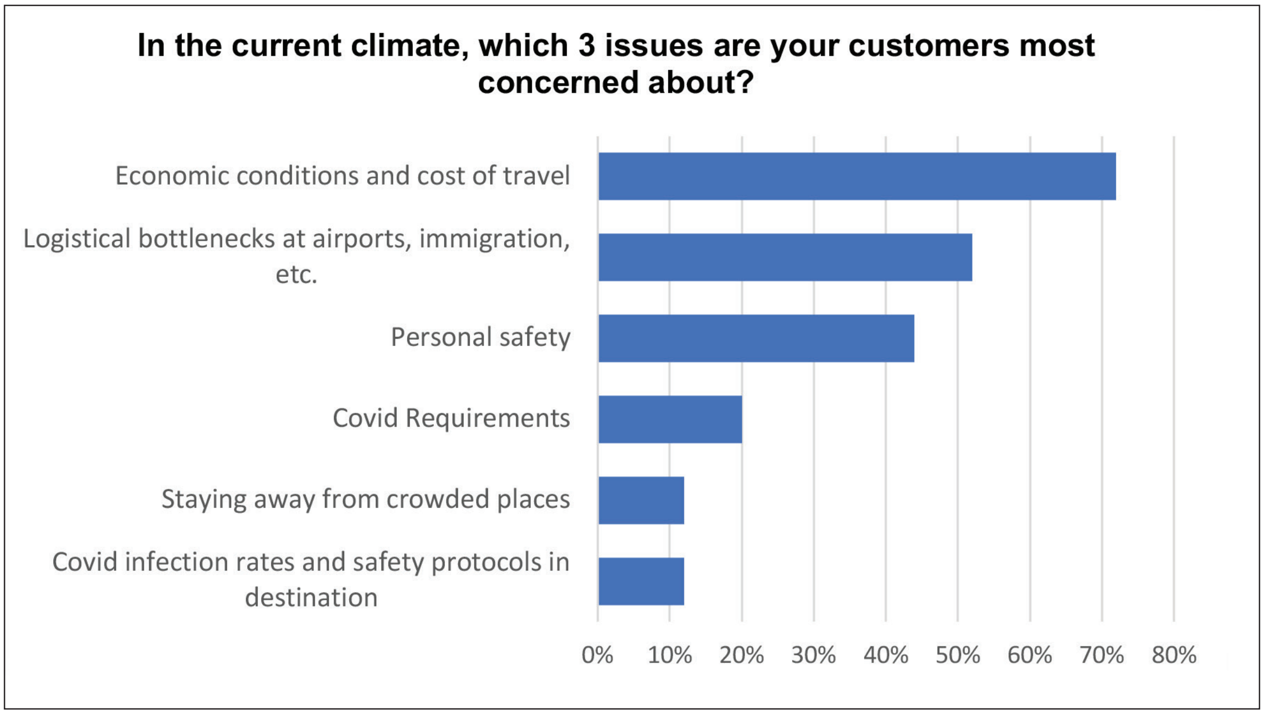
Private groups, FIT and tailormade tours are the primary market segments for tour operators surveyed. They deal primarily with smaller traveller groups:

1. Private groups:	76%
2. FIT:	76%
3. Tailormade tours:	72%
4. Small groups (of 8 people or less):	68%
5. Large group tours (more than 8 people)	32%

Client travel concerns
Interestingly, Covid infection rates, safety protocols and requirements rank very low in terms of what concerns the clients of tour operators surveyed. The 3 issues customers are most concerned about are:

1. Economic conditions and cost of travel: 72%
2. Logistical bottlenecks at airports, immigration, etc. 52%
3. Personal safety 44%

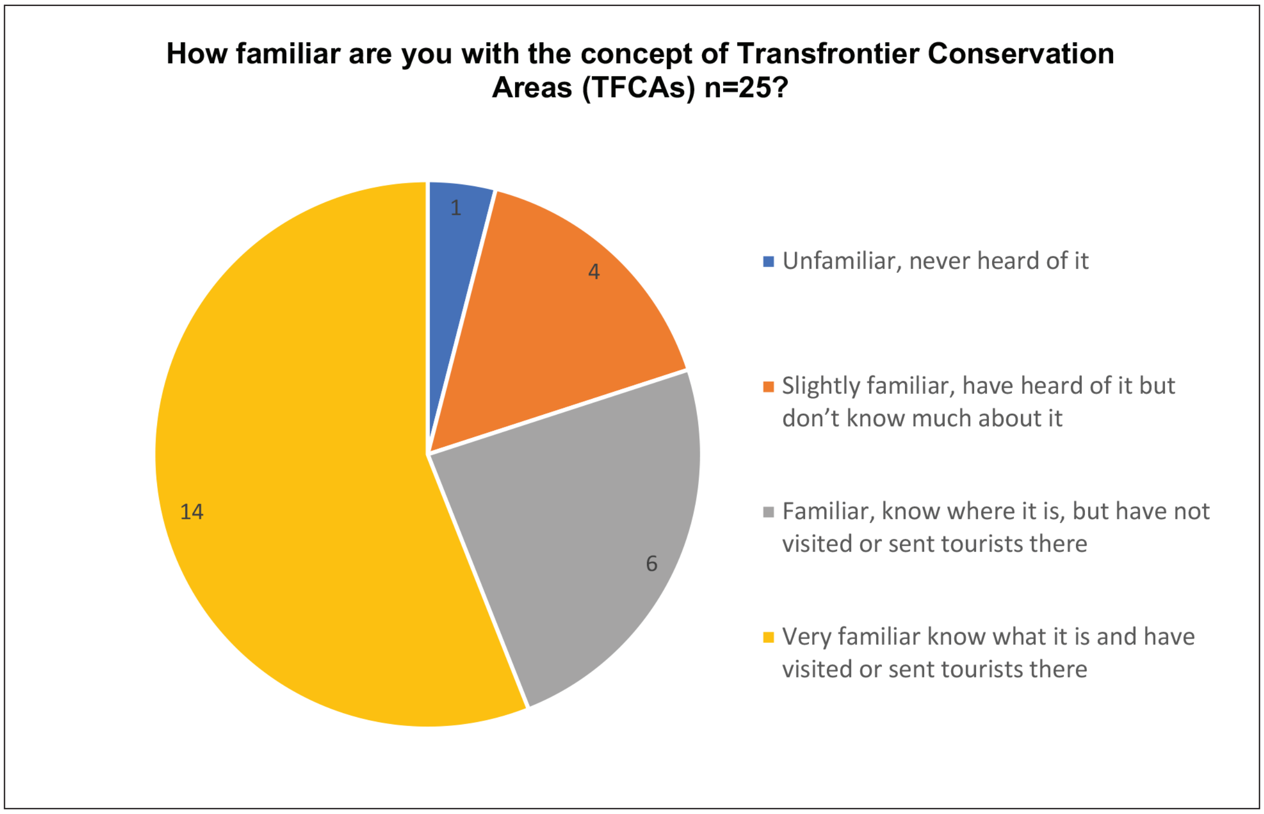
Logistical bottlenecks at airports and immigration points may have resulted from demand surges due to pent-up demand in the wake of the Covid epidemic and should be resolved soon.



Sustainability is gaining increasing importance in terms of whether a customer chooses a destination or a provider. Almost half of tour operators surveyed indicated that sustainability and responsible tourism practices are important and could tip the balance of a sale, 28% said that this was essential for sales and 24% said it was nice to have, but not a deal breaker. TFCAs should be in a good position to capitalise on these trends by promoting their adherence to sustainability principles and operating standards.

TFCA knowledge

There was good knowledge of the concept of TFCAs amongst those tour operators surveyed, with 20 out of 25 respondents indicating that they were either "familiar" or "very familiar" with the concept. Only one person said they were unfamiliar with the concept.

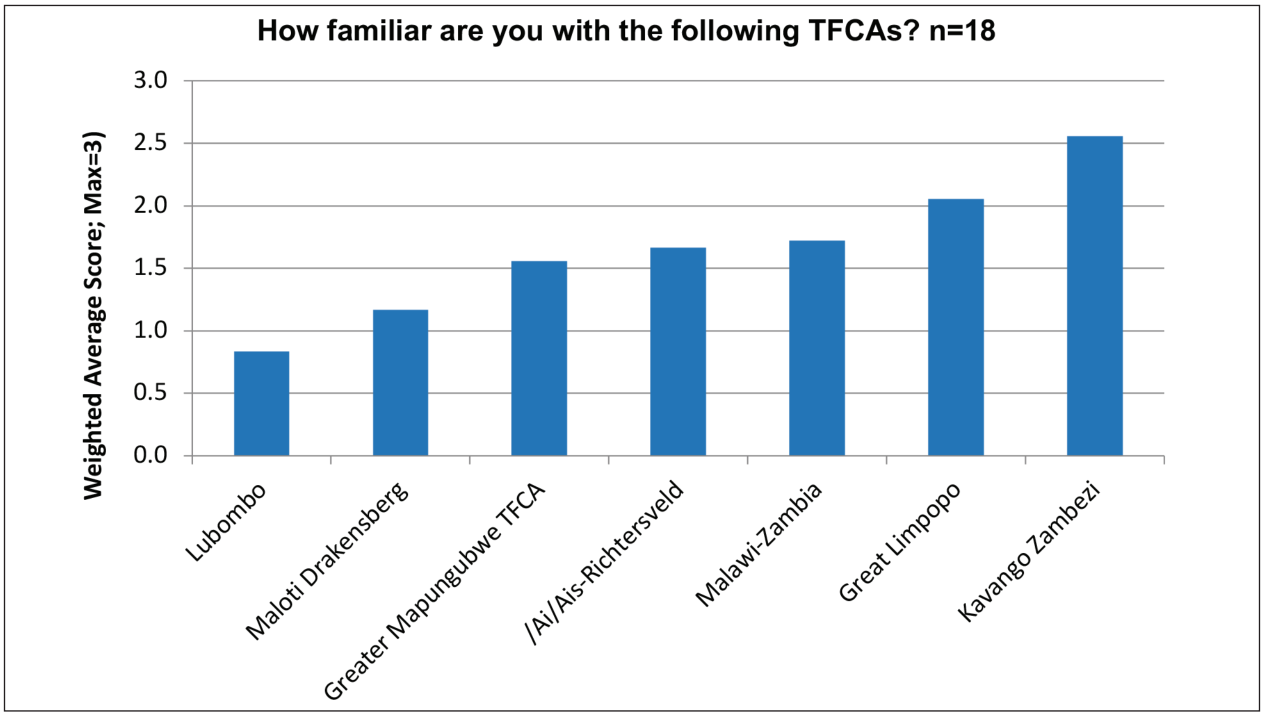


The five tour operators that were unfamiliar with TFCAs responded that they would be interested in receiving more information about TFCAs and the information they would like to receive included:

1. The concept in general and where they are located
2. What experiences and activities they offer visitors
3. Access routes, services and travel time by road and air
4. Availability of accommodation, local transport and other services

In terms of the familiarity of individual TFCAs, the TFCAs with the highest visibility amongst the tour operators polled are KAZA and Great Limpopo. Those with the least visibility are Lubombo TFCA and Maloti Drakensberg.

