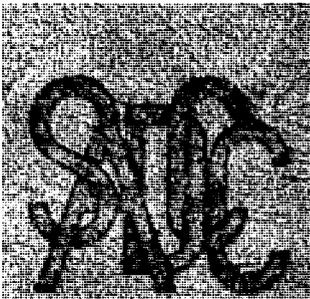


TOURISM

SOUTHERN AFRICAN
DEVELOPMENT COOPERATION



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ABBREVIATIONS

ADB	= African Development Bank
AGIP Spa	= AGIP Spa
AIDAB	= Australian International Development Aid Bureau
ANG	= Angola
AUS	= Australia
AUST	= Austria
BADEA	= Arab Bank for Economic Development in Africa
BEL	= Belgium
BOT	= Botswana
BRA	= Brazil
CAN	= Canada
CBI	= Confederation of British Industries
CFTC	= Commonwealth Fund for Technical Cooperation
C'CI	= Peoples Republic of China
CITES	= Convention on International Trade in Endangered Species
DEN	= Denmark
EEC	= Commission of the European Communities
FAO	= Food and Agriculture Organisation of the United Nations
FIN	= Finland
FRA	= France
FRG	= Federal Republic of Germany
GDR	= German Democratic Republic
IBRD	= International Bank for Reconstruction and Development
ICAO	= International Civil Aviation Organisation
ICE	= Iceland
IDA	= International Development Agency
IDRC	= International Development Research Centre
IDU	= Industrial Development Unit of the Commonwealth Secretariat
IFAD	= International Fund for Agricultural Development
ILO	= International Labour Organisation
IMPOD	= Import Promotion Office for Products From Developing Countries
IRE	= Ireland
ISNAR	= International Service for National Agricultural Research
ITA	= Italy
ITB	= International Tourism Board
ITU	= International Telecommunications Union
JAP	= Japan
KUW	= Kuwait Fund
LES	= Lesotho
MAL	= Malawi
MOZ	= Mozambique
NAM	= Namibia
NET	= Netherlands
NOR	= Norway
NORDICS	= Nordic countries
OPEC	= Organisation of Petroleum Exporting Countries
POR	= Portugal
SADCC	= Southern African Development Coordination Conference
SAFTTA	= Southern African Federation of Travel and Tour Associations
SAREC	= Swedish Agency for Research Cooperation With Developing Countries
SATEP	= ILO Southern African Team for Employment Promotion
SPA	= Spain

SWA = Swaziland
SWE = Sweden
SWI = Switzerland
TAN = Tanzania
TAZARA = Tanzania Zambia Railway Authority
UAPTA = Unit of Account of the Preferential Trade Area
UK = United Kingdom
UNDP = United Nations Development Programme
UNIDO = United Nations Industrial Development Organisation
USA = United States of America
USSR = Union of Soviet Socialist Republics
WB = World Bank
ZAM = Zambia
ZIM = Zimbabwe

1. EXECUTIVE SUMMARY

- 1.1 Tourism has a great potential to contribute to the development of the economies of SADCC member States, and to foreign exchange earnings. The region's sunny climates, sandy beaches, panoramic landscapes, rich wildlife and exotic cultures attract a stream of visitors from around the world every year.
- 1.2 The travel trend within the Tourism industry worldwide has recently been more steady. Whilst the annual number of arrivals increased, the annual growth rate of both arrivals and receipts in the late eighties, dropped compared to the mid-eighties. On the whole, the number of arrivals in the SADCC region has shown a slow but steady increase.
- 1.3 It is estimated that member States earn about US\$225 million in foreign exchange every year from tourism. There is scope for increasing these earnings to US\$300 million a year by the middle of the 1990s; especially if the regional tourism product and infrastructure are rehabilitated and diversified, and if the region maximises its market share within the existing market segments and develop new markets.
- 1.4 The Sector has set for itself the following objectives:
- * maximisation of net foreign exchange earnings;
 - * stimulation of rural development;
 - * encouragement of the conservation of the environment;
 - * projection of a positive image of the region and its people to the outside world;
 - * nurturing of a regional consciousness among the people of the region as a means of fostering understanding and cooperation;
 - * avoidance or minimisation of the negative consequences of tourism development which could, among other things, erode the region's cultural heritage; and,
 - * improvement of the present service standards to an acceptable level.
- 1.5 The strategy for achieving these objectives emphasises:
- * greater utilisation of the local resource base, including diversification and improvement of the regions tourist product;
 - * development of appropriate infrastructure, superstructure and related tourist amenities in the rural areas;

- * ensuring proper planning of tourist projects through closer liaison with other Sectors of SADCC;
- * production and proper dissemination of the region's promotional material;
- * promotion and encouragement of intra-regional travel and initiation of deliberate incentive programmes by member States;
- * encouragement of selective tourism; and,
- * training of professional and skilled personnel at all levels.

