



# National Ecotourism Strategy

## Malawi

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## Acronyms

AP	African Parks
CBT	Community Based Tourism
CISER	Community Initiative for Self-Reliance
DNTIP	Draft National Tourism Investment Master Plan (Current Assessment Report)
DNPW	Department of National Parks and Wildlife
FGD	Focus Group Discussions
FIT	Free Independent Traveller
KFW	KFW Development Bank
NGO	Non-Governmental Organisation
NTIP	National Tourism Investment Plan
PICTS	Promoting Investment and Competitiveness in Tourism Sector
PPF	Peace Park Foundation
RSC	Responsible Safari Company
TOR	Terms of Reference
UNWTO	United Nations World Tourism Organization

## DEFINITION OF TERMS

Domestic Traveller/tourist	a person who travels to a region within country other than that in which she/he has her/his usual residence, for at least one night but less than one year, and the main purpose of whose visit is other than the exercise of an activity remunerated from within the region visited.
Ecotourism	<p>the UNWTO defines ecotourism as all forms of tourism which have the following characteristics:</p> <ul style="list-style-type: none"><li>• All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas.</li><li>• It contains educational and interpretation features.</li><li>• It is generally, but not exclusively organised by specialised tour operators for small groups. Service provider partners at the destinations tend to be small locally owned businesses.</li><li>• It minimises negative impacts upon the natural and socio-cultural environment.</li><li>• It supports the maintenance of natural areas which are used as ecotourism attractions by:<ul style="list-style-type: none"><li>○ Generating economic benefits for host communities, organisations and authorities managing natural areas with conservation purposes;</li><li>○ Providing alternative employment and income opportunities for local communities;</li><li>○ Increasing awareness towards the conservation of natural and cultural assets, both among locals and tourists.</li></ul></li></ul>
Interpretation	is a work methodology consisting of analysing any manifestation, tangible or intangible, of the cultural or natural heritage to transmit it to visitors and tourists for their better apprehension, understanding, and enjoyment.
Malawi's DNA	DNA is the fundamental and distinctive characteristics or qualities of someone or something, especially when regarded as unchangeable. In this case Malawi's unique features.
International Tourist	a person who travels to a country other than that in which she/he has her/his usual residence, but outside her/his usual

environment, for at least one night but less than one year, and the main purpose of whose visit is other than the exercise of an activity remunerated from within the country visited.

Protected Area

an area of land/water especially dedicated to the protection and maintenance of biological diversity, and of natural and associated cultural resources, and managed through legal or other effective means.



## PREFACE

The development of this Ecotourism Development Strategy for Malawi is anchored on the aspirations of the National Tourism Policy which recognises the need to systematically develop our ecotourism sector. The Government of Malawi has substantially improved the status of some important Protected Areas through the public-private partnership model. The local communities also form part of the ecotourism sector, although on a small scale. This Strategy therefore presents a roadmap for further development and marketing of Malawi as a unique ecotourism destination.

Among other initiatives, the Strategy recommends the collaboration amongst all stakeholders in the sector to develop ecotourism products and investment based on the principles that make Malawi a unique ecotourism destination. Furthermore, the developed ecotourism investment marketing plan aims at positioning Malawi as niche ecotourism destination, attracting new visitors in search of different experiences and promoting a different ecotourism destination based on Malawi's DNA and interpretation values.

In this regard, I wish to invite you all to go through this Ecotourism Development Strategy and encourage you to make use of the document to familiarize yourself with the direction that the Malawi ecotourism sector will take for the next seven years. The Strategy outlines a list of manageable and doable initiatives within the limited budgetary allocations for implementation by both the Government, the private sector, local communities and other stakeholders.

Let me take this opportunity to convey my sincere gratitude to individuals and organisations that participated in the development of this Strategy. Particularly, I am indebted to officials in my Ministry for their effective coordination of the development process. In addition, appreciation goes to the industry stakeholders from all over the country for their invaluable inputs throughout the process. Special thanks also go to the African Development Bank for the financial support rendered to the Ministry which facilitated the procurement of consultancy services to spearhead the development of this Strategy. Let me also express my gratitude to the consultants, ICN Artea and Aninver for the valuable and professional guidance during the development process of the Strategy.

George M. Masinga

**ACTING SECRETARY FOR TOURISM, CULTURE AND WILDLIFE**

## FOREWORD

One of the economic sectors that the Government looks up to is Tourism. With pleasure and much joy, I would like to present to you this Ecotourism Development Strategy for Malawi which will run for the next seven (7) years. It is only through a collaborative approach and by working together that we will transform Malawi into the most competitive tourism destination in Africa. This strategy, therefore, presents a valuable opportunity for the local tourism industry to position the Malawian ecotourism product to the regional and global decision makers and critical players. The strategy aims at making Malawi a preferred ecotourism destination with well conserved wildlife resources and unique cultural heritage. It will allow Malawi to be the African ecotourism destination of choice for inbound tour operators, create broad awareness of Malawi and facilitate the yielding of positive returns to the Malawian economy in terms of increased tourist arrivals.

The third Malawi Growth and Development Strategy (MGDS III) currently under implementation. The strategy ends in 2022 and is the fourth medium-term national development strategy formulated to contribute to the attainment of the country's long-term development aspirations. Energy, Industry and Tourism Development, have been selected as one of the five key priority areas. The Tourism sector is challenged "to embrace effective policies that would enable public and private sector collaboration to develop a niche for an economically productive and multi-experience destination". The goals identified to achieve this challenge are: Improved investments in tourism support infrastructure, improved quality of tourism products and services and improved conservation and management of cultural heritage resources.

As one of the Key Priority Areas (KPAs), if properly developed and promoted, tourism industry will greatly contribute to the overall objective of increasing foreign exchange earnings, creation of employment, and retention of earnings from tourism as well as increased income at household level. Most of our major ecotourism attractions are located in the rural and remote areas of the country. In this regard, most of our tourism activities are centred around rural areas where the majority of the country's poor are based. This shows that the tourism sector has the capacity to make significant contribution towards uplifting the socio-economic status of the rural communities.

This Ecotourism Development Strategy does not exist in a vacuum. It is linked with other strategies and plans within the tourism sector and beyond. It should be specially emphasized the National Wildlife Policy that provides the framework within which all Government institutions, private sector, local communities, development partners, civil society and all other stakeholders in the wildlife conservation industry must operate in order to sustainably conserve and develop the wildlife resource base for the national sustainable socio-economic growth.

It is worth also mentioning the Sustainable Cultural Tourism Strategy (SCTS) by UNESCO ROSA that provide technical support to member states in the development of their cultural tourism industries.

It is clear that the potential benefits are substantial, and to fully access these benefits requires dedicated collaboration between all stakeholders. Therefore, this Strategy is not only the responsibility of the Government but also that of the entire private sector.

The Malawi Government has created a very conducive environment for investment, including tourism specific incentives, as such I would like to invite investors from within and outside Malawi to come and invest in the ecotourism sector in Malawi.

It is my hope that this Strategy will unlock the true potential of the Malawian ecotourism sector which we have not yet fully exploited. This potential has the ability to impact the lives of most Malawians and generate jobs, empowerment and livelihood diversification. Lastly let me thank our cooperating partners for the support that they continue to give us. This Strategy was developed with the financial support of the African Development Bank. There is need for cooperation and partnerships to unlock the true realization that tourism is indeed everyone's business and that we, as a team, need to act as a competitive unit to take ecotourism to the next realm. I wish to invite all prospective investors to come and invest in Malawi's ecotourism sector and encourage visitors out there to come to Malawi and enjoy the warmth of Malawi the Warm Heart of Africa!

Hon. Michael Bizwick Usi, PhD

**MINISTER OF TOURISM, CULTURE AND WILDLIFE**

## EXECUTIVE SUMMARY

The Strategy aims at providing direction for product development and diversification, infrastructure, manpower development, community participation, conservation of nature and preservation of cultural heritage as well as marketing and promotion strategies for Ecotourism in Malawi. The Strategy which promotes the development of eco-tourism in Malawi as a niche segment, first analyzing the existing resources and services and then, considering the strategic approach to be implemented in the short, medium and long term.

The number of visitors in Malawi has been growing steadily since 2014 (with the exception of 2015) reaching 893,000 arrivals in 2018. The data shows that just 16% of the 893,000 visitors in 2018 is for holiday reasons. The leading international source markets of this segment are the UK, USA, Germany, and the Netherlands. Regarding the regional markets South Africa, Zimbabwe and Mozambique are the most relevant.

The situational analysis of the Malawi ecotourism sector is based on detailed desk research, surveys, interviews and focus group discussions conducted with tourism stakeholders across the country. Based on the findings of the analysis, the current status of Malawi as a tourism destination is as follows:

- Malawi has an **emerging ecotourism product segment** with relevant natural and cultural **resources, some of them not yet transformed into products;**
- There are tourist accommodation establishments which have some characteristics of eco-lodges or are eco-friendly which **add significant value** in terms of services, activities, and amenities;
- There is a relatively low number of international visitors, and they are more interested with **Lake Malawi and Liwonde National Park;**
- There are substantial challenges in terms of accessibility to most Protected Areas across the country;
- There is limited meaningful participation of local communities surrounding Protected Areas; and
- There is high **potential for growth** based on tourism products and accommodation supply linked to new international market segments and boosting domestic tourism.

The vision for the Ecotourism Strategy is **"To make Malawi a preferred tourist destination with well conserved wildlife resources and unique cultural heritage"**.

Eight main long-term objectives have been identified as follows:

- i. To position the eco-tourism segment as that guaranteeing the sustainable and well-planned development of the destination, making it an example for the rest of the national economic sectors;
- ii. To upgrade Malawi as a destination facing new challenges caused by nature and human development on today's society;
- iii. To differentiate Malawi from other competing destinations through unveiling its identity and deepening its uniqueness;
- iv. To develop innovative products in the context of the vision for eco-tourism;
- v. To promote competitiveness and investments by developing a competitive and attractive ecotourism subsector that attract entrepreneurs, investors and public investments;
- vi. To efficiently market the destination to targeted/priority market/tourist segments;

- vii. To optimize the involvement of the local communities with particular emphasis on youth and women (Inclusiveness); and
- viii. To construct new economic spaces; direct, indirect and induced, where local communities become main agents of their development.

The Situational Analysis led to the identification of four priority Lines of Action for the Development of Ecotourism in Malawi. Each line of action has the list of specific initiatives which are in detail and steps required for their implementations. These lines of action and initiatives are as below:

**A. Articulation and cohesion of ecotourism sector (public, private sector and local communities) through a common vision and shared objectives**

- A.1 Presentation of the National Ecotourism Strategy
- A.2 Creation of a national Eco-tourism cluster, in charge of boosting and implementing the national ecotourism strategy: Coordination and management Board
- A.3 Annual Conference of the Ecotourism sector

**B. Ecotourism products development and Visibility of Malawi as an ecotourism destination - Focusing on visitor experience**

- B.1 Wildlife and Nature Protected Areas: Consolidation of successful management and concession models
- B.2 Introduction of a Grading System for Ecotourism Accommodation facilities and activities
- B.3 Enhancement of World Heritage resources as key part of the ecotourism offer
- B.4 Development of Ecotourism Routes
- B.5 Community based tourism development
- B.6 Development of Ecotourism packages involving the whole experience and linking the protected areas: Green card (different segments)
- B.7 Capacity building Programme definition and implementation: Scaling up ecotourism through world-class guiding and interpretation
- B.8 Preservation and climate change awareness
- B.9 Introduction of Culinary Tourism

**C. Investments**

- C.1 Attracting Ecotourism Investors by promoting the Ecotourism Plan as a road map
- C.2 Seeking Technical and financial support for CBT.

**D. Marketing**

- D.1. Design and Management of Digital Content
- D.2. Website: Design an ecotourism section and provide synergies with private sector
- D.3. Production of Digital promotional materials
- D.4. Digital community creation
- D.5. Awareness campaign for locals
- D.6. Creating an Online ecotourism centre
- D.7. Establishing Social networks for protected areas and natural sites

- D.8. Creating a Data base and carrying out annual tourist survey
- D.9. Web analytics

There is a great deal of ecotourism potential in Malawi that can help conserve the protected areas and improve the livelihoods of communities that border these natural landscapes. However, to catalyze ecotourism in the country, there is need for collaboration and to focus on conservation and restoration of protected areas, ecotourism product development, and promotion and marketing the country as a unique ecotourism destination.

# 1 INTRODUCTION

## Background

The United Nations, in its Sustainable Development Goals (SDGS), recognizes tourism as a viable means to promote sustained, inclusive and sustainable economic growth, full of productive employment and decent work for all.

In Malawi, Tourism is key to the country's economic growth. The sector contributes to Gross Domestic Product (GDP) and creation of jobs. Further, the sector has been recognized by the Malawi Government, in the Malawi2063 Vision and Malawi Growth and Development Strategy (MGDS) III, as one of the priority areas for economic growth and recovery in its Malawi economic growth and recovery plan strategy. The Malawi Growth and Development strategy (MGDS III) places tourism as one of the three key priority areas for economic recovery and development of Malawi. The Department of Tourism developed a Strategic Tourism Development Plan which was implemented between 2002 to 2006 in which investments were being made in the development and promotion of ecotourism products in eco-tourism sites such as Lilongwe Nature Sanctuary, Kayak Africa Lodge at Mumbo and Domwe Island and Blue Zebra on Maleri Island among others.

In 2017 the contribution of travel and tourism to total GDP percentage for Malawi was 7.7 percent and the sector has supported about 446, 000 jobs representing 6.2 percent of employment in the country ([www.worldbank.org](http://www.worldbank.org).) Malawi is blessed with a rich diversity of flora and fauna and it is an all season tourism destination with several tourism products ranging from the fresh water lake and its island, all-season Rivers, mountains, hills, wildlife and culture.

To promote sustainable utilization and development of the tourism industry and making sure that tourism benefits trickledown to the local communities, the Ministry of Tourism, Culture and Wildlife through the Department of Tourism has embarked on the development of a "National Ecotourism Strategy" with funding from the African Development Bank under the Promoting Investment and Competitiveness in Tourism Sector Project (PICTS).

The objective of the project, as stated in the Terms of Reference (TOR), is to provide direction for product development and diversification, infrastructure development, manpower development, community participation, conservation of nature and preservation of cultural heritage as well as marketing and promotion strategies for Ecotourism. The Ecotourism strategy seeks to fill the gaps which were left out in the Strategic Tourism Development Plan of 2002-2006. It also seeks to achieve sustainable utilization and development of tourism products of Malawi as stipulated in the National Tourism Policy. The strategy draws a picture of eco-tourism as a key tourism segment in Malawi by analysing the existing resources and then, considering the strategic approach to be implemented in the short, medium and long term.

In its efforts, the Government of Malawi, through the Department of Parks and Wildlife, has largely improved the status of Protected Areas through the public-private partnership model. Government, through partnership with African Parks has restocked Liwonde National Park, Majete Wildlife Reserve, Nkhotakota and Game Reserve among the 9 Malawi National parks and wildlife reserves. Though on a small scale, the local communities have been involved in the management of these protected areas.

## 2 RATIONALE FOR DEVELOPING STRATEGY

The development of the Eco-Tourism Strategy can be envisaged to benefit Malawi in the following ways:

- Ensuring sustainable utilization of natural, cultural and heritage resources.
- Minimizing negative effects of tourism activities on the natural and built environment.
- Ensuring that the local community' benefits from involvement in business and employment derived from the tourism supply chain.
- Helping in responsible planning and management of tourism programs by involving all stakeholders concerned.
- Preservation of cultural heritage.
- Raising the profile of the country as an ecotourism destination.

The Eco-Tourism Strategy will also help to complement the National Tourism Policy which aims at ensuring sustainable consumption of tourism resources.

## 3 SITUATIONAL ANALYSIS

### 3.1 PRODUCT BASE ANALYSIS

Malawi offers an array of tourism resources which includes; National Parks and Wildlife Reserves; mountains; lakes and islands; wetlands, mountains, agricultural plantations, patches of natural and grown forests across the country; a rich cultural heritage and community life, among others. These provide different type of attractions for a tourist to enjoy wildlife and nature from different perspectives. The provision of a backdrop for development and promotion of ecotourism in Malawi as a key segment. Malawi has the potential to compete with the other great and consolidated African Safari destinations as it has enough resources to become a competitive destination based on its size. This allows a real immersion in nature rather than massive and overcrowded safaris. The strengths of the Malawi ecotourism product rest in a number of aspects namely:

- Relevant number of rich natural and wildlife areas all over the country, but also the interesting and extensive eco-friendly accommodation network and activities.
- Availability of three and four star rated properties that can be considered eco-tourism products and ready to receive different segments of visitors.
- A remarkable Public-Private cooperation in Liwonde National Park, Majete Wildlife Reserve and Nkhotakota wildlife reserve can be replicated in other Areas.
- Presence of other areas with great potential that need different types of improvements to be considered tourist products and not just tourist resources; so, while the flagships have possibilities of development in the short term, these other areas also need to be improved in the mid-term. Probably in this group of natural resources in transition to become premier tourist sites, Nkhotakota is the best positioned for improvement in the short-medium term due to the recent changes introduced by African Parks and the new accommodation facilities. Nyika National Park, Vwaza Marsh or Kasungu National Park are undergoing improvements in a similar way to be more appealing for tourists through Government's support from Peace Parks Foundation and other development partners that support wildlife conservation.
- The friendly people. Malawians are considered one of the friendliest in the world.



## Negatives

The product has a number of weaknesses that need to be improved upon. The challenges include the following:

- In accessibility of some areas, particularly those provide tourists with specific tourist segments.
- In all the cases, the improvements should include not just better accommodation, but also basic infrastructure to promote a better enjoyment of these areas: external and internal signposting/ information /interpretation for self-guided tours, platforms for birds or other wildlife observation are some examples.
- Climate change impacts should be considered another major challenge. As such climate change issues need to be mainstreamed in the planning process which would involve technologically based intervention that would help in future planning activities.
- The relationship with local communities is remarkable in many cases, but it is not visible to travellers. It should be noted that ecotourism is keen on being part of experiences created through interacting with the environment and local communities.
- Insufficient quantitative and qualitative data for most protected areas. Statistics and collection of data, both qualitative and quantitative should be improved to have a more solid knowledge moving forward.

It is necessary to perceive the idea of ecotourism as a tourism product segment, with different degrees of enjoyment, linked to the motivations of the tourists. Each area should have its own digital site/ social network involving all the information needed for the tourist: Digital promotion under a common image and strategy.

Though the difficulties in accessing some Protected Areas limit the chances of tourists visiting many sites throughout the country, but at the same time, creates some feelings about the unspoiled and “the remoteness” that can sound appealing for some travellers motivated for adventure or looking for going out the mass tourism experiences.

## 3.2 STAKEHOLDER ANALYSIS

### Public Sector

The public sector forms an important component and a key stakeholder in the development and implementation of the Eco-tourism Strategy. It is responsible for the formulation of policies, rules and regulations that govern the development and management of the tourism sector. Public sector departments and agencies play a vital role in ecotourism planning, management, implementation and monitoring of programs, through provision of technical advice and financial support. Public administration also participates in the direct creation of the destination and tourism products; and is responsible for many of the tourism resources related to nature or culture. The public sector is also responsible for the development of the required support infrastructures such as access roads, airports and signposts. It is responsible for the expertise needed to boost a competitive tourism destination.

The Department of Tourism is responsible for the formulation of the National Tourism Policy and the National Tourism Master Plan. It also promotes Malawi tourism both locally and internationally through travel fairs, collaterals and familiarization tours.

## **Private Sector and Investors**

The private sector in the tourism industry plays a crucial part in the provision of goods and services required by a tourist such as transportation, accommodation, food and beverage, entertainment and other support services. The private sector drives the tourism sector.

It is necessary to have a healthy and cohesive private sector which can support the government in the development of the tourism industry. Stable public-private sector collaboration is a prerequisite in the development of eco-tourism as such collaboration attracts investors in the tourism industry.

There has been a successful public-private sector partnership between the Department of Parks and Wildlife and African Parks, which has seen the successful restocking of animal population in some of the National Parks and Wildlife Reserves in Malawi.

## **Communities**

Local communities are custodian of the natural resources and cultural heritage. They play a vital role in the provision of local goods and services to tourists such as tour guiding, selling local arts and crafts, fruits and vegetables shops; local communities also provide transport services such as taxis, boats and buses.

Local people help in the presentation of the local culture and heritage through traditional songs, storytelling and artefacts.

## **Non-governmental Organisations**

Non-governmental organisations play an important role in the development and promotion of eco-tourism in a way that they act as advocate between government and local communities. Non-governmental organisations help in creating environmental awareness and implementing projects aimed at minimizing negative impact of human activities on the environment and promotion sustainable use of natural resources. For example, Environmental Society of Malawi (WESM) aims at informing and supporting public participation in the wise use of Malawi's wildlife and natural environment.