TFCA	Unfamiliar (never heard of it)	Slightly familiar (have heard of it, but don't know much)	Familiar (know where it is, but haven't visited or sent tourists there)	Very familiar (know what is and have visited or sent tourists there)
Kavango Zambezi	6%	6%	17%	72%
Great Limpopo	6%	11%	56%	28%
Maloti Drakensberg	31%	19%	38%	13%
Lubombo	44%	31%	13%	13%
/Ai/Ais-Richtersveld	19%	25%	6%	50%
Malawi-Zambia	11%	39%	17%	33%
Greater Mapungubwe	24%	18%	29%	28%



Top of mind attractions of TFCAs

The concepts that come to mind for tour operators that are familiar with TFCAs , when they think of TFCAs are all related to nature and wildlife, namely:

- Wildlife (most prominent)
- Movement/borders/fences and
- Sustainability/biodiversity/conservation

Perceptions of TFCAs among the travel trade remain highly linked to wildlife conservation, and this raises a challenge for TFCA's like Ai-Ais Richtersveld, Maluti-Drakensberg and Lubombo TFCAs, where wildlife concentrations and migration is limited. Focused and segmented marketing and product development is required for these TFCAs, capitalising on the needs and travel preferences of (often niche and special interest) traveller segments who prefer the attractions and experiences that they offer, or who's hobbies and interests are linked to these .

TFCA Potential

The potential for TFCAs is ranked high, with 67% of tour operators (n=18) saying tourism could blossom in these areas and 33% saying tourism could develop to a fair level. Not one tour operator said that the TFCA was not suitable for tourism development.

Reasons for not offering tours to TFCAs

Of the 18 tour operators that are either "familiar" or "very familiar" with TFCAs, 15 currently offer tours to TFCAs. Those (3) that do not promote TFCA cited safety concerns, lack of suitable accommodation and immigration challenges as reasons for not including TFCAs. All three indicated that they would be interested in promoting TFCAs in future.

Views of operator respondents that do offer tours to TFCAs

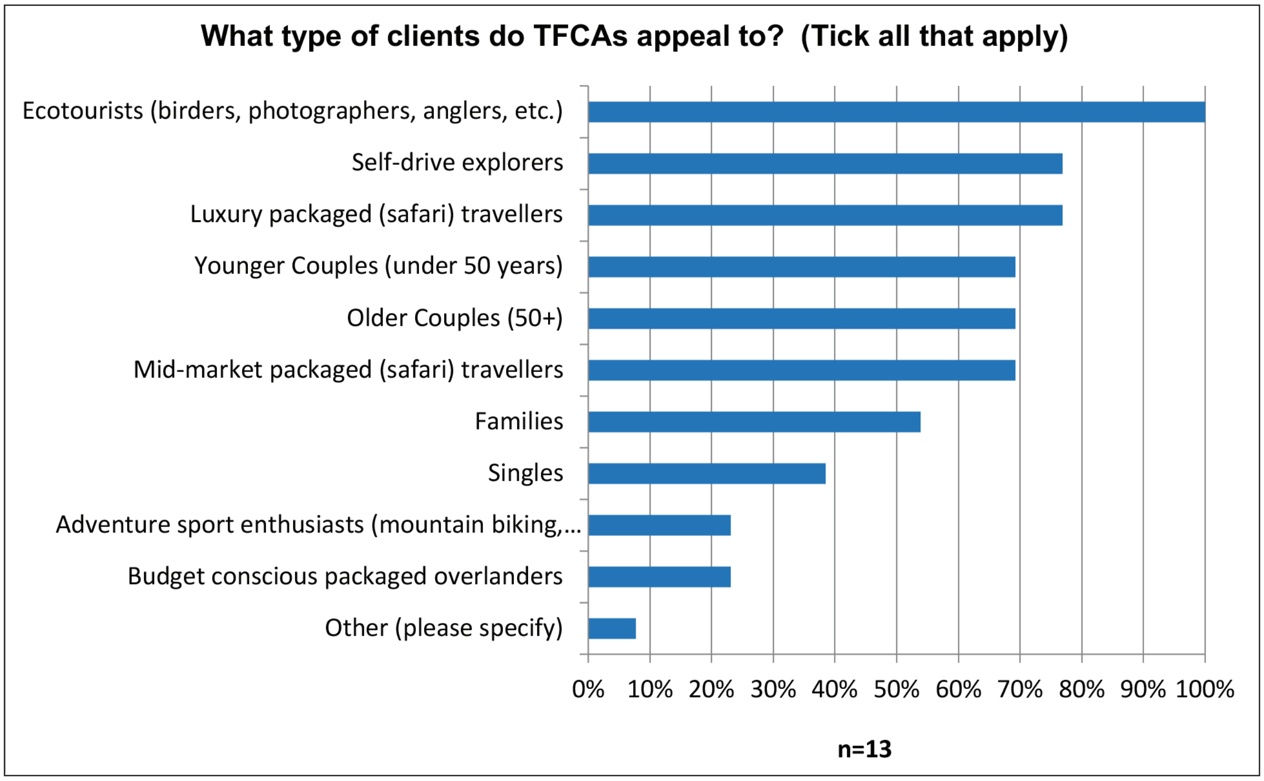
TFCA tourism demand trends

The majority of respondents that do offer TFCAs (n=13) have been doing so for more than five years.

Among them, demand for TFCAs in the 3-5 years prior to 2020 had either increased (38% of respondents) or stayed the same (31% of respondents) although there was broad consensus (69% of respondents) that sales to TFCAs would increase during the Covid recovery period and beyond (2022 to 2030).

All respondents indicated that TFCAs would appeal to special interest ecotourists (birders, photographers, anglers, etc.). Most respondents also cited self-drive explorers and luxury safari travellers as potential target markets, with mid-market safari travellers also getting 70% of votes.

The majority of respondents indicated that TFCAs would appeal to both older and younger couples.

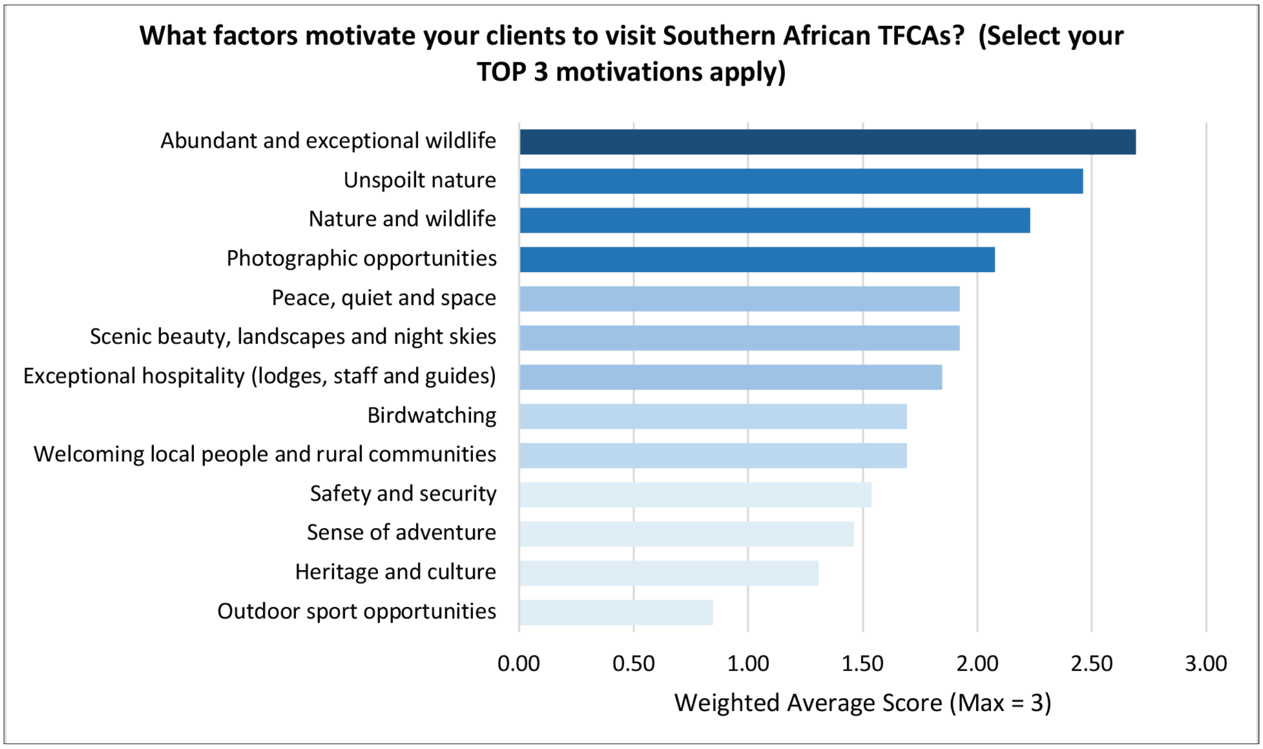


Clients generally prefer to visit TFCAs as part of a cross-border Southern Africa itinerary with a day or two spent there (69%). Only a small percentage (15%) choose the TFCA as their main destination, with most of their time spent there.

The top 3 factors motivating clients to visit Southern Africa's TFCAs are:

1. Abundant and exceptional wildlife (the overriding attraction factors)
2. Unspoilt nature together with wildlife
3. Photographic opportunities

Community based tourism, local culture, local hospitality and adventure experiences scored low relative to nature, wildlife and scenery.