1.6 A number of projects addressing these concerns are at various stages of implementation. Market research in North America has been completed. Ground work has been laid for market research in Scandinavia, Intra-SADCC, Pacific Rim and Eastern Europe. Registration of the regional tour operators is in progress.

The programme comprises 8 projects valued at US\$10.49 million, of which US\$2.56 million has been secured. The financing gap is US\$7.93 million. The cost and funding status of the sectoral programme is contained in the Annex Table.

1.7 SADCC countries participated in tourism fairs in Amsterdam (December 1989), London (November/December 1989), Berlin (April 1990), Gothenburg (April 1990) and ITIX Chicago (April 1990).

1.8 Preparatory work on the assessment of manpower requirements by the Regional Training Council (Hotel and Tourism Training Project) is complete, and the implementation of the project is expected to start in September 1990, when the Consultants visit the Tourism Coordinating Unit and member States.

1.9 The Institute of Development Management (IDM) for Botswana, Lesotho and Swaziland conducted a seminar for SADCC tourism policy-makers in Lilongwe, Malawi, in May 1990, on "Development and Management of Tourism in SADCC". This Seminar is part of an on-going sectoral project "Tourism Workshop Training" which is conducted intermittently, when the need arises. The seminar recommended the following:

- * the expansion and upgrading of the existing regional tourism training institutions, in order to cater for gaps in the current curriculum;
- * include tourism and tourism-related subjects in the national schools training curricula, so as to raise awareness and generate interest of career opportunities in the Tourism Sector;

- * standardise and harmonise the collection and analysis of tourism statistics;
- * take practical measures in producing marketing materials for the region;
- * mount a regional standardisation programme for grading and classification of hotels and other tourist amenities with a view to ensuring uniform quality standards; and,
- * urge member States' airlines to improve on the regional flight schedules and airfares.

Most of these recommendations are already being addressed by the current sectoral programme.

1.10 Work started on the standardisation, harmonisation and improvement of statistics when the World Tourism Organisation, in collaboration with UNDP, conducted a workshop in November 1989, Lusaka, Zambia on tourism statistics. The Sector, with the assistance of the World Tourism Organisation, is due to field consultants in the second half of 1990, to look into classification of hotels and tourism plant in the region. Projects for both rehabilitation and development of the tourism product are at an identification stage.

1.11 Finally, arrangements to undertake a comprehensive review of the Tourism Sector are underway. Consultants to undertake the study are being identified and the study is expected to start in the second half of 1990. The strategy is expected to form the basis for formulating a coordinated regional tourism development programme.

2. REVIEW OF THE REGIONAL SITUATION

2.1 According to the World Tourism Organisation (WTO) statistics, international tourist arrivals in 1989, amounted to 403.6 million, an increase of 3.0 per cent, which is less than half of the 1988 rate of 8.8 per cent. World Tourism receipts in 1989 were US\$208.7 billion; an increase of 7.4 per cent, compared to 14.2 per cent in the preceding year.

2.2 Africa's share of world-wide tourism arrivals did not vary substantially between 1988 - 1989, fluctuating between 3.0 and 3.8 per cent; while its share of receipts was 2.7 to 3.7 per cent of world total. It is observed, however, that the bigger share of both tourism arrivals and receipts goes to North African countries and Kenya, leaving a smaller share for other African countries. SADCC's main overseas tourism markets are Europe, North America and Japan.