Another good example is Lilongwe Wildlife Trust. This is a non-governmental organisation established in 2009 which aims at saving wildlife and conservation of nature in Malawi. The NGO has helped to save lives of endangered species. The centre works in collaboration with both local and international partners in responding to conservation challenges Malawi is facing.

## **3.3 MARKET ANALYSIS-SUPPLY AND DEMAND**

### **Tourism Supply Analysis**

Malawi currently has natural resources that can meet the needs of the different segments, however, it is necessary to promote the existing products and increase the number of competitive tourism products that can attract a broader type of travellers.

Both the FIT and the packaged tourist currently can visit the flagships aforementioned, which offer a variety of visit possibilities including the Big Five in the case of Majete and Liwonde National Park. It could also be said that the emerging Nkhotakota Wild Reserve already offers wildlife experiences and accommodation that can satisfy these tourists. It is necessary to make them better known at the level that corresponds to them not only the individual tourist but also the Tour operators that market South-East Africa.

As for the more adventurous and less demanding in terms of quality of services or accessibility, there is a full offer that includes places like Vwaza Marsh, Kasungu, Nyika, or Mulanje. It is necessary to put these places on the map and "in the heart" of these travellers, making known

everything they are looking for: type of nature, or wildlife, available accommodation, access to the activities they are looking for, the time needed to reach the places among others.

The birdwatchers are highly specialized tourists that can be attracted to some of the hidden gems such as Misuku and Chikangawa, truly paradises for their purposes. Nevertheless, this type of tourist needs specific services and differentiated promotional actions.

In broad terms, all segments of tourists need better information adapted to their needs. General information gives an overall idea of the global offer in terms of the country as a whole but also disaggregated by geographical areas. But other specific information related to the various motivations and expectations is of paramount importance.

However, the main element on which the attraction of travellers should be based on is the genuinely differentiating elements of the country and this will be analysed in the Marketing Plan using the findings of the interpretation section.

### **Tourism Demand Analysis**

Currently, all the available data on tourism demand is quantitative. The available data shows that about 16% of the 893,000 international tourist arrivals in 2017 are for holiday reasons. The leading international source markets of this segment are the UK, USA, Germany, and the Netherlands. Regarding the regional markets South Africa, Zimbabwe and Mozambique are the most relevant. Annex 5 on Tourism Markets Assessments provides a detailed analysis of arrivals in Malawi. Furthermore, Annex 6 provides more details on the current and potential markets and tourist profiles.

## 4 THE VISION AND GOAL OF THE ECO-TOURISM STRATEGY

### 4.1 GOAL

The overall goal of this Eco-Tourism Strategy is to support the implementation of the National Tourism Policy. The Strategy acts as a complementary document to the achievement of the National Tourism Policy, hence its goal is to:

*To create an enabling environment for the development, regulation and promotion of sustainable tourism sector which enhances tourist experience and satisfaction whilst improving socio-economic wellbeing and maintaining cultural identity of the local communities.*

### 4.2 VISION

The vision of the ecotourism strategy is to make Malawi a preferred tourist destination with well conserved natural resources and unique cultural heritage.

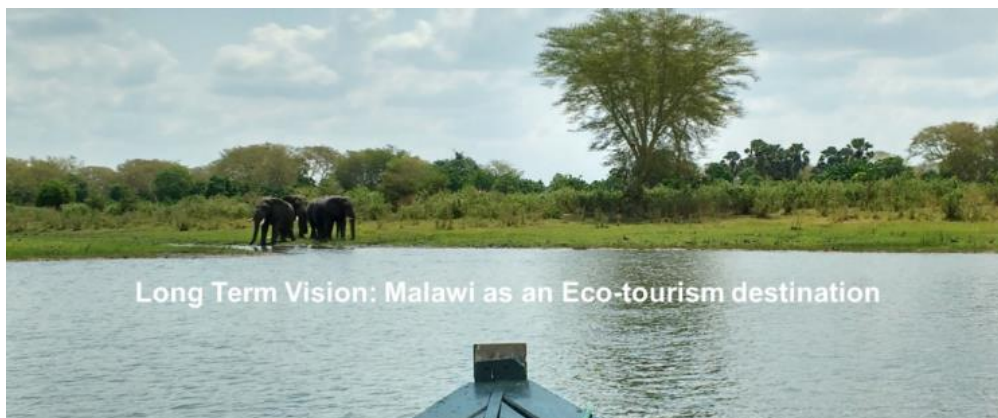


Figure 1- Vision Statement

### 4.3 STRATEGIC OBJECTIVES

The vision requires defining strategic objectives to make it operational. These are top-level axes to guide the generation of specific initiatives as part of the Strategy. The initiatives include a series of specific measures that can be prioritised and tracked.

Eight main long-term objectives have been identified as strategic areas to ensure sustainable tourism development in Malawi.

**Table 1 - Objectives of the Eco Tourism Strategy**

1. To <b>position</b> the eco-tourism segment as guaranteeing sustainable and well-planned development of the destination, making it an example for the rest of the national economic sectors
2. To project Malawi, as a destination that faces the new challenges that nature and manmade activities are posing to today's society.
3. To <b>differentiate</b> Malawi from other competing destinations unveiling its identity and deepening what makes it unique and attractive.
4. To <b>develop innovative</b> products in the context of the vision for eco-tourism.
5. To <b>promote competitiveness</b> and investments through developing a complete tourism offer (accommodation, services, resources) that attracts entrepreneurs, investors and public investments
6. To <b>market</b> the destination to tourist segments
7. To optimize the involvement of the local communities with particular emphasis on youth, women and vulnerable groups
8. To <b>construct new economic spaces</b> ; direct, indirect and induced, where local communities become main agents of their development

## 5 SWOT ANALYSIS

The objective of this SWOT analysis is to identify the internal institutional and sectoral strengths, weaknesses and external opportunities and threats that can affect the performance of the Ecotourism strategy. These factors analyse the operating environment in relation to the achievement of the strategic objectives of the strategy. It helps to discover the factors that are supportive or unfavourable to achieving the objectives of this strategy. The table below outlines the internal and external factors.

<p><b>Internal origin</b> (attributes of the destination)</p>	<p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• Availability of National Tourism Policy that will facilitate sustainable tourism.</li> <li>• Wider offer in terms of National Parks, Forest and Wildlife Reserves, providing different type of proposals to enjoy wildlife and nature.</li> <li>• Extraordinarily rich biodiversity.</li> <li>• Significant offer of eco-lodges located in emblematic natural sites.</li> <li>• Strong commitment of eco-lodges to the preservation of the environment and supporting local communities.</li> <li>• Successful models of PPPs in some National Parks and Wildlife Reserves.</li> <li>• Rich cultural heritage and recognition of cultural and natural resources as World Heritage Sites by UNESCO.</li> </ul>	<p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• Weak articulation of eco-tourist stakeholders in terms of (internal) association and (external) collaboration with public sector.</li> <li>• Inaccessibility of some ecotourism attractions within the destination.</li> <li>• Absence of specific standards for Eco-lodges.</li> <li>• Lack of clear cut strategies for local community participation in tourism.</li> <li>• Lack of up to date eco-tourist statistics.</li> <li>• Sustainability problems such as poaching, and deforestation.</li> <li>• Lack of promotional/marketing materials for ecotourism.</li> <li>• Lack of a proper transport network for domestic travelers.</li> <li>• Lack of collaboration among different stakeholders.</li> </ul>
	<p><b>External origin</b> (attributes of the environment)</p>	<p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• New profile of traveller seeking off-the-beaten track and looking for an in depth immersion in nature.</li> <li>• International recognition of Malawi as an example of wildlife recovery</li> <li>• The reverse image to over tourism regarding other eco-tourism destinations such as Kenya and Tanzania</li> <li>• Growth of telecommunication infrastructure.</li> </ul>

## 6 ECOTOURISM STRATEGIES AND LINES OF ACTIONS

## 6.1 STRATEGY 1

### **Articulation and cohesion of eco-tourism sector (public, private sector and local communities) through a common vision and shared objectives**

This line of action aims to take advantage of the synergies among the various stakeholders forming the eco-tourism industry which currently are working in an isolated way.

#### **LINES OF ACTION**

1. Presentation of the National Eco-tourism Strategy
2. Creation of a national Eco-tourism cluster, in charge of boosting and implementing the national eco-tourism strategy: Coordination and management Board
3. Annual Conference of Eco-tourism sector

## 6.2 STRATEGY 2

### **Eco-Tourism products development: Visibility of ecotourism segment as a unique selling proposition for Malawi as a tourist destination. Focus on visitor experience**

This line of action is intended to make visible the current offer based on the principles that ecotourism makes Malawi a unique tourism destination. A new approach to promote Malawi's differentiation connected with the main motives of the target segments.

#### **LINES OF ACTIONS**

1. Wildlife reserves and Protected Areas: Consolidation of successful management and concession models.
2. Introduction of a Grading System for Ecotourism Accommodation and activities.
3. Enhancement of World Heritage resources as key part of the ecotourism offer.
4. Development of Eco-tourism Routes.
5. Community based tourism development.
6. Eco-tourist package involving the whole experience and linking the protected areas: Green card (different segments.)
7. Capacity building Program definition and implementation: Scaling up ecotourism through world-class guiding and interpretation.
8. Preservation and climate change awareness.
9. Introduction of eco-friendly culinary Tourism.
10. Developing guidelines and grading criteria for certification of ecotourism establishments.
11. Scaling up ecotourism through world class guiding and interpretation.

## 6.3 STRATEGY 3

## **Specific Investments related to Ecotourism**

The master plan for tourism investment that is being developed out in parallel to this project will undoubtedly include the necessary investments infrastructure and transport that affects the tourism sector as a whole. In this line of action, the strategy focuses on the investments that directly feed ecotourism investment needs

### **LINES OF ACTION**

1. Attracting Ecotourism investors by promoting the ecotourism strategy as a road map
2. Seek Technical and financial support for Community Based Tourism (CBT).
3. Identify and designate areas of outstanding natural beauty.
4. Develop clear guidelines for ecotourism investment.
5. Empower local councils to identify areas of ecotourism development.

### **6.4 STRATEGY 4**

#### **Eco-Tourism Marketing**

This line of action is intended to spread the main values and assets of Malawi as an eco-tourism destination.

#### **LINES OF ACTIONS**

1. Design and Management of Digital Content of all ecotourism products.
2. Website: Design an eco-tourism section and provide synergies with private sector.
3. Production of Digital promotional materials of whole offer.
4. Digital community creation.
5. Awareness campaign for locals on the significance of ecotourism and need for conservation.
6. Creating an Online eco-tourism center.
7. Establishing Social networks for protected areas and natural sites.
8. Creating a Data base and carrying out annual tourist survey.
9. Web analytics.
10. Production of both print and electronic guidelines for ecotourism development.



## 7 ACTION PLAN AND PERFORMANCE INDICATORS

The action plan gathers a set of actions focused on keeping attention around Eco-tourism in a permanent manner, in order to position and consolidate Malawi in this type of tourism.

PROJECT NAME	A.1. Presentation of the National Eco-tourism Strategy		
LINE OF ACTION	A. Articulation and cohesion of eco-tourism sector (public, private sector and local communities) through a common vision and shared objectives		
Summarised Project Description	The first step that the eco-tourism strategy should take is to disseminate its approaches and objectives among the different stakeholders and potential investors. The involvement of technicians and politicians at the highest level is vital to show the government's commitment to this strategy and encourage the private sector to be part of it.		
Target	<ul style="list-style-type: none"> <li>- All the stakeholders involved in the tourism value chain.</li> <li>- More specifically those participants in the eco-tourism strategy</li> </ul>		
Investment Type	Hard		Soft X
Project Details			
<p><b>The main goals</b> of this activity imply:</p> <ul style="list-style-type: none"> <li>- To foster collaborations and partnerships among all the stakeholders</li> <li>- Spreading the critical principles of the plan and creating consensus around the strategy as a new stage in the tourism industry development.</li> <li>- Encouraging stakeholders to form part of this new horizon.</li> </ul> <p><b>Specific actions:</b></p> <ul style="list-style-type: none"> <li>- Conduct national wide sensitization campaigns with key decision makers</li> <li>- Public presentation (national level) in Lilongwe inviting the whole sector with the participation of high-level politics (cutting-cross areas) and technical representatives.</li> <li>- Considering the distance from North and South, other regional presentations could be carried out by the Tourism Department, replicating the content to spread the information as much as possible.</li> </ul>			
Stakeholders	<ul style="list-style-type: none"> <li>- Ministry of Tourism, Culture and Wildlife.</li> <li>- Eco-lodges and eco-friendly accommodations association/representatives</li> <li>- Community Based Tourism associations/ representatives</li> <li>- Department of National Parks and Wildlife</li> <li>- Department of Environmental Affairs</li> <li>- Department of Forestry</li> <li>- Department of Climate Change and Meteorological Services</li> <li>- Ministry of Youth and Sports</li> <li>- Local Communities representative</li> <li>- NGOs</li> <li>- Public-Private Partnership Commission</li> <li>- Department of Museums and Monuments</li> <li>- Department of Arts</li> <li>- Academia</li> </ul>		
Potential Leading for Implementation	Ministry of Tourism, Culture and Wildlife. Tourism Department		
Estimated Time Required	1-day presentation in each area, 3 weeks preparation and logistics		
Priority (scale 1-5)	Priority level: 1		
Estimated Final Budget	Total: USD 18,000		

Breakdown of the estimated final budget:

Item	Volume	unit price	Total (US\$)	Comment
National presentation event	1	10,500	10,500	1 large event in Lilongwe: rent facilities, make invitations and meals.
Regional presentation events	3	2,500	7,500	Three smaller regional events

Source of Funding	Malawi Tourism Ministry. PICTs Project.
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Key Performance Indicators	<ul style="list-style-type: none"> <li>- Number of attendees</li> <li>- Number of attendees representing the whole tourism value chain</li> </ul>
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PROJECT NAME	A.2. Creation of a national ecotourism cluster			
LINE OF ACTION	A. Articulation and cohesion of eco-tourism sector (public, private sector and local communities) through a common vision and shared objectives			
Summarised Project Description	Establish a framework of creating synergies among the various stakeholders forming the eco-tourism industry. This action is recommended to ensure the implementation of the Eco-tourism Strategy.			
Target	– All ecotourism stakeholders			
Investment Type	Hard		Soft	X

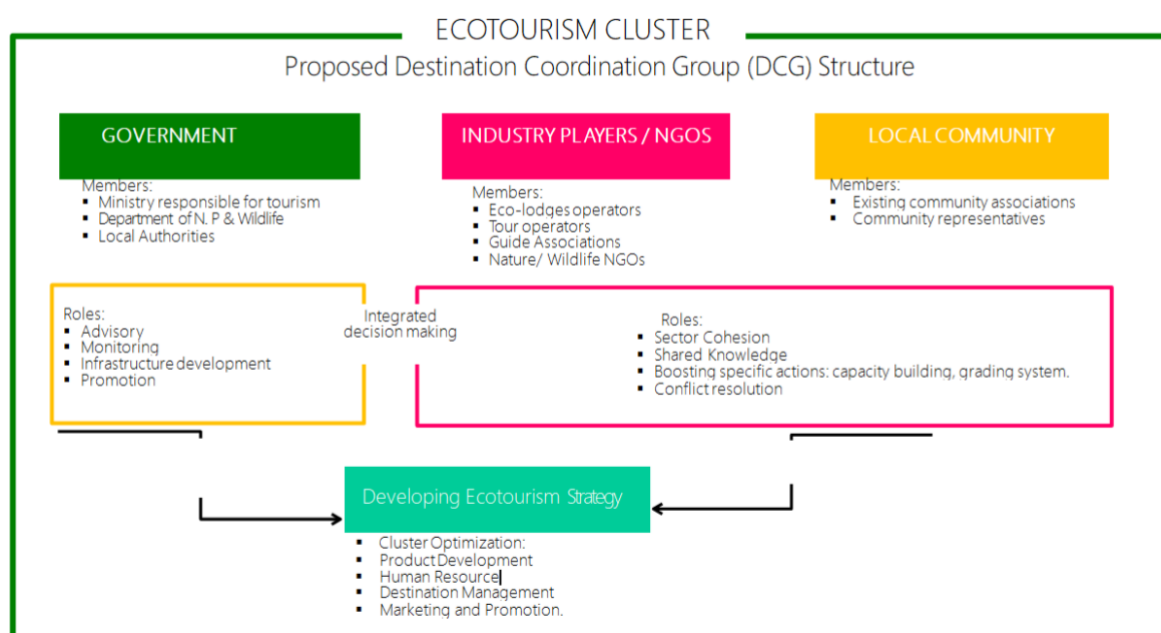
**Project Details**

**The main goals:** to foster a new cooperation culture among the multiple stakeholders and support the Eco-tourism strategy implementation.

The Cluster can adopt several forms depending on the level of commitment of the different stakeholders involved and the capacity of the public and private sector to lead the organization

**Specific actions**

- The various stakeholders should select the management model. The final composition and goals will depend on the final budget and actions approved.
- The Cluster should be a support for the Eco-tourism strategy implementation.
- The Cluster should approve its yearly action plan in the eco-tourism strategy framework.
- Create a management board.
- The government of Malawi will be in charge of leading the implementation in terms of strategy, promotion, infrastructures, and monitoring, and the private sector and local communities should be boosting shared knowledge, capacity building actions, and new tourist products and investments according to the approach of the eco-tourism strategy.



- The different sectors represented by the private side should elect their representatives or promote their own associations that will be forming part of the Cluster. The private sector involved in the Cluster should be committed to the principles of eco-tourism and the eco-tourism strategy for Malawi.

