DEPARTMENT OF TOURISM

DOMESTIC TOURISM MARKETING STRATEGY
(2018-2023)
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### ACRONYMS

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<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>DoT</td>
<td>Department of Tourism</td>
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<tr>
<td>DTMS</td>
<td>Domestic Tourism Marketing Strategy</td>
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<tr>
<td>DNPW</td>
<td>Department of National Parks and Wildlife</td>
</tr>
<tr>
<td>ICT</td>
<td>Information and Communication Technology</td>
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<tr>
<td>MDA</td>
<td>Ministries, Departments and Agencies</td>
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<tr>
<td>MDTS</td>
<td>Malawi Domestic Tourism Strategy</td>
</tr>
<tr>
<td>MGDS</td>
<td>Malawi Growth and Development Strategy</td>
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<tr>
<td>MTSMP</td>
<td>Malawi Tourism Strategic Marketing Plan</td>
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<tr>
<td>NGO</td>
<td>Non-Governmental Organisation</td>
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<tr>
<td>OPA</td>
<td>Organisational Performance Agreement</td>
</tr>
<tr>
<td>THB</td>
<td>Tourism and Hotels Board</td>
</tr>
<tr>
<td>UNWTO</td>
<td>United Nations World Tourism Organisation</td>
</tr>
<tr>
<td>VFR</td>
<td>Visiting Friends and Relatives</td>
</tr>
</tbody>
</table>
FOREWORD BY THE HONOURABLE MINISTER

The Malawi Growth and Development Strategy (MGDS) III recognises tourism as one of the priority sectors for stimulating the country’s economic growth. The Domestic Tourism Marketing Strategy, is linked to the National Tourism Policy and has drawn a lot of lessons from the Marketing Strategic Framework (2017-2022) which as identified key market segments, product lines and branding of Malawi as a tourism destination. Domestic tourism plays a key role in social economic development of the country through among other things creation of various economic opportunities in rural areas. As the country’s major attractions and facilities are located in rural areas, increased local travel has great potential to improve community livelihoods through job creation and utilisation of local products and services.

The Malawi Domestic Tourism Marketing Strategy (MDTMS) is a five year blue print for the promotion of domestic tourism in Malawi covering the period 2018 to 2023 and a product of extensive consultative process. The strategy seeks to direct public, private, NGOs, donor partners and stakeholders’ resource and efforts towards growing domestic tourism promotion which is able to catalyse further development of the sector and expand a range of available economic opportunities to support local livelihoods.

Domestic tourism in Malawi has great potential to contribute to overall growth of the tourism sector. Statistics show that domestic tourism in 2016 accounted for over 70% of all tourism activities in Malawi. In addition, over 75% of room occupancy in all tourist accommodation units and visits to our national parks and wildlife reserves were by local residents. Promoting domestic tourism is therefore an essential ingredient in developing our tourism industry. Owing to the seasonal nature of international tourism and unforeseen global economic and political developments, domestic tourism therefore cushions the negative effect caused by any drop in tourism arrivals and receipts.

The strategies outlined in this MDTMS acknowledge the challenges the country currently faces in growing domestic travel. These includes general lack of culture of travel among locals, a small growing middle class with disposable income to undertake travel, absence of motivation to travel and cultural perception that travel is only for foreigners. The strategy, therefore aims to make Malawians and residents acknowledge travel as part of our way of life and also enhance the role of locals as both hosts and travelers. At institutional level, my Ministry will seek support from all Government Ministries, Departments and Agencies (MDAs) whose policies and functions impact on the tourism sector to ensure that we create an enabling environment for domestic tourism to flourish.

The success of this strategy and plan therefore largely depends on the degree and level of cooperation, corroborations and continued consultation between and amongst Government MDAs and key stakeholders. I therefore call upon all stakeholders to support this initiative to ensure that together we grow our domestic tourism for the mutual benefit of us all.

Henry Mussa, M.P.
MINISTER OF INDUSTRY, TRADE AND TOURISM
PREFACE BY SECRETARY FOR TRADE, INDUSTRY AND TOURISM

Globally, according to WTTC report, 2018, tourism is the fastest growing industry in the world contributing 10.4% towards global GDP. Domestic travel spending generated 72.7% of direct travel and tourism GDP in 2017 and is expected to grow by 4.1% in 2018. Domestic tourism serves as a spring board from which tourism destinations enter and prepare for the highly competitive international tourist market.

From 2015 to date, the country has experienced an increase in domestic travel especially during public holidays, long weekends and local events. In addition, the country has seen an increase in group travel such as schools and colleges; churches, clubs among others organizing themselves to go and experience areas of outstanding natural beauty and heritage. These trends and statistics are encouraging and point to the potential of this segment for sustainable tourism.

This Malawi Domestic Tourism Marketing Strategy and Action Plan seeks to actively grow and direct local travel to other attractions apart from the lake. It aims at instilling a culture of travel in locals by promoting local tourism events, group travel, formation of travel clubs and collaborating with industry to develop and promote competitive packages for the local market. This will consequently fill existing capacities especially in budget to middle level tourist accommodation, which has grown significantly over the past five years, thereby encouraging such facilities to improve on quality and service delivery.