When asked what clients disliked or were disappointed about their experiences in Southern Africa TFCAs, the following issues were cited:

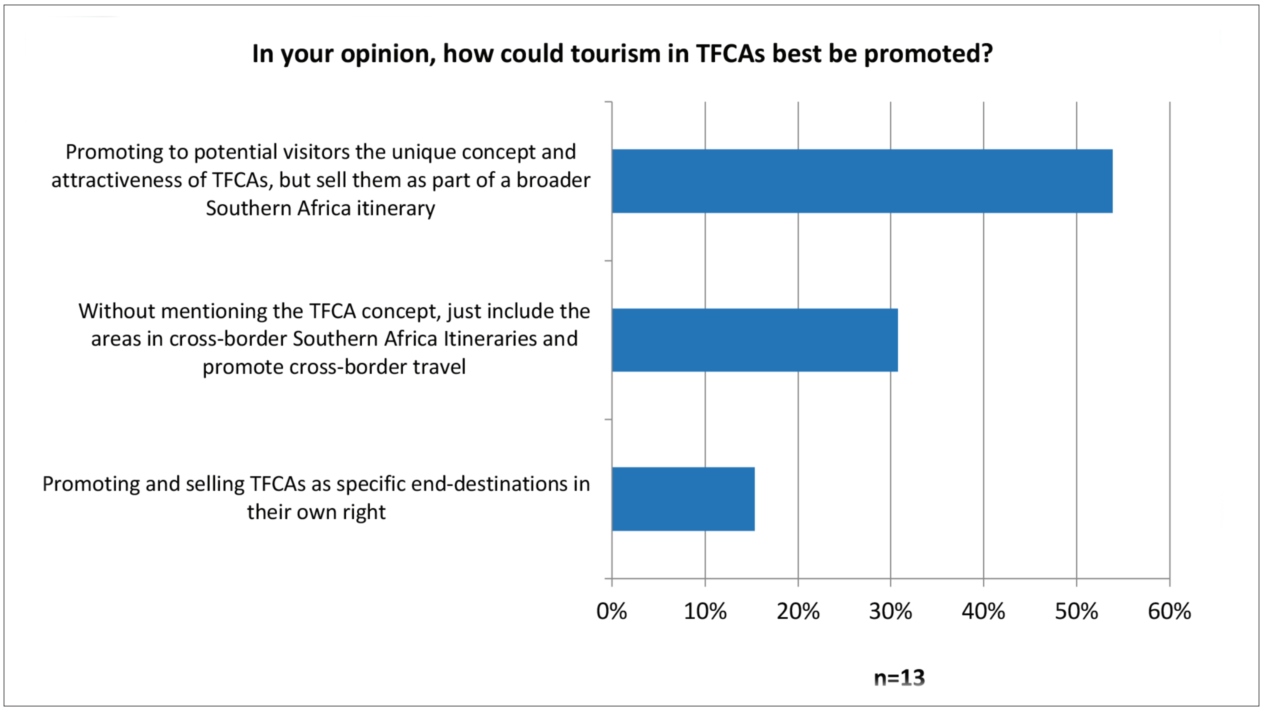
- Immigration issues and visas (also mentioned as border crossings, bureaucracy and border red tape)
- Not enough offerings and logistics
- Game density and deforestation of some areas
- Inappropriate development in sensitive areas
- No consistency between partnerships
- Standard of community accommodation and service not as high as private reserves

The biggest barriers cited by tour operators surveyed in terms of increasing sales to TFCAs included:

- Lack of knowledge and exposure
- Logistics – getting to and from
- Lack of collaboration between countries
- Difficulty in including in itineraries
- Marketing
- Common protocols on visas, vehicles, process at borders – not user friendly (cross border movement)
- Agent rates and easy of doing business
- Geographic distances from traditional tourism locations

Marketing TFCAs

Tour operators surveyed believe the best way to market tourism in TFCAs is to promote to potential visitors the unique concept and attractiveness of TFCAs but sell them as part of a broader Southern Africa itinerary (54%). Only 15% believe they should be promoted and sold as specific end-destinations, while 31% said areas should be included in cross-border itineraries without mentioning the TFCA concept. These findings suggest that some operators may not be serving a conservation-conscious market and that the TFCA concept may not hold special appeal for their clients. These are in the minority, though.



Short phrases of taglines that could be used for promoting the TFCA tourism concept included:

- More than one country, only one destination
- Safari without borders
- Accessible wilderness areas
- Peace Parks for nature and people
- Trans-frontier = Trans-culture = Transfiguration to success
- Where countries, communities and conservation merge
- Breaking down boundaries for people and planet
- Roam free
- Hassle-free border crossings
- Biodiversity beyond borders

ANNEXURE C: RESULTS OF TFCA INTERNAL STAKEHOLDER INTERVIEWS AND SURVEY

Resources

The following sections draws on the results of personal telephonic (VOI) interviews conducted with TFCA coordinators and a number of significant private sector tourism operators in TFCAs.

Institutional Status

To give effect to the tourism component of the SADC TFCA Strategy, Joint Tourism Working Groups, with technical representatives from each respective country, region or province, should be established. These should meet regularly and are responsible for the implementation of activities. Each TFCA would also have a programme coordinator to coordinate the efforts of different stakeholders.

Practically, the structure at a technical level differs from TFCA to TFCA, e.g., Maluti-Drakensberg TFCA has two co-chairs instead of a programme coordinator. Joint Working Groups do not always comprise representatives from each respective country, region or province and these also do not always meet on a regular basis. In fact, it is suggested that getting stakeholders on these Joint Working Groups together is “difficult” for some of the TFCAs.

While a level of flexibility is required in terms of the model, it is essential that responsibility and accountability is clear. Currently, there are varying degrees of knowledge and understanding of the extent to which agreed joint programmes and initiatives are being executed – suggesting that the oversight and coordinating role is not always functioning optimally even if progress is being made.

Tourism Development Status

Most TFCA are yet to establish tourism working groups and only one has in place a joint tourism framework or strategy to guide tourism activities within the conservation area. Some of those which do, have established annual action plans, e.g. MDTFCA which guide their activities on the ground.

Focal points agree that the focus within the TFCAs has been on conservation and ensuring cross-border movement of wildlife and securing the natural and wildlife assets of the TFCAs, not tourism development.

That’s not to say that tourism development is not happening. It is incidental in those TFCA destinations that already have broad tourism appeal, e.g., KAZA by virtual of the tourism assets that exist naturally in those areas. Tourism development in these areas is mature and products were established by private sector operators largely, even before the notion of a TFCA existed, thus they were developed in isolation of a trans-frontier travel concept (supposedly a USP of the TFCA) and are not connected in a circuit.

In many cases, these products may not even know they fall within the TFCA and certainly do not market themselves as part of a TFCA and in association with complimentary products within the TFCA, across borders and as part of a trans-frontier circuit.

For private-sector operators wishing to establish new product within the TFCAs, there are certain challenges highlighted – not least the tenuous business operating environment in some of the conservation areas that form part of a wider TFCA. These challenges range from red tape to logistical challenges, making it expensive and inconvenient to establish product in these areas to build a circuit, but also expensive and inconvenient for travellers to travel to and stay these. In some cases, establishing product is commercially unviable which results in an unequal distribution or clustering of tourism product within the park so that some parks are favoured over others within a TFCA, limiting geographic spread and length of stay.

A particular challenge cited is accessibility in terms of geographic distances and border crossing issues, as well as park fees. Kgalagadi Transfrontier Park is cited as an example of trans-frontier excellence as there is one entry fee and no passport required to cross the border.

Even in the case of public-sector tourism infrastructure, this has been developed for example by the conservation authorities within the individual parks as standalone product, e.g., accommodation at Namibia Wildlife Resorts’ Ai-|Ais Hotsprings and Spa and SANParks’ Richtersveld (comprising the Ai-|Ais / Richtersveld Transfrontier Park). There are however proposals for joint initiatives although these have yet to be concretely established.

Opportunities and Challenges

Accessibility
By far the most cited challenges amongst private- and public-sector stakeholders, accessibility is one of the base-level requirements for tourism to function. It was suggested that even before any marketing is conducted, accessibility be dealt with as a matter of urgency because one cannot sell what cannot be accessed.

While some of this inaccessibility cited by TFCA stakeholders pertains to geographic distances making linkages and management a challenge, as well as seasonality, e.g., flooding rendering certain parts of TFCAs inaccessible at certain times of the year, the accessibility challenges are largely political in nature.

Beyond the fact that each TFCA has different levels of tourism maturity and readiness, private sector stakeholders assert that while the TFCA is a "great idea" practically the complexities exist hampers cross-border travel, which should be one of the key drivers behind the concept of a TFCA.

It is simply too difficult and expensive in many cases for travellers to cross borders within the TFCA. The attraction of visiting several countries within one destination is replaced with friction as travellers must navigate long detours to cross through official border posts, obtain visas (sometimes at a high cost) and present passports. A mechanism facilitating easier movement within the TFCA would be a positive step to realising the vision of the TFCAs such that they exist, from a tourism perspective, as more than trans-frontier in name only.

There have been discussions around the establishment of a SADC Univisa for many years, as well as projects such as that at Greater Limpopo TFCA (Access Facility) where immigration officials would travel to guests if border crossings are booked and pre-paid, but these have yet to be finalised. A pilot project was also conducted recently in the MDTFCA whereby hikers would venture on a walking trail between Witsieshoek and AfriSki, within the TFCA, however the difficulty and expense of doing this regularly would render the joint initiative commercially unviable – "it's too complicated".

In addition to striving for a SADC Univisa, the suggestion is made for tour operators running joint tourism activities to apply for a carnet on behalf of their guests, or for a special visa to be created for trans-frontier park travellers where there is no requirement to present a passport to cross borders within the TFCA and pay for a visa. However, this may not work in some of the TFCAs as there are too many unmanned and uncontrolled exits.

It should also be noted that the notion of borders stopping the movement of people is a myth. The crossing of borders by local communities is already happening, informally and in an unregulated way.

We should leverage the popularity of the more popular destinations for the benefit of the lesser-known and frequented destinations, so we drive community economic growth and job creation.

Facilitating easier cross-border travel within the TFCAs would have great benefit for destinations within the TFCA which may not of their own accord currently enjoy wide support, e.g., the South African side of the Kgalagadi gets many visitors while the Botswana side does not. The Kruger National Park enjoys widespread support, but Gonarezhou (across the border) not. This is mainly due to inequalities in the level of infrastructural development in the different sides that form the TFCA. The situation offers opportunities for substantial public and private sector investment to catalyse new market growth.

Funding and Resource Constraints
For many of the TFCAs, funding and resource constraints are hampering the coordination and execution of tourism activities on the ground. None have a dedicated tourism marketing resource available to drive the marketing of their TFCA meaningfully. While ICPs have already invested substantial amounts to support initiatives like Boundless Southern Africa, more resources are needed.

Signage, marketing collateral and digital marketing platforms are lacking as resources and funding to develop and maintain these does not exist.

Product Development and Mapping
The focus for the TFCAs has been on conservation, not tourism. Thus, the level of tourism product development varies per TFCA, and this based on the tourism assets that existed prior to the TFCA having been established by virtue of the tourism potential that largely private-sector bodies invested in.

Where these tourism assets have not existed, tourism product has not been established or, if it has, it is not tourism-ready and therefore cannot be incorporated within a trans-frontier circuit, enticing travellers to move between products within the TFCA.

The primary direction for donor funding in the last few years has been focused on wildlife / natural resources conservation. Supporting conservation initiatives and enhancing connectivity so that wildlife can move freely between the borders in addition to law enforcement and anti-poaching.