<ul style="list-style-type: none"> <li>- In the short-medium term, three regional clusters should also be created to facilitate geographical representation.</li> </ul>																					
Stakeholders	<ul style="list-style-type: none"> <li>- Ministry of Tourism, Culture and Wildlife. Tourism Department</li> <li>- Eco-lodges and eco-friendly accommodations association/representatives</li> <li>- Community Based Tourism associations/ representatives</li> <li>- Department of National Parks and Wildlife Reserves</li> <li>- Department of Museums and Monuments</li> <li>- Department of Arts</li> <li>- Academic</li> </ul>																				
Potential Leading for Implementation	Shared effort among Tourism Ministry, Private Sector and Local Communities																				
Estimated Time Required	7 years Permanent Body																				
Priority (scale 1-5)	Priority level: 1																				
Estimated Final Budget	Total: USD 370,000 Approx. depend on the type and number of members and the objectives																				
Breakdown of the estimated final budget:																					
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Hire a consultant to set up the Ecotourism cluster</td> <td>6</td> <td>1,500</td> <td>9,000</td> <td>Initial effort to set up the cluster management body</td> </tr> <tr> <td>Marketing campaign to launch the cluster</td> <td>1</td> <td>11,000</td> <td>11,000</td> <td>Initial marketing and communication campaign to support the creation of the cluster</td> </tr> <tr> <td>Annual budget to run the cluster management model</td> <td>7</td> <td>50,000</td> <td>350,000</td> <td>Budget should cover: personnel cost, facilities and expenses. Based on similar bodies</td> </tr> </tbody> </table>		Item	Volume	unit price	Total (US\$)	Comment	Hire a consultant to set up the Ecotourism cluster	6	1,500	9,000	Initial effort to set up the cluster management body	Marketing campaign to launch the cluster	1	11,000	11,000	Initial marketing and communication campaign to support the creation of the cluster	Annual budget to run the cluster management model	7	50,000	350,000	Budget should cover: personnel cost, facilities and expenses. Based on similar bodies
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Annual budget to run the cluster management model	7	50,000	350,000	Budget should cover: personnel cost, facilities and expenses. Based on similar bodies																	
Source of Funding	Malawi Tourism Ministry Private Sector NGOs funding linked to specific projects approved by the Cluster Multilateral Institutions ( World Bank/ African Development Bank)																				
Key Performance Indicators	<ul style="list-style-type: none"> <li>- Approval of operating statutes</li> <li>- Number of affiliated members</li> <li>- Number of tourist sectors represented</li> <li>- Number of yearly projects boosted and implemented</li> <li>- Allocated funding</li> </ul>																				

<b>PROJECT NAME</b>	<b>A.3. Annual Conference of Ecotourism sector</b>													
<b>LINE OF ACTION</b>	<b>A. Articulation and cohesion of eco-tourism sector (public, private sector and local communities) through a common vision and shared objectives</b>													
<b>Summarised Project Description</b>	Institutionalize an annual conference to set and analyze the situation of the eco-tourism sector.													
<b>Target</b>	Various stakeholders of tourism sector													
<b>Investment Type</b>			Soft	X										
<p><b>The goals</b> of the conference are:</p> <p>Monitoring eco-tourism strategy implementation situation, showcase keystone eco-tourism experiences as models of synergy between eco-tourism and conservation and recognition of innovative initiatives</p> <p>The Eco-Tourism Cluster must promote the meeting, and every year it must be held in different areas of the country.</p> <p><b>Specific actions</b></p> <p><b>The conference program will include, among others, the following topics:</b></p> <ul style="list-style-type: none"> <li>- General eco-tourism trends and Malawi's positioning in the regional and national context.</li> <li>- Review of the implementation of the eco-tourism strategy</li> <li>- Review of statistic and data related to tourists</li> <li>- Relevant experiences developed in the country (examples of good practices in terms of cooperation, preservation, and CBT)</li> <li>- Discussion of proposals for the future</li> <li>- National Award for the best eco-tourism experience or project</li> </ul>														
<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Eco-lodges and eco-friendly accommodations association/representatives Community Based Tourism associations/ representatives Department of National Parks and Wildlife Department of Forestry NGOs Private Sector PPP Commission Department of Museums and Monuments Department of Arts													
<b>Potential Leading for Implementation</b>	Eco-Tourism Cluster													
<b>Estimated Time Required</b>	1 day presentation, 4 months preparation and logistics. Yearly													
<b>Priority (scale 1-5)</b>	Priority level: 2													
<b>Estimated Final Budget</b>	Total USD 180,000													
Breakdown of the estimated final budget:														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Item</th> <th style="width: 10%;">Volume</th> <th style="width: 10%;">unit price</th> <th style="width: 10%;">Total (US\$)</th> <th style="width: 45%;">Comment</th> </tr> </thead> <tbody> <tr> <td>Rental of facilities for the annual meeting</td> <td style="text-align: center;">7</td> <td style="text-align: center;">4,000</td> <td style="text-align: center;">28,000</td> <td>Large conference room for up to 200 attendants, including some hotel rooms associated for key people</td> </tr> </tbody> </table>					Item	Volume	unit price	Total (US\$)	Comment	Rental of facilities for the annual meeting	7	4,000	28,000	Large conference room for up to 200 attendants, including some hotel rooms associated for key people
Item	Volume	unit price	Total (US\$)	Comment										
Rental of facilities for the annual meeting	7	4,000	28,000	Large conference room for up to 200 attendants, including some hotel rooms associated for key people										

Organization of the event	7	15,000	105,000	Event organization firm: annual tender to procure services
Meals and refreshments	1,400	20	28,000	Assuming 1 event per year, 7 years, 200 attendants per event and USD 20 per attendant
Miscellaneous expenses			19,000	
<b>Source of Funding</b>	Malawi Tourism Ministry			
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of participants</li> <li>- Representativeness of the different tourist sectors</li> <li>- Number and quality of local experiences presented</li> </ul>			

<b>PROJECT NAME</b>	<b>B1. Protected Areas: Consolidation of successful management and concession models</b>			
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>			
<b>Summarised Project Description</b>	To provide high quality and responsive visitor services compatible with conservation as Protected Areas, the concessions and management models successfully implemented in Malawi should be consolidated and replicated.			
<b>Target</b>	- Current and potential managers and investors in Protected Areas			
<b>Investment Type</b>	Hard		Soft	<b>X</b>
<b>Project Details</b>				
<b>Goals</b>				
<ul style="list-style-type: none"> <li>- The Department of National Parks and Wildlife and Tourism Department should follow up on the situation and evolution of these concessions in terms of eco-tourism experience.</li> <li>- In the same way, in terms of promotion and marketing, close cooperation with the concessions should be guaranteed</li> </ul>				
<b>Specific actions</b>				
<ul style="list-style-type: none"> <li>- <b>Consolidation:</b> The Department of Tourism and that of National Parks must carry out monitoring or follow-up that allows knowing the evolution of the tourist experiences and permanent improvement.</li> <li>- A presentation of best practices and expertise should be made through the Annual Eco-Tourism Conference.</li> <li>- Concessions managers must be integrated into the national eco-tourism strategy as spearheads of sustainable management and an example of a relationship with Local Communities, driving a more active and <b>visible role of these Communities.</b></li> <li>- <b>Replication:</b> The model must be progressively replicated in new protected areas under criteria of economic and environmental sustainability (emerging areas and hidden treasures spaces)</li> <li>- Specific models for emerging protected areas can be defined, considering the difficulties of attracting visitors. Essential services can be implemented in the first phase and progressively add new amenities and activities.</li> <li>- <b>National Parks and Protected areas should be involved in the philosophy and assets of the eco-tourism strategy.</b> A broader experience involving local communities and CBT should be included in the tourist experience in these areas.</li> </ul>				
<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Eco-lodges and eco-friendly accommodations association/representatives Department of Forestry Community Based Tourism associations/ representatives Department of National Parks and Wildlife Public Private Partnership Commission Department of Museums and monuments Department of Arts			
<b>Potential Leading for Implementation</b>	Tourism Department			
<b>Estimated Time Required</b>	2-7-year horizon			
<b>Priority (scale 1-5)</b>	Priority level: 2,			
<b>Estimated Final Budget</b>	<ul style="list-style-type: none"> <li>- Total USD 90,000</li> <li>- First year to select and define KPI and the sources of information, following years to update the information</li> <li>- Basic Monitoring system and indicators definition</li> </ul>			

	- Yearly report in cooperation with NDNP including figures and best practices regarding innovative tourism experience and CBT involvement.			
Breakdown of the estimated final budget:				
Item	Volume	unit price	Total (US\$)	Comment
Creation of a system of reporting on ecotourism concessions	1	18,000	18,000	Hire consultant to establish the system; based on similar references. 6-month consultancy in year 1
Annual report in cooperation with NDNP - consultant	6	12,000	72,000	For the following six years, 3-month consultancy to track the indicators
<b>Source of Funding</b>	Tourism Department Private sector			
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of visitors</li> <li>- Number of management bodies and concessions approved</li> <li>- Number of new activities promoted in the context of the eco-tourism strategy</li> </ul>			



<b>PROJECT NAME</b>	<b>B.2. Introduction of a Grading and Classification System for Ecotourism Accommodation and activities</b>			
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>			
<b>Summarised Project Description</b>	<p>Eco-lodges are a vital part of the eco-tourism offer in Malawi. One of the challenges of the project is to make visible the current offer under grading criteria that allows visitors to know the various existing eco-lodges and their degree of commitment to the environment.</p> <p>Malawi needs complementing the existing hotel star rating system with a separate category of eco-lodges; it will let tourists find different categories: from high end to budget eco-lodges, offering a better and broader offer.</p> <p>The grading system will also be a recognition to those current establishments committed to sustainability principles.</p> <p>A certification would set a competitive advantage, clearly distinguishing genuine local eco-tourism businesses from others that make empty claims. An Eco-tourism certification assures travellers that tourism products are backed by a strong, well-managed commitment to sustainable practices, providing high-quality nature-based tourism experiences.</p> <p>In addition to the accommodation, a different type of activities should be graded.</p>			
<b>Target</b>	Current and potential eco-friendly accommodations			
<b>Investment Type</b>	Hard		Soft	<b>X</b>
<b>Project Details</b>				
<p><b>Goals:</b></p> <ul style="list-style-type: none"> <li>- An Eco-tourism certification provides the government, tourism industry, and visitors with an assurance that a certified tourism product will give a quality nature-based experience backed by a commitment to sustainability.</li> </ul> <p><b>Specific actions</b></p> <p>The different stages for launching a certification process:</p> <ol style="list-style-type: none"> <li>1. Selection of Certification Model: In annex, it is included an analysis of best international practices in ecotourism certification in order to establish comparable benchmarks for potential ecotourism certification in Malawi</li> <li>2. The previous consensus with the tourism sector is recommended (Eco-tourism Cluster)</li> <li>3. Sub-categorization of the Ecotourism certification depending on the size of the business: <ul style="list-style-type: none"> <li>Small, medium, large/Bronze, silver, gold/Basic, intermediary, advance</li> </ul> </li> <li>4. Involving the certification of activities provided by tour-operators, CBT, and tourist guides.</li> <li>5. Contracting experts or companies for certification</li> </ol> <p>As an <b>example</b>, the GSTC (Global Sustainable Tourism Council) gives this list of measures to be implemented:</p> <ol style="list-style-type: none"> <li>a) Focus discussion group: Visit of the destination by the certification agency to make recommendations</li> <li>b) Webinars: To instruct leaders/managers on framework</li> <li>c) Leadership training: To inform stakeholders what is needed to become certified</li> <li>d) Signing Ceremony: Official agreement to fulfil the criteria</li> <li>e) Sustainable tourism training program: for all type of stakeholders</li> <li>f) Destination planning for sustainability: Report to be done to organize the action plan</li> <li>g) Formation of Sustainability Management Committee/Council: Official meeting of the designated managers</li> </ol>				

Criteria for ecolodge star rating should embrace sustainability principles, use of green technology and best practice

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Among criteria that need to be included in the criteria

	<p><b>BUILDING PREMISES</b></p> <ul style="list-style-type: none"> <li>▪ Construction of premises result in minimal impact to the environment</li> <li>▪ Align building orientation to maximise air ventilation &amp; natural lighting</li> <li>▪ Use local and recycled materials for building premises</li> </ul>
	<p><b>GREEN TECHNOLOGY</b></p> <ul style="list-style-type: none"> <li>▪ Use electricity and water saving equipment</li> <li>▪ Utilise sustainable technology for water &amp; electricity</li> <li>▪ Use environmentally-friendly sewage &amp; solid waste system</li> </ul>
	<p><b>HUMAN RESOURCE</b></p> <ul style="list-style-type: none"> <li>▪ Majority of staff/workers are hired from the local community</li> <li>▪ Conduct frequent training courses to local staff</li> </ul>

h) Encourage and promote certification



<b>Stakeholders</b>	Tourism Ministry Eco-lodges and eco-friendly accommodations association/representatives Community Based Tourism associations/ representatives Tour guides associations Tour operators																				
<b>Potential Leading for Implementation</b>	Tourism Department Eco-tourism Cluster																				
<b>Estimated Time Required</b>	<ul style="list-style-type: none"> <li>- 1-year selection and definition of certification model</li> <li>- 6 months launching</li> <li>- 1 year first certifications</li> </ul>																				
<b>Priority (scale 1-5)</b>	Priority level: 1																				
<b>Estimated Final Budget</b>	Total: USD 160,000																				
Breakdown of the estimated final budget:																					
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Initial consultancy to select and define the certification model</td> <td>1</td> <td>140,000</td> <td>140,000</td> <td>Year 1: define the model through an international firm or specialized organization</td> </tr> <tr> <td>Launching communication campaign</td> <td>6</td> <td>2,000</td> <td>12,000</td> <td>6 months advertising campaign</td> </tr> <tr> <td>Support for 1st year certification</td> <td>1</td> <td>8,000</td> <td>8,000</td> <td>Year 2. From year 3 on the Tourism Ministry will manage the process</td> </tr> </tbody> </table>		Item	Volume	unit price	Total (US\$)	Comment	Initial consultancy to select and define the certification model	1	140,000	140,000	Year 1: define the model through an international firm or specialized organization	Launching communication campaign	6	2,000	12,000	6 months advertising campaign	Support for 1st year certification	1	8,000	8,000	Year 2. From year 3 on the Tourism Ministry will manage the process
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<b>Source of Funding</b>	Malawi Tourism Department Private sector																				
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of Certificates Offered</li> <li>- Number of New Investors in Eco-Lodges</li> <li>- Levels of Eco-Lodges Graded</li> <li>- Number of activities offered at an Eco-Lodge</li> <li>- Number eco-lodges graded</li> </ul>																				

<b>PROJECT NAME</b>	<b>B.3 Enhancement of World Heritage resources as key part of the ecotourism offer</b>			
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>			
<b>Summarised Project Description</b>	Malawi should take advantage of UNESCO recognition as a badge of worldwide importance.			
<b>Target</b>	All eco-tourist profiles			
<b>Investment Type</b>	Hard	x	Soft	<b>X</b>
<b>Project Details</b>				
<p><b>Goals:</b>  The resources that are recognized by UNESCO deserve special attention to be enhanced in their forms of presentation to tourists. Due to their specific features, they should be integrated as a relevant part of the eco-tourism experience.  In coherence with the vision and interpretation assets, the enhancement and putting value of these products should integrate:</p> <ul style="list-style-type: none"> <li>- A positioning based on the country as an entire eco-tourism destination that allows a new relationship with nature</li> <li>- Differentiation based on the peculiar identity represented by the link between nature and human being along with the history</li> <li>- A wild and at the same time humanized nature far from mass tourism</li> <li>- Products focused on the value of the mix of nature and human beings besides the importance of “the small” and the feeling of the authentic Africa. All of this, always looking at the future</li> <li>- Values of discovery, adventure, comfort, safety and entire immersion in local life</li> </ul> <p><b>Specific actions:</b></p> <ul style="list-style-type: none"> <li>• <b>Lake Malawi</b> <ul style="list-style-type: none"> <li>- Lake Malawi needs to be presented not only as a leisure and relax area but also as a National Park and a World Heritage Site. It is necessary to highlight the uniqueness of the Lake through various actions, emphasising the importance of conservation values and the fight against climate change.</li> <li>- As a principal tourism hotspot, the area must have a Tourism Information Point (physical or virtual) that acts as an information node on the various activities to be carried out in the National Park area.</li> <li>- Reinforce the protection and conservation of the N.P as a cooperation exercise of the Tourism Ministry, the National Parks Department, and the Private Sector.</li> <li>- Signalling informing the visitor that they are in a National Park, interpretive and informative panels including maps that help identify the area and understand its importance and the need of respect for nature</li> <li>- CBT initiatives linked to the Lake ecosystem should be promoted and included in the set of tourism activities of the Lake</li> </ul> </li> <li>• <b>Chongoni Rock Art</b> <ul style="list-style-type: none"> <li>- In addition to the various actions that are taking place to improve this site as a tourist product (visitors’ reception, entrance, and promotional materials), a more attractive and comprehensive visit to the paintings should be carried out. This visit should include a holistic vision around nature and human beings.</li> <li>- To do that, interpretation and storytelling techniques should be applied. In parallel, to promote a most vibrant and entire experience, an eco-tourist pack should be created involving: the visit to the paintings, landscape enjoyment, visit the close village, and Dedza pottery. This proposal should be ready for FIT and also packed in cooperation with tour operators.</li> <li>- Increase participation of descendant communities who maintain the tradition that inspired the art is a must <ul style="list-style-type: none"> <li>• <b>Traditional Dances: Vimbuza, Tchopa, and Gule Wamkulu.</b></li> </ul> </li> </ul> </li> </ul> <p>As an intangible cultural heritage, these dances should be appropriately presented and marketed and included as a part of the Eco-tourism experience. The offer should be based on close cooperation between the private sector and local communities.  It is necessary to position traditional dances as unique experiences that couldn’t be found anywhere else, and that an “average” tourism experience wouldn’t provide.</p>				

<p>Dances in villages should be interaction-focused, offering the opportunity for genuine connections with people and with nature, promoting perceptions of authenticity that tourists are looking for</p> <p>Positioning this immaterial world heritage as a “must-do” experience in Malawi that will offer the traveller a different perspective on a destination that they wouldn’t see otherwise</p> <p>To shape the idea, we must refer to the CBT support actions included in B.5 and C.2 activities, but the following steps are also suggested:</p> <ul style="list-style-type: none"> <li>- <b>Selection</b> of a representation of villages in tourist influence areas with previous experience performing these dances. These villages will be pilot projects to put in practice innovative ideas.</li> <li>- <b>Plan</b> for the enhancement of the forms of presentation of dances to tourists and to integrate dances in a more comprehensive eco-tourist experience.</li> <li>- <b>Implementation</b> of Pilot projects to put in practice this new experience</li> </ul>	
<b>Stakeholders</b>	<p>Ministry of Tourism, Culture and Wildlife. Tourism Department</p> <p>Eco-lodges and eco-friendly accommodations association/representatives</p> <p>Community Based Tourism associations/ representatives</p> <p>National Department of National Parks and Wildlife</p> <p>Tour operator</p> <p>Travel Agencies</p>
<b>Potential Leading for Implementation</b>	Tourism Department and Eco-tourism Cluster
<b>Estimated Time Required</b>	
<b>Priority (scale 1-5)</b>	Priority level: 1-2
<b>Estimated Final Budget</b>	<p><b>Enhancement of Lake Malawi as Eco-tourism product</b></p> <ul style="list-style-type: none"> <li>▪ Project for enhancement of Lake Malawi as World Heritage Site and National Park.</li> <li>▪ Investment Plan including: <ul style="list-style-type: none"> <li>- Online Visitors Centre</li> <li>- Physical Visitors Centre</li> <li>- Signposting Plan (including directional, informative and interpretative signposting).</li> <li>- Lake Malawi CBT initiatives map and support (see B.5 Initiative)</li> </ul> </li> </ul> <p><b>Chongoni Rock Art Eco-tourist pack</b></p> <ul style="list-style-type: none"> <li>▪ Interpretation Plan focused on the creation of a whole eco-tourist product.</li> </ul> <p>Implementation including improvement of guided visits, and CBT experiences</p> <p><b>Traditional Dances</b></p> <ul style="list-style-type: none"> <li>▪ Project for the enhancement of the forms of presentation to tourist and to integrate dances in a wider eco-tourist experience.</li> <li>▪ Implementation</li> </ul> <p style="text-align: right;">Total USD 244,000</p>

Breakdown of the estimated final budget:

Item	Volume	unit price	Total (US\$)	Comment
Technical studies for the enhancement of Lake Malawi	1	60,000	60,000	International consulting work (based on similar references)
Annual investment plan for Lake Malawi covering online and physical visitors centres, signposting and maps	4	15,000	60,000	The previous project will define a detailed investment plan that will be executed through 4 years
Interpretation plan for Rock Art ecotourism product	1	20,000	20,000	Consulting project
Annual investment plan in the site	4	12,000	48,000	The previous project will define a detailed investment plan that will be executed through 4 years
Technical studies to define the traditional dances tourism product	1	16,000	16,000	Consulting project
Annual investment and maintenance costs for the traditional dances tourism product	4	10,000	40,000	The previous project will define a detailed investment plan that will be executed through 4 years

<b>Source of Funding</b>	Malawi Tourism Department Private sector
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Increased number of tourists</li> <li>- Number of travel agencies and tour-operators involved</li> <li>- Integration of traditional dances into tourism activities</li> </ul>

<b>PROJECT NAME</b>	<b>B.4. ECO-TOURISM ROUTES</b>												
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>												
<b>Summarised Project Description</b>	<p>The rich and extensive offer of eco-tourism in Malawi must be geographically articulated to make it visible and more accessible to travellers.</p> <p>The Routes based on geographical criteria are a simple formula that helps to identify the existing offer and also strengthens relationships between the stakeholders that are part of each route involved.</p>												
<b>Target</b>	- All tourists												
<b>Investment Type</b>	Hard		Soft	X									
<b>Project Details</b>													
<b>Goals</b>													
<p>Structuring eco-tourism offer from a geographical point of view through three Key Routes. The routes should not be understood as closed itineraries, but as territories where usually some flagships act as attractors and anchors for distribution to the rest of attractions through micro-routes.</p> <ul style="list-style-type: none"> <li>- As the eco-tourism project grows stronger, new products, accommodations, and activities will be incorporated.</li> <li>- The three routes will serve free travellers to organize their trips and will be useful for the private sector to shape eco-packs</li> <li>- The routes must show specific products, as well as the associated accommodations and activities. The involvement of the private sector is essential.</li> <li>- The differentiation of each Route should be an asset to enjoy the different areas; it should be based not just on the existing resources but also on the motivations and needs of the eco-tourists.</li> <li>- The routes will be visible through the eco-tourism section of the <a href="http://www.visitmalawi.mw">www.visitmalawi.mw</a> website and the different sites where the private sector offers its products and services.</li> </ul>													
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<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Local tour operators/ Travel agencies International tour-operators Eco-lodges and eco-friendly accommodations association/representatives Community Based Tourism associations/ representatives National Department of National Parks and Wildlife Malawi Travel Marketing Consortium												
<b>Potential Leading for Implementation</b>	National Eco-tourism Cluster												

<b>Estimated Time Required</b>	3-4 years			
<b>Priority (scale 1-5)</b>	Priority level: 2-3			
<b>Estimated Final Budget</b>	Total: USD620,000			
Breakdown of the estimated final budget:				
Item	Volume	unit price	Total (US\$)	Comment
Technical studies for the definition of the open routes and the micro –routes within each area.	1	60,000	60,000	National consulting for technical and design work - 9 months (based on similar projects)
Implementation according the project, including: Signposting, viewpoints, interpretative panels, small infrastructures, bicycle's routes etc.	16	35,000	560.000	35000 USD per km as per other projects
<b>Source of Funding</b>	Malawi Tourism Department Private sector			
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of conditioned kms per year</li> <li>- Number of tourists</li> <li>- Number of new initiatives created around the different Paths.</li> </ul>			

