

**Terms of Reference (ToR) for a Consultancy: Development of a Tourism Barometer for the Southern African Development Community (SADC) Region**

**Joint Action NaturAfrica / Climate Resilience and Natural Resource Management Programme**



## **1. Background on SADC/GIZ C-NRM Tourism Support**

Since 2024, the Joint Action NaturAfrica / Climate Natural Resource Management (C-NRM) Programme has supported the Southern African Development Community (SADC) Secretariat and Member States through the Food, Agriculture, and Natural Resources (FANR) Directorate. This partnership programme is co-funded by the German Federal Ministry of Economic Cooperation and Development (BMZ) and the European Union (EU) and is implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH (GIZ). The programme aims to support SADC FANR in strengthening the implementation of SADC protocols and strategies for sustainable natural resource management in Transfrontier Conservation Areas (TFCAs) by regional and national actors.

The Joint Action includes a Tourism Component which is implemented by the international consulting firm GOPA-AFC. The Tourism Component focuses on (1) supporting SADC with technical assistance on tourism policy development and (2) tourism market development and investment promotion of the SADC Transfrontier Conservation Areas (TFCAs) and Boundless Southern Africa. These activities are aligned to and aim to support the implementation of the [SADC Tourism Programme 2020-2030](#).

## **2. Background on Tourism in SADC Region**

The significance of tourism as an economic sector for SADC cannot be underestimated. While specific data for the period 2020-2024 is limited, the total contribution (direct and indirect) of travel and tourism to SADC GDP was US\$ 56.3bn (8.2% of GDP) in 2017 and was forecast to rise by 3.7% in 2018 and to rise by 4.0% pa to US\$ 86.5bn (8.7% of GDP) in 2028. In terms of employment, in 2017 the total contribution of travel and tourism to employment, including jobs indirectly supported by the industry, was 6.1% of total employment (6,326,000 jobs). This was also expected to rise by 3.8% to 6,563,500 jobs in 2018 (6.1% of total), (WTTC, 2018).

However, the COVID-19 pandemic in 2020 severely impacted global tourism, and the SADC region was no exception. The sector experienced a drastic downturn, prompting Member States to implement measures to mitigate these effects, including incorporating COVID-19 intervention strategies into the SADC Tourism Programme 2020 – 2030 Costed Action Plan.

The SADC Tourism Programme 2020-2030 which was approved by the Joint meeting of Ministers responsible for Environment, Natural Resources and Tourism in Arusha, Tanzania in 2019 aims to fast-track sustainable growth of the tourism sector in the region. The Programme pursues five core strategic goals with specific programmes and activities to be carried out at international, regional, and national levels in the support of development of Tourism across the region. The five goals of the SADC Tourism Programme 2020-2030 are:

Goal 1: Stimulating visitor movement and flows to and within the region

Goal 2: Improving and defending the tourism reputation and image of the region

Goal 3: Developing tourism in Transfrontier Conservation Areas

Goal 4: Improving the quality of visitor experiences and satisfaction levels

Goal 5: Maximising tourism partnerships and collaboration

Collection and dissemination of tourism performance statistics is a key element of the SADC Tourism Programme 2020-2030 and forms part of activities to be implemented to achieve *Strategy 5.2: Tourism Institutional Strengthening Programme* of Goal 5 described above.

### 3. Rationale for the development of a SADC Tourism Barometer

A **tourism barometer** is a tool used to monitor, analyse, and report on the performance of the tourism sector. It provides stakeholders with timely and reliable data to inform policy, measure growth, assess competitiveness, and identify trends. Tourism barometers are essential instruments for evidence-based decision-making, tracking visitor numbers, economic contributions, job creation, contribution to GDP, and other critical metrics such as investments. Examples of well-established and functioning tourism barometers include:

- **UN World Tourism Barometer:** The UN Tourism World Tourism Barometer monitors short-term tourism trends on a regular basis to provide global tourism stakeholders with up-to-date analysis on international tourism. The report is published four times a year and includes an analysis of the latest data on tourism destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes a Confidence Index based on the UN Tourism Panel of Tourism Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism. See, <https://www.unwto.org/un-tourism-world-tourism-barometer-data>
- **WTTC Economic Impact Reports:** While not a barometer per se, these reports by the World Travel and Tourism Council offer insights into tourism's contribution to GDP, employment, and investment at a global and regional level. According to its website, WTTC produces reports on the economic and employment impact of Travel & Tourism for 185 countries/economies and 28 geographic/economic regions in the world. These reports, in collaboration with Oxford Economics, are a vital tool in helping us to equip public and private sector bodies with hard evidence of the huge value Travel & Tourism brings to the economy so that their policymaking and investment decisions support our sector. See, <https://wttc.org/research/economic-impact>
- **EAC Tourism Barometer:** The East Africa Community Tourism Barometer is a newly developed tool that offers Member States a platform for tracking tourism statistics

and identifying regional trends. Through regular updates and a confidence index, the barometer aims to provide valuable information on tourism performance and prospects, thus aiding EAC tourism stakeholders in strategic planning. As a newly established tool, the EAC Tourism Barometer offers SADC, by way of a case study, an excellent learning opportunity as the region embarks on the initiative to develop a tourism barometer of its own. See, <https://www.eacgermany.org/news/the-eac-tourism-barometer-a-comprehensive-tool-to-assess-east-africa-s-tourism-landscape-giz-1>

