



DRAFT 1 TOURISM SECTOR RECOVERY PLAN 2022-2024

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MINISTRY OF ENVIRONMENT, FORESTRY & TOURISM

BACKGROUND

- MEFT is spearheading the Government efforts and coordinating with stakeholders the finalization of the national **Tourism Recovery Plan (NTRP)** for 2022 to 2024.
- **A framework of identified policy strategic interventions, programs and activities to be implemented during the recovery period (2022 to 2024).**

Key Partners:

Government (Ministries), Tourism Private Sector, key stakeholders, Development Partners & Donors.

NB: Policymakers and all stakeholders must act quickly and creatively to safeguard the immediate future of the tourism sector.

THE OBJECTIVES OF THIS MEETING

- The consultation with the industry is to obtain input to enrich the document and have a comprehensive Tourism Recovery Plan.








Process,

- Consultation started at the Directorate level;
- Consultation with the Management of the MEFT (12 October 2021-Day workshop);
- Consultation with the stakeholders 23 Nov 2021 to 15 February 2022;
- Document will be submitted to the Minister before Cabinet.

VISION OF TOURISM IN NAMIBIA

“A mature, sustainable and responsible tourism industry contributing significantly to the economic development of Namibia and the quality of life of all her people, primarily through job creation and economic growth.”

IMPACT OF COVID-19

-  Decline after **severe outbreak and lockdown**
-  **Decrease in tourist arrivals**
89.4% ↓ from 2019 to 2020 and 37% ↑ P provisional 2021
-  Industry at a standstill – **closed down – July 2021 small re-start**
-  Over 1000 companies applied for financial assistance
-  Companies reduced salaries, retrenching & liquidations
-  ± **100** tourism businesses - closed temporarily or permanently
-  ± **4 300** direct jobs in travel, tourism, hospitality and catering lost in 2021

- Car hire
- Airlines
- Airports
- Cross country coach operators
- Long distance passenger bus
- All types of accommodation – hotels, guest houses, B&Bs, Airbnbs, backpackers, national and provincial parks and reserves, self-catering, timeshare & resorts
- Tour, trip & shuttle operators
- Travel agents
- Inbound tour operators
- Retail & crafts
- Restaurants
- Casinos
- Conference centers
- Exhibition centers & ICCs
- Attractions – museums, heritage, cultural & other
- Activities & adventure operators
- Sporting facilities & events
- Festivals, performing arts & creative industries

- **Contraction** – MSMEs in tourism negatively impacted

INTRODUCTION

- Namibia's tourism sector and its **business model are so dependent on attracting visitors and tourists.**
- The restricted movement and closure of borders due to COVID-19 have negatively impacted the country's tourism industry & economy. As a people-oriented industry, tourism is one of the hardest-hit economic sectors.
- Benefits of tourism for host destinations: boosts the revenue of the economy (GDP), creates jobs, develops the infrastructure of a country, and facilitates a sense of cultural exchange between foreigners and citizens.

INTRODUCTION CONT...