The development of circuits, routes and itineraries presents a major opportunity for the TFCAs, thus providing private sector stakeholders, e.g., tour operators, with something tangible to market, not just the ethereal notion of a trans-frontier destination. What has made marketing the TFCAs difficult are the basic practicalities of travel – accessibility and availability and quality of product and experience.

Coordinating the relevant parties to create these linkages has been difficult and in the absence of being able to make these linkages and access these, there is little to market and sell tangibly. That is the real break down.

Further, it should be noted that the diversity of tourism assets within each TFCA make it difficult to market and sell the overarching TFCA concept focusing on USPs as each TFCA has its own. A survey amongst TFCA focal points suggests as much with stakeholders selecting different tourism selling points per TFCA, from strong archaeological and historical access to community-based tourism, to wildlife offerings to adventure sport opportunities. No two TFCAs appear to have the same 'experience' other than the opportunity for trans-frontier travel within one destination – that is the golden thread that unites them.

Stakeholder Relations, Community Involvement and Capacity Building

While community-based tourism is an opportunity cited in some of the TFCAs, this opportunity does not appear to be well-developed, with some focal points highlighting the challenges experienced in communicating the value of the TFCA and indeed tourism to the local communities, not just in terms of the community itself, but also the individuals within it.

In each of the TFCAs, there must be an effort to diversify product beyond the natural assets that exist, i.e., harnessing the heritage, cultural and adventure experiences on offer which all speak to community-based tourism. However, the benefit to communities must go beyond job creation and focus placed on ownership so that they benefit directly from tourism within the TFCAs. Capacity building will be required.

Private-sector stakeholders are to a large extent disengaged from the TFCA concept. This ranges from a lack of understanding of the TFCA (in terms of what it is, their role within it, etc.), to a general disenchantment due to a perception that it has been ineffective or slow.

The current sentiment, not only amongst public sector stakeholders, but indeed also amongst some in the public sector, is that the TFCAs have not delivered on their mandate. The focus must thus be on getting them to be effective and successful from a conservation perspective – the marketing and media interest would then follow suit. Before marketing destination TFCA, interviewees suggest, these should deliver on their mandate and vision of ease of people and wildlife movement (migrations) so that positive stories are developed from action, not words. The proof points for marketing will exist with the effective implementation of the TFCA mandate.

A huge opportunity exists if the TFCAs are effective.

Tourism products market themselves, but as part of the broader TFCA or a route or circuit that is trans-frontier, which is a missed opportunity in terms of inspiring travellers to stay longer and see more within the TFCA. In TFCAs where the tourism sector is mature, there may also be distrust between the private- and public-sector stakeholders, with the former being dismissive of activities conducted because they are slow or ineffective; the latter asserting that private entities are commercially driven, non-inclusive and uncollaborative.

A win-win would be that there would be fruitful collaboration between private-sector associations and public-sector entities, as well as an inclusive approach that extends beyond the "big boys" so that initiatives are aligned for the benefit of all stakeholders.

Focal points acknowledge that there is a big gap in terms of the involvement of private sector, which do not participate in TFCA initiatives. A similar challenge exists with some of the DMOs which do not get involved.

Siloed Marketing Approach

The spectrum of tourism bodies and TFCA entities that exist and are marketing TFCAs on an ad hoc basis, including Boundless Southern Africa, have caused confusion in the market. There isn't a general understanding of who does what, who is responsible for doing what, and how is acting as the coordinator. In addition to being siloed, the marketing role is very fragmented.

As discussed, private-sector tourism product tends not to promote itself as part of or located within a TFCA, nor as part of a trans-frontier circuit, choosing instead to market itself as a standalone product within a standalone destination.

The same can largely be said for the respective provinces, regions, countries and park which comprise the TFCA. These rarely promote the overarching concept of the TFCA within which they are located, and the tourism opportunities that exist, beyond promoting their own area and products.

Several of the TFCA focal points suggested leveraging the existing destination brand and activities for the benefit of the TFCA, e.g., if Tourism KwaZulu Natal is marketing the Drakensberg it should do so stating it is located within the MDTFCA. Commitments have been made in some through joint marketing MOUs, however in many cases the focal points interviewed could not say whether the activities were being executed in practice and were unable to confirm any oversight was being performed to ensure the MOUs were being carried out.

There has been some attempt to promote the TFCAs together at trade shows like ITB Berlin and Indaba under the umbrella of Boundless Southern Africa. It must be noted that focal points and private sector stakeholders question the effectiveness of these shows in promoting the TFCA concept and individual TFCAs, citing those representatives on the stand – usually programme coordinators – are not equipped to 'sell' the TFCA's tourism offer because they are not aware of the product that exists and the rate for these. The ROI from public-sector attendees is therefore low.

This role should be performed by private sector as demonstrated by the success of having Transfrontier Parks Destinations (TFPD) on the stand because they're able to promote itineraries and product within the TFCA.

Special Interest Market Segments and Events
In addition to the existing luxury safari and adventure touring segments, huge potential exists to target special interest segments, such as 4x4 enthusiasts, cultural tourists and mountain bikers, among others.

In some of the TFCAs, special cross-border events such as the Tour de Tuli and Desert Nights have been established to tap into these lucrative special interest market segments. Not only do these generate travel to the TFCAs, but they also create publicity amongst the desired target markets. While practically these events take travellers across borders, they are not generally marketing the TFCA, e.g., Tour de Tuli does not promote the Greater Mapungubwe TFCA.

For events such as these to be successful, they require the commitment of all authorities on both sides of the border, a full-time project management team and sponsorship. These must also be annual events, not ad hoc or once-off events so that they build a following.

The suggestion is made that private- and public-sector roles be clear, with the latter facilitating border crossings and other political support enabling the private-sector stakeholders to run and market the event itself. Itineraries and associated content should be developed in conjunction with these events and shared with tour operators so that these can be sold to niche segments.

There was also commentary from focal points on the importance of the domestic traveller (within or near the TFCA) which should be a focus. The focal point survey highlighted that 44% of travellers to their TFCAs originated locally, however events drew a large percentage of non-residents. More could be done to highlight the tourism assets within the TFCAs to encourage local visitation.

The survey further revealed the top market segments of profile of TFCA travellers as:

- Self-drive explorers
- Families
- Adventure sport enthusiasts
- Ecotourists

Attractiveness of the Trans-frontier Destination concept
The "mystique" of a trans-frontier destination has not been leveraged enough, according to interviewees. The interest from travellers is not in the fact that they are visiting a TFCA. Rather, they are interested in ticking off several countries on one trip (and without having to present a passport to cross a border). Further, the concept of collaborative conservation – the joint protection of a last wilderness – is highly attractive and motivational.

The TFCAs thus should be marketed as "tourism corridors" and the assets that exist within those corridors should be focussed on market segment niches, aimed at inspiring travellers to stay longer and travel within the corridor. The suggestion was made for a visitation or tourist card (like SANParks' Wild Card) as an incentive for travellers to move around within the TFCA and increase their length of stay.

Marketing Initiatives
Under-resourced, under-funded and without strategic direction, the tourism marketing of the TFCAs is at best ad hoc and uncoordinated.

Although some initiatives have been undertaken – media trips, brochures developed, trade show attendance and social media campaigns – these have been done outside of the framework of a marketing strategy or plan. Many of these initiatives have been conducted by Boundless Southern Africa, not initiated by the TFCAs themselves, and these have been once-off tactics that aren't driven to achieve particular goals, e.g. a recent social media campaign for three TFCAs.

Beyond the Boundless Southern Africa website and social media platforms and the SADC TFCA Portal (not a very tourism-friendly resource), very few of the TFCAs have any digital marketing platforms such as a website or social media. For those who do, these platforms are either out-dated or are not being updated meaning they are no longer viable digital marketing platforms to share the TFCA's offering.

Marketing initiatives that are undertaken on behalf of the TFCA take some time to get off the ground due to challenges in getting all the stakeholders in one room, and thereafter aligned behind the initiative. Said one interviewee: "We can't even get an inception meeting together".

As discussed, private sector stakeholders within the TFCA do not market their connection to the TFCA or generally get involved in joint marketing initiatives conducted by the TFCA. Indeed, the TFCAs confirm that they do not have up-to-date product databases of product, and that these databases exist at a local level, i.e. the individual DMOs may have these for their respective areas.

The lack of basic information that travellers would need to access the destination meaningfully, such as product listings and travel and cross-border information should be the first step to marketing, interviewees insist. The travel trade will look for simplicity and will reject complexity. If it is too complicated to access information, or to travel across borders they will simply not promote the TFCA to their clients. The suggestion thus is to start with accessibility, then look at the product, and only then focus on the branding and marketing. The trade should be empowered to market on behalf of the TFCA.

A big gap exists currently in marketing destination Southern Africa to international source markets – the region is being left behind as the world reopens. The destination must align its efforts, budget and focus behind private sector's efforts to market the TFCAs.

Branding the TFCAs
There are mixed views on the recognition of the TFCA concept and the suitability of its name, with public sector largely being supportive of it remaining as such, while private sector questions the extent to which the trade and consumers recognise it.

Although the knowledge of TFCAs amongst tourism stakeholders and consumers may be low, it is said to be an "easy sell" based on the concept being valued. What has not been done successfully is to market its story – and particularly the narrative around conservation and what has been achieved from this perspective. The assertion from private sector is that conservation must be a core theme of the marketing of TFCAs.

Indeed, with the focus being very much on conservation, tourism has lagged so the question arises what kind of structure would be optimal for successful tourism market development, underpinned by a core narrative around conservation successes, and consequently the marketing of TFCAs.

In terms of structures, TFCA focal points believe the diversity within each TFCA requires each to have their own identity and brand (sub-brands for each TFCA) promoted under an umbrella master TFCA brand (e.g. Boundless Southern Africa. Private sector stakeholders expressed concern around identifying an overarching marketing hook for this very reason – there's no common thread.

Even selling the TFCA in its entirety is difficult when the level of product within the TFCA is so diverse in terms of quality level, market segment focus, etc.

Focal points confirm they would not want a bigger TFCA to overshadow the other and that each TFCA should have a marketing officer which engages with Boundless Southern Africa, providing on-the-ground insights, resources and information about marketing initiatives at a localised level. The suggestion is that a menu of collective marketing activities be provided by Boundless South Africa, from which the TFCA marketing point person can select, in addition to pursuing specific marketing initiatives for their TFCA on their own.