<b>PROJECT NAME</b>	<b>B.5 Community based tourism development</b>			
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>			
<b>Summarised Project Description</b>	<p>Local communities, villages, dances, traditional meals, livelihood, and their relationship with nature, are keys for developing genuine and unique eco-tourism products.</p> <p>Malawi needs that Local Communities have a more active role in tourism and can obtain direct/indirect, induced economic benefits.</p> <p>This line of action is directly related to C.2 initiative</p>			
<b>Target</b>	<ul style="list-style-type: none"> <li>- Local Communities</li> <li>- All tourist segments</li> </ul>			
<b>Investment Type</b>	Hard		Soft	<b>X</b>
<b>Project Details</b>				
<p><b>Goals:</b></p> <ul style="list-style-type: none"> <li>- This line is intended to support the CBT initiatives that best fit with the Eco-tourism Strategy. This activity must be understood linked to <b>the initiative (C.2)</b> that will provide the financial support of the projects selected in this line of action.</li> <li>- In the context of the Eco-tourism strategy, CBT initiatives should be promoted, following the inspiring criteria of this type of tourism.</li> </ul> <p><b>Specific activities:</b></p> <ul style="list-style-type: none"> <li>- <b>Assessment of current situation:</b> Malawi has different experiences in this field (see diagnosis). Before launching the CBT products development initiative, a previous assessment of the existing experiences is necessary. Collecting the best practices in terms of tourist experience and local benefits and profits will allow not to start from scratch.</li> <li>- <b>An official call will be made</b> to select the pilot projects that best represent the eco-tourist approach Some criteria for selection and consideration of CBT initiatives <ul style="list-style-type: none"> <li>- Project responds to tourists needs</li> <li>- Project was initiated by the local community</li> <li>- Project is operated and maintained by locals</li> <li>- Money goes back to the community</li> <li>- Cultural and traditional preservation</li> <li>- Health and safety practices</li> <li>- Partnerships with relevant stakeholders</li> <li>- <u>Includes traditional</u> experiences linked, for instance, to foodie experience, traditional dances, fishing, <u>but also innovative experiences</u> promoting feedback with tourists from a more contemporary approach.</li> <li>- Initiatives encouraged by women and youth will be preferred</li> </ul> </li> <li>- <b>Pilot projects:</b> Through the call, a set of existing or emerging CBT experiences will be selected to represent the main assets of the new Eco-tourism strategy.</li> <li>- Considering the existing expertise, a managing plan should be prepared with technical support and additional capacity building.</li> <li>- The plan should include both a technical and economical approach, detailing the activities in the context of the interpretation and procedure of the National Eco-tourism Strategy</li> <li>- The methodology to assess the economic impact of tourism could be created in cooperation with Mzuzu University.</li> <li>- <b>The recommended pilot projects</b> will be selected in the context of the Eco-tourism Strategy prioritizing: <ul style="list-style-type: none"> <li>- Lake Malawi National Park area</li> <li>- Chongoni Rock Art area</li> <li>- Flagship Protected Areas</li> </ul> </li> </ul> <p>The selected projects will receive financial support from the line of action C.2: Financial support for CBT and small entrepreneurs</p>				



<p>- <b>CBT National network for promotion</b> and the sharing of experiences and best practice in community-based eco-tourism should be created in the medium term.</p>				
<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Community Based Tourism associations/ representatives Department of National Parks and Wildlife			
<b>Potential Leading for Implementation</b>	Tourism Department & Eco-Tourism Cluster			
<b>Estimated Time Required</b>	Launching 1 year Implementation from 1 to 7 years			
<b>Priority (scale 1-5)</b>	Priority level: 1			
<b>Estimated Final Budget</b>	Total: USD315,000 Technical assistance to develop feasibility studies			
Breakdown of the estimated final budget:				
Item	Volume	unit price	Total (US\$)	Comment
Hiring a consultant to asses previous experience, define methodology and manage the project - 7 years, monthly fee	84	1,500	126,000	Dedicated resource to define and run the program.
Campaign for the Call for Proposals	5	1,000	5,000	Campaign to promote the Call and attract projects. Digital and visiting Communities.
Capacity building activities: 1 annual program	7	19,000	133,000	Training program, 1 week, for selected participants
Economic impact	1	1	15.000	Study of University to assess the economic impact of CBT
Marketing plan	5	4,000	20,000	Promotion of CBT for travel agencies , FITs and locals
CBT organization	1	16,000	16,000	Support to the CBT National Network
<b>Source of Funding</b>	Malawi Tourism Department Private sector			
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of projects presented to the call</li> <li>- Number of new or renewed CBT initiatives</li> <li>- Number of tourists visiting</li> <li>- Number of agreements with Eco-lodges and Tour operators</li> <li>- Economic impact (direct, indirect or induced).</li> </ul>			

<b>PROJECT NAME</b>	<b>B.6.Eco-tourist packages involving the whole eco-tourism experience and linking the protected areas: Eco-tourism card</b>									
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>									
<b>Summarised Project Description</b>	Malawi must be able to offer products that meet the characteristics that define the country and make it unique. It is also important to connect different parts of the country that help travellers have a more complete and extensive experience. The involvement of the private sector is vital to achieving this goal.									
<b>Target</b>	<ul style="list-style-type: none"> <li>- Free Independent travellers</li> <li>- Domestic tourists</li> <li>- Breaks, weekends and MICE tourists</li> </ul>									
<b>Investment Type</b>	Hard		Soft	X						
<b>Project Details</b>										
<b>Goals</b>										
The private sector should be aligned with the Eco-tourism national strategy through its own offers and proposal for different market segments.										
In collaboration with the private sector, various eco-tourist packs must be offered in each area of the country										
<b>This action should pay special attention to promote nature sites as Coffee Plantations, Tea Estates or hidden gems, as an alternative eco-tourist experience.</b>										
<b>Specific actions</b>										
Local operators require cooperation agreements with international operators to provide these packs and itineraries as innovative and improved experiences for international holidaymakers.										
It is suggested the creation of an eco-tourist card that allows the travellers to obtain advantages in their trips and also makes them participate in a cause in favour of sustainability (e.g: tree planting, support to local communities)										
It is also necessary to design one- and two-days eco-tourism experiences for travellers who visit Malawi for business from the three main cities: Lilongwe, Blantyre, and Mzuzu.										
From Blantyre, the nature sites of Mulanje, the Tea Estates and Zomba Plateau should be specially launched as an alternative to Liwonde N.P and Majete.										
The local tourist must also find their eco-tourist travel model according to their characteristics and possibilities.										
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<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Local tour operators/ Travel agencies International tour-operators Eco-lodges and eco-friendly accommodations association/representatives Community Based Tourism associations/ representatives Department of National Parks and Wildlife Hotels in Lilongwe, Blantyre and Mzuzu									
<b>Potential Leading for Implementation</b>	National Eco-tourism Cluster									
<b>Estimated Time Required</b>	Implementation from 2 to 7 years									
<b>Priority (scale 1-5)</b>	Priority level: 1- 2									

<b>Estimated Final Budget</b>	Total USD 70,000 Launching for public-private cooperation (encouragement of private sector) Eco-tourist card definition and implementation			
Breakdown of the estimated final budget:				
Item	Volume	unit price	Total (US\$)	Comment
Tourism Marketing consultant to define the program: 1 initial 4-months consultancy	4	2,000	8,000	Initial effort to define the program with an external collaborator. Defining the Green Card initiative and how to involve the needed stakeholders
Green packs and green card campaign among various stakeholders	6	1,000	6,000	Encourage joint work between travel agencies, hotels and CBT to offer the benefits of the Green Card
Contributions to the implementation of the program	7	8,000	56,000	Provide support to benefit the green card users: such as discounts to visit National Parks or the enjoyment of activities promoted by Community Based tourism.
<b>Source of Funding</b>	Malawi Tourism Department Private sector			
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of companies involved</li> <li>- Number of packs created</li> <li>- Number of tourists interested</li> <li>- Number of tourists participating</li> </ul>			

<b>PROJECT NAME</b>	<b>B.7 Capacity building Programme for scaling up ecotourism through world-class guiding and interpretation</b>			
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>			
<b>Summarised Project Description</b>	<p>There are opportunities to improve and extend tourist product offerings, presenting Malawi from a new approach based on interpretation assets creating meaningful connections for visitors.</p> <p>An essential part of the development of the tourist experience in Malawi is the tours and visits that rely on nature or culture guides. It is vital a training program that strengthens the local guide skills with a new approach that, in addition to historical or scientific knowledge, brings innovation and originality to their work. The guided tours will thus acquire the category of world-class tourism products.</p>			
<b>Target</b>	- Tour guides			
<b>Investment Type</b>	Hard		Soft	<b>X</b>
<b>Project Details</b>				
<p><b>Goals:</b></p> <ul style="list-style-type: none"> <li>- To support the continuous development of local nature guides to provide high-quality guiding and interpretation in the context of Malawi as a unique and entire eco-tourism destination.</li> <li>- Fostering a culture of quality eco-tourism interpretation and storytelling to enhance operator capabilities for the benefit of their business and product delivery.</li> <li>- Creating a sponsorship program for certified local nature/cultural guides to attend specialized training.</li> </ul> <p><b>Specific activities:</b></p> <p>Based on the interpretation approach, a type of training that helps guides to immerse visitors in an unforgettable experience should be designed.</p> <p>The course will include some <b>general concepts</b> and other more specifics</p> <ul style="list-style-type: none"> <li>- Cultural, historical, and nature issues related to the whole country.</li> <li>- Specific Knowledge about the relationship between human being and nature</li> <li>- Storytelling technique applied to guided visit.</li> <li>- Specific Knowledge about the richness of the different natural areas delving into the features of the various species (bird, plants, and animals)</li> </ul> <p><b>Example of course modules of Special Interest Training:</b></p> <ul style="list-style-type: none"> <li>- Ecosystems and Biodiversity: botany, birdwatching, wildlife linked to trails and hiking guided visits</li> <li>- Lake's Fishes Species. Wildlife &amp; inhabitants' ecosystem in Lake linked to trails, boating, diving...</li> <li>- Local Tribes Culture &amp; World Heritage Dances</li> <li>- History about nature and human being from Chongoni to day life in Villages</li> </ul> <p>The organization will provide easy access for everybody (physically or online). The sponsorship program should consider the needs of the attendees in terms of transport or internet access Women will have specific support to attend these courses</p> <p>Eco-lodges can be training spaces with in-person classes or by streaming. Especially supporting youth women to form part of these groups of guides is a must.</p>				
<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Community Based Tourism associations/ representatives National Department of National Parks and Wildlife Eco-lodges			
<b>Potential Leading for Implementation</b>	National Eco-tourism Cluster			
<b>Estimated Time Required</b>	Capacity building Plan 6 months Yearly implementation of 4 training modules			
<b>Priority (scale 1-5)</b>	Priority level: 1-2-			

<b>Estimated Final Budget</b>	Total USD 230,000			
Breakdown of the estimated final budget:				
Item	Volume	unit price	Total (US\$)	Comment
Definition of a new specialized training program on high-quality guiding and interpretation: 6 months consultancy	1	29,800	29,800	Consulting fees based on similar projects
Scholarships to increase education of guides	35	2,000	70,000	Financial support to attend
Costs of running the program: instructors	140	500	70,000	Daily fee of instructor including creation of materials
Costs of running the program: facilities	140	150	21,000	5 days per module, 4 modules per year, 7 years. Daily cost of renting facilities
Costs of running the program: meals and refreshments	1,960	20	39,200	10 students per module
<b>Source of Funding</b>	Eco-tourism Cluster			
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of modules designed</li> <li>- Number of courses yearly implemented</li> <li>- Number of attendees</li> <li>- New of itineraries and tourist products improved as a result of the training.</li> </ul>			

<b>PROJECT NAME</b>	<b>B.8 Climate change and preservation awareness</b>			
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>			
<b>Summarised Project Description</b>	Tourism is closely connected to the environment and climate. Tourism operations, like transport and accommodation, contribute to climate change. Tourism must be the spearhead raising awareness about the impact of climate change with two objectives: sensitization and resilience. Eco-tourism project cannot be understood without the premise of the commitment to conservation			
<b>Target</b>	- All the tourism value chain stakeholders			
<b>Investment Type</b>	Hard		Soft	<b>X</b>
<b>Project Details</b>				
<b>Goals</b> <ul style="list-style-type: none"> <li>• Research about impact of climate change on tourism</li> <li>• Protect eco-tourism products and tourists to the impacts of climate change</li> <li>• Reduce the contribution of tourism on climate change</li> <li>• Promote tourism business resilience and adaptation to climate change</li> </ul> <b>Specific Activities:</b> <ul style="list-style-type: none"> <li>- Understanding vulnerability and adaptive building capacity: Conduct a baseline physical impact assessment for major tourist attraction sites like Majete, Liwonde, and Lake Malawi.</li> <li>- Reducing Greenhouse gases from tourism activities through resource efficiency awareness in key tourist sites and sensitize on the recycling of wastes, use of solar energy, and use of filtered water.</li> <li>- Communication and industry outreach through capacity building to crucial stakeholders since most of the key players seem not to know specific impacts of climate change on their business develop and distribute a Tourism and Climate Change Brochure for the industry to critical players for a smooth spread of message to tourists and the surrounding communities.</li> </ul>				
<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Eco-lodges and eco-friendly accommodations association/representatives Community Based Tourism associations/ representatives Department of National Parks and Wildlife NGOs Department of Environmental Affairs Department of Climate Change and Meteorological Services Ministry of Youth, sports and Culture Private Sector and PPPS			
<b>Potential Leading for Implementation</b>	National Eco-tourism Cluster in cooperation with Climate Change Centre			
<b>Estimated Time Required</b>	Implementation from 1 to 7 years			
<b>Priority (scale 1-5)</b>	Priority level: 1			
<b>Estimated Final Budget</b>	Total USD 140,000 Research about Climate change impact in tourism and proposals for mitigation and resilience Capacity building actions			

Breakdown of the estimated final budget:

Item	Volume	unit price	Total (US\$)	Comment
Research project with a local institution on climate change impact	1	29,000	29,000	Hire a local research institution - 6 months research project (fees based on similar experiences)
Baseline physical impact assessments in main tourism sites: 3 pilots	3	15,000	45,000	Majete, Liwonde and Lake Malawi. Extensions of the research project
Communication activities in the three sites	21	2,000	42,000	Annually 1 activity in each site
Selection of best sustainable tourism-business practices at national level	6	4,000	24,000	Award to recognize the best practices in sustainability (tourism value chain)

<b>Source of Funding</b>	Malawi Tourism Ministry/ Multilateral Institution
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Presence of vulnerability results of Majete, Liwonde and Lake Malawi National Parks to climate change</li> <li>- Number of trainings on climate change topics</li> <li>- Use of Solar Energy and Filtered water in Eco-lodges</li> <li>- Establishment of Recycle centre on major tourist sites</li> </ul>

<b>PROJECT NAME</b>	<b>B.9Introduction of CULINARY TOURISM: The organic and traditional cuisine experience</b>			
<b>LINE OF ACTION</b>	<b>B.Eco-Tourism products development</b>			
<b>Summarised Project Description</b>	<p>The quality of life with a focus upon nutrition and healthy food is more and more directly related to eco-tourism experiences.</p> <p>The goal of health-safe food places organic food at the forefront, improving the contemporary hospitality with organic /products on their offer, whether in the form of a bio-corner or a menu.</p> <p>This fact involves attractive opportunities for Malawi around some issues such as organic food, permaculture, proximity products, or traditional cuisine.</p> <p>Some existing experiences should be improved and extended as a part of the eco-tourism offer, attending to sustainability and organic criteria</p>			
<b>Target</b>	- All tourist segments			
<b>Investment Type</b>	Hard		Soft	<b>X</b>
<b>Project Details</b>				
<p><b>Goals:</b></p> <ul style="list-style-type: none"> <li>- To incorporate the Malawian cuisine as a vital part of the eco-tourist experiences</li> <li>- Promote gastronomy tourism as a tool to progress sustainability</li> <li>- Promote the concept of gastro-diplomacy to further intercultural understanding and enhance cultural sharing through gastronomy</li> <li>- To claim traditional gastronomy as a part of the Malawian heritage</li> </ul> <p><b>Specific activities:</b></p> <ul style="list-style-type: none"> <li>- <b>The gastronomy club, a club formed by</b> Eco-lodges, Community Based Tourism initiatives, and local restaurants, <b>focused on promoting traditional menus</b>, including some of the following features:</li> </ul> <p>Inclusion of local products and traditional dishes.</p> <ul style="list-style-type: none"> <li>- Inclusion of proximity products</li> <li>- Inclusion of permaculture products</li> <li>- Traditional dishes and culinary techniques</li> </ul> <ul style="list-style-type: none"> <li>- <b>The club will promotes capacity building for members</b></li> </ul>				
<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Community Based Tourism associations/ representatives			
<b>Potential Leading for Implementation</b>	Tourism Department & Eco-Tourism Cluster			
<b>Estimated Time Required</b>	Launching 1 year Implementation from 1 to 7 years			



<b>Priority (scale 1-5)</b>	Priority level: 1																				
<b>Estimated Final Budget</b>	Total: USD 121,800																				
<b>Breakdown of the estimated final budget:</b>																					
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Definition of a new specialized training program on high-quality traditional cuisine</td> <td>1</td> <td>29,800</td> <td>29,800</td> <td>Consulting fees based on similar projects</td> </tr> <tr> <td>Capacity building activities: 1 annual program from year 2 to year 5</td> <td>3</td> <td>19,000</td> <td>57,000</td> <td>Training program, 1 week, for selected participants focused on creating traditional menus</td> </tr> <tr> <td>Yearly award for best traditional menu and for most innovative culinary experience</td> <td>14</td> <td>2.500</td> <td>35,000</td> <td>National recognition awards in different categories: traditional cuisine and innovative cuisine based on traditional food</td> </tr> </tbody> </table>		Item	Volume	unit price	Total (US\$)	Comment	Definition of a new specialized training program on high-quality traditional cuisine	1	29,800	29,800	Consulting fees based on similar projects	Capacity building activities: 1 annual program from year 2 to year 5	3	19,000	57,000	Training program, 1 week, for selected participants focused on creating traditional menus	Yearly award for best traditional menu and for most innovative culinary experience	14	2.500	35,000	National recognition awards in different categories: traditional cuisine and innovative cuisine based on traditional food
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Yearly award for best traditional menu and for most innovative culinary experience	14	2.500	35,000	National recognition awards in different categories: traditional cuisine and innovative cuisine based on traditional food																	
<b>Source of Funding</b>	Malawi Tourism Department Private sector																				
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of club members</li> <li>- Number of new menus provided</li> <li>- Number of tourists enjoying culinary experience</li> <li>- Tourism Agencies and Tour operators involved</li> </ul>																				

<b>PROJECT NAME</b>	<b>C.1. Attracting ecotourism investors</b>																												
<b>LINE OF ACTION</b>	Investments																												
<b>Summarised Project Description</b>	Attracting ecotourism investors by promoting and emphasising the uniqueness, strengths and development opportunities of Malawi in the context of Eco-tourism Strategy																												
<b>Target</b>	- International and national potential investors																												
<b>Investment Type</b>	Hard		Soft	<b>X</b>																									
<b>Project Details</b>																													
<p>This line of action should be applied, considering the findings and recommendations of the National Tourism Investment Master Plan. In all likelihood, the Plan will include different tools for promoting investments in the field of tourism.</p> <p>The eco-tourism investments should have their own profile according to the Eco-tourism strategy and the principles which inspire this type of tourism that have been mentioned throughout this document.</p> <p>1. Organizing and participating in eco-tourism investment tradeshows and events to showcase eco-tourism investment opportunities to local and foreign investors:</p> <ul style="list-style-type: none"> <li>- Public- partnership initiatives and concessions in Protected Areas</li> <li>- Eco-lodges</li> <li>- Innovative tours through the eco-tourist packs and experiences based on the World Heritage recognition</li> <li>- Rental car, boats and other types of transport</li> </ul> <p>2. Information about incentives to investment (general and specifically for eco-tourism projects)</p> <p>3. Dissemination of a promotional document of the eco-tourism strategy</p>																													
<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department I Department of National Parks and Wildlife Private Sector and Public Private Partnership Commission Tour operators Travel Agencies Transport providers																												
<b>Potential Leading for Implementation</b>	Tourism Ministry																												
<b>Estimated Time Required</b>	Annual campaigns																												
<b>Priority (scale 1-5)</b>	Priority level: 1																												
<b>Estimated Final Budget</b>	Total USD 210,000																												
Breakdown of the estimated final budget:																													
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Item	Volume	unit price	Total (US\$)	Comment																									
Marketing material design and distribution			9,000	Physical/ digital materials																									
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Legal and Technical advice.	6	7,000	42,000	To provide all necessary legal and technical information to national and international investors																									
<b>Source of Funding</b>	Malawi Tourism Ministry																												
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of tradeshows celebrated</li> <li>- Number of interested investors</li> <li>- Number of new investments</li> </ul>																												

