

2016

A tourism survey of the Victoria Falls region including:

Victoria Falls - Zimbabwe, Livingstone - Zambia, Chobe / Kasane - Botswana, & Hwange - Zimbabwe

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AFRICA ALBIDA TOURISM

AIR LINKAGES & SEAT CAPACITIES ARE QUICKLY GROWING

VICTORIA FALLS INTERNATIONAL AIRPORT - ZIMBABWE

- Newly operational in May 2016
- Over 100,000 additional seats added to the area
- Capacity for 1.5 million passengers
- 4km category 2 runway



South African Airways operates an Airbus A330-200 daily between Victoria Falls and Johannesburg. The A330-200 has 222 seats, 88 more than the smaller aircraft it replaced.

Ethiopian Airlines flies four flights weekly from Addis Ababa to Victoria Falls and return via Gaborone, using the latest Boeing B737-800 New Generation Aircraft which has 16 business class seats and 102 economy seats.

Airlink flies daily except Saturdays from Cape Town to Victoria Falls return using an 83-seater Avro RJ85.

Flies Mondays, Thursdays, and Sundays, Johannesburg to Victoria Falls return, and daily Harare to Victoria Falls return, using a 50 seater E145.

Operates a direct flight daily from Johannesburg to Victoria Falls with 162 seats in a business class and economy configuration with a 737-800. On Wednesdays, Fridays and Sundays it adds a second 737-400 flight from Johannesburg to Victoria Falls with 150 seats from July to early November.

Flies daily from Harare to Victoria Falls return using a B737-200 and an MA60.

Flies direct three times a week from Nairobi to Victoria Falls on Mondays, Thursdays and Saturdays using an Embraer E190 Aircraft with 96 seats, and flies on to Cape Town and return.

Flies four times a week, Mondays, Wednesdays, Fridays, Sundays from Windhoek to Victoria Falls return using a 37 seater ERJ125.

THE HARRY MWAANGA NKUMBULA INTERNATIONAL AIRPORT, LIVINGSTONE - ZAMBIA



- Recently upgraded
- 3km long runway
- Capacity for 250,000 passengers

Flies daily to Livingstone from Johannesburg return using a B738 or A320 with 138 to 157 seats.

Flyies daily from Nelspruit to Livingstone return using an ER3 or or AR8 carrying between 37 and 84 passengers.

Flies daily from Lusaka to Livingstone return using an 18 or 50 seater aircraft.

Fly daily to Livingstone from Johannesburg return on a B738 or B734 carrying 144-168 passengers.

Flies three times a week on Sundays, Wednesdays and Fridays from Nairobi to Livingstone and on to Cape Town return using a 94 seater E90.

THE KASANE INTERNATIONAL AIRPORT, CHOBE - BOTSWANA



- Recently upgraded
- 3km long runway
- Capacity for 250,000 passengers

Flies on Tuesdays and Thursdays from Maun to Kasane return and on Wednesdays, Fridays and Sundays from Gaborone to Kasane and return using an ATR 45 or ATR 72 with 45 or 72 seats.

Flies daily from Johannesburg to Kasane return using an Avro RJ 85 carrying 83 passengers.

2016 TOTAL AREA TOURIST ARRIVALS WERE MARGINALLY UP - BUT INTERNATIONAL ARRIVALS ARE RISING SHARPLY

TOTAL AREA TOURIST ARRIVALS ESTIMATES 2016	
Area Total	435,000 - 500,000
Of which:International	305,000 - 355,000
Local	130,000 - 145,000

TOTAL AREA TOURIST ARRIVALS ESTIMATES 2015	
Area Total	400,000 - 460,000
Of which:International	280,000 - 320,000
Local	120,000 - 140,000