The strategy will only work effectively if all stakeholders pool their resources and efforts to implement this ambitious programme. The critical success factors for implementing this strategy will hinge upon the Ministry’s ability and capacity to forge sustainable strategic partnerships with the tourism private sector. In addition, the strategy will endeavor to provide opportunities for partnerships with other institutions that provide support services to the industry. It will further ensure that all potential investors are properly guided on where to direct their investment in the sector, such as recreation and leisure facilities, activities near resort areas, among others.

The Ministry will therefore ensure that adequate resources are available for implementation of this Strategy and Plan. Regular meetings and quarterly Stakeholders review meetings will be held periodically to monitor, evaluate and review our efforts to ensure that we are on the right track.

Ken Ndala PhD
SECRETARY FOR INDUSTRY, TRADE AND TOURISM
EXECUTIVE SUMMARY

The Malawi’s Domestic Tourism Marketing Strategy (MDTMS) outlines key focus areas to enhance local travel. This strategy is as a result of a recommendation from the Strategic Marketing Framework (2017-2022), which recognizes domestic tourism as an essential contributor to sustainable tourism growth and development.

Formal and informal interviews undertaken as part of the development of this Strategy have revealed a number of factors as to why Malawians rarely travel for leisure. These include: lack of disposable income to undertake travel, lack of motivation for travel, higher cost of holidays, and cultural perceptions that leisure travel is for foreigners. It is worth noting that a considerable number of those interviewed indicated that a culture of travel is slowly permeating through the society but that more needs to be done on raising awareness about other key attractions and activities in addition to lake Malawi that one can undertake as well as on the pricing ranges of most of the tourist facilities and services.

Some notable challenges in growing domestic tourism include:

- Lack of integrated packaging and differentiated marketing of the tourism products by operators
- The misconception of travel as an unnecessary luxury
- Limited partnerships and cooperation for domestic tourism.
- The perceived high costs of travel and tourism facilities

This Strategy, therefore outlines the current situation, effective ways of stimulating local travel and the resources required to support its implementation. It should further be emphasized that the Strategy needs to incorporate flexibility and allow for annual reviews to match with the dynamics and developments in the sector.
CHAPTER 1: INTRODUCTION

1.1 Background

Government identified Tourism as one of the priority sectors for economic growth in line with the Malawi Growth and Development Strategy (MGDS) III. This is in recognition of the sector’s socio-economic contribution to the growth of the national economy. Recently Government developed the National Tourism Policy (2018-2023)\(^1\) to guide the development, regulation and promotion of the sector and also provide room for the amendment of the Tourism and Hotels Act. Over the last twenty years, focus has been on international tourism marketing with little regard on the impacts of the domestic market. This has resulted into uncoordinated efforts to promote and grow this component. This strategy will provide a framework that informs and supports the integrated marketing approach of the country’s assets, attractions and events on the domestic market. It has been developed as one of the key recommendations of the Strategic Tourism Marketing Framework for Malawi (2017-2022) that identifies domestic tourism as a key component of Malawi’s tourism industry.

1.2 Rationale

A number of studies done on Malawi Tourism between 2002-2014 which include the 2020 Tourism Development Strategy Via Via Report, the World Bank Tourism Sector Report (2010), and the Strategic Tourism Plan for Malawi (2008-2014), stress the need to harness domestic tourism in the overall tourism management, development and promotional efforts. Currently, international marketing has taken precedence over domestic tourism. Yet, evidence suggests that the latter provides the bedrock for the former. This means that support of the local market has the potential to improve quality of products and services, and ultimately the confidence of international visitors. This also reduces the exposure of the tourism industry to fluctuations in international demand, which is extremely sensitive to global, political and economic issues.

The domestic travel market is therefore important as it makes a substantial contribution to the industry’s sustainability. Further, domestic tourism provides critical support for the industry as follows:

a) Seasonality – it acts as a cushion for the business during off-peak seasons when international travelers are unlikely to visit;

\(^1\) Draft National Tourism Policy
b) Regional distribution – it provides an opportunity for each region to be unique as people travel from one region to another in the same country appreciating the different attractions in each region;

c) Increased domestic spending – it encourages travelers to spend more in their own country; and

d) Encourages greater and effective investment in the sector – Success in the domestic market provides businesses and communities the opportunity to develop their product for the international market.

This Strategy will assist industry players in developing their own Domestic Tourism Marketing Plans for the coming years, and promote a spirit of collaboration to achieve growth in the industry in attainment of key outcomes of national development as envisaged in the National Tourism Policy, MGDS III and the United Nations Sustainable Development Goals 8, 12, and 14.²

1.3 Methodology

The process of development of this Strategy involved a series of regional and zonal consultative meetings with key players in the industry, desk research and expert interviews to help shape the Strategy and refine areas for both clarity and practice. Regional meetings also sought to validate and further refine initial drafts of the strategy. In the absence of baseline data for critical domestic tourism indicators, proxies were used for analysis.³

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² http://icr.unwto.org/content/tourism-and-sdgs
³ Domestic Tourism Indicators as provided by UNWTO www.e-unwto.org/action/doSearch?ConceptID=2464&target=topic
CHAPTER 2: CONTEXT ANALYSIS

2.1 Population and Demographic Profile

Malawi’s population is estimated at 17.9 million. The majority are females representing 52 percent of the total population. This trend is similar in millennials whose composition is 28.1 percent females and 25 percent males of the total population. Millennials also make up 53.1 percent of this total population but head 63.3 percent of households. 92 percent of this population is engaged in income generating activities. The active population (20-64 years old) constitute 41.3 percent females and 38.5 males. These are more likely to travel for leisure and recreation.