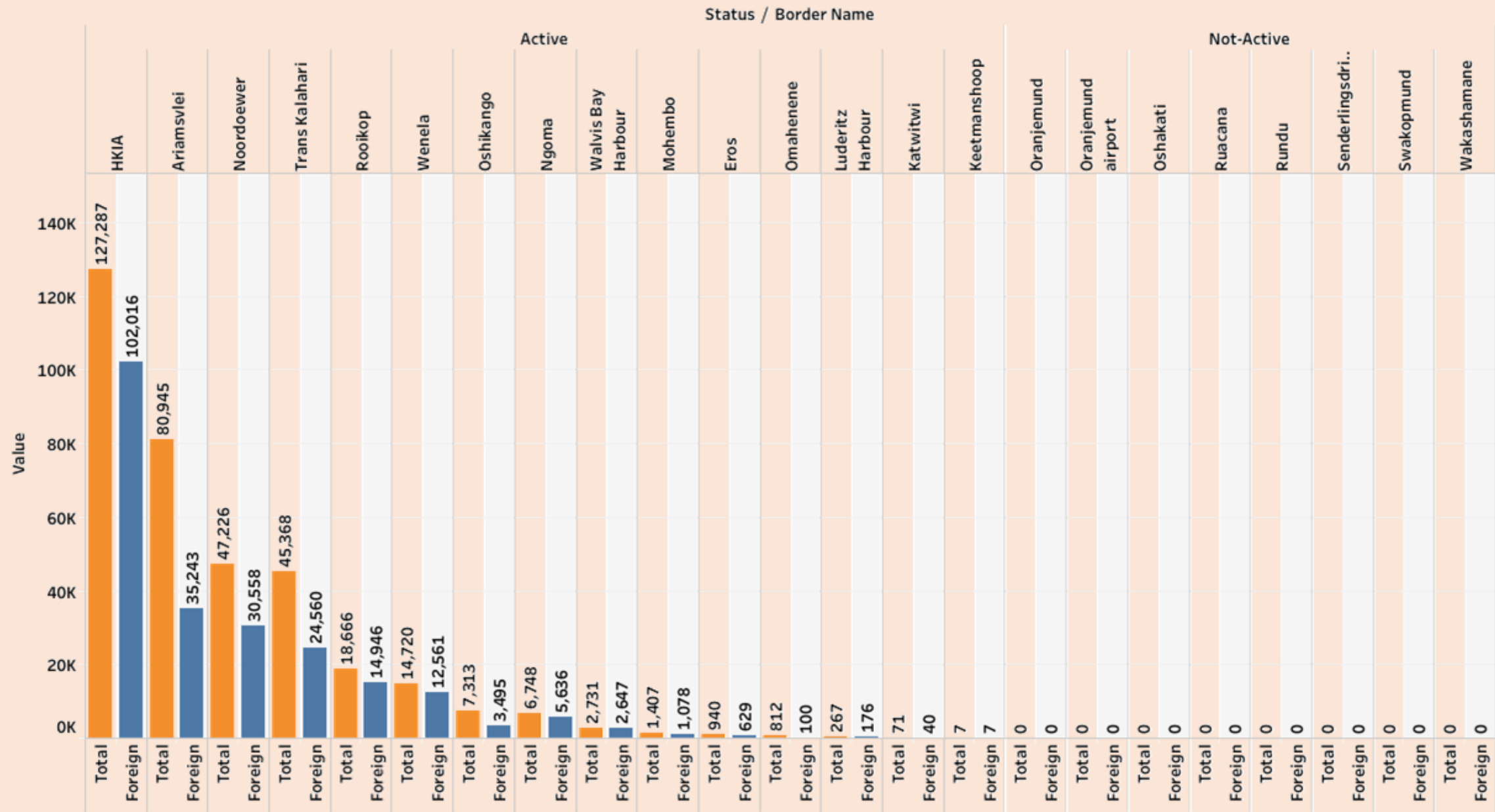
- During 2020, drop of over 80% in hotel and other short-stay occupancy rates.
- International tourist arrivals declined by 89.4% in 2020 as compared to 2019.
- **The crisis for the tourism sector presents opportunities to rearrange, reboot and rebuild for a more successful and sustainable future based on targeted interventions.**
- **The estimate for 2021 (233 692) based on the Electronic Border Management System indicate an increase of 37.8% in tourist arrivals as compared to the 2020 (169 565) figures.**