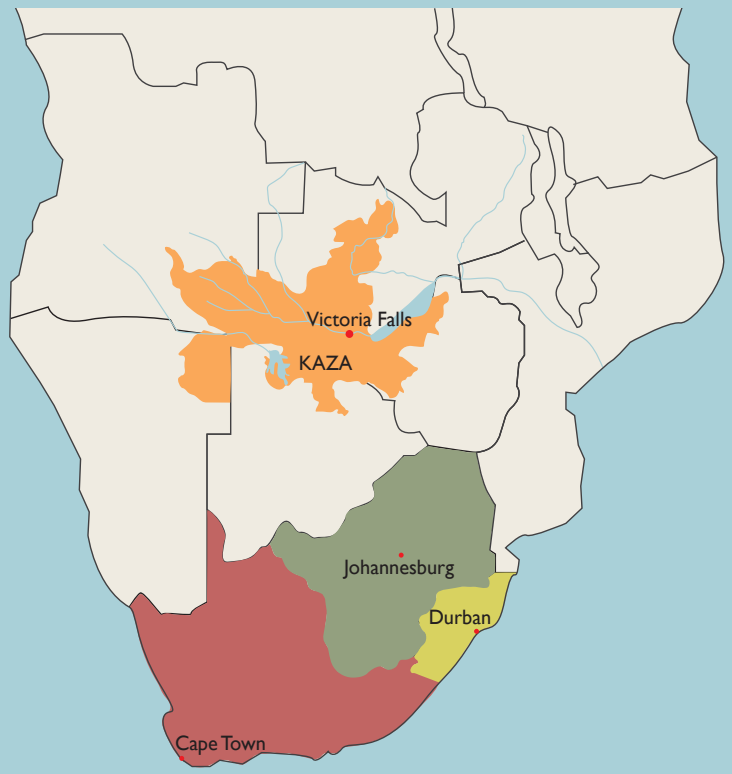
- The international border tourist arrival totals are distorted by cross border movements by the same tourist on multi-country visits, day trips to Victoria Falls from Chobe / Kasane, and day trips to Chobe National Park from Victoria Falls and Livingstone. The total number of actual international tourists is therefore thought to be 305,000 - 355,000 for the area in 2016, which estimate has been arrived at by counter balancing hotel and accommodation stays and entries to the Victoria Falls rainforest with tourist arrivals at borders.
- Local tourists account for another 40%, or between 130,000 and 145,000 visitors across the region.

TOP 12 AREA PRIMARY SOURCE MARKETS	INTERNATIONAL VISITOR ARRIVALS - COUNTRY OF ORIGIN	VISITOR ARRIVALS TO VICTORIA FALLS, ZIMBABWE		VISITOR ARRIVALS TO ZIMBABWE		VISITOR ARRIVALS TO ZAMBIA		VISITOR ARRIVALS TO BOTSWANA		VISITOR ARRIVALS TO SOUTH AFRICA	
		2015	2016	2015	2016	2015	2016	2014	2015	2015	2016
• Whilst Zimbabwe enjoyed a modest growth in arrivals, Victoria Falls had very healthy growth in arrivals from its key source markets. • This is on the coat tails of significant growth in tourist arrivals of 17% in 2016 into South Africa but also due to the new access facilities at the new Victoria Falls airport. • Neither Zambia nor Botswana enjoyed the same area growth in 2016.	USA	42,299	63,502 +50%	66,577	82,699 +24%	38,496	39,378 +2%	38,624	37,093 -4%	297,226	345,013 +16%
	GERMANY	17,123	21,288 +24%	26,355	28,929 +10%	8,025	7,718 -4%	26,151	24,637 -6%	256,646	311,832 +22%
	AUSTRALIA	10,969	13,383 +22%	22,016	21,413 -3%	10,193	8,538 -16%	13,822	11,611 -16%	99,205	109,146 +10%
	FRANCE	10,117	11,244 +11%	14,622	14,286 -2%	4,861	4,810 -1%	7,992	8,089 +1%	128,428	154,226 +20%
	JAPAN	9,479	19,718 +108%	12,713	22,566 +78%	8,742	7,420 -15%	8,857	4,605 -48%	20,202	25,802 +28%
	ITALY	6,347	7,666 +21%	9,042	9,551 +6%	4,165	3,859 -7%	4,627	4,313 -7%	52,377	60,774 +16%
	UK	5,524	5,073 -8%	53,528	32,457 -39%	36,997	38,464 +4%	20,601	22,887 +11%	407,486	447,840 +10%
	SWITZERLAND	4,439	5,747 +29%	6,644	7,717 +16%	-	2,483	5,750	6,550 +14%	48,510	55,160 +14%
	CANADA	1,686	1,198 -29%	5,113	4,157 -19%	6,310	5,472 -13%	7,255	6,211 -14%	56,224	61,179 +9%
	INDIA	627	1,308 +109%	5,421	4,074 -25%	25,517	21,095 -17%	509	2,331 +358%	78,385	95,377 +22%
	CHINA	983	1,712 +74%	6,925	9,164 +32%	20,648	20,120 -3%	933	1,058 +13%	84,878	117,144 +38%
	NETHERLANDS	-	-	-	-	-	4,658	8,909	8,417 -6%	121,883	147,973 +21%
TOTALS - THESE MARKETS ONLY		109,593	151,839 +39%	228,956	237,012 +4%	163,954	156,874 - 4%	144,030	137,802-4%	1,651,450	1,931,466 +17%