2.2 Overview of Global Domestic Tourism

According to the World Travel and Tourism Council (WTTC), tourism is one of the fastest growing industries in the world contributing 10.4 percent towards global Gross Domestic Product (GDP). Domestic travel spending generated 72.7 percent of direct travel and tourism GDP in 2017 and is expected to grow by 4.1 percent in 2018. In Malawi, in the domestic segment, a similar trend applies.

2.3 Malawi Domestic Tourism and Trends

Published data from WTTC indicates that domestic travel spending generated 90.7 percent of direct Travel & Tourism GDP in 2017 compared with 9.3% for visitor exports (i.e. foreign visitor spending or international tourism receipts). Domestic travel spending is expected to grow by 3.5% in 2018 to MWK2.57 billion, and rise by 4.9 percent per annum to MWK4.15 billion in 2028. At the same time Government spending on travel and tourism is expected to rise by 4.7 percent in 2018 rising by an estimated 5.6 percent in 2028 to almost K30.27 billion.

The above figures show that domestic expenditure by residents for both leisure and business trips combined with government spending on travel & tourism services directly linked to visitors, such as cultural services (eg museums) or recreational services remains vital for rejuvenating the tourism value chain and the strategy will need to provide appropriate messages to trigger travel and conversion.

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4 NSO Population Projections Malawi
5 NSO IHS4 Report
6 WTTC 2018
7 World Travel and Tourism Council (WTCC, 2018)- Malawi Country Report
8 Definitions of these fall within the Tourism Satellite Accounting Framework- Refer to the glossary of terms and definitions.
In terms of analysis of travelers, tourism reports have focused on measuring number of international visitors by purpose of travel, mode of transport, type of accommodation and by ports of entry and exit.

Further, domestic tourism has shown constant growth and is the backbone of the industry. Based on occupancy figures, latest reports indicate that almost 65 percent of urban and city occupancy rates are residents. Visitors to both National Parks and Wildlife Reserves also show residents as dominant accounting for almost 80 percent of all visitors though expats account for higher overnight stays. Furthermore, the number of visitors to museums and other heritage sites show that the majority are residents made up of up of school groups, expatriates, government officials and church groups.

In terms of places visited, regional consultations meetings and expert interviews showed that most residents and locals visit the Lake (65 percent), National Parks and Game Reserves (25 percent); heritage sites (5 percent), mountains/hills (3 percent) and 2 percent would visit other attractions in addition to the above.

Based on sample reports from 2016 Lake of Stars Arts Festival and 2017 Sand Music Festival, majority of patronage at events and festivals is local. There is also a growing number of adventure clubs that organise hiking and camping trips both as a way of promoting good health, thrill and relaxation.

Sport tourism is also attracting a lot of resident travel from boating, yachting, golfing, cycling to football events. The Mount Mulanje Porters Race, Luwawa Mountain bike race, Zomba Plateau marathon, and Cape Maclear Tri-athlon are some of the key sport tourism events. Such events are now receiving a lot of support from corporate sponsors who combine utilization of tourism attractions and assets to promote or launch their products. Opportunities therefore exist for the industry and event organisers to partner with such companies to promote events and ultimately the attractions themselves. Such gatherings and events also offer a number of economic and social opportunities for the participants, local communities and the players in the tourism industry.

From a business point of view the private sector has undertaken a number of initiatives to promote domestic tourism through among others:

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9 Based on a sample of Occupancy Statistics collected in cities, Lakeshore and protected areas
10 Based on annual reports from the Museums section, Department of culture for period 2014-2018
11 Report on Regional Consultative meetings, Data from Museums of Malawi, Department of National Parks and Wildlife and African Parks.
12 Telkon Networks supports Mulanje Porters Race, Standard Bank has been supporting the Be More Race and Old Mutual is also involved in similar initiatives.
• Introduction of Loyalty incentive schemes particularly within the hospitality sector;
• Special rates offered during the off-peak season by the hospitality sector;
• New developments, such as, online booking systems and emergence of easily accessible transaction points like retail outlets;
• Advertising through radio and TV campaigns; and
• Increased event organization and patronage.

In terms of the marketing trends, with increasing media landscape, no single platform can claim the majority of consumer influence. The Department will spearhead and embark on use of popular online platforms and formats including search, social, video, mobile and travel sites to promote the various attractions to the various market segments above. In addition, there is need to continuously monitor the growth and relevance of other emerging platforms both online and offline for use as long as they align to key activities. Use of various consumer decision models to reach out to domestic consumers should also be explored and one most notable is the consumer planning model developed by TNS- world leader in market research and their travel planning cycle outlined in diagram 1\(^\text{13}\) below would provide a good guide in the implementation of this strategy.