Namibia Foreign Arrivals - 2021

Total Arrivals To Namibia According To Borders - 2021

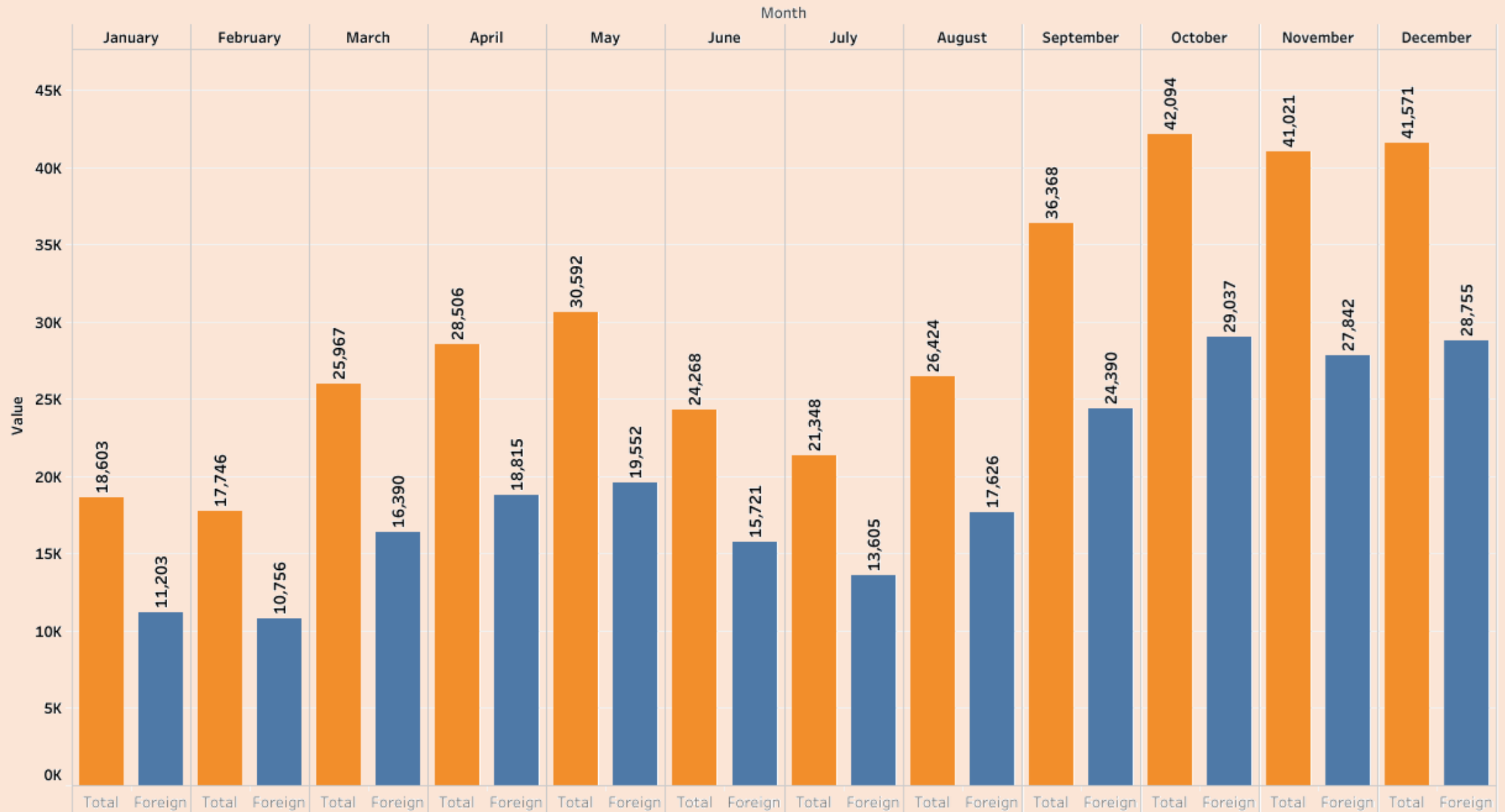
Total Arrivals – 354 508

Total Foreign Arrivals – 233 692

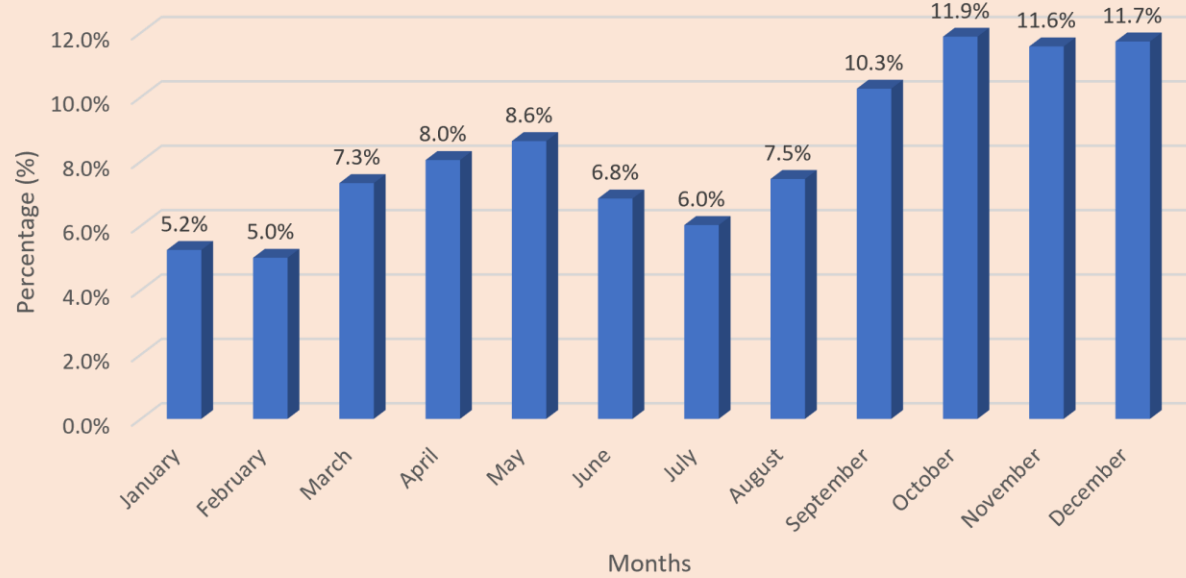