NB BOTSWANA FIGURES ARE FOR 2014 AND 2015

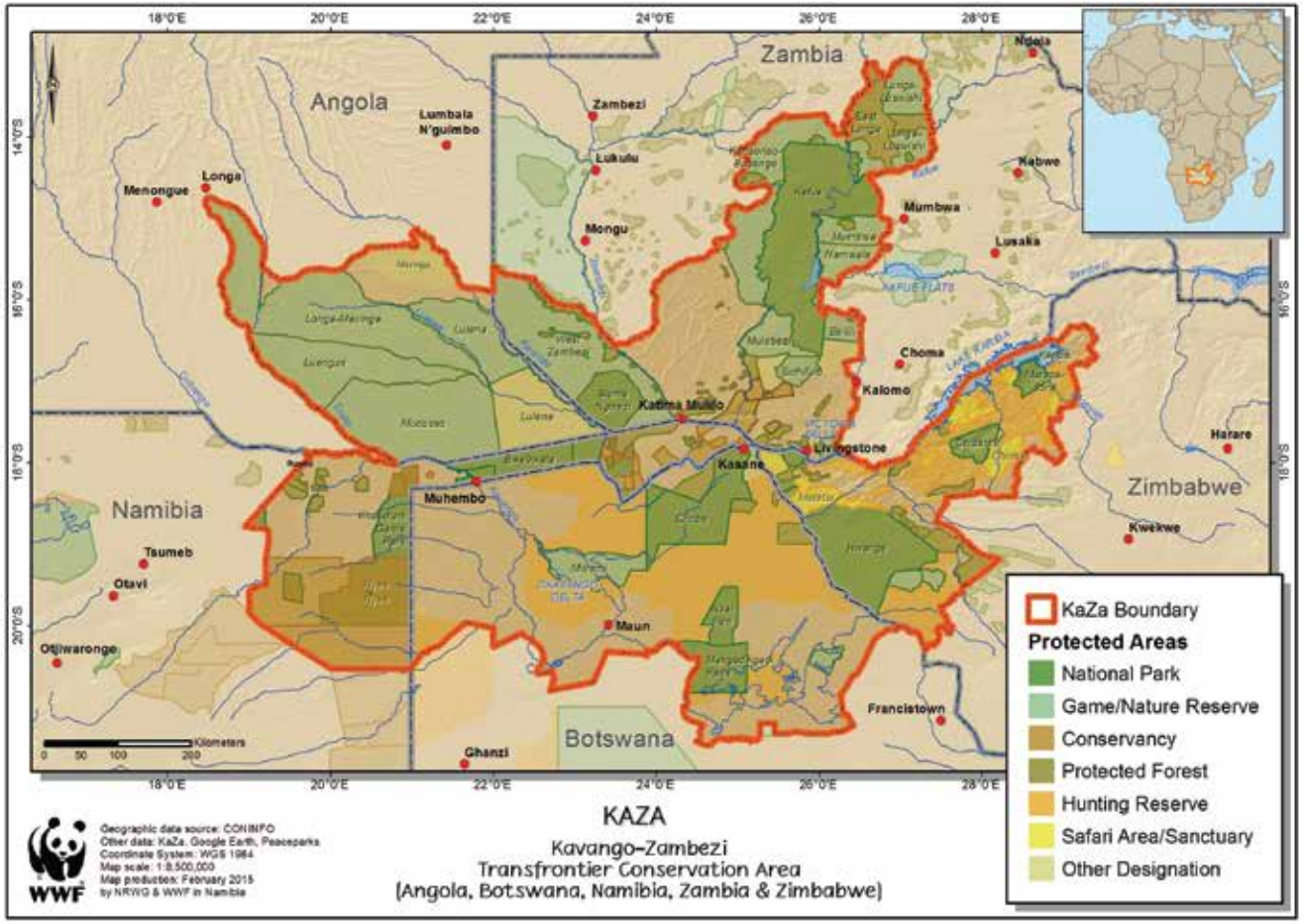
A new airline hub arises





The new hub will serve a beautifully preserved and under exposed KAZA wildlife estate.

- The new airport at Victoria Falls is changing the region
- It is quickly emerging as a new and additional hub to those of Johannesburg, Cape Town and Durban
- Its 4 km Category 2 runway can land all current wide bodied aircraft direct from long haul source markets
- Over 100,000 more passenger seats have been added into Victoria Falls with the new routes and airlines
- Area access is also supplemented by upgraded international airports in Livingstone and Kasane. The area is quickly starting to open up



KAZA

Kavango–Zambezi
Transfrontier Conservation Area
(Angola, Botswana, Namibia, Zambia & Zimbabwe)

AFRICAN SAFARIS ARE MOTIVATED BY TWO SPECIES:



KAZA is home to a healthy population of lion



The KAZA area is home to nearly 60% of Africa's remaining elephant populations≠

What is the Kavango - Zambezi Transfrontier Conservation Area (KAZA)?

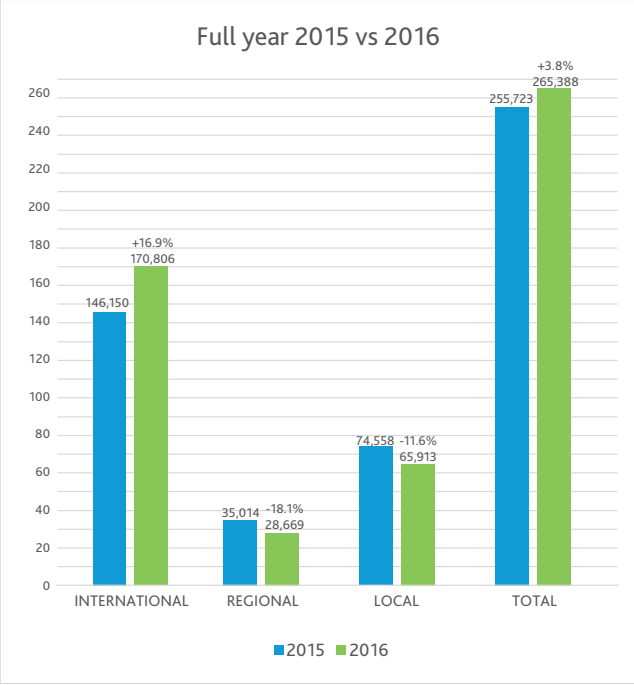
- KAZA is a conservation collaboration between 5 countries - Botswana, Zimbabwe, Zambia, Namibia and Angola
- The combined area creates the largest conservation area on earth - 520,000km^2
- It also creates a combined protection zone of the most pristine and diverse wildlife estate on the planet
- Included are 4 World Heritage sites and 35 National Parks, Forestry Reserves and Protected Wildlife Areas.
- Victoria Falls is gateway to, and central to the KAZA wildlife estate

"Provided they are preserved the wildlife estates of KAZA and the lion, elephant and other wildlife within them are more valuable than gold."