Diagram 1: TRAVEL PLANNING CYCLE

Table 1: THE CONSUMER TRAVEL PLANNING CYCLE EXPLAINED

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dreaming</td>
<td>Actively thinking about where to go. Focus is on selecting a location or an event</td>
</tr>
<tr>
<td>Planning</td>
<td>Actively collecting information and seeking recommendations</td>
</tr>
<tr>
<td>Booking</td>
<td>Most people book flights/make arrangements for transport</td>
</tr>
<tr>
<td>Anticipating</td>
<td>Generates a need for detailed information- further opportunity to sell up</td>
</tr>
<tr>
<td>Enroute</td>
<td>Commence their holiday. There is an opportunity to enhance</td>
</tr>
<tr>
<td>Destination</td>
<td>On holiday plans change- high potential to influence what people see and do</td>
</tr>
<tr>
<td>Post-Holiday Sharing</td>
<td>Back to the real world- sharing with friends and family they become advocates of the destination/product/event</td>
</tr>
</tbody>
</table>

Operators and the Department have a role to continuously monitor the cycle and influence travelers to ensure conversion of any promotional effort into actual booking and travel within the cycle.

2.4 SWOT Analysis

A SWOT analysis of the domestic market has been done to understand the strengths, weaknesses, opportunities and threats.

2.4.1. The Strengths include issues such as-
- Minimal language barriers- local consumers can easily communicate with service providers in the local languages
- Friendliness (rich culture and friendly people)
- Upcoming accommodation units increasing the number of beds and eateries
- Proximity (attractions well distributed across the country)
- Relatively reasonable gate entry fee to Wildlife Reserves, monuments and museums
- A growing middle class to affluent market
2.4.2. Weaknesses
- Limited public transport network
- Limited Tourist related transportation system
- Poor access to some major tourist attractions including some protected areas which limits self-drives
- Unplanned and under-developed infrastructure
- Lack of cohesion between stakeholders
- Limited community involvement
- Dilapidated national heritage sites
- Inadequate targeted packages for residents by operators
- Limited support services in tourist attractions
- Lack of targeted promotional materials by operators

2.4.3. Opportunities
- Growing mid-to-high income urban population that is willing to travel
- Peaceful and stable political environment
- Increasing propensity for Events/Festivals
- Acceptance of heritage/ethnic groupings that are encouraging cultural interaction, travel and preservation
- Potential long-holiday and weekend opportunities for city/town breaks and gate-aways
- More involvement of local communities around tourist attractions
- Increased accessibility of tourism information through ICT in the country

2.4.4. Threats
- High population growth exerting pressure on the natural resources
- Prohibitive travel and accommodation rates for local residents
- Poor service delivery and below standard accommodation and related elements
- Unfavorable economic conditions
- Limited local air access making local travel expensive
- Poor public transport system across the country (including bus terminal infrastructure)
- Insecurity in some places
- Unreliable electricity and water services
- Cultural shock
2.5 Product Analysis

The 2018-2023 Strategic Tourism Marketing Framework has identified five Tourism Product lines as focus for both promotion and development. These products lines include:

- The Lake including rivers
- Wildlife
- Nature
- People and Culture
- Meetings, Incentives, Conventions and Events

For purposes of this strategy, a tourism product is referred to as the sum of physical and psychological satisfaction it provides to tourists during their travelling route to the destination. It therefore includes nature and what the tourist purchases, sees, experiences and feels from the time they leave home until they return.

The domestic tourism product, in this case, is a composite of the following:

- Lakes and islands, Rivers
  Lake Malawi, also known as the Calendar Lake (365 Miles long and 52 miles at its widest point) dominates Malawi’s Tourism landscape and remains a popular destination for excursionists and longstays. Its islands, offer a variety of water sporting and nature experiences. Like Lake Malawi itself, the Shire River holds a special place in the hearts of all Malawians. The 402 km Shire River is Lake Malawi’s only outlet and is easily the nation’s longest river. Other rivers also offer a wide range of tourism opportunities like white water rafting, sport fishing, among others.

- Wildlife and forest reserves
  For the first time in many years, Malawi now offers Big Five game viewing experience. This has been made possible by innovative ideas in relation to game management that have transformed its wildlife and wilderness areas. The protected areas that are under the public-private partnership arrangements have seen restocking and re-introduction of wildlife. This has resulted in more visitors being able to experience a variety of game. Malawi’s wildlife reserves still remain one of the cheapest products for locals and residents due to low park entry fees.

- Mountains, plateaus, hills, valleys and scenery
  These are scattered across the country. Notable ones include Mount Mulanje, Nyika, Viphya and Zomba Plateaux; Dedza and Chikala Hills; Shire Valley and a wide range of scenic spots across the country.
Activities include: Hiking and Abseiling, Mountain biking, Birdwatching, Photographic safaris, Nature Trails and extreme sports.

- Accommodation, food and beverage
  There is a wide range of accommodation units from budget to high end ideal for all segments. There is now a growing trend towards serving local cuisine in most eateries thus offering an opportunity to have local meals and beverage in a different setting.

- Conference packages
  Malawi offers a range of modern conferencing venues and facilities both in its major cities, towns and along the shores of Lake Malawi.

- Events including sports, weddings, religious trips, cultural festivals etc

- Heritage and Culture
  In recent years there has been an upsurge of festivals and other cultural events at various key locations. These provide visitors and local people alike with a brilliant showcase for artistic talent across the whole spectrum, from dance and drama to films and fashion. Lovers of Malawian arts and culture are spoilt for choice when it comes to events. Each of these is distinct from the others with its own outstanding features.