Namibia Foreign Arrivals - 2021

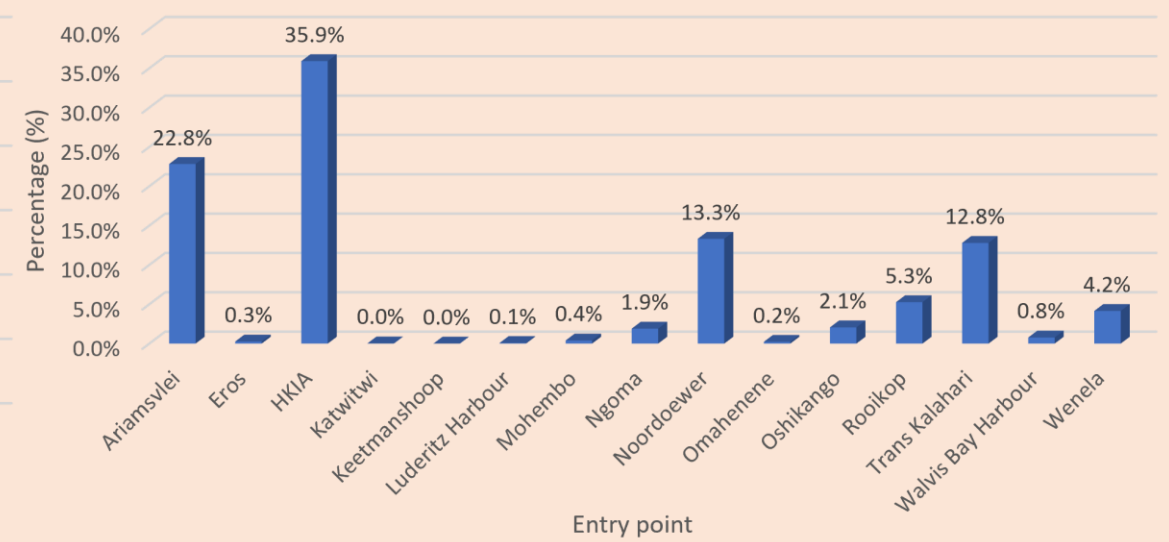
Total Arrivals To Namibia According To Months - 2021



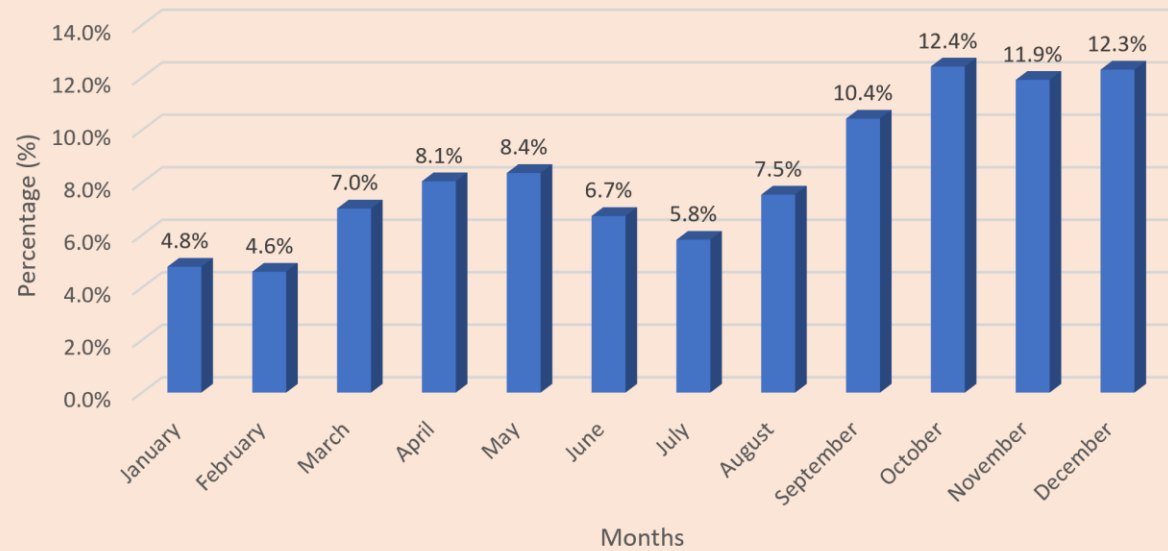
Total arrivals (%)



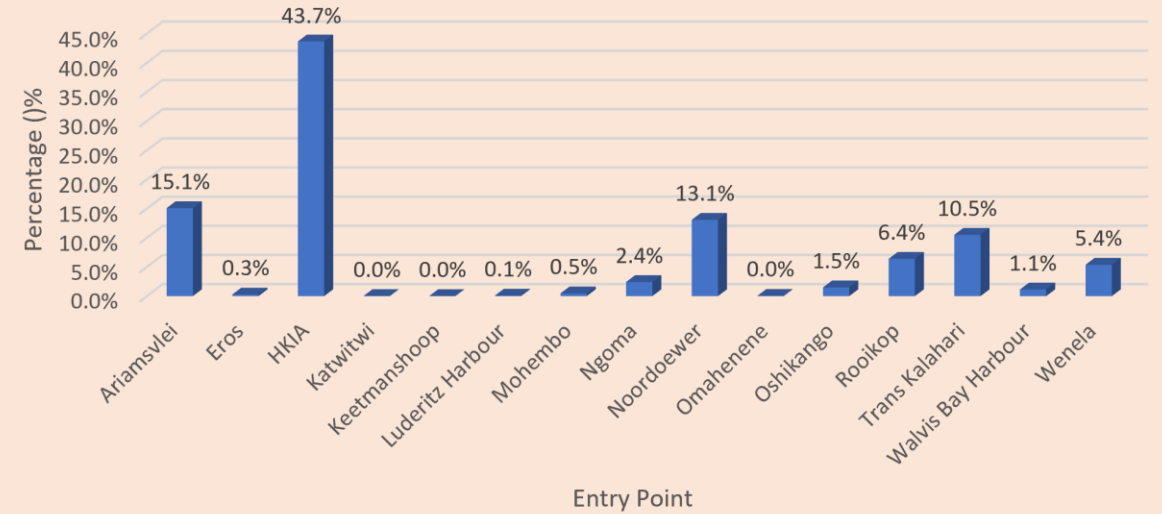
Total arrivals (%)



