Regional Cross-Border Tourism:
Recommendations for the Southern African Development Community (SADC)
Manuel Bollmann, FTT Programme Development Manager
Background to Study

Tourism in the SADC Region – Definitions of international, domestic and regional tourism

1. **International Tourism**: Tourists travelling from overseas into one SADC country (with at least one overnight stay) e.g. a German tourist travelling to South Africa and return

2. **Domestic Tourism**: Tourists travelling within their home country for at least one overnight stay e.g. a South African tourist travelling from his Johannesburg home to Cape Town (min. 1 night)

3. **Regional Cross-border Travel (not tourism)**: Day visitors travelling from their home country to another SADC country (without overnight stay) e.g. a Lesotho resident travelling from his Maseru home for shopping to Bloemfontein, RSA, returning the same day to Lesotho

4. **Regional Cross-border Tourism – Case 1**: Tourists travelling from his home country in SADC to another SADC country (with at least one overnight stay) e.g. a South African resident travelling from his Johannesburg home to Maputo, Mozambique (with at least one overnight stay)

5. **Regional Cross-border Tourism – Case 2a**: Tourists travelling from their home country overseas to more than one other SADC country (with at least one overnight stay) e.g. a British tourist travelling to South Africa (spending at least one night) and continuing his trip to Botswana

6. **Regional Cross-border Tourism – Case 2b**: Tourists travelling from their home country in SADC to more than one other SADC country (with at least one overnight stay) e.g. a South African tourist travelling from his Johannesburg home to Swaziland and continuing his trip to Mozambique (staying away from home for at least one night during his journey)

7. **Regional Cross-border Tourism – Case 3**: Tourists travelling from their home in SADC to another destination in their home country and at least one other SADC country (with at least one overnight stay in the domestic destination) e.g. a South African resident travelling from his Cape Town home to the Kruger National Park and continuing his trip to Swaziland and/or Mozambique. (staying away from home for at least one night during his journey). The domestic destination (Kruger Park) is part of a regional trip.
Onset:
In November 2014, Fair Trade Tourism was commissioned by GIZ to conduct a study on the opportunities and constraints for increased cross-border tourism in the SADC region. The findings of this study are currently being finalised and inputs from Alliance stakeholders will be greatly appreciated.

Primary Objectives:
Demonstrate the economic opportunities from regional integration in the tourism sector and how existing barriers can be overcome.

Methodology:
- Desk study review of literature and data analysis available from RETOSA, the World Bank, the World Economic Forum (WEF), UNWTO, WTTC, AfDB, et all.
- Personal conversations with key informants
- Field visits to and expert interviews in key destinations within Malawi, Mozambique, Namibia and South Africa
- Online opinion survey among sample of 6000 Southern African and international tour operators, plus other tourism stakeholders within SADC response rate just above 200 (3,4%).
Background to Study

'I only believe in *statistics that I doctored myself*'
Background to Study

Regional arrivals within SADC (2013): 15.8 million SADC citizens travelling to other SADC countries

Overseas arrivals in SADC (2013): 6.8 million Overseas tourists in SADC countries

The mark of a good holiday
Tourism Receipts per International Tourist (USD)
Survey Respondents by Country

Respondents from SADC countries

Respondents from non-SADC countries

Botswana
Lesotho
Mozambique
Mauritius
Malawi
Namibia
South Africa
Tanzania
Zimbabwe
Unknown

France
Germany
Italy
Kenya
Luxemburg
Netherlands
UK
Switzerland
USA

The mark of a good holiday
Survey Respondents by Travel Segment

- Inbound Tour Operator, 56
- Accommodation Establishment (hotel, resort, lodge, guesthouse, camp), 20
- Activity Provider (sports & recreation, outdoor adventure, etc), 4
- Destination Management Organisation, 7
- Food & Beverage Establishment (restaurant, bar, cafe, etc), 1
- Ground Transport Operator (bus, taxi, etc), 4
- Outbound Tour Operator, 10
- Travel Agency, 9
- Tourist Attraction, 1
- Online Booking Platform (accommodation), 2
- NGO, Community-based Organisation, etc, 1
- Other, 10

The mark of a good holiday
Findings

I) Market Positioning & International Media Image

II) Professional Knowledge and Capacity

III) Enabling Environment & Framework Conditions

IV) Linking Tourism- & Conservation Policy

V) ...

VI) ...

VII) ...