Marketing tactics identified as highly suited included:

- Social media campaigns
- Trade Fams
- Trade marketing campaigns
- Media Fams

Further activities identified as somewhat suited included:

- Public Relations
- Email marketing
- Attendance at trade shows
- Own marketing collateral

Role of Boundless Southern Africa

There is broad agreement that had it not been for Boundless Southern Africa there would be little to no marketing conducted on behalf of the TFCAs, despite the ad hoc and un-strategic nature of the marketing that this organisation has done.

Launched in 2010 with a fair amount of hype and budget, there were great expectations certainly amongst private-sector stakeholders of the role that Boundless Southern Africa would play. Although initiatives have been undertaken, these have not communicated properly to private sector.

Over time Boundless Southern Africa has become under-resourced and under-funded – a "rudderless ship" to which only one resource has been allocated. Further, the organisation does not have the mandate to drive initiatives. It must provide support and rely on the support of tourism working groups.

Among the activities it has undertaken are a series of media trips, a social media campaign, content creation in the form of brochures and attendance at such trade shows as Indaba and WTM Africa. However, it lacks basic collateral, such as visuals, GPS mapping and product databases, and it gets little to no support from the private sector which does not appear to have "bought into" what Boundless Southern Africa is trying to achieve when it does conduct marketing campaigns.

The Boundless Southern Africa website has also been relaunched but again is a victim of lack of strategy since it was not designed knowing who its target market is – travel trade or end consumer.

The shotgun approach without a clear strategy is making it difficult to get anything right. We should have a clear B2B and B2C strategy.

Despite not having a strategy, TFCA focal points feel Boundless Southern Africa has been complimentary to their efforts and that it is an existing brand with a favourable reputation. It was also described as a "neutral" entity that could cut through political agendas and competition for scarce resources and funding, i.e., one voice for all partner states and all TFCAs.

There is largely no objection to retaining the name Boundless Southern Africa and its role should be to promote the overall TFCA concept, as well as the individual TFCA brands. While much of the tourism marketing function would rest within the individual TFCAs, and each country, province or region should be responsible for the execution thereof, Boundless Southern Africa should provide shared marketing services – a menu of affordable marketing opportunities – from and for which individual TFCAs can select and budget based on their strategy and what they have deemed therefore most valuable, e.g.:

- Exposure on the Boundless Southern Africa website and social media channels
- Participation on Boundless Southern Africa show stands
- Participation in Boundless Southern Africa media and travel trade fams

In this structure, the individual TFCAs should input into Boundless Southern Africa and drive their own marketing initiatives, not the other way around as is the case currently. Boundless Southern Africa would also be transformed into a B2B platform which coordinates communications to travel trade and government, with the TFCAs focusing their marketing efforts on consumers.

An opportunity exists to link product within the TFCAs and create and promote tourism itineraries which are shared with tour operators and end consumers. The suggestion was made for Boundless Southern Africa to play a role in publishing itineraries on its websites with product listing, such as that provided by responsibletraveller.com, offering market linkages for tourism products within the TFCA.

A further suggestion offered provides for subsidised marketing initiatives which private sector can tap into, e.g. subsidised attendance at trade shows to ensure market linkages. This would be particularly useful to the "missing middle" product level – not SMEs who are already subsidised largely, or established operators which would have their own stand and would likely not participate on an additional stand such as the TFCA one.

It must be said that private-sector stakeholders will only consider aligning with and endorsing the brand – Boundless Southern Africa or otherwise – if it is strong enough and has credibility in terms of the quality of its marketing. Stakeholders would not wish to endorse a brand that appears weak because it has failed to update its digital marketing platform or is using poor quality content.

Summary of key insights

Branding

- Boundless Southern Africa has some brand equity, but it lacks a clear focus and is under-resourced and not strategic in its marketing and communications approach. Broad support for it remaining as an umbrella organisation to market TFCA concept, and individual TFCAs, particularly due to its "neutrality".
- The diversity and differentiated offer with each TFCA requires each to have its own identity and brand.
- The appeal of existing destination brands should be leveraged and linked for the benefit of those that are lesser known.

Product packaging

- Linkages, circuits, and itineraries are key if the TFCA vision of people movement is to be ensured, but this will require work done to improve accessibility.
- One cannot market what does not exist – start with the fundamentals such as accessibility and product before you promise what cannot be delivered, and focus on the products and experiences that do exist.

Promotion

- The overall view is that BSA should promote awareness of the TFCA concept and tourism possibilities, on both B2B and B2C basis.
- The TFCAs should drive their own marketing strategies and tactics, with BSA providing support and guidance with e.g. technical planning, information, contact databases, possibly shared marketing services and other aspects of communal value to the TFCAs
- A marketing strategy and plan for each is required to ensure that tactics are not run ad hoc.
- There is opportunity in leveraging special interest segments, such as adventure tourism, cultural tourism.
- Empower the private sector to promote the TFCA – they are the ones who can sell the destination.

Organisation

- Enrol the private sector and community in the vision of the TFCA – explaining the benefits of its success to them, and to individuals.
- The siloed approach has been hugely damaging to the success of TFCA tourism marketing. Each country, province or region needs to be equally invested and interested in promoting the TFCA – a joint marketing committee or marketing focussed working group is required.
- For marketing to be effective, certain enabling factors must be fixed, most notably accessibility. Focus less on the long-term plays (establishment of a univisa) and more on the practical quick-win short-term plays (improving visa openness).

ANNEXURE D: BENCHMARKING COLLECTIVE TOURISM ORGANISATIONS

An assessment was conducted of the marketing roles, functions and activities of six organisations that promote multiple destinations and/or products. These are:

- Vanilla Islands Tourism Organisation
- Pacific Asia Travel Association (PATA)
- Caribbean Tourism Organisation (CTO)
- South Pacific Tourism Organisation
- Africa's Eden
- Classic Portfolio

Summary Assessment

		Primarily Destination and Allied Organisation Membership				Primarily Private Business Membership	
		Pacific-Asia Travel Association (PATA)	Caribbean Tourism Organisation (CTO)	Vanilla Islands Tourism Organisation	Pacific Tourism Organisation (SPTO)	Africa's Eden	Classic Portfolio
Membership	Government Ministries/Tourism authorities and allied institutions	X	X	X	X		
	Private sector tourism operators	X			X	X	X
	NGOs and other	X	X		X		
Marketing objectives and focus	Member brand endorsement and professionalisation	X	X				
	To communicate/promote/PR the corporate activities and successes of members			X	X	X	X
	As a policy mouthpiece and awareness/lobby organi-sation on behalf of members	X	X	X	X	X	
	As a marketing support service – policy, training, standards, statistics, market research	X	X				
	To market member products/destinations to potential travellers (B2C marketing)			X		X	X
	To market member products/destinations to the travel trade (B2B marketing)			X	X	X	X
Marketing support and advice services	Provide advice and guidance on tourism policy/legal matters	X	X		X		
	Provide and organise HRD/training services	X	X		X		
	Maintain and publish tourism statistics	X	X		X		
	Undertake, curate and publish market research and trend information	X	X		X		
	Provide advice and guidance on Sustainable Tourism Development	X	X	X	X		
	Provide advice on marketing strategies and methods	X	X		X		X

		Primarily Destination and Allied Organisation Membership				Primarily Private Business Membership	
		Pacific-Asia Travel Association (PATA)	Caribbean Tourism Organisation (CTO)	Vanilla Islands Tourism Organisation	Pacific Tourism Organisation (SPTO)	Africa's Eden	Classic Portfolio
	Develop or assist members in developing digital marketing platforms and strategies		X	X	X	X	X
	Maintain and provide members with trade and/or media contacts/databases		X		X	X	X
Direct Marketing services	Conduct destination promotions (campaigns, special offers, etc.)			X		X	X
	Attend and exhibit at consumer fairs with/on behalf of members			X			X
	Attend and exhibit at trade fairs with/on behalf of members			X	X	X	X
	Provide online trade destination education programmes				X		
	Organise and host travel trade and media fam trips			X		X	X
	Organise and host travel trade workshops and roadshows			X		X	X
	Develop, design and/or print marketing materials for members			X		X	X
	Other						
Marketing collateral used	Member website – intranet with member login	X	X		X	X	
	Public-facing website	X	X	X	X	X	X
	Active Facebook page	X	X	X	X	X	X
	Active Instagram page	X	X	X	X	X	X
	Active Twitter account	X	X	X	X	X	X
	Corporate brochure(s)				X		

		Primarily Destination and Allied Organisation Membership				Primarily Private Business Membership	
		Pacific-Asia Travel Association (PATA)	Caribbean Tourism Organisation (CTO)	Vanilla Islands Tourism Organisation	Pacific Tourism Organisation (SPTO)	Africa's Eden	Classic Portfolio
	Destination brochure(s)			X	X		
	Active YouTube account	X	X	X	X	X	X
	Corporate videos						
	Destination videos						
	Professional image gallery/repository			X	X	X	X
	Other						
Information services	Maintain and publish generic destination information						
	Bespoke for each destination/member			X		X	X
	Links to destination/member information sources	X	X	X	X		
	Maintain, publish and promote DMO member information						
	Bespoke for each DMO member			X			
	Links to DMO information sources	X	X		X		
	Maintain, publish and promote private product information/product directory						
	Bespoke for each private product					X	X
	Links to private product information sources	X	X		X	X	

Detailed overviews

Vanilla Islands
The Vanilla Islands is a marketing concept launched by the representatives of the tourist offices and tourist authorities based in the Indian Ocean. Rather than competing with each other, these Indian Ocean Islands chose a partnership approach to improve the region's visibility. The Vanilla Islands project links destinations, bringing together and highlighting the islands' assets in a joint tourist initiative.

Together we are strong, and together we are not an island but part of a whole destination ~ Alain St. Ange, former CEO Seychelles Tourism Board and Tourism Minister

Created in 2010 but officially launched in 2011, the Vanilla Islands concept is rooted in leveraging pooled resources and expertise. At the time, tourism professionals felt that the promotion of Reunion, Mauritius, Madagascar, Seychelles, Comoros and Mayotte could only be achieved by leveraging these shared resources. The hope was to extend the selling of the islands as a whole to achieve visitation of several islands (at least two) on one trip.

Interestingly, the departure point of the organisation is that each Vanilla Island member state is considered as having a hub position from which clients can conveniently visit other islands within the region. "The issues of air links, maritime connections and setting up of packages are the key components" that need to be in place to facilitate this intra-regional travel[150].

Three focus areas on launch[151] included the setting up of a website, a joint promotion to further develop cruise ship business and the establishment of a "regional academy" for people specialising in regional product. Further plans included carrying out an audit of the region and setting up a meeting with regional tour operators, as well as planning packages with airlines serving the route, organising trade roadshows and a press trip[152].

Accessibility being a key issue, Air Austral created a Vanille Islands pass[153] touted "the most cost-effective inter-island circuit". The pass allowed for long-haul travellers (from Paris) to travel via Reunion across the Indian ocean network with a maximum length of stay of a month. At least four legs had to be booked simultaneously and every destination could be visited only once.