Foreign Arrivals (%)



Foreign arrivals (%)



TOURISM RECOVERY ASSISTANCE MODELS

PUBLIC

Government Ministries, Departments

- **Policies and initiatives** to stimulate the economic recovery of tourism sector
- Commissioning of **impact needs assessments** (e.g UNDP & MEFT)
- Development of **country-specific plans** for tourism recovery

PRIVATE

Airlines, Airports, Tourism Operators

- **Promotional marketing campaigns** to coordinate destination offers (alignment)
- **Vouchers** to stimulate product purchase (local and regional) e.g., “2 for 1”
- **Waiver of change fees:** Promotional pricing– airport, tourism operators

UNWTO Resilience-based framework for the new global economic order



The tourism industry needs to demonstrate resilience from several sides. We broadly propose that three segments, namely, governments, market players, and local communities, need to get their act together to lend resilience to the industry.

IMPACTS AND RECOVERY STRATEGIES

<u>Description of Impact</u>	<u>Response and Recovery Strategies</u>
<ul style="list-style-type: none">• Decline in number of foreign tourists	<ul style="list-style-type: none">○ Relaunch domestic market / Focus on domestic market;○ Seek new domestic segments;○ Reducing prices;○ Marketing plan;○ Maintenance cost cut
<ul style="list-style-type: none">• Closure of businesses;• Occupancy levels and room rates drop;• Severe disruption of normal operations	<ul style="list-style-type: none">○ Ensuring a coordinated response of hospitality industry;○ Pushing to reopen airport and major tourist attractions;○ Building a marketing plan
<ul style="list-style-type: none">• International travel cancellations;• Occupancy rate drop;• Job cuts	<ul style="list-style-type: none">○ Deploying of contingency plans;○ New operating measures;○ Preventive health measures

SUMMARY: STRATEGIC INTERVENTIONS (SI)

SI 1: POLICY MATTERS AND COVID-19 TOURISM REGULATIONS AND MEASURES

Program 1:
Restore International
Traveler Confidence

Program 2:
Extend Financial Support to
the Businesses in the Sector

SI 2: AGGRESSIVE ONLINE MARKETING AND PROMOTION CAMPAIGNS

Program 3:
Build a strong Namibian brand using
multiple advertising platforms

Program 4:
Create Synergy with Key Stakeholders

Program 5:
Promote & Digitalize Tourism
Investment Opportunities

Program 6:
Develop Domestic and African Market

Program 7:
Adopt aggressive marketing campaigns in
international source markets.

SUMMARY: STRATEGIC INTERVENTIONS (SI)

SI 3:

**ATTRACT NEW GEO AND
SPECIAL SEGMENTS OF
GLOBAL TRAVEL MARKETS**

**Program 8:
Create New Tourism
Routes and Expand
Tourism Product Offering.**

SI 4:

**INCREASED TOURISM MARKET
INTELLIGENCE THROUGH
STATISTICS**

Program 9:

Develop a National Spatial Tourism Master Plan.

Program 10:

Collection of Domestic Traveler Statistics

Program 11:

Digitalize International Arrival and Exit Processes

Program 12:

Application of Big Data in Tourism

STRATEGIC INTERVENTIONS CONT...

SI 5:

IMPROVE ACCESSIBILITY AND CONNECTIVITY

Programs 13:

Easing of Visa Requirements for
Tourism and Business Travelers

Program 14:

Improve Air Access to Tourism
Flagships of Namibia

STRATEGIC INTERVENTIONS: DETAILED

These interventions will be implemented simultaneously, considering the effects of the stop and start cycles that the sector will be expected to contend with at least in the short to medium term as the virus evolves, bringing with its possible new waves and strains.