- 2.3 Although tourism contributes substantially to the development of the SADCC economies, its development must be controlled, in order to avoid the risk of negative impact on local culture and the environment. Tourism is also susceptible to the volatility of the world economy. Coordinated development can facilitate product diversification, multi-destination tour planning and economies of scale in marketing, research and training.
- 2.4 The resource base for tourism development in the SADCC region consists of such natural attractions as the pleasant climate; sandy beaches of Angola, Mozambique, Namibia and Tanzania; wildlife of Botswana, Mozambique, Tanzania, Zambia and Zimbabwe; the Okavango Delta of Botswana; Mount Kilimanjaro of Tanzania; the Victoria Falls of Zambia/Zimbabwe; the mountain scenery of Lesotho; the beautiful Lake Malawi and the colourful traditional villages in Swaziland.
- 2.5 In terms of accommodation facilities, Namibia and Zimbabwe have adequate hotel capacity. Lesotho, Swaziland, Malawi and Zambia need to increase their capacity, particularly in the tourist resorts. Angola, Mozambique and Tanzania have acceptable accommodation capacity, but most units require rehabilitation and refurbishment. Botswana needs more hotels, especially in Gaborone. Although not quantified yet, it has been observed that occupancy rates vary widely among and within member States.
- 2.6 The principal means of transportation for long-haul tourism is the aircraft. SADCC carriers handle 43 percent of the total weekly non-regional traffic. The rest is handled by foreign carriers. A lot of revenue which should accrue to SADCC airlines is thus lost. Available surface transportation within the region varies considerably. Road and rail services are available in most member States. The roads linking tourist destinations are in very poor state. Train departures suffer from chronic delays. These problems affect the movement of tourists, forcing them to fly where surface transport would have been preferable. This tends to increase the costs to tourists and has the effect of reducing the number of tourists, as well as making destinations unattractive.
- 2.7 Firms with capacity to handle clients on guided tours exist in most of the member States. They tend to be small, specialized, private operators, or large parastatals.
- 2.8 The availability of amenities varies widely, depending on each member State's stage of development. For example, national parks are well developed in Botswana, Malawi, Tanzania, Zambia and Zimbabwe, but much less so in the other member States. The absence of parks in some member States will affect general sectoral market strategies based on multi-country destination product packaging. The

opportunities for expanding the industry could be missed because of this situation and the loss of revenue is incalculable.

- 2.9 Tourism administration is primarily a state responsibility, involving government ministries at the policy and regulatory level, and tourism organizations (boards or corporations) responsible for promotion and development. The private sector is organized into Hotel and Restaurants Associations and, to a lesser extent, Travel Agents and Tour Operators Associations.
- 2.10 Since its inauguration in June, 1989, the Southern African Federation of Travel and Tourism Associations (SAFTTA) held meetings in Swaziland, Mozambique, Zambia and Botswana with tourism associations of these countries, in order to work out a programme for collaborating with the Tourism Sector. However, at this early stage, SAFTTA requires resources to overcome teething problems. SAFTTA and the Sector Coordinating Unit are assessing the nature and magnitude of resources required. It is hoped that when fully functional, SAFTTA will play a major role in the development of the regional tourism industry.
- 2.11 International marketing within the region is underdeveloped, with most firms selling directly to international outlets and few incoming wholesalers. Wholesalers play an important role for overseas business partners who prefer working through a single contact point, to dealing with a number of different hotels and ground operators.
- 2.12 The international marketing of SADCC tourism is done through a network of wholesale tour operators, primarily on a national basis. In some cases, SADCC member States' tourism is packaged jointly with that of South Africa, which is undesirable. The danger with this situation is that South Africa's tourism gets developed at the expense of that of the region. In some cases, the regional identity of SADCC as a tour destination in its own right is lost, and the opportunities for attracting large numbers of tourists are lost to the region. Overseas marketing is coordinated by national tourism offices based in diplomatic missions. Tanzania, Zambia and Zimbabwe make fairly effective use of this network.
- 2.13 Typically, consumers of SADCC tourism are married, professional and managerial people, travelling without children. Most (75 percent) are over 45 years of age. These categories of tourists usually have high discretionary incomes. The market is, however, volatile, since the tourists move from one destination to another, demanding high standards of service and quality. Their preference is for individual travel or small, exclusive and highly personalised groups.