<b>PROJECT NAME</b>	<b>C.2 Financial support for CBT and small entrepreneurs</b>			
<b>LINE OF ACTION</b>	Investments			
<b>Summarised Project Description</b>	<p>The main objective is to strengthen community involvement to ensure pro-poor and sustainable growth in the sector.</p> <p>Selected CBT initiatives (B.5) and other eco-tourism initiatives promoted by small entrepreneurs. This line provides with support in technical and economic terms.</p>			
<b>Target</b>	<ul style="list-style-type: none"> <li>- Local Communities interested in implementing CBT</li> <li>- Curious vendors</li> <li>- Handicrafts</li> <li>- Tour-guides</li> <li>- Other activities such as small catering, agribusiness, entertainment or transport</li> </ul>			
<b>Investment Type</b>	Hard		Soft	<b>X</b>
<b>Project Details</b>				
<p><b>Goals</b></p> <p>This community involvement entails the creation of new employment opportunities in tourism businesses, the supply of goods and services to tourism enterprises and direct sales, and establishment of community-based businesses in the area, including craft and souvenir retail outlets, guide services, entertainment, transport, catering, and lodging.</p> <p>The Project aims to provide support to communities through (i) Raising awareness as to how communities could better participate in industry activities and improve tourism's economic impact; (ii) Training and skills enhancement in areas that could help to increase their participation as employees, suppliers, and small business operators; (iii) Partnerships with the private sector to develop linkages for common benefits.</p> <p><b>Specific activities:</b></p> <p>To achieve the goals mentioned above is necessary to provide a <b>Tourism Fund</b> focused on supporting:</p> <ul style="list-style-type: none"> <li>- Selected project of CBT</li> <li>- New potential business.</li> </ul> <p>To access financial support, a technical and economic viability project must be submitted with the support of the tourism fund.</p> <p>It also contemplates participation in the design and implementation of sector activities, thus ensuring the community as a whole had a genuine stake in the growth of eco-tourism</p> <p>Projects boosted by women will be prioritized.</p>				
<b>Stakeholders</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Eco-lodges and eco-friendly accommodations association/representatives Tour-guides associations Curious vendors associations Handicraft associations Community Based Tourism associations/ representatives NGOs Private Sector			
<b>Potential Leading for Implementation</b>	Tourism Department			
<b>Estimated Time Required</b>	Fund regulation 6 months Implementation 1-3 years			

<b>Priority (scale 1-5)</b>	Priority level: 1-2			
<b>Estimated Final Budget</b>	Total: USD350,000			
Breakdown of the estimated final budget:				
Item	Volume	unit price	Total (US\$)	Comment
Structuring of the Tourism fund: initial launching expenses	1	11,000	11,000	Hire consultant to structure the programme
Hiring a consulting firm to provide technical support to 5 CBT projects per year	35	3,000	105,000	Provide technical support to projects through consultants preparing business plans for the projects
Monitoring and evaluation: 1 midterm and 1 final evaluation	2	12,000	24,000	Two evaluation to ensure the proper execution of the program
Grants to CBT project sponsors to launch their projects: 5 per year, 7 years	35	6,000	210,000	Grant to project sponsors to launch their CBT projects
<b>Source of Funding</b>	Ministry of Tourism, Culture and Wildlife. Tourism Department Multilateral funding			
<b>Key Performance Indicators</b>	<ul style="list-style-type: none"> <li>- Number of applicants</li> <li>- Number of new business</li> <li>- Number of new CBT initiatives</li> <li>- Increase of direct, indirect and induced incomes</li> </ul>			

PROJECT NAME	D.1 Design and Management of Digital Content													
LINE OF ACTION	Marketing													
Summarised Project Description	<p>Due to the various tasks involved in the digital area, an adequate team of experts capable of addressing the complexities of the various digital marketing activities should be hired.</p> <p>A specialized and experienced digital Tourism Marketing Agency seems the best option.</p>													
Target	Proper design and management of the entire process													
Project Detail														
<p>In charge of <b>implementing the digital marketing plan and adapting the general strategy to the digital media in collaboration with Malawi's Tourism Marketing responsible</b>. Their duties would also include designing publicity and promotional content for the web and various online platforms. Their role is to generate traffic to increase the digital presence of the Malawian eco-tourism offer, coordinate the multiple agents involved in digital communication and follow up the campaigns in quantitative and qualitative terms.</p> <ul style="list-style-type: none"> <li>- Contents development fitting with the interpretation assets and strategic Plan for eco-tourism.</li> <li>- Design of the digital promotional materials included in this Plan</li> <li>- Digital Community management</li> <li>- Web analytics, providing quarterly reports to the Tourism Department aimed to reach decisions based on the performance data provided by the KPI's</li> <li>- Capacity building of Tourism Department about the use of web analytics</li> </ul>														
Estimated time required	6-12 months and yearly maintenance													
Priority	It is a priority to launch the new strategy and the development and maintenance of the global umbrella defined in this operative plan													
Estimated Final Budget	Total: USD126,000													
Breakdown of the estimated final budget:														
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Hire specialized and experienced digital Tourism Marketing Agency - 7 years, annual fee</td> <td>7</td> <td>18,000</td> <td>126,000</td> <td>In charge of implementing the digital marketing plan and adapting the general strategy to the digital media in collaboration with Malawi's Tourism Marketing responsible</td> </tr> </tbody> </table>					Item	Volume	unit price	Total (US\$)	Comment	Hire specialized and experienced digital Tourism Marketing Agency - 7 years, annual fee	7	18,000	126,000	In charge of implementing the digital marketing plan and adapting the general strategy to the digital media in collaboration with Malawi's Tourism Marketing responsible
Item	Volume	unit price	Total (US\$)	Comment										
Hire specialized and experienced digital Tourism Marketing Agency - 7 years, annual fee	7	18,000	126,000	In charge of implementing the digital marketing plan and adapting the general strategy to the digital media in collaboration with Malawi's Tourism Marketing responsible										
Key Performance Indicators	<ul style="list-style-type: none"> <li>• Number of tasks completed according to schedule</li> <li>• Increase of visitors to the webpage</li> <li>• Number of private stakeholders involved</li> <li>• Increase of digital community members</li> </ul>													

PROJECT NAME	D.2 Website: Design an eco-tourism section and provide synergies with private sector																							
LINE OF ACTION	Marketing																							
Summarised Project Description	<p>In the first phase of the implementation, some information and necessary promotional materials to visualize Malawi's eco-tourism offer need to be included in the current website.</p> <p>As per the transversal features of eco-tourism, many other current sections can be linked (bird watching, game drives, biking, hiking)</p> <p>It is not necessary to change the website entirely, but it is essential to re-think how the eco-tourism value proposals (emotions and feelings) and concrete (practical) information is collected and presented.</p> <p>As part of this information, the private sector joined to the new eco-tourism certification should be represented as a vital part of the offer.</p>																							
Target	<ul style="list-style-type: none"> <li>- International</li> <li>- Regional</li> <li>- Domestic travellers</li> </ul>																							
Project Details																								
<ul style="list-style-type: none"> <li>- <b>Design of a specific section</b> about eco-tourism. The narrative of this section will include the messages of differentiation and the list of available eco-tourist sites. In the mid-term, this section will be linked to the Online Eco-tourist centre. The different keys included in the section of this Marketing Plan: "TO DISCOVER THE AUTHENTIC ECO-TOURISM IN AFRICA AND BE A PART OF IT," should be considered as part of the core narrative.</li> <li>- <b>Eco-tourism label recognition.</b> The website should incorporate the private sector offer, involving the new grading system. The goal is to engage the private sector and transmitting guarantees of safety and health for the traveller.</li> </ul>																								
Estimated time required	3 months																							
Priority	1																							
Estimated Final Budget	Total: USD24,500																							
Breakdown of the estimated final budget:																								
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Design and develop of a specific section about eco-tourism</td> <td>1</td> <td>5,000</td> <td>5000</td> <td>The new section will include the messages of differentiation and the list of available eco-tourist sites</td> </tr> <tr> <td>Design and develop of a specific section to incorporate the private sector offer</td> <td>1</td> <td>15,000</td> <td>15000</td> <td>This section will transmit guarantees of safety and health for the traveller</td> </tr> <tr> <td>Campaign to engage the private sector</td> <td>3</td> <td>1,500</td> <td>4500</td> <td>Hiring consultancy services - 3 months, monthly fee</td> </tr> </tbody> </table>					Item	Volume	unit price	Total (US\$)	Comment	Design and develop of a specific section about eco-tourism	1	5,000	5000	The new section will include the messages of differentiation and the list of available eco-tourist sites	Design and develop of a specific section to incorporate the private sector offer	1	15,000	15000	This section will transmit guarantees of safety and health for the traveller	Campaign to engage the private sector	3	1,500	4500	Hiring consultancy services - 3 months, monthly fee
Item	Volume	unit price	Total (US\$)	Comment																				
Design and develop of a specific section about eco-tourism	1	5,000	5000	The new section will include the messages of differentiation and the list of available eco-tourist sites																				
Design and develop of a specific section to incorporate the private sector offer	1	15,000	15000	This section will transmit guarantees of safety and health for the traveller																				
Campaign to engage the private sector	3	1,500	4500	Hiring consultancy services - 3 months, monthly fee																				
Key Performance Indicators	<ul style="list-style-type: none"> <li>- Traffic site</li> <li>- Social sharing</li> <li>- Social mentions</li> </ul>																							

PROJECT NAME	D.3 Digital promotional materials																		
LINE OF ACTION	Marketing																		
Summarised Project Description	<p>As mentioned, in the first phase, some information and necessary promotional materials to visualize Malawi's eco-tourism offer need to be included in the current website (new eco-tourism section).</p> <p>Nowadays, the site <a href="http://www.visitmalawi.mw">www.visitmalawi.mw</a> has a lot of information, but it should be restructured in a more appealing and practical approach, aligned with this eco-tourism plan.</p>																		
Target	<ul style="list-style-type: none"> <li>- International</li> <li>- Regional</li> <li>- Domestic travellers</li> </ul>																		
Project Details																			
<p>The website should carry out a specific section about eco-tourism. This section will include the messages of differentiation and the list of available eco-tourist sites. In the mid-term, this section will be linked to the Online Eco-tourist centre.</p> <p>The goal is to make things more appealing, as well as, more straightforward for potential visitors:</p> <ul style="list-style-type: none"> <li>- <b>INTERACTIVE MAP.</b> An interactive map showing the full range of public and private attractions and points of interest around the country from a bird's eye view. By clicking to zoom onto an area of the map, a window will open, providing a whole range of related useful information: National and Regional level.</li> <li>- <b>DOWNLOADABLE DIGITAL MAP</b> from Malawi's website, including the full offer of Protected Areas and associated eco-tourism experiences. A brochure with the existing accommodations in the various areas and practical information about how to get there, the time needed, and other recommendations for travellers.</li> </ul> <p>The map will be expanded with new initiatives that are being implemented.</p> <ul style="list-style-type: none"> <li>- <b>QRs</b> in the different accommodations and tourist information points will be linked to this map providing practical information about activities. In collaboration with the private sector</li> </ul>																			
Estimated time required	4-8 months																		
Priority	1-2																		
Estimated Final Budget	Total: USD19,000																		
Breakdown of the estimated final budget:																			
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Item	Volume	unit price	Total (US\$)	Comment															
Design and development of an interactive and downloaded map	1	10,000	10000	The map will show the full range of public and private attractions and points of interest															
Campaign to support the private sector to install QR codes	6	1,500	9000	Hiring consultancy services - 6 months, monthly fee															
Key Performance Indicators	<ul style="list-style-type: none"> <li>- Number of Downloads</li> <li>- Number of stakeholders jointed to QRs project</li> <li>- Interactive map visits</li> </ul>																		

PROJECT NAME	D.4 Digital community creation																		
LINE OF ACTION	Marketing																		
Summarised Project Description	<p>The ability of destinations to create a digital community in which valuable information is shared for all the agents involved is one of the keys in a successful tourist marketing strategy.</p> <p>The online community's purpose is to serve as a common ground for people (Tourism Department, local stakeholders, tourists, tour- operators and travel agencies, NGOs) who share the same interests around eco-tourism and all its associated values.</p>																		
Target	– All tourists and stakeholders																		
Project Details																			
<ul style="list-style-type: none"> <li>- The digital community around eco-tourism in Malawi allows for social interaction across the world between people of different cultures (domestic tourism included) and access to and the exchange of information around the destination.</li> <li>- This community offers many benefits to the destination, among them that of promoting and controlling the image they want, exponentially multiplying their visibility and recognition, involving the public and private sectors in the "defence of the values of the destination," having a solid promotional structure and communicating the unique characteristics of the destination, improving or leading the positioning in the main keywords of potential search value, etc</li> <li>- Social networks play a fundamental role as educational supports to guide the conversation in the community. Not only Instagram but also Facebook, TikTok, and other social platforms that are consolidated in potential markets are relevant for creating the community.</li> <li>- The community will allow contacting even small tourist niches (birdwatchers). It is possible to find people also interested in specific topics (community- based tourism, permaculture, tribal dances) and to seek and share information on these subjects.</li> </ul>																			
Estimated time required	Permanent updating																		
Priority	1-2																		
Estimated Final Budget	Total: USD131,000																		
Breakdown of the estimated final budget:																			
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Development of the social media network on Instagram, Facebook, TikTok, and other social platforms</td> <td>1</td> <td>5,000</td> <td>5,000</td> <td>Initial effort to define and develop the social network</td> </tr> <tr> <td>Hiring consultancy services to manage the social network - 7 years, monthly fee</td> <td>84</td> <td>1,500</td> <td>126,000</td> <td>Dedicated resource to run the program</td> </tr> </tbody> </table>					Item	Volume	unit price	Total (US\$)	Comment	Development of the social media network on Instagram, Facebook, TikTok, and other social platforms	1	5,000	5,000	Initial effort to define and develop the social network	Hiring consultancy services to manage the social network - 7 years, monthly fee	84	1,500	126,000	Dedicated resource to run the program
Item	Volume	unit price	Total (US\$)	Comment															
Development of the social media network on Instagram, Facebook, TikTok, and other social platforms	1	5,000	5,000	Initial effort to define and develop the social network															
Hiring consultancy services to manage the social network - 7 years, monthly fee	84	1,500	126,000	Dedicated resource to run the program															
Key Performance Indicators	<ul style="list-style-type: none"> <li>- Number of people and stakeholders involved</li> <li>- Number of Shares</li> <li>- Number of Likes,</li> <li>- Number of Follows,</li> <li>- Number of Views.</li> </ul>																		



PROJECT NAME	D.5 Awareness campaign for locals													
LINE OF ACTION	Marketing													
Summarised Project Description	<p>The awareness campaign should form part of the Local Tourism Marketing Plan but focus on the opportunities that eco-tourism provides.</p> <p>The campaign should also spread the various sustainability issues and challenges for Malawi and the Malawians.</p>													
Target	– Local Population													
Project Details														
Yearly Social Networks campaign aimed to:														
<ul style="list-style-type: none"> <li>- Promote the discovery of hidden treasures that help diversify and take the pressure off flagships</li> <li>- Raise awareness of Malawi's rich biodiversity</li> <li>- Raise awareness of the importance of world heritage represented by the different properties and sites declared by UNESCO.</li> <li>- Promote packs that facilitate access to different products</li> </ul>														
Estimated time required	1 month for designing the campaign 2 weeks for implementation													
Priority (scale 1-5)	Priority level 1													
Estimated Final Budget	Total: USD21,000													
Breakdown of the estimated final budget:														
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Yearly Social Networks campaign</td> <td>14</td> <td>1,500</td> <td>21000</td> <td>Hiring consultancy services -2 months per year, monthly fee</td> </tr> </tbody> </table>					Item	Volume	unit price	Total (US\$)	Comment	Yearly Social Networks campaign	14	1,500	21000	Hiring consultancy services -2 months per year, monthly fee
Item	Volume	unit price	Total (US\$)	Comment										
Yearly Social Networks campaign	14	1,500	21000	Hiring consultancy services -2 months per year, monthly fee										
Key Performance Indicators	<ul style="list-style-type: none"> <li>- Increase of local visitors to the various eco-tourist sites</li> <li>- Increase of eco-lodges' local guests</li> <li>- Increase of visitors to emerging nature sites, hidden treasures and CBT experiences</li> </ul>													

PROJECT NAME	D.6 Online eco-tourism centre																		
LINE OF ACTION	Marketing																		
Summarised Project Description	The online gateway to the eco-tourism public-private proposals in Malawi. It is the final phase of the eco-tourism section development a more sophisticated tool to solve the needs of travelers.																		
Target	– ALL SEGMENTS																		
Project Details																			
Interactive digital information tool available on <a href="http://www.visitmalawi.mw">www.visitmalawi.mw</a> , for planning and organizing the visit in advance.																			
<ul style="list-style-type: none"> <li>- Digital reference point for all stages of visitor's trip (inspiration, decision, planning, execution &amp; communication).</li> <li>- The virtual place where digital community contribute with their opinions and advises</li> </ul>																			
Estimated Time Required	6 months																		
Priority (scale 1-5)	5-7																		
Estimated Final Budget	Total: USD10,000																		
Breakdown of the estimated final budget:																			
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Design and develop a digital reference point for all stages of visitor's trip</td> <td>1</td> <td>5,000</td> <td>5000</td> <td>The stages of the visitor's trip includes inspiration, decision, planning, execution &amp; communication</td> </tr> <tr> <td>Design and develop of a virtual place</td> <td>1</td> <td>5,000</td> <td>5000</td> <td>The virtual place will allow digital community to contribute with their opinions and advises</td> </tr> </tbody> </table>					Item	Volume	unit price	Total (US\$)	Comment	Design and develop a digital reference point for all stages of visitor's trip	1	5,000	5000	The stages of the visitor's trip includes inspiration, decision, planning, execution & communication	Design and develop of a virtual place	1	5,000	5000	The virtual place will allow digital community to contribute with their opinions and advises
Item	Volume	unit price	Total (US\$)	Comment															
Design and develop a digital reference point for all stages of visitor's trip	1	5,000	5000	The stages of the visitor's trip includes inspiration, decision, planning, execution & communication															
Design and develop of a virtual place	1	5,000	5000	The virtual place will allow digital community to contribute with their opinions and advises															
Key Performance Indicators	<ul style="list-style-type: none"> <li>- Traffic site</li> <li>- Number of private companies jointed</li> </ul>																		

PROJECT NAME	D.7 Social networks for protected areas and natural sites				
LINE OF ACTION	Marketing				
Summarised Project Description	Updating information about Protected areas through social networks				
Target	– ALL SEGMENTS				
Project Details					
<ul style="list-style-type: none"> <li>- Each protected area, in collaboration with the Department of Protected Areas and the managers of these sites (African Parks or others), will maintain their social network. They will be updated with information and images about wildlife and news that may be of interest to travellers.</li> <li>- A standard image/format will be created, and those responsible for its use will be trained on it.</li> </ul>					
Estimated Time Required					
Priority (scale 1-5)	2-3-4				
Estimated Final Budget	Total: USD90,000				
Breakdown of the estimated final budget:					
	<b>Item</b>	<b>Volume</b>	<b>unit price</b>	<b>Total (US\$)</b>	<b>Comment</b>
	Hiring consultancy services to update information and images about wildlife and news - 5 years, monthly fee	60	1,500	90,000	Including Each protected area (African Parks or others). This project will start of year 3
Key Performance Indicators	<ul style="list-style-type: none"> <li>- Number of social networks created</li> <li>- Traffic sites data</li> </ul>				