  Many ethnic tribes also offer opportunities for visitors to experience the unique culture by taking part in the various tribal festivals. Some of the dances such as Vimbuza, Gule Wa Mkulu and Soopa (Tchopa) are recognised by UNESCO as masterpieces of oral and intangible heritage of humanity. These and other events are a unique way to sample the diverse culture of the country. In addition, World heritage sites include Chongoni Rock Art Site in Dedza, which charts the history of early settlers, was designated a World Heritage Site in 1996 by UNESCO and Lake Malawi National Park which was designated a World Heritage Site in 1984. The events and historical sites offer an opportunity for cultural exchange and sense of pride.

2.6 Domestic Market Segmentation

People travel for a number of reasons. An analysis of visitor feedback forms and guest comments from selected units along the lake, in protected areas and reviews on social media (TripAdvisor, booking.com) shows that most residents travel to relax, for sports, to reconnect and rejuvenate and others indicated that they shorter breaks
that go with events and festivals also offer strong motivation to travel. For purposes of this strategy, the market segments will be those outlined in the Strategic Tourism Marketing Framework as follows:

2.6.1 Meetings, Incentives, Conferencing and Events

It covers those that travel for conferences and meetings including those that possibly stay at paid lodging. This is a valuable market that generates domestic travel and visitor expenditure. It also increases the visibility of the industry to the local communities. The following are some of the requirements for the segment:

- Standard to up market conferencing venue
- WI-FI- as part of the conference package
- Competitive conference packages
- Adequate catering services
- Support services (banks, medical, etc)
- Quality customer service delivery
- Outdoor activities
- Wellness services

2.6.2 Visiting Friends and Relatives (VFRs)

Traditionally VFRs would lodge with family or friends and few would use paid accommodation and eat out. However, this may be changing in urban centers with the opening up of more eateries/fast-foods and specialist restaurants for meals for special occasions. The strategy identifies the following as requirements for the segment:

- Reliable, affordable and comfortable public transport
- Support services (banks, internet services, medical, etc)
- Information
- Restaurants
- Entertainment venues

2.6.3 Short and Intensive Holiday Makers

The primary motivation for this segment is to take a break from everyday life, travel to nearby attractions but not for more than 4 days. It is often characterized by staying in paid accommodation, relaxation, guided tours and experiencing local attractions. It gives people space to unwind and release stress; opportunity to see parts of their country they have never seen before; and chance to meet new people and make new connections. Requirements identified for this segment are:

- Reliable transportation
- Leisure activities that are easily accessible and within a short drive
- Information (reliable google maps, 3words or cito-code) that identify key services and attractions such as pubs, restaurants etc.
- Restaurants
- Support services (banks, networks connections, medical, etc)
- Competitive accommodation and good service

2.6.4 Thrill Oriented Adventurers

The traveler seeks thrilling outdoor activities and is driven by challenging experiences. These are usually within the 18-50 age bracket and love adventure and extreme sports.

Requirements identified for this segment are:

- Reliable transportation
- Good equipment that is readily available
- Information
- Restaurants
- Support services (Emergency, Medical and Rescue services)
- Competitive accommodation and good service

2.6.5 Authentic Nature and Culture Lovers

This traveler is more into cultural exchanges, interaction with various cultural groups and is eager to learn new cultural experiences. On the part of nature, they have knowledge about conservation and have a sustainable oriented mindset and travel behavior. Whilst it may cut across all age brackets the majority will tend to be older and those in the mid to high income brackets

Requirements identified for this segment are:

- Reliable transportation
- Tour guiding
- Safety and security
- Competitive accommodation, restaurants and all other services
- Interpretation and facilities
- Signage and information

2.6.6 Curious and Price Sensitive Digital Lovers

These are young travelers, 35 years of age and below, and have a young and technical oriented mind. Most likely combine work and travel and are keen to share their travel
experiences on digital media platforms. The requirements for this segment may include:

- Access to good internet facilities
- Reliable transportation
- Fun outdoor activities
- Competitive accommodation, food and drink
CHAPTER 3: THE STRATEGY

3.1 Vision
*To grow domestic tourism for a sustainable tourism economy*

3.2 Mission
Promote domestic tourism which meets the needs of all existing and potential travelers for sustainable business operations

3.3 Goal
The goal of the MDTMS is to contribute to the overall goal of the sector to Gross Domestic Product from current 4 percent to 12 percent by 2022.

3.4 Key Result Areas

- Enhanced culture of tourism and travel among Malawians
- Improved geographical spread of tourism benefits
- Increased utilisation of tourist facilities and attractions

3.4.1 Key Result Area 1: Enhanced culture of tourism and travel among Malawians

Malawians are not into mainstream tourism and travel. There is evidence that currently, there is more corporate than individual travel and most people feel that travel and tourism is for foreigners/pastime.

The product analysis above shows that Malawi offers a variety of things to do for all tourism segments. Promotional campaigns should highlight these key products and activities to consumers. This will be achieved through generic marketing by the Department of Tourism and targeted marketing by the private sector.