Sri Lanka and Zanzibar were allegedly meant to join the Vanilla Islands grouping according to news reports, but there appears to be no official inclusion of the two islands in any marketing collateral. A news report from 2016 indicates that Maldives[154] also left the organisation – indeed it no longer appears on any of the organisation's marketing collateral.

Institutional Structure and Responsibilities
The vision of the Vanilla Islands organisation is to position the Indian Ocean region as a "quality, world-class holiday destination that offers unparalleled diversity and one of the last frontiers of sustainable tourism". The organisation aims to achieve this by working with tourism establishments and authorities of each member state to provide them with "expertise, joint action plans to improve on the efficiency of attracting high-end visitors to the region, in coordination and joint collaboration with each member countries' existing tourism promotion infrastructure"[155].

In 2014, the concept was taken up a notch with the establishment of the Vanilla Islands Association[156] and budget allocated to the organisation to fund dedicated resources which would drive marketing activities and communication; work with your operators to establish tourism product, inter-island packages and hosting educational tours, press trips and roadshows. It would also be responsible for market research and studies, as well as capacity building and product development.

The association is run in collaboration with the Union of Chambers of Commerce of the Indian Ocean Islands[157] (an entity supported by the AFD to the tune of 400,000 euros bringing together the Chambers of Commerce and Industry of the six island groups). Each year, the presidency of the organisation is rotated amongst the islands.

150 African Tourism Board (2018) Vanilla Islands Organization
151 eTurboNews (2010) Marketing plan for tourism destinations of the Indian Ocean islands
152 Seychelles Nation (2011) Tourism chiefs promote Vanilla Islands brand in Germany
153 Air Austral (2014) Vanille Islands pass
154 Corporate Maldives (2016) Maldives no longer a member of Vanilla Islands
155 Ibid.
156 Tourmag (2014) Island hopping packages: the Vanilla Islands, a commercial "gateway for Tour Operators
157 AFD (2018) The Indian Ocean: Island-to-Island circuits to boost tourism

Brand and Strategy

Vanilla was selected as a common asset shared by the Indian Ocean Islands – the islands share other similarities perhaps making it easier for them to collaborate: Creole heritage, a mix of cultures, beautiful landscapes, etc.

Vanilla was thus chosen as the brand used to launch the brand internationally in such markets as France, the UK, the Netherlands, Germany, Switzerland and Italy, as well as the Scandinavian markets, South Africa and Asia (India and China)[158].

The Vanilla Islands Organisation supports the individual islands' efforts to extend the penetration of markets and build on the product offering by proposing new inter-island packages. It achieves this by consolidating its resources at tourism fairs, sharing stand space, and participating in joint roadshows and workshops – all with the aim of promoting inter-island packages and products[159].

When tourists travel to the other tourism regions such as the Caribbean, they say they are going to the Caribbean islands, but when they travel to the Indian Ocean, travellers tend to say they are going to Mauritius or Seychelles or any other island. So we need to work together to put our region in the forefront and to market the Vanilla Islands as one region. ~ Alain St. Ange, former CEO Seychelles Tourism Board and Tourism Minister[160]

Further, the organisation recognises the importance of empowering stakeholders to enhance efficiency. It is mandated to:

1. Provide training to regional tourism offices
2. Conduct studies to identify trends and opportunities
3. Provide members with the right competencies
4. Crisis management

The Vanilla Islands also has as an objective promoting quality standards and services as successful promotion of inter-island products relies strongly on the confidence of the operators who will be promoting the products. Gaps between existing quality systems across the region must be bridged to ensure that similar standards and quality are achieved as visitors have an expectation of uniformity in the offering of an island-hopping product.

Eco-tourism is the driving force of the initiative, with plans to develop 31 eco-tourism circuits across the Vanilla Islands[161]. A review of the existing eco-tourism services was conducted, identifying 470 services. Eleven regional travel agencies have been selected to promote the "Vanilla Islands" destination through at least 26 combined inter-island packages to European travel trade professionals.

Joint Marketing Initiatives and Tactics

Marketing	What	Notes
Website	Dedicated website for Vanilla Islands: www.vanilla-islands.org	• The website was obviously set up a while ago as it still has a G+ chicklet – social media network that was discontinued in 2019. • The site content is offered in French and English • The website features general information on each island, with a special tab for eco-tourism with search capability for island-hopping packages and videos. • Further segments provided for include golf (plus a landing page for the Vanilla Islands Golf Pro Am - this is an important niche for the Vanilla Islands) and sustainable tourism, including cultural tourism. • There's also a news with news from each of the islands.

158 Ibid.
159 African Tourism Board (2018) Vanilla Islands Organization
160 Travel Pulse (2016) Could alliance make travel easier in world's most remote region?
161 AFD (2018) The Indian Ocean: Island-to-Island circuits to boost tourism

Marketing	What	Notes
Social Media	**Facebook**: 127,198 followers **Twitter**: 1,930 followers **Instagram**: 4,589 followers **LinkedIn**: 1,410 followers **YouTube**: 485 subscribers	• Focus is on promoting destination offer on all the social media channels, which are updated regularly. • Use of country hashtags included in posts and Seychelles Tourism used to be very good about tagging #vanillaislands and #IlesVanille which should be standard practice among all the representative NTBs. • While the following is very high on Facebook in particular, the engagement is very low. At best, one would describe the social media platforms as "ticking over" but not really engaging with audiences.
Email	There's email registration functionality on the website.	• On registration however, the user gets no confirmation in their inbox that the registration has been noted – a missed opportunity to connect with an audience that is interested in your content
Events	Vanilla Island events have been established on each of the islands:	• International Tourism Fair (ITM) in Madagascar • Kreole festival in Mauritius • Seychelles Carnival • Liberté Métisse Festival in Reunion • Heritage and Culture festival in the Comoros • Mayotte Lagoon Festival
Public Relations	Press trips conducted to visit two or three islands	
Trade Liaison	• Roadshows and Fams • Travel agent training • Packages and special airfare pricing in collaboration with airlines serving the islands – Air Seychelles, Air Austral and Air Mauritius	• To launch the eco-tourism programme in 2018, over 30 tour operators, divided into six groups, tested a trip combining all six islands over eight days. The partner travel agencies also presented their 470 tourist products, 70 of which are located on Reunion Island and 200 on Madagascar. • Tour operators still feature Vanilla Island packages on their website, e.g. Adventure Life, 2by2Holidays and Journeys & Africa • This example from Lux Resorts illustrates how product can support the initiative through their own marketing.
Sales Collateral	Mention is made of a brochure for international trade fairs, as well as a document with "information on each island"[162].	

Pacific Asia Travel Association (PATA)
Founded in 1951, PATA is an NPO B2B membership-based association that acts as a "catalyst for the responsible development of travel and tourism to, from and within the Asia Pacific region"[163].

The organisation brings private and public sector together, acting as a coordinating body to facilitate partnerships, as well as aligned advocacy, research and events on behalf of its members, which include government entities such as NTOs, RTOs and LTOs, but also private sector entities such as hospitality organisations, tour operators, travel agencies, international airlines and airports.

While PATA does not appear to do any consumer-facing activities to promote its members, it empowers members to improve efficiencies that drive destination marketing, e.g. PATA Destination Marketing Forum in 2022, an in-person conference aimed at help members build back sustainably through cultural heritage and community-based tourism[164]. Business linkages are created between members both through events, but also through an online marketplace and business listing.

162 Tourmag (2014) Island hopping packages: the Vanilla Islands, a commercial "gateway for Tour Operators
163 PATA (date unknown) About PATA
164 PATA (2022) PATA Destination Marketing Forum

Institutional Structure
PATA's network includes Chapters and Student Chapters, which organise travel industry training programmes and business development events across the globe.

The organisation is run by an executive board with a chair, vice chair and chief executive officer, along with eight board members from different member states. Members are supported by a large Secretariat comprising departments for events, internal affairs, marketing, research, sustainability and social responsibility and supporting functions such as finance and administration, and membership. Special advisors and offices in London and China further exist to help strengthen regional partnerships and provide guidance.

Joint Marketing Initiatives and Tactics

Marketing	What	Notes
Website	Dedicated website for PATA: https://www.pata.org/	• Unlike the Vanilla Islands website, this is very much a B2B site for the association and not to promote the destination. • The website offers member resources, including product and service listings, research and trends, news, e-learning and an online marketplace. • It also shares information about PATA's programmes including its awards, chapters and internships. • There's a firm focus on sustainability with a set main menu and sub menu items addressing such topics as SDGs and the provision of sustainability resources for members. • Also offered are CEO and PATA blogs, a newsroom for the association and individual news sections for chapter and youth. • Altogether a very well run, and up-to-date B2B website – very clear it is for businesses.
Social Media	**Facebook**: 16,483 followers **Twitter**: 6,286 followers **Instagram**: 2,169 followers **LinkedIn**: 22,318 followers **YouTube**: 1.47k subscribers	• While the website is clearly B2B in its communication focus, the social media platforms take more of a hybrid approach including PATA news and relevant info for members like research and trends, but also promoting destinations and their offerings although the latter to a lesser extent. The content is duplicated across platforms.
Events	PATA hosts an annual forum in December as well as a full calendar of summits and events for members across the globe.	• The annual forum acts as a knowledge platform for members sharing trends and insights, research findings and practices. • Events around the globe are offered to members for training and to form business linkages.
Public Relations	All public relations are aimed at promoting the activities of the association amongst members and to the broader tourism community	• A news section on the website lists all press releases issued by the association

Pacific Tourism Organisation (SPTO)
Established in 1983 as the Tourism Council of the South Pacific, the Pacific Tourism Organisation is the mandated organisation representing tourism in the region, comprising 21 government members and 200 private-sector members[165].

The organisation's vision is for its member islands to be empowered and benefit from sustainable tourism through developing "innovative partnerships". The focus of the organisation thus is not just on serving as a regional marketing body. Rather, it also sees itself as a leader in regional tourism policy and development.

However, unlike the Vanilla Islands, the organisation does not appear to be engaged in cross-border or island-linkages tourism initiatives. The marketing focus – on its website and other marketing platforms – does not promote circuits or networks. Rather, it is very much is on ensuring the destinations' sustainable tourism development as a region and then as individual destinations. Indeed, even the B2C microsite redirects visitors to the NTO's own destination marketing sites.
By pursuing sustainable tourism for the region, transforming marketing through digital technologies and securing the evidence base for decision-making through research and statistics, STOP in collaboration with partners can guide a

165 Pacific Tourism Organisation (date unknown) About the Pacific Tourism Organisation

recovery that brings tourism back better, and more resilient, and enables Pacific Island economies, people, culture and the environment to thrive.