PROJECT NAME	D.8 Data base and annual tourist survey				
LINE OF ACTION	Marketing				
Summarised Project Description	<p>A coherent marketing strategy needs permanent feedback based on visitors' data. This feedback allows us to ensure that the experiences offered are in line with the needs and expectations of tourists.</p> <p>To collect this information from holidaymakers, two complementary types of data (quantitative and qualitative) and different sources are suggested</p>				
Target	– All tourist segments				
Project Details					
<ul style="list-style-type: none"> <li>- <b>Quantitative Research</b> through a basic questionnaire. A homogeneous collection of information in the different tourist attractions and accommodations that provide a picture of eco-tourists (origin, expenditure, socio-demographic data, etc.). The basic questionnaire will be completed with the collaboration of the National Parks Departments and concessions as well as eco-lodge owners.</li> <li>- <b>Qualitative research</b> through a specific survey that provides a piece of detailed information about the visitors' experience</li> </ul> <p>It will be necessary to perform periodic surveys of visitors (at least yearly) in the different segments analysed to obtain more detailed information on their behaviour and motivations before, during, and after the trip. The results will provide permanent guidance regarding the development of the destination, the necessary investments, and the marketing strategy.</p> <p>The result of these quantitative and qualitative data should be applied to the public and private tourism strategies and will be presented in the yearly conference about eco-tourism.</p>					
Estimated Time Required	<p>Three months definition of the questionnaire and survey</p> <p>Basic questionnaire one- year implementation to get the whole year picture</p> <p>Survey to implement during the high peak season.</p>				
Priority (scale 1-5)	1				
Estimated Final Budget	Total: USD21,800				
Breakdown of the estimated final budget:					
	<b>Item</b>	<b>Volume</b>	<b>unit price</b>	<b>Total (US\$)</b>	<b>Comment</b>
	Define and develop the questionnaire	1	800	800	Including quantitative research (basic questionnaire) and qualitative research (specific survey)
	Survey to implement during the high peak season.	7	3,000	21000	Survey to be carried out during 2 months of the peak season every year
Key Performance Indicators	<ul style="list-style-type: none"> <li>– Number of Protected Areas involved</li> <li>– Number of Eco-lodges involved</li> <li>– Number or questionnaire completed</li> <li>– Number of surveys completed</li> </ul>				

PROJECT NAME	D.9 Web analytics													
LINE OF ACTION	Marketing													
Summarised Project Description	<p>The destinations' webpages play an essential role in the digital tourist framework in terms of information about our main markets and potential tourists.</p> <p>The information provided by the web analysis besides the results of surveys and databases can draw a complete picture of the evolution of the destination.</p>													
Target	– All markets													
Project Details														
<ul style="list-style-type: none"> <li>- To compile, measure, evaluate, and explain internet big data findings to facilitate decisions for both the improvement of the official website and online marketing actions on external media.</li> <li>- To interpret the statistics generated by the internet users (number of visits, rebound percentages, traffic sources, conversions, ROI, etc.) from the various source markets, media, and formats, to reach conclusions which will improve the results of all digital communication actions</li> </ul>														
Estimated time required	Quarterly reports													
Priority (scale 1-5)	1-7													
Estimated Final Budget	Total: USD56,000													
Breakdown of the estimated final budget:														
<table border="1"> <thead> <tr> <th>Item</th> <th>Volume</th> <th>unit price</th> <th>Total (US\$)</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>Quarterly report</td> <td>28</td> <td>2,000</td> <td>56000</td> <td>To interpret the statistics generated by the internet users (number of visits, rebound percentages, traffic sources, conversions, ROI, etc.)</td> </tr> </tbody> </table>					Item	Volume	unit price	Total (US\$)	Comment	Quarterly report	28	2,000	56000	To interpret the statistics generated by the internet users (number of visits, rebound percentages, traffic sources, conversions, ROI, etc.)
Item	Volume	unit price	Total (US\$)	Comment										
Quarterly report	28	2,000	56000	To interpret the statistics generated by the internet users (number of visits, rebound percentages, traffic sources, conversions, ROI, etc.)										
Key Performance Indicators	<ul style="list-style-type: none"> <li>- Quarterly reports</li> <li>- Annual monitoring report to compare the evolution of the different variables</li> <li>- Monitoring of specific campaigns' impact</li> </ul>													

## 8 ACTION PLAN

The Ecotourism Development Strategy for Malawi is the result of a complete strategic planning process for the country. The strategy defines the long term vision for the destination, the strategic objectives, the aims, the challenges and possible solutions, four clear lines and actions, and within each line of action, a number of specific objectives, to accomplish the strategic objectives in the time frame defined for this Ecotourism Development Strategy for Malawi (seven years).

### 8.1 PROPOSED INITIATIVES

The Strategy includes a total of **23 initiatives** to be developed during a 7-year period. The initiatives have been grouped into 4 blocks:

- Articulation and cohesion (3 initiatives)
- Ecotourism products development (9 initiatives)
- Investments (2 initiatives)
- Marketing (9 initiatives)

### 8.2 TOTAL INVESTMENT

The Action Plan, defined for the Strategy, involves a total investment of **USD 3,618,100 over 7 years**. We assume that all the hard investments related to infrastructures are in the National Tourism Investment Master Plan (currently in the design phase).

The breakdown of the investment for each of the 4 blocks of initiatives is the following:

- Articulation and cohesion: US\$ 568,000
- Ecotourism products development: US\$ 1.990.8 million
- Investments: US\$ 560,000
- Marketing: US\$ 499,300

The action plan establishes a total investment per year that ranges from USD 423,576 to USD 580,743.

The figure 2 below illustrates all the proposed initiatives within the four lines of action and the Action Plan for the Strategy, including the costs and period for each initiative.

Table 2 – Initiatives of the action plan

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	TOTAL	
<b>Articulation and cohesion</b>									<b>568,000</b>
A.1	Presentation of the National Eco-tourism Strategy	18,000	0	0	0	0	0	18,000	
A.2	Creation of a national Eco-tourism cluster to boost the National Eco-tourism Strategy	70,000	50,000	50,000	50,000	50,000	50,000	370,000	
A.3	Annual Conference Eco-tourism sector	0	30,000	30,000	30,000	30,000	30,000	180,000	
<b>Eco-tourism productus development</b>									<b>1,869,000</b>
B.1	Wildlife and Nature Protected Areas: Consolidation of successful management and concession models	0	40,000	10,000	10,000	10,000	10,000	90,000	
B.2	Accommodation and activities, grading system	60,000	50,000	50,000	0	0	0	16,000	
B.3	Enhancement of World Heritage resources as key part of the eco-tourism offer	44,000	50,000	50,000	50,000	50,000	0	244,000	
B.4	Eco-tourism route	0	0	0	60,000	160,000	200,000	200,000	620,000
B.5	Community based tourism development	45,000	45,000	45,000	45,000	45,000	45,000	315,000	
B.6	Eco-tourism packs involving the whole experience and linking the protected areas. Green card	0	20,000	10,000	10,000	10,000	10,000	70,000	
B.7	Capacity building. Program definition and implementation: Scaling eco-tourism through world-class guiding and interpretation	50,000	30,000	30,000	30,000	30,000	30,000	230,000	
B.8	Preservation and climate change awareness	0	40,000	20,000	20,000	20,000	20,000	140,000	
<b>Investments</b>									<b>560,000</b>
C.1	Attracting eco-tourism investors by promoting the eco-tourism plan as a road map	30,000	30,000	30,000	30,000	30,000	30,000	210,000	
C.2	Technical and financial support for CBT.	50,000	50,000	50,000	50,000	50,000	50,000	350,000	
<b>Marketing</b>									<b>499,300</b>
D.1	Promoting Malawi as an eco-tourism destination. Micro site and social networks	18,000	18,000	18,000	18,000	18,000	18,000	126,000	
D.2	Online eco-tourism center	24,500	0	0	0	0	0	24,500	
D.3	Digital information social networks National Parks	0	19,000	0	0	0	0	19,000	
D.4	Statistic and surveys	18,714	18,714	18,714	18,714	18,714	18,714	131,000	
D.5	Basic promotional materials	3,000	3,000	3,000	3,000	3,000	3,000	21,000	
D.6	Eco-tourism sub-brand	0	0	0	0	0	10,000	10,000	
D.7	Social networks for protected areas and natural sites	0	0	18,000	18,000	18,000	18,000	90,000	
D.8	Data base and annual tourist survey	3,114	3,114	3,114	3,114	3,114	3,114	21,800	
D.9	Web analytics	8,000	8,000	8,000	8,000	8,000	8,000	56,000	
<b>TOTAL INVESTMENTS (US\$)</b>		<b>423,576</b>	<b>480,076</b>	<b>479,076</b>	<b>580,743</b>	<b>580,743</b>	<b>541,943</b>	<b>531,943</b>	<b>3,618,100</b>

## 9 ANNEXES

### 9.1 Terms of Reference

The Terms of Reference for the development of this Ecotourism Strategy are as follows:

- a) Conduct a Situation Analysis of Ecotourism in Malawi and its competition elsewhere;
- b) Conduct a review of existing tourism plans, reports and studies in relation to ecotourism;
- c) Conduct an assessment of the existing ecotourism products and select the most promising tourism development products based on preliminary resource assessment and consultation with key stakeholders;
- d) Develop ecotourism development guidelines for investment in general, and protected areas and areas of outstanding natural beauty in particular;
- e) Assess and map each product with a framework that includes resource, market, economic and social criteria;
- f) Develop an Ecotourism Strategy with a clear vision and proposed (short, medium and long-term) action plans in the areas of product development, community participation, marketing, and promotion as well as legal and institutional framework; and
- g) Design collateral materials for ecotourism promotion

### 9.2 Annex 1: COVID 19 findings and proposals to be included in the Eco-tourism Strategy

This document provides a situation analysis of the tourism industry in the context of COVID-19. Furthermore, it highlights the key issues to be considered for appropriate responses pertaining ecotourism in Malawi. This report takes into consideration recommendations from the global ecotourism strategy. Suffice to say that the recommendations will be included as a separate action plan for the short term, linked to the specific needs of the pandemic.

#### International context and potential scenarios

The COVID-19 pandemic is, first and foremost, a humanitarian crisis affecting people's lives, and has triggered a global economic crisis. This has very tangible impacts on the tourism sector, which is critical for many people, places and businesses.

#### Effects of the crisis on the various subsectors at the international level

To get an idea of the dimensions of the crisis in tourism at the moment, this document provides the most striking statistics that speak of the situation at the international level, and which have been provided by the OECD until 2020, April 15. Table 1 below outlines the effects of the COVID-19 pandemic on various subsectors.



**Table 3 - Statistics on the effects of COVID-19 on subsectors**

<b>Aviation</b>	<ul style="list-style-type: none"> <li>- International Civil Aviation Organization (ICAO) estimates, as of 8 April, 2020 that the fall in scheduled international passenger traffic during the first half of 2020, will equate to a reduction of between 41 to 51% of seats offered by airlines.</li> <li>- There are around 105 countries worldwide that have completely closed their borders to inbound tourists, allowing only citizens and residents to re-enter the country</li> <li>- IATA has estimated that only 30 airlines (from over 700) have the financial capacity to survive a prolonged crisis, and stay in operation</li> </ul>
<b>Railways</b>	<ul style="list-style-type: none"> <li>- Significant drops in passengers from 50% to 85%</li> </ul>
<b>Tour-operators</b>	<ul style="list-style-type: none"> <li>- On 6 March in Europe, the crisis was preliminarily estimated to cause a reduction of business for tour operators of at least 50% in 2020</li> </ul>
<b>Accommodation</b>	<ul style="list-style-type: none"> <li>- STR consultants' report sets that in countries for which data is available, occupancy decreased more than 90% compared to 2019 in 11 countries, and more than 70% in a further 39 countries occupancy between 15-21 March 47, and has remained at these levels since</li> <li>- China occupancy had fallen by 89% in the first two weeks of February, to less than 10%. By 25 March, 87% of hotels that were operating in China in January had re-opened.</li> </ul>
<b>Platform economies (Airbnb)</b>	<ul style="list-style-type: none"> <li>- As of 2 April, apartment bookings have been reported to have decreased anywhere from 41% to 96%.</li> </ul>
<b>Business and MICE</b>	<ul style="list-style-type: none"> <li>- Almost every member of the Global Business Travel Association reports cancelling or suspending all international business travel (98%)</li> </ul>
<b>Culture</b>	<ul style="list-style-type: none"> <li>- The American Alliance of Museums (AAM) estimates that a third of museums in the United States will not reopen</li> </ul>
<b>Tour guides</b>	<ul style="list-style-type: none"> <li>- Significant drops in their activities, placing significant constraints on their income. In Japan, for example, workloads for March and April had declined more than 80% on average. In Israel, 4 000 tour guides have been left jobless</li> </ul>
<b>Employment in the subsector</b>	<ul style="list-style-type: none"> <li>- It is estimated temporary staff within the subsectors will lose their jobs whilst other will have to take pay cuts to stay employed due to reduction in the operations.</li> </ul>

## Tourist behaviour

The crisis is expected to have a permanent impact on consumer behaviour, accelerating the move to online, with a greater emphasis on hygiene and healthy living, and higher use of cashless and contactless payment methods. The impact on travel behaviour remains to be seen, but tourism businesses, such as cruise and aviation, are already preparing to improve health screening and hygiene measures, and there is strong recognition that a lot **needs to be done to restore travellers' confidence**. The negative perception of tourists as risk carriers by host communities in some countries may also be a consequence of the pandemic. This implies the need for Malawi to strategize to counter the negative perception of tourists as risk carriers as it might hugely affect the sector.

The activities and experiences that will recover the fastest are those of rural tourism and nature, by providing their services in an open and natural space in accordance with the new behaviours and attitude of the tourist demand.

The principles of eco-tourism (the paradigm of nature tourism) respond to many of the new needs that lie ahead (*healthy destinations, clean brands, safety for clients and workers*), now is time to act in Malawi considering the specific challenges of the outbreak but also reinforcing all the elements that create a solid strategy in this type of tourism

National Parks and protected areas, Eco-lodges, transport and other associated services should take measures that ensure the confidence of the traveller in these values.

## Specific measures

Globally, many governments are introducing tourism specific measures to address the immediate impacts on the sector, and facilitate recovery.

It is important to be mindful of the special features of the tourism industry. Tourism is a peculiar economic sector, and if the crisis of the COVID-19 is not acted upon quickly and accurately, the effects can be very damaging in the medium and long term.

- It is a highly fragmented and dispersed sector, largely made up of SMEs. In certain subsectors, tourism is made up of self-employed workers. In both cases, companies and workers lack sufficient financial capacity to survive a great crisis like the current one.
- It is a cross-sector and multi-level sector, made up of different subsectors, in which it is important that none be left neglected.

The UNWTO-led Global Tourism Crisis on 1 April published recommendations for government action focusing on three key areas: **mitigating the impact on employment and liquidity, protecting the most vulnerable and preparing for recovery**.

In coherence with this statement and after reviewing diverse initiatives at global scale, three major response categories and types have been identified:

- **Putting in place co-ordination mechanisms:** including taskforces and co-ordination measures to better target responses and support sector recovery (e.g. private sector dialogue, timely provision of data, co-ordinated policy responses for the short, medium and long-term).
- **Protecting people:** protecting visitors and tourism workers
- **Ensuring business survival:** along the tourism supply chain, and in particular supporting SMEs, including through cash flow supports.

Beyond the immediate responses needed, one the common agreements is that **policy makers ought to learn from the COVID-19 crisis, to improve crisis management strategies, strengthen co-ordination mechanisms and better prepare destinations and the sector more broadly to respond to future shocks**.

## Key points for eco-tourism in Malawi

**“Coronavirus is a crisis for emerging countries, but it does not have to be a catastrophe”**

Abhijit Banerjee. Economy Nobel Prize 2019

As mentioned above it is difficult to know the extent Malawi is going to be affected by the outbreak, and how the evolution of the COVID-19 can affect national, regional and international tourism. In any case, it is necessary to prepare the eco-tourism industry and be ready for the end of the lockdown both at local and worldwide level.

### 1. Putting in place co-ordination mechanism

**Public-private collaboration.** This is one of the common tools adopted in most of the countries. The recovery cannot be understood without it.

- In the case of Malawi it is suggested that a crisis committee be created (the cell of the future Eco-tourism Cluster). A small group to promote a dialogue and permanent contact between the Tourism Department and representatives of Eco-tourism.
- It is imperative for stakeholders to know that the Tourism Department remains working on the Eco-tourism strategy.
- There is a need to keep constant communication to make them feel supported for instance communication through an email asking for their situation and requests, tell them that the eco-tourism strategy is alive and that you want to support them (as far as possible).
- Constantly advocating for the significance of together as a good post-coronavirus strategy.

### 2. Protecting people

It is vital to prepare eco- tourist sites (National Parks and protected areas) and accommodation facilities (lodges) as COVID-19 free places for tourists and workers.

Governments are adopting different type of measures:

- A COVID-19 free certificate, sanitary certification, to guarantee a safety accommodation, promoted by hotels associations.
- A protocol involving health and safety measures approved by and for the entire tourism value chain (for instance Spanish government is tackling a National Project of Technical Specifications and Guarantee Seal for the Prevention of COVID-19)

**The Department of Tourism must work with the private sector, health department and the National Parks and Wildlife Department. This could be a first step in the grading system that has been suggested in the eco-tourism strategy**

### 3. Ensuring business survival

As stated in the ecotourism strategy, eco-lodges are one of the axes on which the tourism industry is based. It is necessary to make visible the importance of supporting eco-lodges as a key part of the ecotourism industry and ensuring its survival.

At the same time, it is necessary to support the local communities that are directly, indirectly, or induced, which are being affected by the closure of the accommodation facilities.

Countries for which the impact of the pandemic on tourism is most drastically felt have focused on providing financial relief to tourism SMEs, such as postponed VAT payment. Liquidity injections have been introduced to ensure business survival in the immediate term.

Other assistance efforts include information on helping to prevent the spread of the virus, support to provide flexibility and relief for companies and workers in the reduction of working hours, temporary lay-offs and sick leave, financial instruments to reduce the impact (e.g. tax relief, guarantees, grants),

measures regarding procurement and late payments, and actions to help SME adopt new work processes and find new markets.

**Although the extent Malawi can implement such measures is not known, it is imperative to indicate that perhaps now more than ever, the support of multilateral institutions and donors to the tourism industry is vital.**

#### 4. Marketing

According to the expected tourism behaviour and as per the forecast of some surveys and trendsetters<sup>1</sup>, the activities and experiences that will recover the fastest are those related to leisure and nature.

- The values that tourists are looking for match perfectly with values of eco-tourism strategy for Malawi: feeling of solitude, security, immersion in nature and not overcrowding.
- Proximity travel will be the key to recovery in the short term. Long-range travel will remain until the end of the process.
- In this context, the priority market for the tourism sector this season will be the national market, together with the regional proximity market.
- The domestic tourism marketing plan should be reinforced in light of this new situation.
- Eco-tourism marketing should be included in the national marketing plans as a priority, considering three phases presented in table 12 below:

**Table 4 - Eco-tourism marketing action phases**

MARKETING ACTIONS COVID-19 CONTEXT		
PHASE 1 STAY AT HOME BUT DON'T FORGET US	PHASE 2 PRE-RECOVERY	PHASE 3 RECOVERY
<p>“We will love seeing you later in the year”</p> <p>In the meantime, refresh the mind of travellers about Malawi as an eco-tourism destination</p> <p>Launch digital marketing messages focused on the values of ecotourism linked to the needs of eco-tourists</p>	<p>“We are working hard to make your next holidays safe and enjoyable”</p> <p>Indicate how the country is preparing for re-opening and the security measures adopted.</p>	<p>Depending on the final impact of the virus in the country, this phase should highlight the positioning of the country during the epidemic outbreak or how the recovery has boosted a more enjoyable, comfortable and safety destination.</p>

<sup>1</sup>How Will Covid-19 Affect Future Travel Behaviour? A Travel Crisis Expert Explains. *The New York Times*. April 2020.