Strategic Objective: Increase domestic trips

Strategy 1

- Allow more locals and residents visit attractions and other areas of outstanding natural beauty

Activities

a. Undertake promotional campaigns on the benefits of travel to current and potential tourists
b. Conduct training of tourism product owners, employees and neighbouring communities
c. Facilitate the formation of tourism clubs
d. Encourage tour operators to package trips to such areas;
e. Encourage service providers to offer exciting hospitality services
f. Lobby for development of visitor service infrastructure in all places of tourist interest

Strategy 2
• Encourage Operators to package trips

Activities
a. Undertake targeted marketing across consumer segments
b. Promote and encourage special offers
c. Undertake public awareness campaigns through print and electronic media
d. Promote and encourage Malawian cuisine

Strategy 3:
• Encourage service providers to offer exciting hospitality services

Activities
a. Promote visitor welcome programmes
b. Offer tour guiding services where applicable
c. Undertake targeted marketing
d. Offer Loyalty schemes
e. Undertake visitor satisfaction surveys in hospitality units

Strategy 4
• Develop the Malawian Domestic Tourism Brand

Activities
a. Identify customers and motivational factors
b. Evaluate provider value proposition
c. Assess competitive Brand Positioning
d. Determine core brand elements
e. Create the Brand Promise
f. Symbolize Brand Touch Points

3.4.2 Key Result Area 2: Improved geographical spread of tourism benefits

Due to differences in endowments of tourism resources and inability to utilize such resources, the benefits are unevenly spread resulting in little or no benefits from tourism for some communities. In addition, not many communities are aware of the benefits of tourism hence frequent conflicts with operators. It is therefore vital that the Strategy addresses this gap in knowledge and benefits to ensure that the potential of tourism is realized.
Strategic Objective: Increase Tourism Benefits

Strategy 1:
Increase the knowledge of tourism and its benefits among locals

Activities
a. Develop and implement tourism awareness campaigns
b. Lobbying for the formation of tourism clubs in schools
c. Lobbying for inclusion of tourism studies in the national curriculum from early childhood education
d. Encourage and support utilisation of ICT in tourism information dissemination
e. Support and encourage media to promote tourism through networking sessions, fam trips and other initiatives
f. Undertake Appropriate Tourism Impact Assessment (ATIA)

Strategy 2:
- Increase average expenditure by local tourists

Activities
a. Encourage targeted packages for locals
b. Offer loyalty schemes
c. Promote local cuisine
d. Showcase local arts, crafts and dance
e. Encourage local value addition of souvenirs, agri-produce at attractions and properties
f. Encourage local patronage at events.

3.4.3 Key Result Area 3: Increased utilization of tourist facilities and attraction

Tourism by nature is seasonal and this is a challenge that most operators and attractions face. Whilst domestic tourism is able to cushion against such fluctuations, most attractions and facilities are underutilized. The way forward is to ensure all year round patronage.

Strategic Objective: Sustain business and facility operations

Strategy 1:
- Encourage local consumption of tourism services

Activities
a. Support use of local materials in any aspect of tourism development
b. Encourage the utilisation of agricultural produce, crafts and other forms of art at tourism establishments
c. Promote and encourage Malawian cuisine
d. Encourage and promote “an eat out or walk about” campaign.
e. Promote local tourism events
f. Encourage and promote packages by operators

Strategy 2:
- Encourage patronage at attractions, events and festivals.

Activities

a. Encourage local councils to promote facilities and attractions in their locality
b. Developing a crisis management plan
c. Partner with private sector to signpost unique tourism assets and attractions
d. Lobby for the formation and capacitation of tourism promotion units in local councils
e. Undertake monitoring and evaluation of key tourism events
### Table 2: ACTION PLAN

**KEY RESULT AREA 1: ENHANCED CULTURE OF TOURISM AND TRAVEL AMONG MALAWIANS**

<table>
<thead>
<tr>
<th>Strategic Objective 1: Increase domestic trips</th>
<th>Time frame</th>
<th>Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 Q2 Q3 Q4</td>
<td>Q1 Q2 Q3 Q4</td>
<td>250M</td>
</tr>
</tbody>
</table>

**Strategy: Allow more locals and residents visit attractions and other areas of outstanding natural beauty**

<table>
<thead>
<tr>
<th>Activities</th>
<th>Indicator</th>
<th>Lead</th>
<th>Supporting Agencies</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undertake promotional campaigns on the benefits of travel to current and potential tourists</td>
<td>Number of consumer reached</td>
<td>DOT, Media Houses, Private Sector, MTC</td>
<td>Tourism products promoted</td>
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</table>