The tourism performance monitoring tools described above demonstrate the role of barometers in benchmarking tourism performance, informing investment decisions, and enhancing regional integration. Tourism barometers serve as strategic tools by:

- **Monitoring Trends:** Tracking arrivals, departures, expenditures, and market preferences.
- **Informing Policy and Planning:** Providing governments and stakeholders with data to shape policies, attract investment, and align with regional goals.
- **Enhancing Competitiveness:** Benchmarking performance against peers.
- **Promoting Accountability:** Ensuring transparent reporting on progress toward goals like sustainable tourism.

The development of a SADC Tourism Barometer is justified by the fact that, currently, the region lacks a consolidated platform for tracking tourism performance across Member States. Existing global and regional tools do not provide granular, SADC-specific data, which limits their utility for local policymakers and investors. Developing a **SADC Tourism Barometer** would therefore:

- Enable more accurate, regionally-relevant reporting and benchmarking of tourism performance.
- Strengthen regional collaboration and integration in line with SADC objectives.
- Provide Member States with actionable insights to drive sustainable tourism development.

#### **4. Objective of Consultancy and Scope of Work**

The primary objective of the consultancy is to develop a Tourism Barometer for the SADC region, enabling the collection, analysis, and dissemination of tourism performance data across Member States. The scope of work covers the following areas:

##### **4.1 Review of Existing Regional and International Barometers**

- Analyse models such as the UNWTO, WTTC, and EAC barometers to identify best practices.
- Review tourism data collection methodologies currently in use in the SADC region.

#### 4.2 Stakeholder Engagement

- Identify key tourism statistics and data collection agencies in Member States (e.g., national tourism boards, central statistical agencies, ministries of finance/central banks, immigration authorities).
- Consult with stakeholders to identify key needs, challenges, and existing data gaps.

#### 4.3 Development of the SADC Tourism Barometer Framework

- Propose a conceptual framework, including governance structures, data sources, and reporting mechanisms.
- Define a set of **key indicators** to be monitored, such as:
  - Tourist arrivals and departures (domestic, regional (SADC/Africa), international}.
  - Tourism revenue {domestic, regional (SADC & Africa) and international}.
  - Employment in the tourism sector.
  - Accommodation occupancy rates.
  - Visitor satisfaction indices.
  - Market source analysis.
  - Tourism’s contribution to GDP.
  - Expenditure incurred by tourists classified according to main tourism consumption categories (e.g., Accommodation, Food and Beverage, Transportation, Entertainment).
  - Sustainable tourism indicators (e.g., carbon footprint, biodiversity impact).
  - Tourism investments

#### 4.4 Methodology

- Propose a **data collection and analysis methodology**, ensuring alignment with international standards (e.g., UNWTO, WTTC).
- Data collection and analysis methodology should include development of standardised data collection templates to make it easy to get the data from data sources.
- Incorporate a mix of primary and secondary data sources, including surveys, immigration data, and financial reports.
- Recommend a digital platform for data aggregation, real-time dashboard for data visualization, and data dissemination.

- The digital platform should ideally be available in the official SADC languages (English, French, Portuguese).

The digital platform should be accompanied by an easy to use User Manual.

#### 4.5 Capacity Building and Knowledge Transfer

- Develop training modules for Member States on data collection and reporting.
- Build capacity for using the barometer and its maintenance as a decision-making and performance monitoring tool for SADC Secretariat and Member States.

#### 5. Deliverables

1. **Inception Report:** Detailing the approach, timeline, and stakeholder engagement plan.
2. **Situational Analysis Report:** Overview of existing tourism data collection systems and gaps in the SADC region.
3. **Draft SADC Tourism Barometer Framework:** Including proposed indicators, data sources, and methodologies.
4. **Pilot Implementation Report:** Findings and lessons from a test phase in selected Member States.
5. **Final SADC Tourism Barometer Framework and Implementation Plan:** Including guidelines for scaling across all Member States.

#### 6. Stakeholders and Partnerships

The following agencies should participate:

- **National Tourism Boards:** For local tourism data and insights.
- **National Statistical Agencies:** For integrating tourism data into broader economic statistics.
- **Immigration Departments:** For visitor arrival and departure statistics.
- **Private Sector Stakeholders:** Such as hotel associations and tour operators for market data.

#### 7. Methodological Approach

The consultancy will adopt a phased approach:

1. **Situational Analysis:** Assess existing systems and identify gaps.
2. **Stakeholder Engagement:** Collaborate with Member States and regional bodies.
3. **Framework Development:** Draft and validate the barometer structure.
4. **Pilot Testing:** Conduct a trial in select Member States to refine the tool.

5. **Implementation and Rollout:** Scale the tool across the region, accompanied by training and capacity-building activities.