VIII) ...
I) Market Positioning & International Media Image

The mark of a good holiday
## I) Market Positioning & International Media Image

<table>
<thead>
<tr>
<th>Rank</th>
<th>Respondents’ disagreement with the following statements:</th>
<th>SADC average</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Joint tourism marketing of SADC countries is done well</td>
<td>91%</td>
</tr>
<tr>
<td>2</td>
<td>National Tourism Organisations promote cross-border tourism</td>
<td>83%</td>
</tr>
<tr>
<td>3</td>
<td>Travel advisories and negative media don't deter tourists away from Africa</td>
<td>83%</td>
</tr>
</tbody>
</table>
II) Professional Knowledge and Capacity

The mark of a good holiday
## II) Professional Knowledge and Capacity

<table>
<thead>
<tr>
<th>Rank</th>
<th>Respondents’ disagreement with the following statements:</th>
<th>SADC average</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Sufficient training of government officials interacting with tourists</td>
<td>69%</td>
</tr>
<tr>
<td>5</td>
<td>Sufficient training in the tourism industry</td>
<td>67%</td>
</tr>
<tr>
<td>6</td>
<td>No need for expatriate managers in hospitality industry</td>
<td>66%</td>
</tr>
</tbody>
</table>
III) Enabling Environment & Framework Conditions
### III) Enabling Environment & Framework Conditions

<table>
<thead>
<tr>
<th>Rank</th>
<th>Respondents’ disagreement with the following statements:</th>
<th>SADC average</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Tourism assets are properly utilised in this country</td>
<td>64%</td>
</tr>
<tr>
<td>8</td>
<td>Public facilities available and in good condition</td>
<td>62%</td>
</tr>
<tr>
<td>9</td>
<td>Government invests public resources in infrastructure and tourist attractions</td>
<td>58%</td>
</tr>
<tr>
<td>10</td>
<td>Temporary import of vehicles possible without customs payment</td>
<td>56%</td>
</tr>
</tbody>
</table>
IV) Linking Tourism- & Conservation Policy
### IV) Linking Tourism- & Conservation Policy

<table>
<thead>
<tr>
<th>Rank</th>
<th>Respondents’ disagreement with the following statements:</th>
<th>SADC average</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Endangered species are effectively protected (poaching is prevented)</td>
<td>53%</td>
</tr>
<tr>
<td>14</td>
<td>Coordination of government agencies involved in regulating tourism</td>
<td>50%</td>
</tr>
<tr>
<td>25</td>
<td>Nature areas are cleaned regularly and are free of rubbish</td>
<td>44%</td>
</tr>
<tr>
<td>26</td>
<td>Transfrontier Conservation Areas (TFCAs) are well managed</td>
<td>43%</td>
</tr>
</tbody>
</table>
Draft Recommendations

Develop a sector development strategy for enhancing competitiveness of SADC tourism

It is suggested that a comprehensive and sustainable growth strategy is developed to make the tourism sector in the SADC region more competitive.

Such a regional strategy should be founded in series of value chain analyses / destination assessments conducted for specific cross-border destinations

Objective 1: Access to SADC tourist destinations improved
Objective 2: Average length of stay and expenditure of tourists expanded
Objective 3: Value for money of Southern African tourism services improved
Objective 4: Conservation through tourism in NP and TFCAs improved
Objective 5: Regulatory impact assessment introduced
A parting warning

The Sorcerer’s Apprentice
(Goethe, 1797; illustration by F. Barth 1882)

The mark of a good holiday
The mark of a good holiday

manuel@fairtrade.travel
Working Groups

**Group 1: Bridging the gap between tourism and conservation**
Moderator: Les Carlisle, AndBeyond
Rapporteur: Richard Malesu, Botswana Tourism Organisation

**Group 2: Market Positioning & International Media Image**
Moderator: Sonja Gottlebe, Go To Madagascar
Rapporteur: Jane Edge, Fair Trade Tourism

**Group 3: Professional Knowledge and Capacity**
Moderator: Sue Snyman, Wilderness Safaris
Rapporteur: Grace Nderitu, Eco Tourism Kenya

**Group 4: Enabling Environment & Framework Conditions**
Moderator: Gitta Paetzold, Hospitality Association of Namibia
Rapporteur: Sinha Levkovic, Seychelles Ministry of Tourism & Culture

Cross-border travellers

The mark of a good holiday