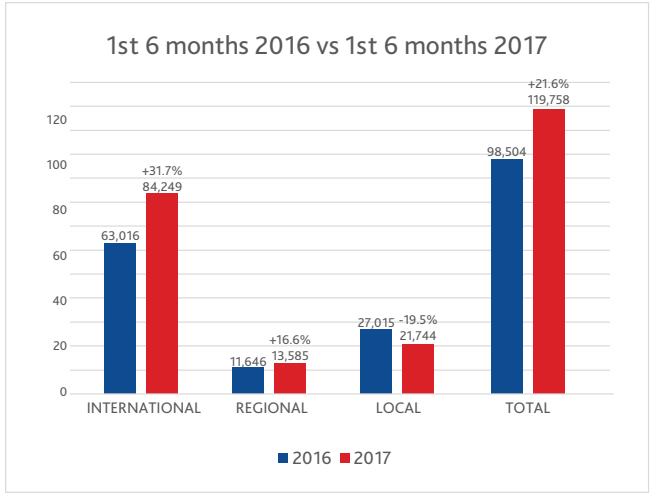
RAINFOREST VISITOR NUMBERS - VICTORIA FALLS (ZIMBABWE SIDE ONLY)

INTERNATIONAL ARRIVALS UP 17% IN 2016



- A sizeable drop in local arrivals has masked significant growth in international arrivals on the Zimbabwe side.
- International tourist arrivals to Victoria Falls rose 17% in 2016 and have gained an additional 32% on that in the first 6 months of 2017.
- Regional tourist arrivals to Victoria Falls dipped in 2016 but are recovering well in 2017 with easier and increased air access.
- The area and particularly Victoria Falls, is failing to leverage the very large tourist flows from the UK into South Africa. This will change greatly once direct access is available to the area from the UK.
- Similarly large markets in Europe await direct access, particularly from Germany, France and the Netherlands.

...AND ANOTHER 32% IN THE FIRST 6 MONTHS OF 2017



ACCOMMODATION IS VARIED IN QUALITY, STYLE AND SIZE ACROSS THE AREA TO MEET ALL BUDGETS

TYPE	PROPERTIES					ROOMS					BEDS				
	Victoria Falls	Livingstone	Chobe	Hwange	Total	Victoria Falls	Livingstone	Chobe	Hwange	Total	Victoria Falls	Livingstone	Chobe	Hwange	Total
Hotel	10	14	4	1	29	1223	899	334	100	2556	2659	1732	668	200	5259
Safari Lodge / Camp	11	16	31	20	78	131	154	450	175	910	294	334	918	384	2160
Luxury Self Catering	1	-	-	3	4	31	-	-	-	31	142	-	-	-	142
Guest House / B & B	23	41	13	-	77	348	413	92	-	853	742	872	192	-	1806
Self Catering	3	10	7	-	20	34	121	41	89	285	88	318	115	254	545
Backpackers / Camping	5	6	6	-	17	65	118	43	-	226	498	523	546	-	1929
Total	53	87	61	24	225	1832	1705	960	364	4861	4423	3779	2439	838	11,479

- Occupancies were again marginally over 50% for 2016 for the area
- Hwange, Zimbabwe's largest national park, is included in the 2016 survey

ACTIVITIES AVAILABLE IN VICTORIA FALLS, LIVINGSTONE AND CHOBE

- The area is well served with multiple conference venues
- Livingstone has a bouyant local conference market
- The area has strong potential for the MICE (Meeting, Incentives, Conferences and Events) markets

CONFERENCE FACILITIES



LOCATION	VENUES	ROOMS	CAPACITY
Victoria Falls	13	28	2242
Livingstone	9	16	3508
Kasane	4	7	550

TRANSFER BUSES



LOCATION	VEHICLES	SEATS
Victoria Falls	146	2261
Livingstone	101	778
Kasane	86	1003

ACTIVITIES ARE OF HIGH QUALITY AND ARE WIDE RANGING

CRUISE BOATS



LOCATION	BOATS	PASSENGERS
Zambezi River, Victoria Falls	36	1,513
Zambezi River, Livingstone	7	600
Chobe River, Kasane	72	2,500