3.14 The independence of Namibia and her joining of SADCC as the tenth member of the Organisation on 1st April, 1990 has brought opportunities and challenges for cooperation in the SADCC Tourism Sector. Namibia brings to the region her rich, well-managed stock of wildlife resources, and this allows tourists to follow an uninterrupted broadbelt of wildlife resources stretching from the Namib Desert in the west, to the Hwange and the Luangwa Game Reserves in the east. The sandy beaches offer unlimited opportunities for sun-bathing and other water-based recreational activities. In the interior, the rugged terrain and scrubland desert offer challenges for those interested in explorer-type tourism, with opportunities for combining both the Namib and the Kalahari deserts, etc. A number of programmes and projects could be identified around these and other opportunities.

3. REVIEW OF THE PROGRAMME

3.1 The SADCC tourism development programme is designed to provide a product which meets the specific demands of the various consumers. The programme is developed in the context of national and regional socio-economic development objectives, in order to:

- * ensure that the industry as a whole is viable and profitable;
- * contribute to regional development and integration, through foreign exchange earnings, employment creation, human resources development and rural development;
- * ensure conservation of tourist attractions and to avoid social, cultural and environmental degradation as well as foreign exchange leakages; and,
- * promote maximum use of local materials in construction and tourist operations.

3.2 The programme of the Tourism Sector is based on a project-by-project approach, which has resulted in a set of projects that do not closely reflect the priorities of the Sector. It has, therefore, become necessary to adopt a sectoral planning approach. Towards this end, arrangements are well underway to launch a review of the Sector, in order to recommend a long-term development strategy that will form the basis for formulating a coordinated regional tourism development programme. The consultants have been identified and resources secured. It is expected that work on the review will start during the second half of 1990.

3.3 The benefits of tourism development may be summarized as follows:

a) Foreign Exchange Earnings

SADCC member States earn about US\$225 million a year from tourism. There is scope, however, for raising this figure to US\$300 million a year over the next five years if tourism infrastructure plant and services are improved. Part of the earnings flow out of the region in the form of loan repayments, fees on management contracts and luxury imports. An important consideration should be to maximize net foreign exchange earnings.

b) Environment

Protection of indigenous culture and the environment must be incorporated into tourism planning. By utilising the natural, historical and cultural heritage of the region, tourism can contribute to its preservation and conservation. Uncontrolled tourism can cause environmental degradation and erosion of cultural heritage.

c) Human Relations

Tourism provides opportunities for interaction between peoples from various parts of the world, with different social and cultural values. These contacts facilitate mutual understanding and foster better human relations.

d) Rural Development

Tourist attractions are often located in areas of limited alternative use. The introduction of tourist facilities (hotels, ground operators, etc.) can stimulate broad-based development of these areas by creating demand for supporting infrastructure and other services, generating employment and injecting incomes into these areas.

3.4 Broadly, the Tourism Development Programme comprises four components:

- * Tourism Product Development;
- * Tourism Research and Marketing;
- * Tourism Services; and ,
- * Manpower Development and Training.

3.4.1 Specific forms of the tourism product that need rehabilitation and upgrading in various SADCC countries are being identified in consultation with member States. The majority of the member States have submitted their project proposals and projects to be included in the sectoral programme which have not

satisfied the requirements of the prescribed project presentation and selection criteria, and some member States have not yet submitted their projects. However, the Tourism Coordination Unit is working closely with member States in formulating regional tourism product development projects. In order that these projects may tally with the proposed long-term sectoral strategy, it has become necessary to plan for their implementation after the review of the sector, so that the project will form a cohesive part of the whole sectoral programme.

3.4.2 Tourism Marketing focuses on trade fairs and other exhibitions, production of promotional materials (brochures, audio-visual aids and display material), and market research. In Europe, SADCC has participated in trade fairs in Amsterdam, Gothenburg, Montreux, Berlin and London. Market research is intended to assess the size and potential of tourism markets in Europe, North America, Asia and the SADCC region. A study of the European market was completed in 1986, and its recommendations have been incorporated into the Programme. With the assistance of the Commonwealth Secretariat, a study of the North American market has just been completed; programme activities arising from its recommendations, once approved, will be incorporated in the programme. The Commonwealth Secretariat will also finance Market Research in Asia, Scandinavia and the SADCC region. Although action has been initiated with the Council for Mutual Economic Assistance authorities to conduct a market study in Eastern Europe, no reaction has been forthcoming. Periodic consumer surveys will be undertaken as part of market research.