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<tr>
<td>Conduct training of tourism product owners, employees and neighbouring communities</td>
<td>Number of stakeholders trained, MTC, Local Councils, Private sector</td>
<td>DOT</td>
<td>Tourism products promoted</td>
<td>1.5m</td>
<td>1m</td>
<td>2.5M</td>
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<tr>
<td>Facilitate the formation of tourism clubs</td>
<td>Number of clubs formed</td>
<td>MTC</td>
<td>DOT, Tourism products promoted</td>
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<td>2.5M</td>
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<td>Encourage tour operators to package trips to such areas</td>
<td>Number of operators packages</td>
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<td>DOT, Private sector, Tourism products promoted</td>
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<td>Encourage service providers to offer</td>
<td>Number of service providers</td>
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<td>DOC, Tourism products promoted</td>
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<td>0.5m</td>
<td>0.5m</td>
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<td>Strategy 2: Encourage Operators to package trips</td>
<td>Number of consumer segments reached</td>
<td>MTC, Private Sector</td>
<td>DOT, Tourism Associations</td>
<td>Tourism products promoted</td>
<td>Number of promotions</td>
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<tr>
<td>Promote and encourage special offers</td>
<td>Number of promotional campaigns</td>
<td>MTC, Private Sector</td>
<td>DOT, Tourism Associations</td>
<td>Tourism products promoted</td>
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<td>Strategy 3: Encourage service providers to offer exciting hospitality services</td>
<td>Promote visitor welcome programmes</td>
<td>Number of programmes</td>
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<td>DOT</td>
<td>Promote and encourage Malawian cuisine</td>
<td>Percentages of operators offering local cuisine.</td>
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<tr>
<td>Offer tour guiding services</td>
<td>Percentag e of tour guiding services offered</td>
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<td>MTC Tourism Associations, DOT</td>
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<td>2m</td>
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<td>Number of segments reached</td>
<td>Private sector</td>
<td>MTC, DOT, Tourism Associations</td>
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<td>offer Loyalty schemes</td>
<td>Percentag e of loyalty schemes</td>
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<td>Number of surveys undertak en</td>
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<td><strong>Strateg y 4</strong></td>
<td><strong>Develo p domest ic tourism brand</strong></td>
<td>Identify customer s and motivatio nal factors</td>
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<td>Private sector, Tourism Associations</td>
<td>national tourism brand developed and promot ed</td>
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<table>
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<td>Symbolise Brand Touch Points</td>
<td>Percentage increase in promotional materials</td>
<td>Private Sector, MTC</td>
<td>DOT</td>
<td>National tourism brand developed and promoted</td>
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<td>40m</td>
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RESULT AREA 2: IMPROVED GEOGRAPHICAL SPREAD OF TOURISM BENEFITS

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<th>Strategic Objective 1: Increase Tourism Benefits</th>
<th>Time frame</th>
<th>Estimate Cost</th>
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<tr>
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<tr>
<td>Strategy</td>
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<td>Increase the knowledge of tourism and its benefits among locals</td>
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</tr>
<tr>
<td>Activities</td>
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<td>DOT</td>
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<tr>
<td>Supporting Agencies</td>
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<td>MTC</td>
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</tr>
<tr>
<td>Output</td>
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<tr>
<td>Knowledge of tourism enhanced amongst locals</td>
<td>20 m</td>
<td>10m</td>
</tr>
<tr>
<td>Number of awareness campaigns</td>
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<tr>
<td>Number of clubs formed</td>
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<td>DOT, MTC</td>
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<tr>
<td>Tourism Associations, Schools</td>
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<tr>
<td>Knowledge of tourism enhanced amongst locals</td>
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<td>1m</td>
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<tr>
<td>Lobbying for the formation of tourism clubs in schools</td>
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<tr>
<td>Number of clubs formed</td>
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<tr>
<td>DOT, MTC</td>
<td></td>
<td></td>
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<tr>
<td>Tourism Associations, Schools</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledge of tourism enhanced amongst locals</td>
<td>1.5 m</td>
<td>1m</td>
</tr>
<tr>
<td>Lobbying for inclusion of tourism studies in the national curriculum from early childhood education</td>
<td>Report produced</td>
<td>DOT, MTC</td>
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<tr>
<td>---</td>
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<tr>
<td>Encourage and support utilisation of ICT in tourism information dissemination</td>
<td>Number of reports produced</td>
<td>MTC</td>
</tr>
<tr>
<td>Support and</td>
<td>Number of</td>
<td>DOT</td>
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</table>
encourage media to promote tourism through networking sessions, fam trips and other initiatives

<table>
<thead>
<tr>
<th>Reports</th>
<th>MTC, Private sector</th>
<th>of tourism enhanced amongst locals</th>
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</table>

<table>
<thead>
<tr>
<th>Undertake appropriate tourism impact assessment</th>
<th>DOT</th>
<th>MTC Tourism Association, Private operators</th>
<th>Knowledge of tourism enhanced amongst locals</th>
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</thead>
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<tr>
<td>Number of reports</td>
<td>DOT</td>
<td>MTC Tourism Association, Private operators</td>
<td>Knowledge of tourism enhanced amongst locals</td>
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<td>10m</td>
<td>10m</td>
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**Strategy 2: Increase average**

<table>
<thead>
<tr>
<th>Encourage targeted packages</th>
<th>Numéro of operators</th>
<th>MTC</th>
<th>DOT</th>
<th>Knowledge of tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.5m</td>
<td>0.5m</td>
<td>0.5m</td>
<td>0.5m</td>
<td>0.5m</td>
</tr>
<tr>
<td>ge expenditure by local tourists</td>
<td>offer loyalty schemes</td>
<td>MTC, private sector</td>
<td>DOT</td>
<td>Knowledge of tourism enhanced amongst locals</td>
</tr>
<tr>
<td>--------------------------------</td>
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<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Promote local cuisine</td>
<td>Numbe r of operators</td>
<td>Knowledge of tourism enhanced amongst locals</td>
<td>3m</td>
<td>3m</td>
</tr>
<tr>
<td>Showcases local arts,</td>
<td>Numbe r of events</td>
<td>Knowledge of</td>
<td>5m</td>
<td>5m</td>
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</table>