GUIDED FALLS TOUR



Victoria Falls and Livingstone

SOUVENIR SHOPPING



Victoria Falls, Livingstone and Kasane

THE BOMA - DINNER & DRUM SHOW



Victoria Falls, Zimbabwe - capacity of 320 people per night

GOLF



Victoria Falls, Livingstone and Kasane

VILLAGE AND CULTURAL TOUR



Victoria Falls, Livingstone and Kasane

STEAM TRAIN



Victoria Falls and Livingstone

RIVER FISHING



Victoria Falls, Livingstone and Kasane

LIVINGSTONE MUSEUM



Livingstone

MANY ARE ADVENTUROUS AND ADRENALIN HIGHS

HELICOPTER FLIGHTS



LOCATION	HELICOPTERS	CAPACITY
Victoria Falls	8	34
Livingstone	5	22

WHITE WATER RAFTING



LOCATION	COMPANIES	RAFTS	CAPACITY
Victoria Falls	5	45	360
Livingstone	4	27	200

CANOEING



LOCATION	COMPANIES	CANOES	CAPACITY
Victoria Falls	3	58	116
Livingstone	3	40	80

VICTORIA FALLS BRIDGE BUNGEE JUMPING



60 people per day

GORGE SWING AND ZIP LINE



LOCATION	COMPANIES	CAPACITY/DAY
Victoria Falls	2	120
Livingstone	1	60

CANOPY TOUR



80 people per day - Victoria Falls

DEVIL'S POOL



Livingstone

RIVER BOARDING



Victoria Falls and Livingstone

VICTORIA FALLS MICROLIGHT FLIGHTS



Livingstone

SOME ARE ON THE WILD SIDE

BIG 5 AND OTHER GAME DRIVES



Victoria Falls, Livingstone and Kasane

ELEPHANT INTERACTION



LOCATION	COMPANIES	ELEPHANT
Victoria Falls	4	22
Livingstone	2	12

LION, CHEETAH AND RHINO INTERACTION



Victoria Falls and Livingstone

CROCODILE FARM



Victoria Falls

REPTILE PARK



Livingstone

SNAKE PARKS



Victoria Falls and Livingstone

HORSE BACK GAME TRAILS



Victoria Falls and Livingstone

GAME WALKS



Victoria Falls

VULTURE LUNCH



Victoria Falls

...THE LIST GOES ON!