Coronavirus and the travel industry. *Skift research and independent journalism*. April 2020

### 9.3 Annex 3: General inventory of ecotourism resources

Table 5 - Ecotourism resources<sup>2</sup>

TYPE OF RESOURCE	Sites	Features	Associated tourism activities or attractions
<b>WILDLIFE AND NATURE<sup>3</sup></b>  <b>National Parks</b>	<b>Nyika National Park</b>	<p>Malawi's largest park at 3250 sq.km, characterized mainly by its high rolling grassland.</p> <p>Nyika National Park is home to some 85 species of mammals, and over 420 species of birds. Common mammals seen include roan antelope, zebra, eland, reedbuck, bushbuck, common duiker, warthog, baboon, hyena, serval cat, jackal and bush pig. The park has one of the highest densities of leopard in central Africa. Elephants, buffalo and Kudu usually keep to the lower ground on the northern edge of the park but elephants have been seen on the high plateau, on a number of occasions. Some few years ago the park was restocked with 35 more Elephants. Lions have also of late been sighted. Some of the interesting birds to look for are Wattled Crane and Denham's Bustard.</p>	<p>Day and night drives.</p> <p>Walking opportunities for game viewing, bird watching, flower spotting, trekking</p> <p>A number of other walking trails</p> <p>Mountain biking with experienced guides</p> <p>Driving day safaris, as well as more conventional 4x4 excursions are available.</p> <p>Trout fishing.</p> <p>For the birdwatcher, the park has over 400 species.</p>
	<b>Kasungu National Park</b>	<p>This was Malawi's second largest park but it has been long overtaken by Liwonde and Majete in the south, as well as Nyika in the north, and even in Central Malawi, Nkhotakoata Wildlife Reserve. It is the closest to the capital, Lilongwe and is bordering Zambia. Visitors to the park can see elephants, hippo, buffaloes, greater kudu, hartebeest, sable, impala, puku, bushbuck, duiker, zebra and roan.</p> <p>Other animal species that can be seen include lion, leopard, civet, serval cat, genet, and bush baby. The Park has over 300 species of birds. This makes it a good destination for bird watcher</p> <p>A few fish species such as eastern happy, straight fin barb, line spotted barb, sharp tooth catfish, redeye labeo, shire-stekelpaling, shire-kurperchurchil and redbreast tilapia occur in the dam and streams of the park.</p>	<p>Game viewing drives</p> <p>Mountain Hikes</p> <p>Trail Walks</p> <p>Overnight Trails Hikes</p> <p>Sport fishing (angling).</p> <p>Visit to Historical and archaeological sites</p> <p>Cultural experiences in the surrounding villages</p>
	<b>Liwonde National Park</b>	<p>Malawi's most popular national park. With Shire River, Lake Malawi's only outlet running through the park, thus enhancing its beauty and tranquility. Wildlife includes elephants,</p>	<p>Great spot for boat safaris.</p>

<sup>2</sup>Based on the research of the consultants through sources of information such as the visitmalawi.mw site, 2018 brochure and the tour-operators proposals, the main ecotourism resources in Malawi are as follows

<sup>3</sup>It must be highlighted that all protected areas are ideal bird watching areas.

		antelopes, black rhino, leopards, lions and impressive bird life with nearly 300 species.	
	<b>Lake Malawi National Park</b>	<p>A UNESCO World Heritage Site since 1984, and the world first water marine park, boasts of its richness in biodiversity.</p> <p>Lake Malawi is globally important for biodiversity conservation due to its outstanding diversity of its fresh water fishes. The property is considered to be a separate bio-geographical province with estimates of up to c.1000 species of fish half occurring within the property: estimated as the largest number of fish species of any lake in the world. The property is also rich in other fauna including mammals, birds and reptiles.</p> <p>The <b>islands of Mumbo, Domwe and Maleri</b> make this park's experience magical and memorable.</p>	kayaking, scuba diving, snorkelling and sailing
	<b>Lengwe National Park</b>	This birdwatchers' paradise is about 75kms from Blantyre. It has over 300 species of bird life. Guests can also spot other wildlife such as warthogs, buffaloes, baboons, bushbuck and impala.	Bird watching, safari.
<b>Forest Reserves</b>	<b>Ntchisi Forest Reserve</b>	An untouched paradise, entirely undiscovered by mass tourism. It is an excellent destination for bird watchers. Some mammals, butterflies, and strange and unknown plants and orchids are also plentiful. The Forest Reserve contains some of the last remaining indigenous rainforest in Malawi.	Hiking and mountain biking territory
	<b>Thuma Forest Reserve</b>	Filled with Miombo woodland and striking variety of plants and indigenous trees, elephants, buffaloes, bush buck, leopard, spotted hyena and primates roam the reserve.	Hiking, Safari
	<b>Dzalanyama Forest Reserve</b>	It is a favorite site for ornithologists with different and rare species, the variety of flora is also interesting and includes some wonderful ferns and epiphytic orchids.	Bird watching, safari.
<b>Wildlife Reserves And Nature Sanctuaries</b>	<b>Vwaza Marsh Wildlife Reserve</b>	<p>This reserve lies along the Malawi Zambia border.</p> <p>The reserve has a wide variety of animal species including Elephant, Buffalo, Lion, Leopard, large numbers of hippo, greater kudu, impala, warthog, eland, roan antelope, Lichietenstein's hartebeest, puku, zebra and reedbuck. The wetland areas around Lake Kazuni and Zaropool, are very rich in waterfowl and other birds. The most common waterfowl include Egyptian Geese, White Face Ducks and other birds, with approximately 300 recorded species.</p>	Quality bird watching, Game viewing (best during dry season)

	<b>Nkhotakota Wildlife Reserve</b>	Said to be Malawi's oldest reserve, is dotted with streams and waterfalls. One can spot elephants, lions, leopards and buffaloes. Bird life over 280 species, has been rated by Birdlife International as an area of 'special Interest'.	Bird watching fishing, canoeing, river rafting. Game drives
	<b>Majete Wildlife Reserve</b>	Malawi's success story in terms of conservation, a partnership between Malawi government and African parks has turned Majete from a heavily poached to a big 5 reserve. Nearly 3000 wildlife have been re-introduced.	Game drives, bush walks, bird watching and boat safaris.
	<b>Mwabvi Wildlife Reserve</b>	With an area of 135km <sup>2</sup> , it is Malawi's smallest wildlife reserve, and it's least accessible. Nevertheless, it has a wide variety of habitats and riverine areas.	Safari, hiking.
	<b>Kuti Wildlife Reserve</b>	This tiny gem offers lots of activities. The wildlife species includes zebras, elephants, antelopes, wildebeest and primates.	Horse riding, bike safaris and birdwatching
	<b>Lilongwe Nature Sanctuary</b>	Located at the heart of the capital city within a beautiful wildlife reserve, this is Malawi's only accredited sanctuary and is home to almost 200 different rescued wild animals.	This is a must see for all visitors passing through for birdwatching, walking safaris and relaxation.
<b>Landscapes and Scenery</b>	<b>Plateaus Coffee &amp; Tea plantations. Sugar Plantations</b>	It could be said that the landscape is a constant in the country, full of contrasts and richness.  An alternative to the better-known offer of National Parks  Zomba Plateau, Mount Mulanje, Thyolo Tea Estates	Tea Tours, Birding Biking, Coffee Tours Nature Walks, Sports
<b>Botanical Gardens</b>	<b>The National Herbarium and Botanic Gardens of Malawi</b>	These are not well developed in Malawi but they have potential to attract domestic tourism,  They are monitored by a parastatal botanical institution and is the principal authority on botanical and related matters in Malawi.  The some of the botanic gardens in Malawi are; Zomba Botanic Garden, Kulemeka Botanic Garden in Lilongwe, Catalina Botanic Garden in Blantyre, etc	Picnic, leisure and recreation in form of weddings and engagements, education, conservation
<b>Cultural Heritage</b>	<b>Chongoni Rock Art Site in Dedza</b>	The Chongoni rock art area was declared a UNESCO World Heritage Site in 2006. It contains 127 declared rock painting sites, about one site per km <sup>2</sup> , making it one of the richest concentrations of rock art in central Africa.	Cultural Route
	<b>Popular Events</b>	The Umtheto among the Ngoni of Mzimba, The Kulamba Ceremony among the Chewa, The Gonapamuhanya Festival among the Tumbuka ,Umhlanganowa Maseko among the Ngoni of Ntcheu, Mulhakho wa Alhomwe among the Lhomwe	Cultural visit. Soaking up in local traditions

<b>Inmaterial Heritage</b>	<b>Dances</b>	UNESCO has classified many of Malawi's dances as unique.	Cultural visit. Enjoying traditional dances
<b>Community Tourism</b>	<b>Cultural Villages</b>	<p><b>Njobvu Cultural Village</b> Near Liwonde NP's Makanga Gate, Njobvu Cultural Village offers visitors a rare opportunity to stay in a traditional Malawian village, sleeping in traditional mud-brick huts (with or without a mattress – your choice!)..</p> <p><b>Mpale</b> Situated on top of the rocky Chinaphale Hill, 30 Km north of Mangochi Town.</p>	<p>During the day tourists are invited to take part in the villagers' daily lives, visiting traditional doctors, the village school and eating local food such as nsima. All proceeds go directly to the community</p> <p>Cultural expedition into the past and present of the Yao culture and other ethnic groups found along the Lake Malawi. They offer food and beverages, accommodation, conferencing, cultural edutainment and excursions</p>



## 9.4 Annex 4: Marketing materials

This annex presents some marketing materials developed by the consultants. This includes marketing materials, design for a tourism website and a triptych, including information about the Eco-tourism Strategy.

### Promotional materials

A logo has been created for application on different promotional materials. Two different versions have been carried out for the Department of Tourism choice. Their details are attached in a dossier attached to this document.

### Website:

It has to be highlighted that the website is focused on the potential but also the final visitor of Malawi. The objective should be to show eco-tourism as a remarkable and appealing type of experience and to provide detailed information about how to make it real. The Ecotourism Strategy triptych is focused on spreading the eco-tourism strategy, providing information to, among others, investors, local stakeholders, tour- operators, and NGOs.

- The objective of this section of the website must be to generate traffic to increase the Malawian eco-tourism offer's digital presence. It is not necessary to completely change the current website, but it is essential to re-think how the eco-tourism value proposals (emotions and feelings) and concrete (practical) information is collected and presented.
- Practical information to plan the trips linked to the different segments of eco-tourists is highly recommended. This information must be connected to the Eco-lodges, their location, and services across the country.

### Digital Promotional Materials Eco-Tourism Strategy Triptych:

The triptych is focused on tourism stakeholders and potential investors. The brochure presents the strategic keys in a synthetic way:

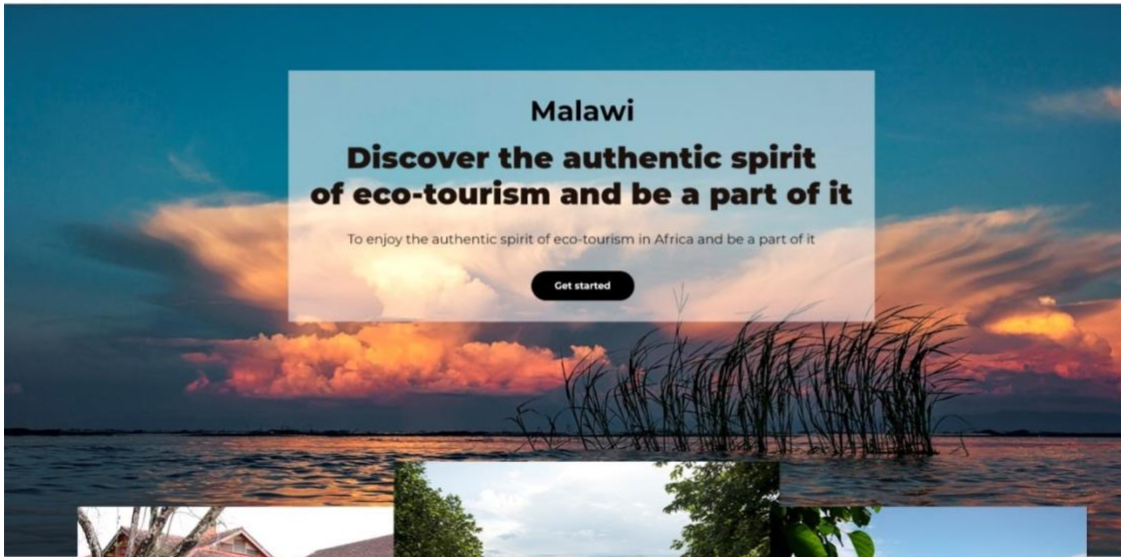
- The Vision, which represents an aspiration description of what a destination would like to achieve in the long-term.
- The Strategic Objectives, which are top-level, axes to guide the generation of specific initiatives as part of the Strategy.
- The action plan, which presents the initiatives to be carried out as part of the strategy, the investment and the schedule

Promotional materials (See dossier)





Website mock up



**Malawi**  
**Discover the authentic spirit of eco-tourism and be a part of it**  
 To enjoy the authentic spirit of eco-tourism in Africa and be a part of it  
[Get started](#)



# Welcome to Malawi!

**“An amazing journey to the warm heart of Africa, in which to meet wild nature, in which to find yourself”**

Perfect for safari adventure and "big five" photo hunting, to meet and navigate Lake Malawi, glimpse the peaks of Mulanje, enjoy hiking in the Zomba forests or enjoy its islands.

**Eco-tourism map and resources**

### Majete Nature Reserve

Majete Wildlife Reserve is a 270-square-mile (700 km<sup>2</sup>) protected area in the lower Shire River valley, near Blantyre (Malawi's second largest city) and the Kapachira Falls. Majete's entrance includes a heritage centre, which displays confiscated trapping devices for capturing buffalo and other animals, and homemade muzzleloaders retrieved from poachers. 30 square miles (78 km<sup>2</sup>) of the park's core sanctuary area are reserved for visitors participating in safaris.





## Visit Malawi, eco-tourism in the warm heart of Africa

Emerging protected areas, natural sites and hidden gem treasures for enjoying intimate experiences: Mulanje, Zomba Plateau, Tea Estates, Coffee Plantations, Vwaza Marsh- Nyika or Ntchisi Forest.

With more than 1,750,000 accommodations and countless offers that are updated daily, travelers can book to make the most of their stay.

### What kind of ecotourist are you?

Scientist

Intrepid Explorer

Aware and Committed

Packaged Explorer

Domestic Traveler

Start: London ▾

Plane >

**1** Lilongwe - 1 night ▾

Bus >

**2** Blantyre - 4 nights ▾

Bus >

**3** Nkhota kota - 1 night ▾

Bus >

**4** Mzuzu - 1 night ▾

Plane >

End: London ▾

**Thu, Aug 7 - Tue, Aug 13** [Edit](#)

S	M	T	W	T	F	S	
	2	3	4	5	6	7	8
9	10	11	12	13	14	15	
16	17	18	19	20	21	22	

[See full calendar](#)

### Plan your trip

#### Itinerary Planner

Enter destination (Country, Region, or City) ?

[+ Add destination](#)

Start → End 2 adults ▾

ACTIVITIES PREFERENCES (OPTIONAL) ▾

Popular

Slow & easy

Culture

Balanced

Medium

Outdoors

Hidden gems

Fast-paced

Relaxing

Romantic

Beaches

Historic sites

Museums

Shopping

Wildlife

See your plan

**About us**

- Marketing Malawi
- Contact Us
- Document and forms

**Plan your visit**

- Visa, Immigration and customs
- Transportation
- fligh
- Road
- Railway
- Water
- Travel tools and tips
- Gallery

**Useful Links**

- Tourism directory
- Invest in Malawi
- Visa and Immigration
- Government of Malawi

Dpt. of Tourism  
Tourism House  
Off Convention Drive, Private  
Bag 326  
Lilongwe, City Centre  
**Malawi, Africa**

Email: [info@visitmalawi.mw](mailto:info@visitmalawi.mw)  
Phone: +265 1 775 499  
Fax: +265 1 770 650  
[www.visitmalawi.mw](http://www.visitmalawi.mw)

Figure 2- Web design

# Triptych:

The new strategy defines the eco-tourism offer and the key tourist profiles that need to be addressed

## ECO-TOURISM OFFER

Malawi as a whole eco-tourism destination



## ECO-TOURIST PROFILES



# Malawi



Dpt. of Tourism  
Tourism House  
Off Convention Drive  
Private Bag 326  
Lilongwe  
City Centre  
**Malawi, Africa**  
Email: [info@visitmalawi.mw](mailto:info@visitmalawi.mw)  
Phone: +265 1775 499  
Fax: +265 1770 650  
[www.visitmalawi.mw](http://www.visitmalawi.mw)

### Eco-tourism Strategy

\*Malawi logo used with permission of the Malawi Tourism Board

A vision represents an aspirational description of what a destination would like to achieve in the long-term. The vision should be the guiding light which inspires the destination. Although the Strategy has been defined for a time horizon of seven years, the vision and strategic objectives of the plan are recognized as having a longer-term relevance. The vision of Malawi as an Eco-tourism destination has been elaborated following a thorough and participative strategic planning process.

**VISION STATEMENT**

**"Transforming Malawi into an inspiring eco-tourism destination capable of generating a cross-cutting economy throughout the country in the coming years"**

- Products focused on the value of this mix of nature and human being besides the value of "the small" and the feeling of the authentic Africa.
- A positioning based on the country as an entire eco-tourism destination that allows a new relationship with nature.
- Values of discovery, adventure, comfort, safety and entire immersion in local life.
- A wild and at the same time humanized nature far from massive tourism.



The vision and mission require defining strategic objectives to make it operational. These are top-level axes to guide the generation of specific initiatives as part of the Strategy. The initiatives include a series of specific measures that can be prioritized and tracked. Eight main long-term objectives have been identified as strategic axes to reach the desired future:

**STRATEGIC OBJECTIVES**

**The new Eco-tourism strategy for Malawi includes eight strategic objectives:**

- 1** Positioning Malawi as an eco-tourism destination that guarantees the sustainable and well-planned development of the destination, making it an example for the rest of the national economic sectors.
- 2** Boosting Malawi as a destination that faces the new challenges that nature and human development are posing to today's society.
- 3** Differentiating Malawi from other competing destinations unveiling its identity and deepening what makes it unique and different.
- 4** Developing innovative products in the context of the vision for eco-tourism.
- 5** Promoting competitiveness and investments. Developing a complete tourism offer (accommodation, services, resources) that attracts entrepreneurs, investors and public investments
- 6** Efficient marketing of the destination to targeted/priority market/tourist segments
- 7** Inclusiveness by optimizing involvement of the local communities with particular emphasis on youth and women.
- 8** Construction of new economic spaces; direct, indirect and induced, where local communities become main agents of their development.

The action plan establishes a total investment per year that ranges from USD 348,248 to USD 511,914. This last four years are more intensive in terms of investment volume due to, among others, the development of a first phase of the Eco-tourism route. The figure below illustrates all the proposed initiatives within the four lines of action and the Action Plan for the Eco-Tourism Strategy of Malawi, including the priority level, costs and period for development of each initiative.

- LINES OF ACTION**
1. Articulation and cohesion of eco-tourism sector (public, Private sector and local communities) through a common vision and shared objectives.
  2. Eco-Tourism products development & Visibility of Malawi as eco-tourism destination as a whole.
  3. Promoting investments in eco-tourism.
  4. Marketing plan.

**Action plan**

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	TOTAL
<b>Articulation and cohesion</b>								<b>660,000</b>
A.1 Presentation of the National Eco-tourism Strategy	18,000	0	0	0	0	0	0	18,000
A.2 Creation of a national Eco-tourism cluster to boost the National Eco-tourism Strategy	70,000	60,000	60,000	60,000	60,000	60,000	60,000	370,000
A.3 Annual Conference Eco-tourism sector	0	30,000	30,000	30,000	30,000	30,000	30,000	180,000
<b>Eco-tourism products development</b>								<b>1,969,000</b>
B.1 Wildlife and Nature Protected Areas: Consolidation of successful management and concession models	0	40,000	10,000	10,000	10,000	10,000	10,000	90,000
B.2 Accommodation and activities, grading system	60,000	60,000	60,000	0	0	0	0	180,000
B.3 Enhancement of World Heritage resources as key part of the eco-tourism offer	44,000	60,000	60,000	60,000	60,000	0	0	244,000
B.4 Eco-tourism route	0	0	0	80,000	180,000	200,000	200,000	660,000
B.5 Community based tourism development	45,000	45,000	45,000	45,000	45,000	45,000	45,000	315,000
B.6 Eco-tourism packs involving the whole experience and linking the protected areas. Clean card	0	20,000	10,000	10,000	10,000	10,000	10,000	70,000
B.7 Capacity building. Program definition and implementation. Scaling eco-tourism through world class guiding and interpretation	60,000	30,000	30,000	30,000	30,000	30,000	30,000	230,000
B.8 Preservation and climate change awareness	0	40,000	20,000	20,000	20,000	20,000	20,000	140,000
<b>Investments</b>								<b>660,000</b>
C.1 Attracting eco-tourism investors by promoting the eco-tourism plan as a road map	30,000	30,000	30,000	30,000	30,000	30,000	30,000	210,000
C.2 Technical and financial support for C&I	60,000	60,000	60,000	60,000	60,000	60,000	60,000	360,000
<b>Marketing</b>								<b>498,000</b>
D.1 Promoting Malawi as an eco-tourism destination. Micro sites and social networks	18,000	18,000	18,000	18,000	18,000	18,000	18,000	126,000
D.2 Online eco-tourism center	24,500	0	0	0	0	0	0	24,500
D.3 Digital information social networks National Parks	0	18,000	0	0	0	0	0	18,000
D.4 Statistics and surveys	18,714	18,714	18,714	18,714	18,714	18,714	18,714	131,000
D.5 Basic promotional materials	3,000	3,000	3,000	3,000	3,000	3,000	3,000	21,000
D.6 Eco-tourism sub-brand	0	0	0	0	0	10,000	0	10,000
D.7 Social networks for protected areas and natural sites	0	0	18,000	18,000	18,000	18,000	18,000	90,000
D.8 Data base and annual tourist survey	3,114	3,114	3,114	3,114	3,114	3,114	3,114	21,800
D.9 Web analytics	8,000	8,000	8,000	8,000	8,000	8,000	8,000	56,000
<b>TOTAL INVESTMENTS (USD)</b>	<b>423,578</b>	<b>480,078</b>	<b>478,078</b>	<b>680,743</b>	<b>680,743</b>	<b>641,943</b>	<b>631,943</b>	<b>3,818,100</b>

Figure 3- Eco-tourism Strategy triptych

### 9.5 Annex 5: Tourism Markets Assessment

After analysing the tourism offer in terms of products and resources, it is necessary to know about the demand from the available data. This Annex provides an analysis of the tourism market in Malawi involving figures about visitors, revenues and tourist behaviour.