3.4.3 Tourism Services include standardisation of the grading of tourism facilities and regional tourism statistics; creation of a network of SADCC tour operators, through registration and accreditation; and mobilization of the tourism enterprise community to participate effectively in regional tourism development through the Southern African Federation of Travel and Tourism Associations. To ensure uniformity of standards throughout the region, the Sector has prepared a project aimed at achieving uniform hotel and tourism plant grading standards in all member States. A number of seminars leading to the implementation of the project were conducted in 1989. However, the actual implementation of the project itself will start in the second half of 1990 with support from the United Nations Development Programme (UNDP) and the World Tourism Organisation (WTO).

3.4.4 Manpower Development and Training Programme encompasses the assessment of skilled manpower requirements in the industry, expansion and up-grading of training facilities, and organisation of training programmes to meet the requirements. With the assistance of the German Association for Technical Cooperation (GTZ), the Sector, in collaboration with the Regional Training Council, have commissioned a study to assess the needs of strengthening the existing hotel and tourism training institutions in the region. The implementation of this project is expected to start in September 1990, when the consultants will visit member States to carry out a manpower survey.

4. CURRENT STATUS OF PROJECTS

a) Tourism Marketing

Project 1.0.1: Internal Distribution Network

The objective of this project is to set up an efficient network of incoming wholesalers to programme and package comprehensive regional multi-destination tours, to sell these internationally and regionally, and to handle incoming passenger flows. The following activities will be undertaken in implementing this project:

- * identification of suitable incoming wholesalers, based on distribution of offices, regional experience and international exposure and contacts;
- * identification of suitable national offices for combining into regional co-operative selling organisations;
- * identification of weaknesses in the distributive sector in member States and design and implement technical assistance programmes;
- * communicating with selected operators and drafting plan of operation;
- * inspection of selected tourism products, within the region and the Indian Ocean;
- * drafting of tour programmes and itineraries and costing;
- * production of brochures; and,
- * marketing and selling of tours.

Because of the multiplicity of destinations and individual products available within the region, it will be advantageous to approach international out-going operators with a choice of programmes offered by regional in-coming operators. This network will also serve as a distribution network for developing intra-regional tourism.

Initial product research has been carried out and guidelines for the registration of regional tour operators have been adopted by SADCC countries. Member States have submitted their lists of tour operators and work on the compilation of a directory of regional tour operators by the Tourism Coordination Unit is in progress. The Sector will work closely with the regional tour operators in drafting regional tour programmes, itineraries and costing as soon as groundwork has been completed. The project is fully funded by member States in kind through the provision of transport, hotel accommodation, etc., to the staff of the Sector Coordinating Unit.

Project 1.0.2: Promotional Resources Base Development

Effective marketing requires effective communication of the facts and the image of the product in question. This requires - more than in any other industry - a good range of effective, informative, printed and audiovisual material. Display material is required for decoration of stands and booths at trade shows and for Point of Sale (POS) displays.

This project aims to provide and distribute the necessary printed, audiovisual and display material required for effective marketing, and to set up and run an annual tourism market workshop for joint promotion of the regional product to international and local travel industry professionals. The project will also assess the viability of operating SADCC Tourism Offices in important market areas.

It is envisaged that the project will be implemented through funds made available from the regional travel and tourism enterprise sector when it becomes fully operational. The total cost of the project is US\$0.48 million. Funding is being sought.

Project 1.0.3: Tourism Marketing in Europe

Europe, and the former colonial powers of the United Kingdom and Portugal, in particular, have been a traditional source of overseas visitors to the region. A large proportion of these have been visiting friends and relatives, while others have traditionally combined member States with South Africa and (to a lesser extent) Kenya; as part of group or individual package

tours. Tanzania, Zambia and Zimbabwe have engaged in serious marketing in continental Europe as well as in the UK. It is now necessary to diversify market segments both geographically and structurally and to put an exclusively SADCC product on the market, omitting South Africa, which is both politically and commercially a liability.

The project will utilise the Promotional Resources Base and the International Distribution Network as the basic tools for promoting and selling the regional Tourism product. Various micro projects are in hand or under consideration:

FRG: Berlin Travel Fair (ITB): The EEC has agreed to finance member States participation in the fair and has provided funding under the national indicative programmes of member States.