<p>| Number of operators | Knowledge of tourism enhanced amongst locals | 5m  | 5m | 5m | 5m | 5m | 5m | 25M |</p>
<table>
<thead>
<tr>
<th>Crafts and dance</th>
<th>Tourism enhanced amongst locals</th>
<th>Encourage local value addition of souvenirs, agri-produce at attractions and properties</th>
<th>MTC, DOT</th>
<th>Private sector</th>
<th>Knowledge of tourism enhanced amongst locals</th>
<th>10m</th>
<th>40m</th>
<th>40m</th>
<th>40m</th>
<th>20m</th>
<th>155M</th>
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<tbody>
<tr>
<td>Encourage local patronage at events</td>
<td>DOT</td>
<td>Private Sector, Media Houses</td>
<td>Knowledge of tourism enhanced amongst locals</td>
<td>5m</td>
<td>5m</td>
<td>10m</td>
<td>10m</td>
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</table>
**KEY RESULT AREA 3: INCREASED UTILIZATION OF TOURIST FACILITIES AND ATTRACTION.**

<table>
<thead>
<tr>
<th>Strategic Objective 1: Sustain business and facility operations</th>
<th>Time frame</th>
<th>Estimate Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support use of local materials in any aspect of tourism development</td>
<td>Q1</td>
<td>Q2</td>
</tr>
<tr>
<td>Dot, MTC, councils and private sector</td>
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<td>1m</td>
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<tr>
<td>Encourage the utilization of agricultural produce, crafts and other forms of art at</td>
<td>DOT, Ministry of Agriculture, Ministry of Trade, Tourism Associations, MTC, Dept of Arts</td>
<td>0.4 m</td>
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<tr>
<td>Tourism Establishments</td>
<td>Number of operators</td>
<td>DOT MTC</td>
</tr>
<tr>
<td>------------------------</td>
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<td>---------</td>
</tr>
<tr>
<td>Promote and encourage Malawian cuisine</td>
<td>DOT Media houses, MTC, Private sector</td>
<td>0.5m</td>
</tr>
<tr>
<td>Encourage and promote &quot;an eat out or walk about&quot; campaign</td>
<td>DOT Event organiser, Private sector</td>
<td>1m</td>
</tr>
<tr>
<td>Promote local tourism events</td>
<td>DOT Event organiser, Private sector</td>
<td>5m</td>
</tr>
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</table>

<p>| | | | | | | | | | 2.5M | 4m | 2m | 1m | 1m | 12M | 2.5M | 12.5m | 80M |</p>
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<thead>
<tr>
<th>Strategy</th>
<th>Encourage and promote package(s) by operators</th>
<th>Number of packages</th>
<th>MTC, DOT</th>
<th>Private Sector, Tourism Associations</th>
<th>Tourism products and services promoted</th>
<th>DOT</th>
<th>Local Councils, Tourism Associations</th>
<th>Tourism products and services promoted</th>
<th>Number of reports</th>
<th>Partner with private sector to signpost unique tourism assets and number of partnerships</th>
<th>Private Sector, MTC, Local Councils</th>
<th>Tourism products and services promoted</th>
<th>Number of partnerships</th>
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<tr>
<td>2</td>
<td>Encourage local councils to promote facilities and attractions in their locality</td>
<td>Number of reports</td>
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<td>Local Councils, Tourism Associations</td>
<td>Tourism products and services promoted</td>
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<td>3.6m</td>
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<td>10.8m</td>
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<td>50m</td>
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<tr>
<td>attractions</td>
<td>Number of Councils, Tourism Associations</td>
<td>Number of reports/reports promoted</td>
<td>DOT</td>
<td>Local Councils, Tourism Associations</td>
<td>Number of reports/reports promoted</td>
<td>DOT</td>
<td>Local Councils, Tourism Associations</td>
<td>Number of reports/reports promoted</td>
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<td>Lobby for the formation and capacitation of tourism promotion units in local councils</td>
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<td>Local Councils, Tourism Associations</td>
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<td>10m</td>
<td>54M</td>
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<tr>
<td>Undertake monitoring and evaluation of key tourism events</td>
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<td>Develop a crisis management plan</td>
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<td>20 m</td>
<td>30 m</td>
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CHAPTER 4 : IMPLEMENTATION PLAN

The implementation of this strategy will be guided by the following:

4.1. Underlying Principles
   - A partnership between government, private sector and communities;
   - Responsible tourism-based approach which takes recognition of sustainable environmental management; respect for local cultures and economic viability
   - Sound market research and performance measurement.
   - Community participation

4.2. Values:
   Premised on:
   - Respect for local culture and heritage;
   - Service excellence;
   - Integrity and Transparency and
   - Non- discrimination;

4.3. Assumptions

The success of this Strategy is based on the following assumptions:
   - Steady national economic growth that leads to increased disposable income.
   - Political will.
   - Increased propensity to travel locally
   - Well maintained support infrastructure
   - Public and private investments in infrastructure development.
   - Availability of human and financial resources.
   - Tourism mainstreaming across the public sector
   - Strong partnerships with all stakeholders including media, industry stakeholders and communities.
   - More local Government involvement in the identification and support for development of public areas for tourism related events

4.4. Key success factors

   - Effective packaging to ensure competitive pricing, access to information, ease of purchase, quality travel experiences in line with target market needs.
• Competitive, safe and convenient access and transport modes to tourism destinations and products.
• Research that focuses on areas where there is high potential for domestic tourism growth.
• Recognition of stakeholders
• Domestic tourism campaigns roll-out.
• Ensure an effective monitoring and evaluation system.