STRATEGIC INTERVENTION 1

Policy Matters & Covid-19 Tourism Regulations & Measures

Program 1: Restoring International Traveler Confidence - Activities

- The industry to offer flexible and implement friendly reservation/cancellation protocols due to unforeseen or changing circumstances caused by measures against Covid-19 public health.
- Provide friendly entry requirements (PCR negative test at the point first entry).
- Relax the extra medical insurance to cover potential Covid-19 hospitalization costs requirement.
- To support increased vaccination campaign for Covid-19 of the population coverage and Industry through public campaigns (ministry and stakeholders)

STRATEGIC INTERVENTION 1

Policy Matters & Covid-19 Tourism Regulations & Measures

Program 1: Restoring International Traveler Confidence - activities

- MEFT & MOHSS to help leverage digital services / apps to foster e-health and support healthcare systems related health information (remote areas).
- Advocate for automation as opposed to human contact to limit the spread of the virus without compromising jobs.
- Offer Travel Advisories that allows airlines, travel companies provide information to their users on the travel requirements and policies about the destination.
- **Encourage the industry to reconsider the check out time in the accommodation establishments from 10H00 to 11H00.**

Program 2: Extend Financial Support to the Businesses in the Sector

- Extended livelihood benefits to workers who have lost their jobs during the pandemic.
- Engage NAMRA on possible provision of Tax breaks or other forms of tax incentives for tourism businesses, in particular those who remained committed to fixed capital investments and maintenance expenditures during the pandemic.
- Coordinate between government and banks to provide further financial support in the form of concessionary and accessible credit for tourism businesses.
- Support the industry by financing targeted professional marketing and promotion campaigns in key tourist markets across multiple and transboundary platforms, with a renewed emphasis on Namibia's compatibility with international health and safety demands.

Program 2: Extend Financial Support to the Businesses in the Sector

- Align medium and long-term government budget allocations with the need to invest in general productivity-enhancing aspects of the Namibian economy.
- Engage with financial institutions to ensure access to loans and provide extended support and relief to struggling enterprises.
- The development of financial products for encouraging previously disadvantaged Namibians to enter into the tourism sector.
- Build on the successes of the Conservation Relief, Recovery and Resilience Facility in mitigating the socio-economic impacts of the pandemic, facilitating investment in communal areas.
- Engage NTA on their training levy to cater for tour guides.

Strategic Intervention 2:

Aggressive Online Marketing and Promotion Campaigns

Program 3: Build a strong Namibian brand using multiple advertising platforms

- A combination of traditional and modern media should be used to broaden the reach and desirability of Namibia as a top tourist destination within Sub-Saharan Africa.
- Secure the services of a top advertising company(ies) and marketing agency(ies) in SADC is strongly advised in this regard.
- Secure global and continental media services or platforms and partnerships.
- MEFT in collaboration with NIPB to coordinate stakeholder inputs into the rebranding of Namibia and to ensure coherence between the National Brand and the Tourism sub-brand for the “Tourism Destination Namibia”.

Strategic Intervention 2: **Aggressive Online Marketing and Promotion Campaigns**

Program 3: Build a strong Namibian brand using multiple advertising platforms

- Develop and position “**Destination Swakopmund & Walvis Bay**” as a hub for tourism for Namibia.
- Develop other sub-hubs for different tourism related activities.
- Facilitate familiarization trips with the private sector and NTB for local and international journalists to create positive image on the destination.
- Increase Namibia’s visibility on search engine marketing & optimization platforms.
- Support NTB marketing initiatives.
- Develop a brochure of 10 best tourist attractions not to be missed when visiting Namibia.
- Increase Namibia’s visibility at popular international sports events

Program 4: Create Synergy with Key Stakeholders

- Revive a more dynamic Tourism Competitive Advisory Council.
- Accelerate the establishment of Regional Tourism Forums in all the 14 political regions of the country.
- Implement targeted collaboration with private sector initiatives to create various destinations and new product contents, new visual and static marketing materials and communication channels.
- Develop a strong synergy and collaboration with regional inter-governmental organizations, UN Agencies, and development partners for funding and technical support.

Program 4: Create Synergy with Key Stakeholders

- Create a proactive and inclusive network for all stakeholders to develop and maintain good partnerships within the sector.
- Liaise with NBC to develop a program knowledge on tourism.
- Engage Road Authority to enhance road signage and road connectivity to tourist attractions.
- Encourage all government state owned enterprises to promote tourism.
- Engage the private sector to include the immigration and customs officials in educational and familiarization trips.
- Engage the MHAISS and NAMRA on customer care training.

Program 5: Promote & Digitalize Tourism Investment Opportunities

The following activities will be undertaken under this program:

- Create a comprehensive digitalized profile of Tourism Investment Opportunities in Namibia and synergy in collaboration with Namibia Investment Promotion and Development Board to create a database of tourism investment opportunities in the country.
- Position Namibia as a destination for tourism businesses investment in collaboration with the Namibia Investment and Development Promotion Board.

Program 5: Promote & Digitalize Tourism Investment Opportunities

- Promote tourism opportunities in protected areas in line with the Park Management Plans and Tourism Development Plans as well as applicable legislation.
- Develop tourism investment opportunities audio visuals to be shared with all Namibian foreign Missions.
- Expedite the awarding and implementation of concessions as provided for in the Park Management Plans and Tourism Development Plans.
- Identify public private partnership (PPP) opportunities in the sector.

Program 6: Develop Domestic and African Travel Market

- **Offer reduced park entry fees to the domestic market during the low and festive seasons.**
- The industry / across the value chain offers special packages, rates/discounts to Namibians, SADC and African travelers to revive the sector. Treat African markets as part of the domestic travel market.
- The industry / across the value chain offers special educational/fam trip and promotional packages to attract new geo-markets and niche markets.