Netherlands: Participation on a communal stand by SADCC States at Tour, (Amsterdam Travel-Trade only event) has been, and continues to be financed bilaterally since 1986 by CBI-Netherlands.

Scandinavia: Joint participation at TUR - Swedish Holiday and Travel Fair - Gothenburg, is being financed bilaterally by IMPOD.

Funding of Scandinavia workshops, market development and advertising and public relations, is being sought.

Switzerland: Joint Stand for SADCC States at Travel Trade Workshop -Montreux (Swiss professional - only travel fair). Funding is being sought for SADCC's participation in this fair.

Additional funding is being sought for SADCC European Tourism Promotion Office (US\$7.00 million) and for Special Interest Market (US\$0.15 million), targeted, for example, at game hunting, bird watching, etc.

Project 1.0.4: Intra-Regional Tourism Marketing

Intra-regional tourism marketing is not only a commercial necessity to increase revenue in the tourism industry in SADCC, but should also be seen in the light of the generally accepted democratic right of all sections of the population to take holidays. The promotion of travel within the region will increase understanding and cooperation, among the citizens of the region.

The aims of this project are:

- * to assess the size, potential and needs of the traditional (middle-high incomes) travelling public in the region;
- * to assess the needs and requirements of lower-income groups for holiday travel;
- * to identify means of communicating and distributing the tourism product of the region to differing segments of the population; and,
- * to identify product requirements and price levels appropriate to regional needs.

The project will be implemented as soon as funds made available by the Commonwealth Secretariat are released. The terms of reference for the intra regional market research have already been submitted to the Commonwealth Secretariat. It is expected that the actual research will start during the second half of 1990.

Project 1.0.5(1): North American and Pacific Rim Market Research

Project 1.0.5(2): Scandinavian Market Research

Project 1.0.5(3): Eastern Europe Market Research

The objective of these projects is to assess the potential to attract visitors from these three areas to the SADCC region.

The North American component of the project has been completed through funds made available by the Commonwealth Secretariat. The study report will be discussed by Ministers of Tourism in September 1990 in Maseru.

Both the Pacific Rim component and the Scandinavian Market Research will be financed by the Commonwealth Secretariat. The terms of reference have been drawn up and submitted to the Commonwealth Secretariat. Implementation should commence soon.

b) Tourism Product Development

Project 2.0.1: Product Development

The objectives of this project are:

- * to identify the infrastructure required for tourism development and estimate costs;

- * to select projects from national master plans to be included in the regional plan and re-appraisal of these projects; and,
- * to commission feasibility studies on projects agreed upon with member States, in the order of priority.

Specific tourism products that need rehabilitation and up-grading in various SADCC States are being identified in consultation with member States. However, the detailed programme will await the outcome of the comprehensive review of the Sector and its long-term development strategy.

c) Tourism Services

Project 3.0.1: Classification of Hotels and Tourism Plant

Tourists rely on brochures and other persuasive data sources to make their choice. A grading system introduces an objective element into the decision-making process, thus reducing the element of chance and possible disappointment. This encourages consumers and assures customer satisfaction.

The objectives of the project are:

- * to design and implement a standard grading/classification system for hotels, other accommodation establishments, and ground operators;
- * to achieve uniformity of standards throughout the region; and,
- * to ensure high standards and relevant value-for-money at all tourism plant in operation.

Funding (US\$0.1 million) has been secured from the UNDP and project execution will be carried out by the WTO during the 1990/91 period.

Project 3.0.2: Harmonization and Standardization of Tourism Statistics

Tourism statistics are currently inadequate owing to various constraints in the collection and processing of data, and to varying methodologies in use. Accurate and reliable statistics are needed for analysis of current and on-going programmes, and for future planning.

This project aims to design and implement systems for collecting and analyzing frontier arrival figures for visitors, hotel arrivals and occupancy, for a statistical analysis system; and guidelines on the collection and analysis of tourism statistics for the region.

World Tourism Organization (WTO) has assisted the Sector in the development of statistics guidelines, and will also assist in the implementation of this project under WTO's regional cooperation in Tourism Development for the Eastern and Southern African Countries. Project execution started with a workshop on Tourism Statistics, held in Lusaka, Zambia, in November 1989.