PHOTOGRAPHIC AND BIRDING EXCURSIONS



Victoria Falls, Livingstone and Kasane

SWIMMING UNDER THE FALLS



Livingstone

QUAD BIKING



Livingstone

ABSEILING



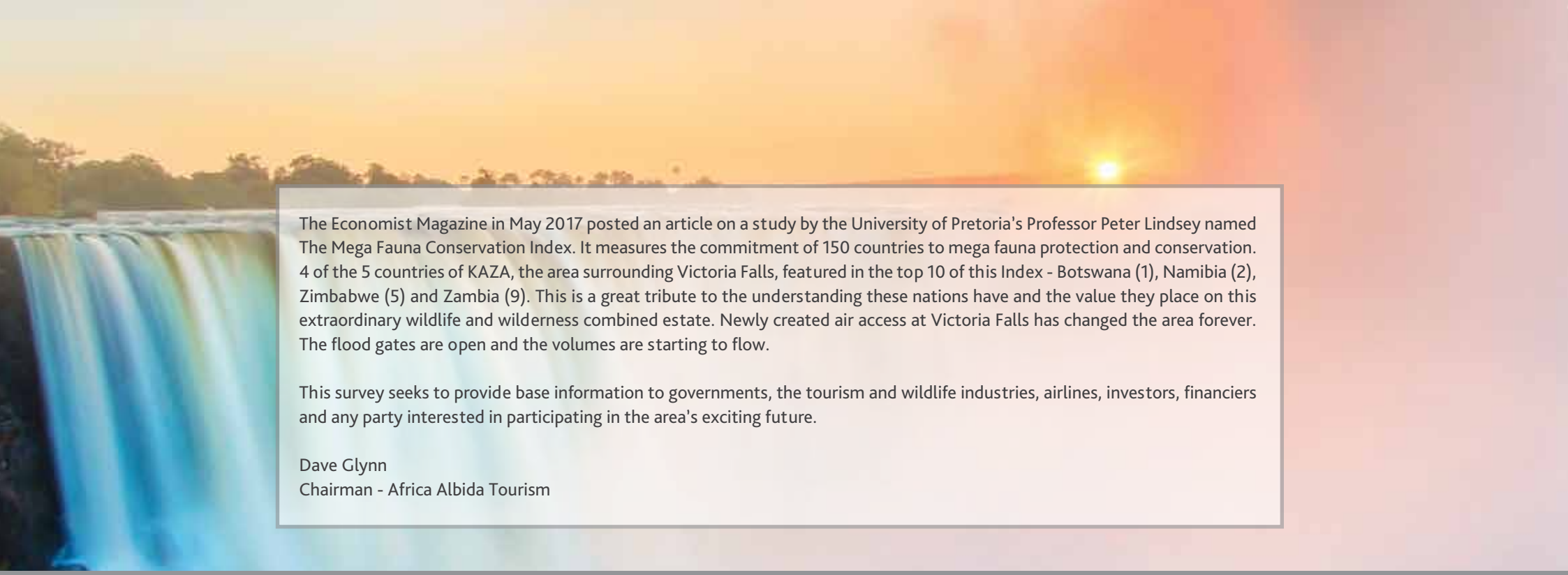
Livingstone

Strategic opportunities

- With area occupancies at 50% in 2016 and over 11,000 beds in the area,there is still plenty of capacity for growth in arrivals.
- Most activites, whilst varied, have small volume capacity. There is room for large volume activities to extend stays.
- The area would benefit from a convention centre which would also assist airlines with volumes and business class passengers.
- Wide ranging opportunities exist for the MICE (Meetings, Incentives, Conferences and Events) markets.
- Less than 10% of area arrivals are children, leaving wide opportunity for family activities.
- Special Economic Zone (SEZ) investment incentives are being offered in Victoria Falls, Zimbabwe as well as other investment initiatives in Livingstone and Kasane.
- Some lower priced activities would assist the area.
- New air linkages are opening up the area.

Strategic planning needs

- With air access opening the area up quickly, long range area physical planning is imperative and urgent.
- With arrivals set to grow sharply, border access points need up-resourcing, e.g. international arrivals to Victoria Falls grew 17% in 2016 and a further 32% in the first 6 months of 2017.
- The area is richly endowed with lion, elephant and unspoilt wilderness, the very reasons for the African safari. Long range tourism success will rest on the ability to preserve these, and to reduce human / wildlife conflicts on their fringes.
- Long term success will need to successfully include rural populations into the tourism economy.
- Easier visa regimes and high quality and focused destination marketing will assist the regional tourism growth.



The Economist Magazine in May 2017 posted an article on a study by the University of Pretoria's Professor Peter Lindsey named The Mega Fauna Conservation Index. It measures the commitment of 150 countries to mega fauna protection and conservation. 4 of the 5 countries of KAZA, the area surrounding Victoria Falls, featured in the top 10 of this Index - Botswana (1), Namibia (2), Zimbabwe (5) and Zambia (9). This is a great tribute to the understanding these nations have and the value they place on this extraordinary wildlife and wilderness combined estate. Newly created air access at Victoria Falls has changed the area forever. The flood gates are open and the volumes are starting to flow.

This survey seeks to provide base information to governments, the tourism and wildlife industries, airlines, investors, financiers and any party interested in participating in the area's exciting future.

Dave Glynn
Chairman - Africa Albida Tourism

DISCLAIMER

Locating quality and current information has in some cases been difficult, particularly with the reluctance of some industry players to share information. The figures used should be regarded as indicative and whilst every effort has been made to source and provide accurate numbers no responsibility is taken for errors they may contain.

Airline information above is taken from their websites and from information provided by them.

For any enquiries contact: africaslivingsoul@gmail.com or (+263) 778 505 162

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AFRICA ALBIDA TOURISM

VICTORIA FALLS Safari Club · VICTORIA FALLS SAFARI LODGE · VICTORIA FALLS Safari Suites · LOKUTHULA LODGES • VICTORIA FALLS · MAKUWA KUWA RESTAURANT · THE BOMA Dinner & Drum Show · NGOMA SAFARI LODGE — CHOBE • BOTSWANA — · SANTONGA VICTORIA FALLS