Program 6: Develop Domestic and African Travel Market

- Sign collaboration agreements with media and communication channels to produce new contents and publications using local print, marketing avenues and electronic media and other social media platforms. This shall form part of the local domestic market campaign to be developed and spearheaded by the Namibia Tourism Board, but developed in consultation with the tourism sector stakeholders for buy-in.

Program 7: Adopt Aggressive Marketing Campaigns in International Markets

- Sign marketing agreements with Airlines to offer discounted educational seat rates/tickets of media communications, influencers, tour operators, etc. and collectively offer special holiday packages that include, accommodation, seats, transfers, etc. to passengers in collaboration with the airlines.
- Allow more international airlines to fly into the country.
- Launch a global digital/online marketing campaign in collaboration with global communication companies.

Program 7: Adopt Aggressive Marketing Campaigns in International Markets

- Implement a 360-Degree strategic approach to reach the targeted international travelers and maintain its visibility in the source markets by means of partnerships with leading product brands to reach millions of consumers in the special interest segment.
- Ensure Namibia's visibility at popular international sports events.
- Re-activate and adopt a new business model for participation in Namibia networking events, roadshows, expos and trade fairs, educational strategic interventions.

Program 7: Adopt Aggressive Marketing Campaigns in International Markets

- Allow & facilitate ease of entrance for tourists, trade visitors, visiting journalists, incentive groups and conference delegates in collaboration with MIRCO, NAC, MHAISS, airlines, etc.
- Develop an annual tourism and cultural events calendar and promote events in conjunction with Regional and Local Authorities.
- Support and collaborate with new and emerging tourism platforms and initiatives.
- Collaborate with MHAISS in the training of Customs and Immigration officials on customer care and client services.

Strategic Intervention 3:

Attract New Geo- and Segments of the Markets

Program 8: Create New Tourism Routes and Expand Tourism Product Offering

- Develop cultural and heritage tourism through the full implementation of the National Strategy on Sustainable Heritage Tourism Development and Employment Creation Opportunities at Community Level (2020-2030).
- Develop packages and promote Namibian gastronomy.
- Develop digital content and profiles for the promotion of adventure tourism products such as cycling, hiking, astronomy and agritourism, etc.

Strategic Intervention 3:

Attract New Geo- and Segments of the Markets

Program 8: Create New Tourism Routes and Expand Tourism Product Offering

- Identify and develop tourism routes and products in the KAZA and other transboundary areas including two or three countries.
- Use digital platforms to profile all tourism destinations, activities, etc. for re-issue to marketing and promotion channels to attract new international travel segments.
- Allow and promote ease of fly-in Safaris to major tourist destinations in Namibia to attract high value and low volume tourists and new market segments.

Strategic Intervention 3:

Attract New Geo- and Segments of the Markets

Program 8: Create New Tourism Routes and Expand Tourism Product Offering

- Promote the Four Rivers Route, Arid Eden and Omulunga Palm Route.
- Aggressively market to Russia, North America, India, Scandinavian countries, China, South America, and other African countries such as Ghana, Nigeria, Rwanda etc.
- Develop new tourism products offering such as, mining, agritourism and aqua tourism.

Strategic Intervention 3:

Attract New Geo- and Segments of the Markets

Program 8: Create New Tourism Routes and Expand Tourism Product Offering

- Develop indigenous tourism products such as village home stays.
- Train local people to be tour guides in their regions.
- Promote ecotourism products such as arts and crafts, and encourage the travelers to buy them.
- Collaborate with National Heritage Council to engage communities to identify and develop historic and heritage sites and tell stories of historic events within their villages.

Strategic Intervention 4: **Increased Tourism Market Intelligence through statistics**

Program 9: Develop a National Spatial Tourism Master Plan

The aim is to guide sustainable tourism operations in hotspot areas; guide the appropriate development of new tourism products, destinations and associated infrastructure; attract and encourage new investment into sustainable tourism; manage tourism development and the carrying capacity at different tourism destinations and ensure equitable distribution of tourism benefits countrywide.

Program 10: Collection of Domestic Tourism Statistics

- Develop mechanism and or systems in collaboration with NTB and other relevant business registration authorities to collect domestic tourist data from the identified tourism establishments.
- Develop an online platform on the Ministry's website and relevant offices, NSA, NTB, etc. for submission of these data for analysis and compilation of occupancy and travelers' reports.
- The Ministry, NSA and BON to collaborate with relevant partners to conduct regular national domestic tourism surveys to estimate its contribution and value to the national GDP.
- Develop and or update the National Domestic Tourism Strategy.
- Conduct frequent easy-to-use and quick electronic tourism surveys.