SPTO has three core strategic priorities:

1. Marketing the region
2. Sustainable tourism planning and development
3. Research and statistics

Linked to this are four innovative partnerships:

- Cruise and yachting sector development
- Supporting and promoting investment and product development
- Improving air access and route development
- Developing and empowering our Pacific People's capacity

Institutional Structure
The SPTO comprises a Council of Ministers of Tourism, a Board of Directors and Management which drive's the organisation forward based on a Strategic Plan (2020 to 2024).

The Council of Ministers of Tourism comprises a minister or authorised representative from each member country, which meets annually. Its responsibilities include:

- Monitoring and reviewing the organisation's policies, strategies, work programme activities and budgets
- Providing comments and guidance on these
- Securing funding for the activities of the Pacific Tourism Organisation

The Board of Directors consists of one representative from each of the 21 member governments and 5 members representing the private sector. It meets a minimum of twice a year. Its responsibilities include:

- Approval and monitoring of SPTO's annual core and work plan budgets
- Approval and monitoring of operating policies and strategies
- Supervision of the implementation of SPTO's work programmes
- Reviewing and monitoring operating rules, procedures and regulations in the financial and administrative matters of the SPTO
- Advising on other matters as required by management

A Chief Executive Office, appointed by the board, carries out the day-to-day administrative functions of SPTO and us supported by professional and administrative staff, as well as technical advisors. The SPTO has five divisions which serve the following functions:

- Research and statistics
- Marketing
- Special projects
- Finance and operations
- Sustainable tourism

As a membership-based organisation, private-sector members can select from an a la carte menu of benefits which scale depending on the level of membership secured. These benefits include:

- Access to a newsroom
- Access to marketing & sustainability webinars and events
- Access to an image library
- Access to a knowledge hub
- Company listing
- Market linkages
- Newsletters
- Sponsored content

Joint Marketing Initiatives and Tactics

The marketing function within SPTO is engaged in marketing the Pacific region to achieve sustainable tourism growth[166]. As such, the division works closely with trade partners, development partners, creative agencies and the community on the following key functions:

- Building digital capability of SPTO and its member countries – see Digital Strategy here
- Cruise and yachting sector development
- Tourism HR development through regional partnerships
- Pacific Brand Management
- Marketing Planning
- Trade show coordination
- Marketing the region in key long- and short-haul, and emerging markets
- Creating awareness of Pacific niche market products
- Managing the Pacific Storytelling Specialist Programme
- Managing the Industry Membership Programme
- Strengthening the Trade & Tourism Promotion Programme in partnership with SPTO Korea
- Providing technical assistance to its members
- Partnering with research agencies to strengthen SPTO's Data-driven Marketing efforts.

Of particular interest are the following special programmes:

The Pacific Storytelling Specialist Programme which is focused on upskilling travel advisors, trade, and tour operators in the Pacific region in order to sell the tourism product.

South Pacific Tourism Exchange which takes place annually.

The MFAT Project which is a digital transformation project aimed at helping to drive the digital marketing of the region through such initiatives as supporting NTOs with their digital marketing efforts and capacity building. This is in addition to a Digital Content Strategy for the Pacific Islands, as well as developing a standardized digital technology stack and providing digital marketing software on a long-term cost-sharing basis for NTOs.

Lastly, the Membership Programme provides resources, workshops, and tools for the travel trade. Our regional and international membership encompasses National Tourism Organisations (NTOs), hotels, resorts, car rental operators, coach operators, travel agents, tour operators, airlines, cruise and dive operators, and all other businesses associated with travel and tourism in the Pacific.

The organisation also provides ongoing support on social media and digital channels in promoting its members, including the promotion of destinations and the referral of consumers to the websites of NTOs in the region. For stakeholders to promote the destination, a Pacific Tourism Media Library has been created where resources can be downloaded provided the user abides by the Terms of use: https://spto.brandkit.io/. The website includes the SPTO's brand guidelines but these are for the organization, not necessarily an overarching brand guideline for the region's tourism marketing as is the case with the Vanilla Islands.

Marketing	What	Notes
Website	Dedicated website/microsite for SPTO Islands: • B2B: www.southpacificislands.travel/ • B2C: www.southpacificislands.travel/discover/	• The main site is a B2B site mainly used to unpack the association and its mandate and initiatives. • The B2B website offers a link to a B2C microsite where visitors can source information about the respective member islands. This information is introductory and simply links back to the NTO's destination marketing site. • Very well structured corporate site which is up-to-date and easy to navigate. The consumer sight feels like an afterthought. • There is a newsletter sign-up facility.
Social Media	**Facebook**: 103,864 followers **Twitter**: 6,330 followers **Instagram**: 1,964 followers **LinkedIn**: 9,440 followers **YouTube**: 27.8k subscribers	• The focus on social media platforms is to promote the association's and its member's news. It tags its members in the posts. No real consumer focus and content is duplicated across platforms.

166 SPTO (date unknown) What we do – Marketing

Events	SPTO hosts several virtual and in-person events, including the South Pacific Tourism Exchange, its premier event.	• The annual exchange brings a network of tour operators, member countries, excursion operators, hoteliers, etc. together to form business linkages and share insights and experiences.
Public Relations	All public relations are aimed at promoting the activities of the association amongst members and to the broader tourism community	• A news section on the website lists all press releases issued by the association
Sales Collateral	On the website, a landing page provides access to promotional brochures, including a South Pacific map and Travellers Guide	

Caribbean Tourism Organization (CTO)
Established in 1989, the Caribbean Tourism Organization (CTO) is the region's tourism agency, with 24 Dutch, English and French country members and a myriad of private-sector allied members.

The organization has as its vision positioning the Caribbean as the most desirable, year-round, warm-weather destination. Its purpose is leading sustainable tourism – One Sea, One Voice, One Caribbean.

The primary objective of the Caribbean Tourism Organization is to provide to and through its members, the services and information necessary for the development of sustainable tourism for the economic and social benefit of the Caribbean people.

Among the benefits to its members the organisation provides specialised support and technical assistance in sustainable tourism development, marketing, communications, advocacy, human resource development, event planning & execution and research and information technology.

Additional benefits include[167]:

- An instrument for "close collaboration" in tourism among the various parties
- Developing and promotion regional travel and tourism programmes to and within the Caribbean
- Provide members with opportunities to market their products more effectively to the Caribbean and international tourism marketplace
- Assist member countries, particularly smaller member countries, with minimal promotional budgets
- Carry out advertising, promotions, publicity and information services
- Provide a liaison for tourism matters between member countries
- Provide a sound body of knowledge on tourism through data collection, collation and research
- Create processes and systems for disseminating and sharing tourism information
- Provide advice, technical assistance and consultancy services with respect to tourism
- Provide training and education for Caribbean nationals
- Seek to maximise tourism's contribution to the economic development of member countries
- Encourage coordination of research and planning at a local, regional and international level
- Research and identify ecological effects of tourism and recommend action aimed at minimising negative and maximising positive effects
- Developing a tourism product which is essentially Caribbean

167 CTO (date unknown)

Broadly as stipulated on its website, CTO's "services" are broken down into the following categories with these activities and notably for the purposes of our study there is very little marketing activity on behalf of members or for the organisation itself despite the mandate it outlines above.

Categories	
Marketing	Member newsletter, key media database for regional and international media, circulating member press releases.
Research	Tool simplifying reporting on visitor exit surveys; visitor intelligence database for analytics; Tourism information management system; tourism satellite accounts; on-demand surveys, including satisfaction surveys, segmentation reports, statistical reports.
Training & Education	This includes providing scholarships and study grants to students who want to pursue tourism studies; providing practical work experience for students studying tourism; ensuring common curricula for speciality areas of tourism; certification programme to strengthen competitiveness of tourism enterprises; online language training; equipping enterprises to run their tourism businesses better; effective crisis communications; customer relations for frontline personnel.
Resources	There are a few toolkits aimed at assisting government members such as how to train, manage and retain good employees; create awareness of tourism at school level; and teaching resources to facilitate tourism education.

Much of the organisation's marketing activities sit in the realm of media and influencer relations, specifically to distribute member news to its database of regional and international media, as well as to share media contacts with members so that they may do their own media relations.

The organisation does not appear to be engaged in cross-border or island-linkages tourism initiatives based on the information available on its website and social media platforms. Its marketing focus does not promote circuits or networks. Rather, it is very much on capacity building and empowering members to "do tourism better" through training, toolkits, insights (statistics) and HR development.

There is a destination showcase for each of the 24 member countries. It is very limited in terms of information provision and again centred on that country, not on creating a circuit between several destinations. The listing provides links to the national DMO's website and social media, e.g. Anguilla, Dominica and Turks & Caicos.

Institutional Structure

The organisation is led by a secretary general and an executive which represents different departments, including membership services; finance and resource management and resource mobilisation and development. Further there are experts appointed to perform specialist roles, e.g., sustainable tourism specialist, statistics specialist, database administrator and librarian.

CTO is funded by countries which pay membership dues based on a tourism arrivals formula, thus ensuring an equitable distribution of the financial obligation across the member countries. Extra regional funding agencies support projects and services CTO's income-generating activities.

The Tourism Ministerial Council[168] comprises a Ministers and Commissioners of Tourism, Secretaries of State for Tourism or others of equivalent rank and represents the highest policy making body in the organisation.

The Board of Directors of CTO is the highest Executive Body of the Organization and is responsible for the overall direction of the activities and programmes of the organisation within the policies prescribed by the Council of Ministers & Commissioners. It comprises the Directors of Tourism representing the Government membership, together with the hotel and other tourism private sector members. The officers of the Board of Directors will comprise the Chairman of the Board and the six (6) Vice Chairmen representing the various country groupings contained in the Annex III of the Constitution.

The Executive Sub-Committee, of the Board of Directors, is the management committee of the Board of Directors taking decisions on all aspects of CTO's work in between meetings of the Board. The term of service is two years.

The CTO ha comprises a Council of Ministers of Tourism, a Board of Directors and Management which drive's the organisation forward based on a Strategic Plan (2020 to 2024).

168 CTO (date unknown)

Joint Marketing Initiatives and Tactics

The functions and resources outlined on the website do not support the marketing and tourism activities that the organisation sets out as its focus area. So, while activities in marketing and tourism development are a key focus for the organisation, the allocation of human resource indicated on its website does not support these activities actually being driven in practice. On its website, the marketing function is limited to a landing page for each member country with very basic information and links to that country's national DMO website, and social media.

Further, there is a news section on the website centres around news about the organisation itself generally. Under its resources and in line with its mission of helping tourism businesses "do better", it offers a fairly robust digital toolkit for tourism businesses which makes recommendations on content, social media best practice, improving business profiles and messaging recommendations.