The Workshop was attended by Senior tourism statisticians from member States, who discussed standardised and harmonised systems for the collection and analysis of tourism statistics for the region.

A consultant will soon visit individual countries to assist, improve and implement the standardised tourism statistical system agreed upon.

1.0.2 PROMOTIONAL RESOURCE BASE DEVELOPMENT

<u>Estimated Cost:</u>		<u>Financing Gap:</u>
Total	: US\$0.48m	US\$0.48m
Foreign	: US\$0.48m	<u>Executing Agency:</u>
Local	-	
<u>Funding Secured:</u>		<u>Start:</u>
Foreign	: -	
Local	: -	<u>Duration:</u>

Objective: To produce and distribute the printed audio-visual and display materials for effective marketing and to set up and run annual tourism market workshop with a view to selling the regional products to international and local travel industry professionals.

Description: Effective marketing of tourism requires effective communication of the facts and the image of the products in question more than in any other industry. A good range of effective informative printed and audio-visual materials is essential in the promotion of the industry.

The specific tasks to be undertaken in this project are:

- a) production of printed material such as brochures, agents manual, regional map and hotel and tour operator guide;
- b) audio-visual materials;
- c) display materials (poster series) and display units; and,
- d) newsletter.

Status: Funding sought.

1.0.3 TOURISM MARKETING IN EUROPE

Estimated Cost:

Total : US\$8.65m
Foreign : US\$8.65m
Local : -

Financing Gap:

US\$7.45m

Executing Agency:

CBI Netherlands
IMPOD Sweden

Funding Secured:

Foreign : US\$1.20m (CBI/IMPOD)
Local : -

Start:

Duration:

Objective: To maximise market share in Europe and to diversify market operations and segments.

Description: Tanzania, Zambia and Zimbabwe have engaged in serious marketing in continental Europe as well as the U.K. It is now necessary to diversity market segments both geographically and structurally and to put an exclusively SADCC product on the market.

The tasks to be undertaken will be:

- a) development of a network of regularly attended professional travel trade shows in Europe;
- b) holding of regular promotional workshops and seminars for the travel trade;
- c) distribute regional promotion material; and
- d) monitor market trends.

Status: Funding secured from IMPOD, Sweden and CBI, Netherlands, for participation by SADCC member States at tourism fairs in Sweden and the Netherlands.

Funding being sought for SADCC Tourism Promotion Office in Europe and for the European Market Study.

Project	Project Title	Estimated Cost US\$ Million		Funding Secured & Source US\$ Million		Funding under Negotiation US\$ Million	Financing Gap US\$ Million	Comments/Status
		Total	Foreign	Local				
TOURISM								
1.0.1	Internal Distribution Network	0.02	-	0.02	0.02 (SADCC)	-	-	Under implementation.
1.0.2	Promotional Resources Base Development	0.48	0.48	-	-	-	0.48	Funding sought
1.0.3	Tourism Marketing in Europe	8.65	8.65	-	1.20 (CBI/IMPOD) (SWE) (NET)	-	7.45	Funding sought.
1.0.4	Intra-Regional Tourism Marketing	0.40	0.40	-	0.40 (CFTC)	-	-	Research will begin during second half of 1990.
1.0.5	1. North America & Pacific Rim Market Research Projects	0.30	0.30	-	0.30 (CFTC)	-	-	Study completed.
	2. Scandinavian Market Research	0.04	0.04	-	0.04 (CFTC)	-	-	Implementation will start during the second half of 1990.
	3. Eastern European Market Research	-	-	-	-	-	-	Consultations with CMEA underway.
2.0.1	Product Development	-	-	-	-	-	-	Cost estimates will be made after the review of the sectoral programme.
3.0.1	Classification of Hotels & Tourism Plant	0.20	0.10	0.10	0.10 (SADCC) 0.10 (UNDP)	-	-	WTO is recruiting consultants to implement the project.
3.0.2	Harmonization & Standardisation of Tourism Statistics	0.40	0.30	0.10	0.10 (SADCC) 0.30 (WTU/UNDP)	-	-	Under implementation.
TOTAL		10.49	10.27	0.22	2.56	0.00	7.93	