Strategic Intervention 5: **Improve Accessibility and Connectivity**

Program 11: Digitalize International Arrival and Exit Processes

- Full integration of electronic Border Management System (eBMS) at all points of entry.
- Link the Directorate's Research Office to the MHISS eBMS' for statistical purposes.
- Produce timely quarterly and annual tourism statistics.

Program 12: Application of Big Data in Tourism

- Create online platforms for sharing of good practices on tourism planning, development and management
- Create a one-stop shop on major tourism trends and forecasts (updated and relevant)
- Ensure access to and affordability of digital services.
- Improving processes in strategic destination planning.

Program 13: Easing of Visa Requirements for Tourism and Business Travelers

- MEFT to work in close relationship with Ministry of Home Affairs, Immigration, Safety and Security, Ministry of International Relations and Cooperation, Embassies, etc. to have a flexible VISA regime for leisure and business travellers.
- VISA requirement exemption for leisure travellers to targeted source markets.
- Namibia to finalise and sign the KAZA Univisa regime with Zimbabwe, Zambia, Botswana and Angola.
- Introduce online VISA Application System.

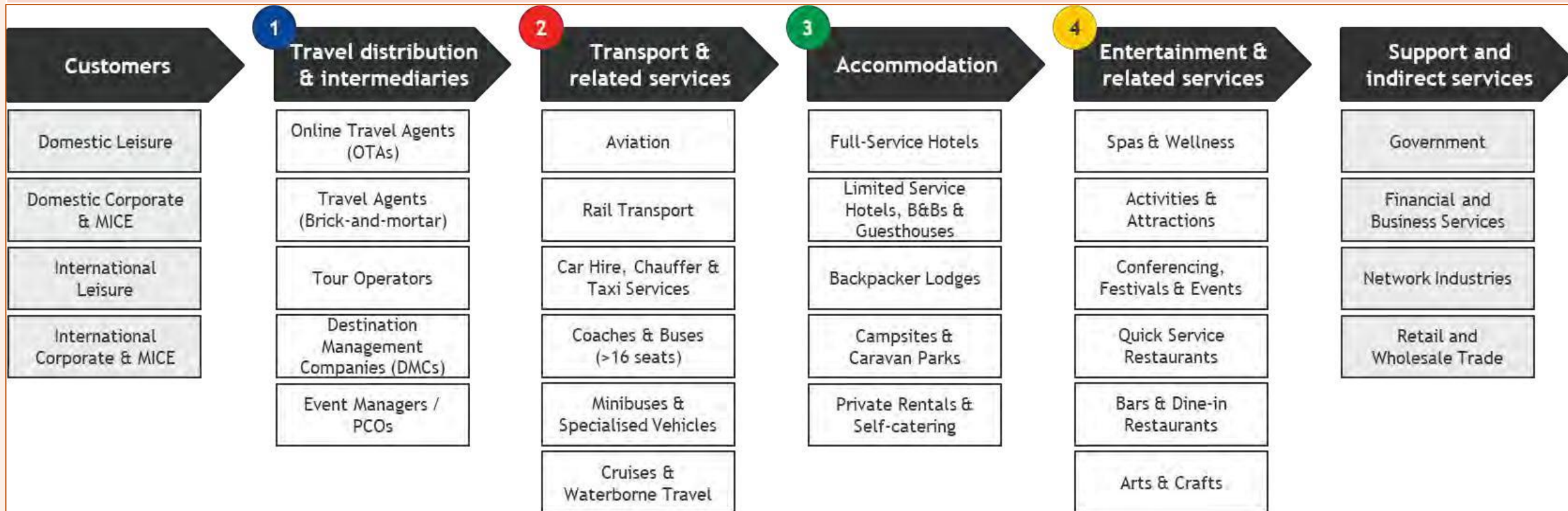
Program 14: Improve Air Access to Tourism Flagships of Namibia

- Promote network resilience among airlines.
- Sign an agreement with reputable air service airlines to provide affordable, regular and easy access to the tourism flagships.
- Promote flying safaris for tourists to Sesriem airstrip for ease access to Namib Sand Sea UNESCO World heritage site.
- Promote flying safaris for tourists to Etosha for ease access to Etosha National Park, surroundings and to other major tourism flagships/destinations in the country.
- Develop, upgrade and promote Mpacha Airport in Katima Mulilo as an International hub for tourism in KAZA area for international link to Victoria Falls, Okavango Delta, KAZA countries.

Strategic Intervention 6:

Challenges in the Tourism Value Chain

The tourism value chain consists of the following facets. These aspects require targeted and specific interventions to reset and ensure inclusivity, empowerment and transformation.



INVESTMENT REQUIRED

The following are estimated budgetary provisions that will be required to implement the set strategic interventions, programmes and activities:

- Government must make the financial provision through treasury or budget allocation.
- This should be supplemented by donors, development partners and private sector funding for targeted projects.

“To emerge from this Covid-19 crisis will require an extraordinary effort”



“Tourism is a Lifeline”

Thank you!