Brand guidelines are available to members but focus on the application of the logo.

Marketing	What	Notes
Website	Dedicated website/microsite for SPTO Islands: • B2B: https://www.onecaribbean.org/	• The main site is a B2B site mainly used to unpack the association and its mandate and initiatives. The existing CTO website serves as an online platform for existing and potential members to provide them with information about the organisation's activities and access to resources to assist their destinations and businesses. • There does not appear to be a separate site or microsite which is B2C focussed and aimed at destination promotion.
Social Media	**Facebook**: 30,406 followers **Twitter**: 13,2k followers **Instagram**: 1,052 followers **LinkedIn**: 9,440 followers **YouTube**: 1,35k subscribers	• The focus on social media platforms is to promote the organisation and its member's news. It tags its members in the posts. No real consumer focus and content is duplicated across platforms. • Posting is done on a very ad hoc and infrequent basis.
Events	CTO hosts several events during the year, including World Tourism Day celebrations, State of the Tourism Industry Conference and Caribbean Week	• While most of the events appear to B2B focussed, the Caribbean Week NY is a consumer-facing event showcasing the cultural beauty of the Caribbean: www.CaribbeanWeek.com. It would appear from social media that this hasn't run since 2019.
Public Relations	All public relations are aimed at promoting the activities of the organisation amongst members and to the broader tourism community	• A news section on the website lists all press releases issued by the organisation

Africa's Eden

Africa's Eden is purely marketing-driven private-sector tourism association focused on promoting the Botswana-Namibia-Zimbabwe-Zambia region to global trade through "awareness and collaboration"[169]. The association is said to represent "the entire tourism sector", from large product suppliers to local operators, restaurants and attractions, including "the whole supply chain in Botswana, Namibia, Zambia and Zimbabwe".

Established as the Victoria Falls Regional Tourism Association (TVFRTA) in 2020 to promote the KAZA destination around the core product of the Victoria Falls, the association touts itself as the first "multi-country destination marketing campaign entirely driven by the private sector in the region"[170].

Members of the TVFRTA (11 founding firms), normally competitors, formed a "healing coalition" to develop a digital platform to enable KAZA tourism to recover by inspiring travel, spotlighting new itineraries and allowing for direct bookings. The coalition also committed to strengthen the coordination of all stakeholders along the tourism value chain.

The TVFRTA has bolstered its reputation, despite being a relatively young organisation, by engaging with established entities that have high brand credibility, e.g. Wetu, such that the association appears to be endorsed by mature and reputable tourism brands.

168 Africa's Eden (date unknown)
168 Adventure Travel News (2020) A healing coalition for Africa's Eden

Institutional Structure and Responsibilities
With over 400 members under its umbrella, Africa's Eden is a registered NPO focussed on promoting the destination in a "positive and informative light".

Africa's Eden believes in the strength of working together to show that we can competitively compete with the rest of the world as a premier tourism destination.

The members of the Association confirm portfolio committee chairpersons at the Annual General Meeting (AGM). They report directly to the Board chairman[171]. All Committees will comprise at least 3 Association members, where possible, including a representative from each member country.

Each Committee will be required to meet at least once every month at the start of the Association establishment, moving to every two months after April 2021. These meetings will be recorded in meeting minutes, which will be circulated following each session. Committees will update the Board chairperson monthly and the broader membership quarterly through written reports – monthly short-form, quarterly long-form.

The CEO will sit on all Board committees and play an intermediary role between operations and strategic board direction. Committees will be required to present their annual strategy and work plans at the AGM for approval.

It claims on its website that it believes the "lifeline" of the destination depends on the people and nature of the region, hence it supports and promotes the following free of charge:

- NGOs, charities and conservation organisations from the region
- small, local businesses on the periphery of tourism as they believe they add to the experience of the destination

Any funds received by the organisation is directly re-invested in the promotion and support of the region.

Brand and Strategy
Vast… wild… wonderful! … Africa's Eden tagline and main brand "the heart of Southern Africa" is clearly outlined in its Brand Guide which includes its visual identity, but not the brand story.

The Strategy of Africa's Eden "focusses efforts on areas for strategic intervention based on perceived priorities articulated by the Board"[172]:

- **Access**: Facilitating and supporting regional air and ground transport links, including a lobby function to promote and sustain visa policy and immigration ease for visitors and workers
- **Revenue and finance**: activities, policies and revenue streams to sustain the association, develop the regional tourism product and facilitate visitor spending
- **PR and marketing**: Foster the development of the brand through a range of marketing, communications and public relations activities, including brand evolution, identity, website, social media, newsletters, membership database, online travel training and engagement with Wetu.
- **Conservation and Social Responsibility**: Focused on establishing and expanding the Conservation and Social Responsibility activities of Africa's Eden and TVFRTA, the CSR function aims to leverage the member network and coordinate conservation activities through fundraising and partnerships.

The consumer-facing brand of the TVFRTA is Africa's Eden, with the core marketing platform being a website with a trade section that empowers members to market the destination although unlike the Vanilla Islands website and marketing this does not appear to focus on promoting circuits, linkages or itineraries including several products on one trip. Rather the focus appears to be on promoting the destination as a whole, the sub-destinations and then the product listings within these.

Joint Marketing Initiatives and Tactics
KAZA tourism stakeholders have been provided with a "holistic destination toolbox" which includes a website, social media strategy, newsletter, digital magazine, itinerary builder, direct booking platform, online travel training, social media messaging, 365-day marketing and a travel trade event, initially virtually but now run in-person not only in the region, but overseas.

According to its Members Guide, the association is working with two international social media companies – MMGY Hills Balfour in the UK and Green Team Global in the USA. The guide also talks about travel influencers, a newsletter reaching a database of 9,000 travel trade contacts and access to Online Travel Training – a leading e-learning provider on which Africa's Eden has six course modules available.

171,172 Africa's Eden (2022) Members Guide

Marketing	What	Notes
Website	Dedicated B2C website with a travel trade section where member and trade resources can be found: www.africaseden.travel	• Much of the site is focussed on providing practical information about the region, and about its members which offer travel within the region. • The travel trade section includes a database of members and membership information (how to join, costs and benefits). • Members resources such as a checklist, social media and digital marketing tips, a classifieds section and membership brochures are available • There is a newsletter sign-up facility, a podcast, events calendar and blog written by the CEO. • Lastly there's an e-learning component with online courses for Namibia, Botswana and Victoria Falls. • The website is a bit incomplete. Menu items with no real content, or old content, and links behind them.
Social Media	**Facebook**: 6,796 followers **Twitter**: 462 followers **Instagram**: 7,845 followers **LinkedIn**: 1,412 followers **YouTube**: 51 subscribers	• The focus on social media platforms is to promote the destination and member's posts. It shares its members' posts and tags them. Posting is done regularly but there doesn't appear to be a strategy behind it. Rather posting done ad hoc based on what members are posting. The exception is Facebook and Twitter which seem to have its own content – although some of the content is reposting of member news. For the small falling, fair amount of engagement.
Events	Africa's Eden has hosted virtual and in-person events, most notably its inaugural show which drew international buyers.	• The inaugural Africa's Eden show in Victoria Falls drew over 70 global buyers and featured 100 destination partners from across Botswana, Zambia, Namibia and Zimbabwe[173]. It is scheduled to host an event in the USA, and another in the KAZA region in 2023.
Public Relations	All public relations are aimed at promoting the activities of the association amongst members and to the broader tourism community	• The press relations is done in conjunction with initiatives like the event, not on a regular basis.

Classic Portfolio

Describing itself as the leading collection of independent lodges and camps in Africa's wild (and not so wild) places, Classic Portfolio represents 17 members and 55 lodges and camps across 12 African countries.

The privately owned collection was launched in 1993 by founder and owner Suzanne Bayly-Coupe with a desire to explore Africa's wildest places in support of conservation and communities. Classic Portfolios is committed to conservation, community and commercial sustainability, while offering trusted experiences for discerning travellers, according to its website[174].

It touts itself as a "strategic partner to tourism businesses that are committed to making a difference through contributing to a sustainable and celebrated Africa". Its focus, it says, is on driving their commercial viability through a membership platform, shared business services, strategic advice and individually customised support solutions. At its core is its membership offering:

- Classic Portfolio membership is a seal of approval – recognition that you belong to a leading collection of independently owned lodges and camps, whose owners and investors are committed to making a positive impact on conservation and communities, through creating sustainable and unique eco-tourism experiences.
- Classic Portfolio members have a shared vision and ethos.
- Classic Portfolio celebrates the identity of each of its members and their unique characteristics – members are a collaboration of individual passions committed to a common purpose.

173 Tourism Update (2022) Inaugural Africa's Eden show drew over 70 global buyers click here
174 Classic Portfolio (date unknown) Classic Portfolio homepage click here

Joint Marketing Initiatives and Tactics

Classic Portfolio conducts a variety of representation and marketing services on behalf of its members who can in turn select as many or as few as their business requires. These range from trade relations supported by a sales team covering the globe, to media and PR to content creation.

Based on the low level of social media and PR activity, it would appear much of Classic Portfolio's activities are centred around travel trade marketing – the Agent Zone on the website features a robust library of sales sheets, rates and fact sheets, rate sheets and images that can be used to sell the respective properties.

Lastly, the organisation does not appear to promote destination, featuring standalone properties which are members instead. That said, there is also no evidence that it promotes a cross-pollination of products or circuit amongst its member portfolio, linking different members on an itinerary, which would be cross-border in nature. That may well be done at a sales level however when travel trade liaise with the sales team.

Marketing	What	Notes
Website	Dedicated website for Classic Portfolio: www.classic-portfolio.com with an agent zone for trade customers.	• The website is focussed on portraying the portfolio of properties that are members, with a small section on how to become a member and what Classic Portfolio can do on their behalf. It is largely customer facing – B2C and B2B (travel trade) • The listing of product is segmented by country which is useful • The Agent Zone section is a triumph and very useful for travel trade – everything they need in one place.
Social Media	**Facebook**: 4,800 followers **Twitter**: 2,900 followers **Instagram**: 4,589 followers **LinkedIn**: 1,009 followers **YouTube**: 325 subscribers	• Posting on Facebook and Instagram is done regularly and aimed at featuring the portfolio's members who are tagged. Posts are duplicated on the two channels. The LinkedIn and Twitter handles, and YouTube channel have been inactive for many months.
Trade Liaison	Trade Shows	• While Classic Portfolios used to take a stand at trade shows such as Indaba and WTM Africa it is the membership organisation's policy no longer to invest in this type of marketing. Instead it focusses on leveraging its sales team, and the digital sales collateral created on behalf of members to promote them.

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Signed with Impression - Chain of Custody

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