## 8. Duration

This consultancy will require an estimated 60 working days to complete, over a 6-month period, starting from the first day of the Consultancy Contract being signed. This timeframe is expected to include implementation of a pilot and revisions based on stakeholder feedback.

## 9. Duty station and travel

The consultancy firm will work from its home base and will be expected to make its own logistical arrangements if travel is required. The proposed maximum cost for travel should be included in the financial bid and will be reimbursed upon presentation of proof of travel.

## 10. Qualifications, Skills, and Expertise Required for the Consultant

To successfully develop and implement the SADC Tourism Barometer, the consultant or consultancy team must possess the following qualifications, skills, and expertise:

### 1. Educational Qualifications

- Advanced degree in **Economics, Statistics**, or related fields.
- Additional certifications in **Tourism Development, Tourism Management, or Data Analytics** are an advantage.

### 2. Professional Experience

- **Proven experience** (at least 8–10 years) in tourism sector analysis, particularly in developing or managing tourism barometers or similar performance measurement tools.
- Strong track record of working with **regional organizations** (e.g., UNWTO, WTTC, EAC) or **intergovernmental bodies** on tourism development and monitoring initiatives.
- Demonstrated experience in developing data collection methodologies, conducting **statistical analysis**, and developing **indicators** for tourism or related sectors.
- Experience in implementing **large-scale regional or multi-country projects** involving data collection, reporting, and stakeholder coordination.
- Familiarity with **SADC Member States' tourism dynamics**, data systems, and statistical capacities.

### 3. Technical Skills and Expertise

- **Data Analysis and Management:**

- Expertise in statistical software (e.g., SPSS, R, Stata) and data visualization tools (e.g., Tableau, Power BI).
- Knowledge of international tourism data standards, such as **UNWTO International Recommendations for Tourism Statistics (IRTS)** and **Tourism Satellite Accounts (TSA)**.
- **Tourism Performance Metrics:**
  - Ability to design and implement tourism indicators, including economic, environmental, and social metrics.
- **Research Methodology:**
  - Strong skills in designing surveys, conducting interviews, and secondary data analysis.
  - Knowledge of sampling techniques and data quality assurance practices.
- **Digital Systems Development:**
  - Familiarity with the design and deployment of **online platforms** for data aggregation, analysis, visualization, and reporting.
- **Capacity Building:**
  - Experience in delivering training sessions and workshops for diverse audiences, including government officials and private sector stakeholders.

#### 4. Regional and International Knowledge

- In-depth understanding of **SADC's institutional frameworks** and the region's tourism landscape.
- Awareness of global trends in tourism, including post-COVID recovery strategies, sustainable tourism practices, and digital transformation.

#### 5. Stakeholder Engagement and Communication Skills

- Proven ability to collaborate with multiple stakeholders, including **governments, private sector players, and development partners**.
- Excellent **written and verbal communication skills**, including the ability to present complex data in an accessible format for diverse audiences.
- Experience in **mediating between regional and national entities** to build consensus and ensure alignment with strategic objectives.

#### 6. Language Proficiency

- Fluency in **English** is required. Proficiency in **French** and/or **Portuguese** (other official SADC languages) is highly desirable to engage effectively across Member States.

#### 7. Personal Attributes



- Strong **analytical and problem-solving skills**, with a proactive and innovative approach to challenges.
- High level of **cultural sensitivity** and ability to work effectively in a multicultural and multilingual environment.
- Commitment to **delivering high-quality outputs** within agreed timelines.

#### **Preferred Additional Expertise**

- Knowledge of **climate change and environmental sustainability indicators** relevant to tourism.
- Experience in integrating **gender-sensitive and inclusive approaches** into tourism monitoring frameworks.

#### **Team Composition (if applicable)**

If the consultancy is undertaken by a team, it should include specialists in:

- Tourism data collection and analysis.
- Digital systems development and IT solutions for data management.
- Capacity-building and training.
- Regional development and integration.

This combination of qualifications and expertise will ensure the consultant or team can design and implement a robust Tourism Barometer for the SADC region that aligns with global best practices and regional needs.

### **11. Reporting**

The consultancy will report to the **SADC Secretariat's Food Agriculture and Natural Resources** and provide regular updates to a steering committee comprising representatives from SADC TCU, SADC PPRM Directorate, GIZ C-NRM, Member States.

### **12. Confidentiality**

The consultant shall comply with GIZ Terms of Contract and shall be mindful of its duty of loyalty and confidentiality connected to this contractual relationship.

### **13. Procurement procedures**

Candidates must submit the following documentation in English:

- Proposal (not exceeding 5 pages in total) which includes information on how the consultant's or firm's qualifications and experience match the requirements of this project. The proposal should be inclusive of a methodology and road map that includes timelines;

- CV of the Lead Consultant;
- Company Profile;
- Contact details of two previous clients for reference purposes; and
- Financial proposal based on the set number of days at a specified rate per day. The financial proposal MUST be submitted as a separate document.

Applications should be sent by email by no later than 31 March 2025- to the following email address: [Martha.Lesege@gopa-afci.de](mailto:Martha.Lesege@gopa-afci.de). The selection procedure will be done based on the documents submitted.