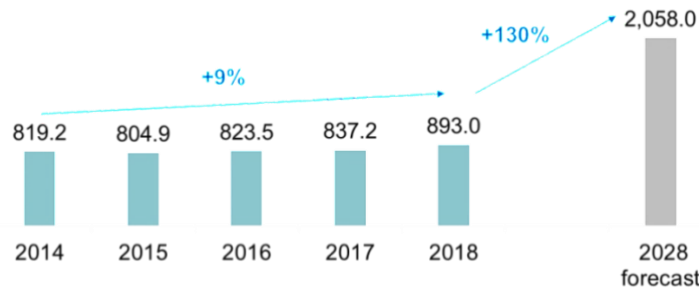
The literature reviewed was provided by the Department of Tourism as well as other reliable international sources such as the World Bank (WB) and the World Travel & Tourism Council (WTTC).

#### General Data

**Analysis of arrivals in Malawi:** The number of visitors in Malawi has grown steadily since 2014 (with the exception of 2015) reaching 893,000 arrivals in 2018.

**Forecasts for 2028** point to a significant increase in arrivals, with more than 2 million tourists expected for that year.

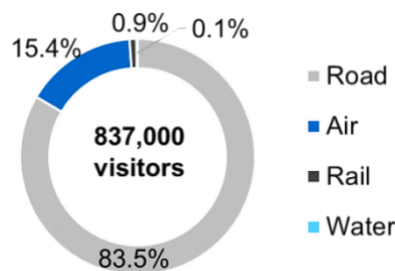
Figure 4 - Number of arrivals. (thousands)



Source: National Tourism Statistics, World Travel and Tourism Council (WTTC)

Of the total number of visitors arriving in Malawi in 2017, **more than 80 percent of visitors chose road transport to visit the country.** Air transport took second place, accounting for 15.4 percent of arrivals.

Figure 5 - Visitors arrivals by means of transport (2017)



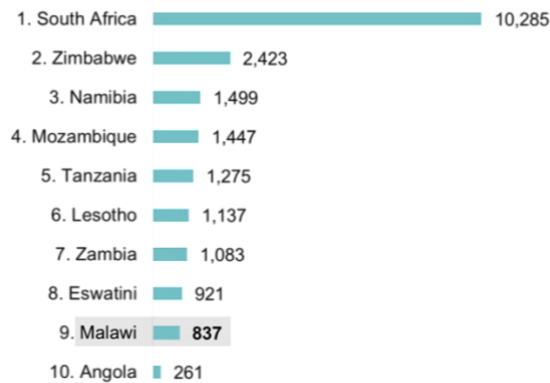
Source: National Tourism Statistics

According to World Bank's data for 2017, Malawi is among the Top 10 countries in the Southern Africa Development Community (SADC) region in terms of number of inbound visitors (overnight visitors). However, comparing with its neighboring countries (Zambia, Tanzania, Mozambique and Zimbabwe), Malawi has still plenty of room for improvement.

South Africa leads the top-10 regional ranking with 10 million overnight visitors in 2017 (more than half the total volume).



Figure 6 - International inbound tourists (overnight visitors). Top 10 countries 2017. (Thousands)

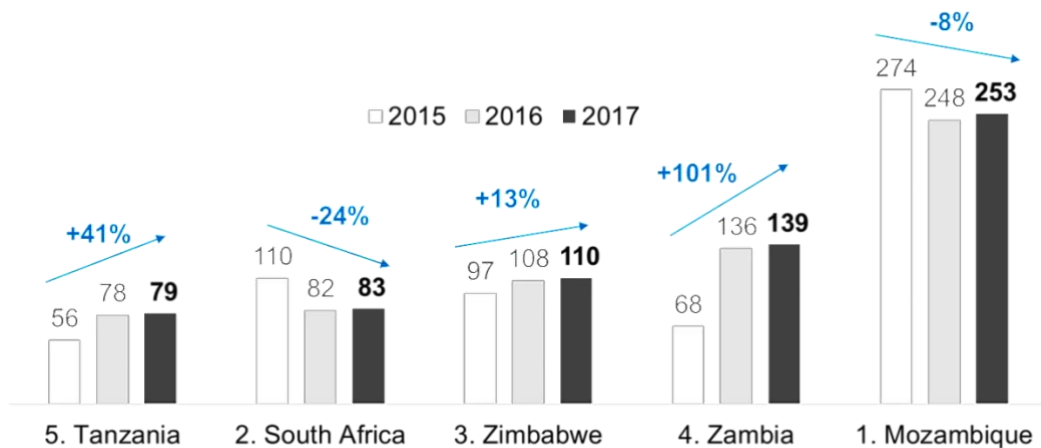


Source: World Bank Data

Neighbouring countries are the main source of visitors to Malawi. **Mozambique is at the top of the list of the five main regional countries, contributing 235,000 of visitors in 2017** (a third of the total). Zambia and Zimbabwe are second and third in the top-5 list of source countries.

The **number of visitors from Zambia to Malawi has grown dramatically since 2015**, doubling the number of visitors in 2017 (139,000 visitors). Tanzania and Zimbabwe have also increased their number of visitors to Malawi since 2015 (41% and 13% respectively). On the other hand, the number of visitors from Mozambique and South Africa decreased.

Figure 7 - Top 5 regional source countries (thousand visitors)

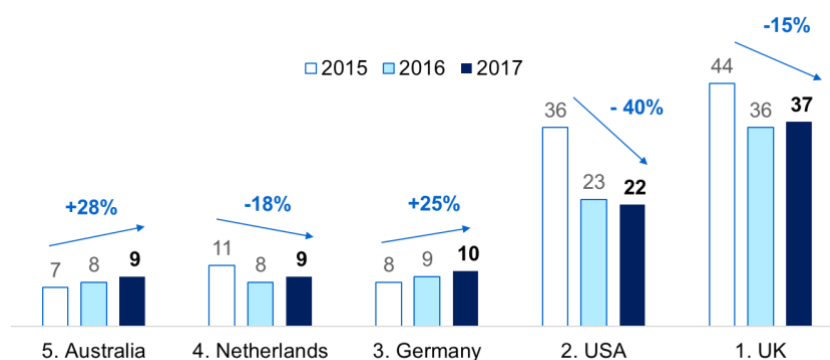


Source: National Tourism Statistics

Note: For the top 5 ranking the consultants have compared 2017 data.

**The United Kingdom and the United States are the main international visitors' sources in Malawi** – 37,000 and 22,000 visitors in 2017. However, the number of visitors from these two countries has decreased since 2015, especially for USA (-40%). Data from Australia and Germany, was promising, increasing their number of visitors to Malawi by 28% and 25 % respectively since 2015.

Figure 8 - Top 5 international source countries (thousand visitors)



Source: National Tourism Statistics.

Note: For the top 5 ranking the consultants have compared 2017 data.

### Tourist behavior:

Overall, the main purpose for travelling to Malawi for both regional and international markets is Work & Business. For the top 5 main source countries in the region 73 percent of the total visitors travelled to Malawi for work, while **only 16 percent of them travel to Malawi on holiday**.

The number of holiday visitors from the main source countries of the region has suffered an important decrease in the last years. The number of visitors from South Africa and Zimbabwe remained solid in 2017 with 37,900 and 31,000 holiday visitors respectively, (1s and 2nd in 2017). On the other hand, the volume of visitors from Mozambique suffered an important decrease in 2017, dropping to 25,000 visitors.

Figure 9 - Top 5 regional source countries – Purpose (thousand visitors)

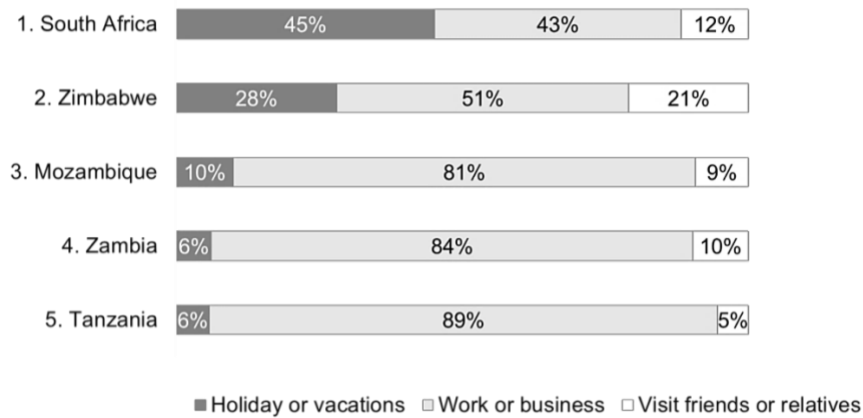


Source: National Tourism Statistics

Note: For the top 5 ranking the consultants have compared 2017 data.

As the following table shows, South Africa is the country where holiday visitors to Malawi have the highest representation (45% of total visitors), followed by Zimbabwe (28%).

Figure 10 - Top 5 regional source countries – Purpose of visit (% of total visitors)

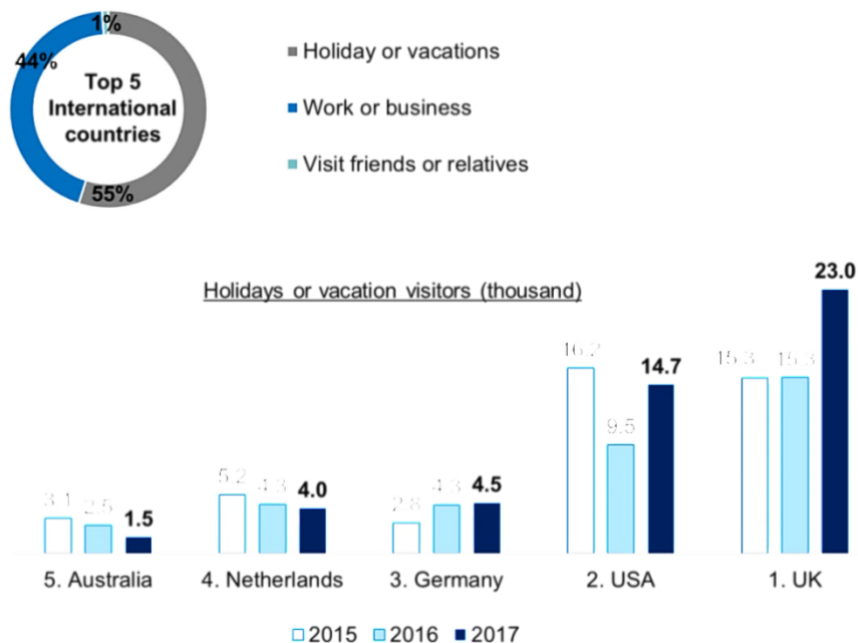


Source: National Tourism Statistics

For the top 5 main source countries internationally, 55 percent of the total visitors travelled to Malawi for holidays or vacation while 44% visited Malawi for work.

USA and UK are the top source countries with 23,000 and 15,000 respectively in 2017. Numbers of tourists from these two countries increased in 2017, while the remaining countries of the list remained constant overall, with a slight decrease in Australia.

Figure 11 - Top 5 international source countries (thousand visitors)

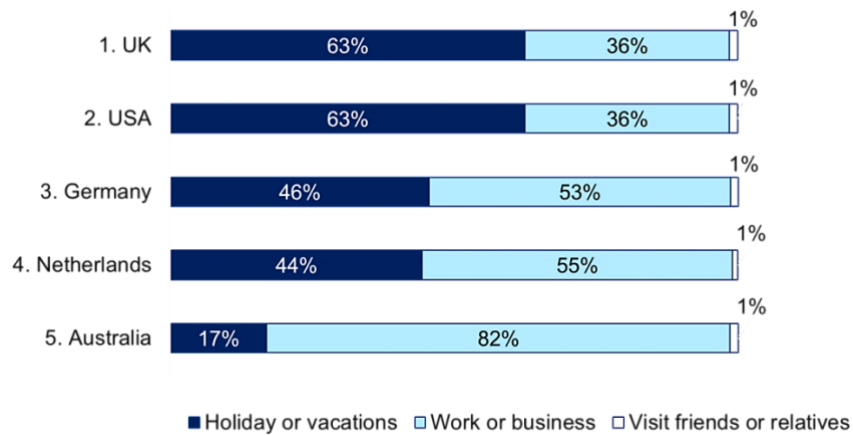


Source: National Tourism Statistics

Note: For the top 5 ranking the consultants have compared 2017 data.

As the following table shows, UK and USA lead the ranking regarding representation of holiday visitors in Malawi with 63% of the total visitors each.

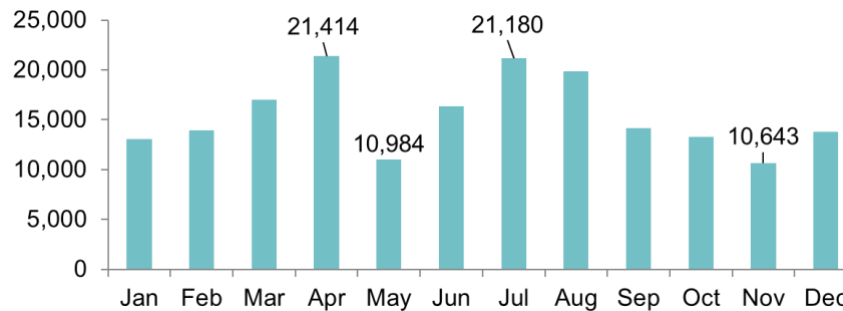
**Figure 12 - Top 5 regional source countries – Purpose of visit (% of total visitors)**



Source: National Tourism Statistics

The distribution of the number of tourists in Malawi is seasonal with several oscillations throughout the year. The figure below shows two months of maximum visits (April and July) with over 21,000 visitors and two weaker months, May and November, with less than 11,000.

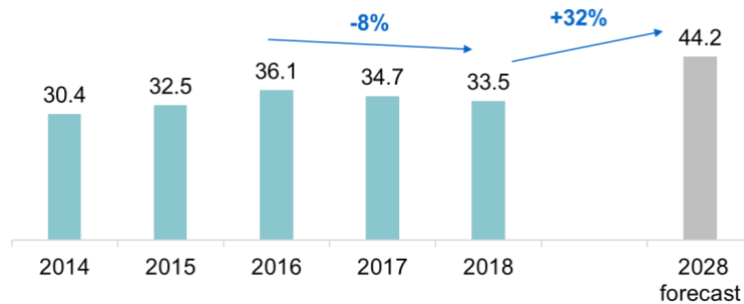
**Figure 13 - No. Visitors Monthly distribution. Holiday or vacation (2017)**



Source: National Tourism Statistics

Despite a slight decrease in the last two years (2017 and 2018), international travel spending the WTTC forecasts to reach over US\$44 million by 2028.

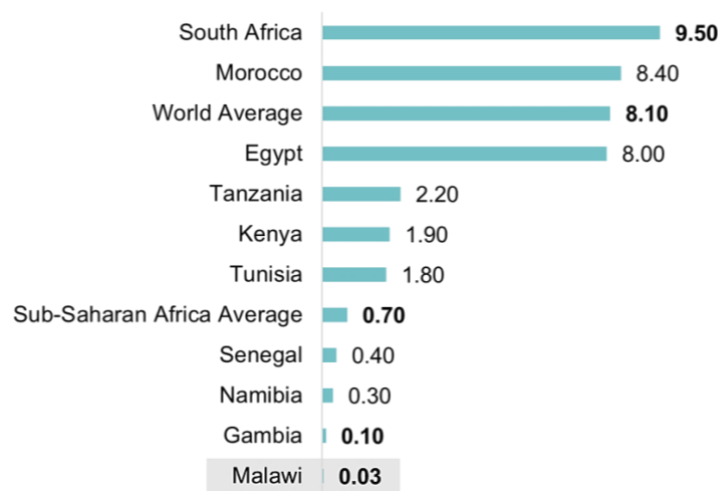
**Figure 14 - International tourism spending in Malawi (US\$ million)**



Source: World Travel and Tourism Council (WTTC)

Compared to neighboring countries and other international benchmarks (figure below), Malawi lags behind in terms of international travel spending. However, as the figure above shows, forecasts for the coming years are promising and reveal the country's great potential.

**Figure 15 - International travel spending (US\$ million)**

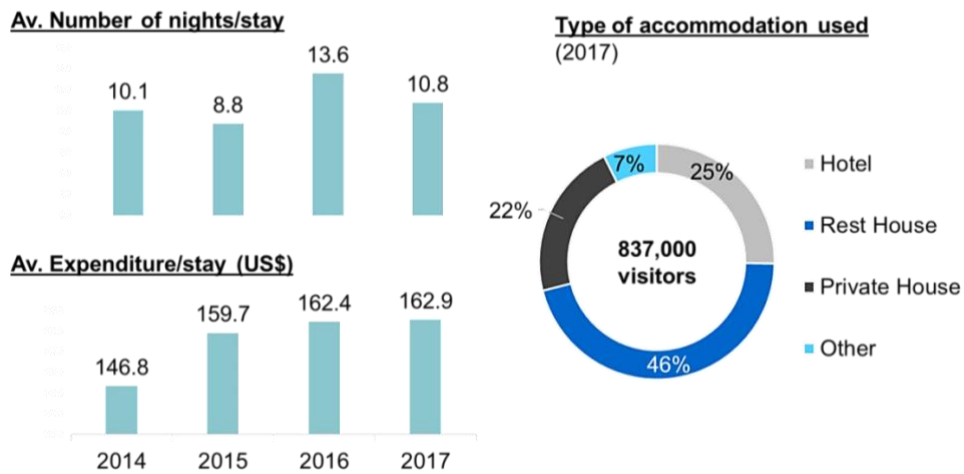


Source: World Travel and Tourism Council (WTTC)

**Average spending** by travellers has increased steadily in the last years, reaching US\$162 per tourist per stay. The number of nights spent by travellers has dropped to an average of 10.8 nights in 2017 from 13.6 nights in the previous year.

**Preferred accommodation** types are rest houses, which account for 46% of the total demand for accommodation. Hotels account for 22% of requests for accommodation.

Figure 16 - Expenditure and accommodation



Source: National Tourism Statistics

According to Malawi's tourism statistic data, the main tourist profile envisages middle aged men (around 70% of males between 25 and 49 years old) who travel to Malawi for work or business purposes.

### Domestic Tourism

Data from WTTC indicate 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).

Figure 17 - Malawi travel spending



Source: World Travel and Tourism Council (WTTC)

#### **Other domestic tourism data:**

- Based on occupancy figures, latest reports indicate that almost 65 percent of urban and city occupancy rates are residents.
- Additionally, 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 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.
- 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.

#### **Malawi Parks and Protected Areas**

According to African Parks Annual Report 2018, the number of visitors to Malawi Parks managed by this organization remained solid in 2017.

Majete's tourism continued to grow, with annual visitor numbers rising from 9,180 in 2017 to 11,678 in 2018—an increase of 27%. In parallel, net revenues grew by 34% (from \$240,057 in 2017 to \$323,223 in 2018).

Tourism increased at Liwonde National Park by almost 20% during 2018—reaching just under 20,000 visitors for the year—and park revenues grew from \$329,699 to \$405,052

Although tourism is not a top priority during the first five years of reserve revitalisation, in 2018, the 1,061 people who visited Nkhotakota generated \$12,448 in gross revenues.

## 9.6 Annex 6: Current and Potential Markets and Tourists Profiles

### UNITED KINGDOM

The UK economy is currently the **5th in the world**. In 2018, the UK unemployment rate was 4.0%, the lowest level since the 1970s. UK residents took **72 billion trips abroad** in 2017 spending US\$ 71.4 million (3% more than the previous year). **45,000 British visitors** travelled to Malawi in 2017. 23,000 out of those were on holidays having a significant increase since 2015 (15,300 visitors).

With regards to travelling motivators, British tourists are influenced by the **longstanding desire to visit a destination** (45%), followed by a **past visitation to the destination** (31%), a **safe place** to visit (27%), the **city experiences** the place offers (27%) and the **opportunity to relax, unwind and decompress** (25%).

Regarding vacation activities, British travellers are highly interested in **trying local food and drinks** (70%) closely followed by **visiting natural attractions** like mountains or waterfalls. They are also attracted by **nature parks** (58%), **viewing wildlife or marine life** (55%) and **northern lights** (52%).

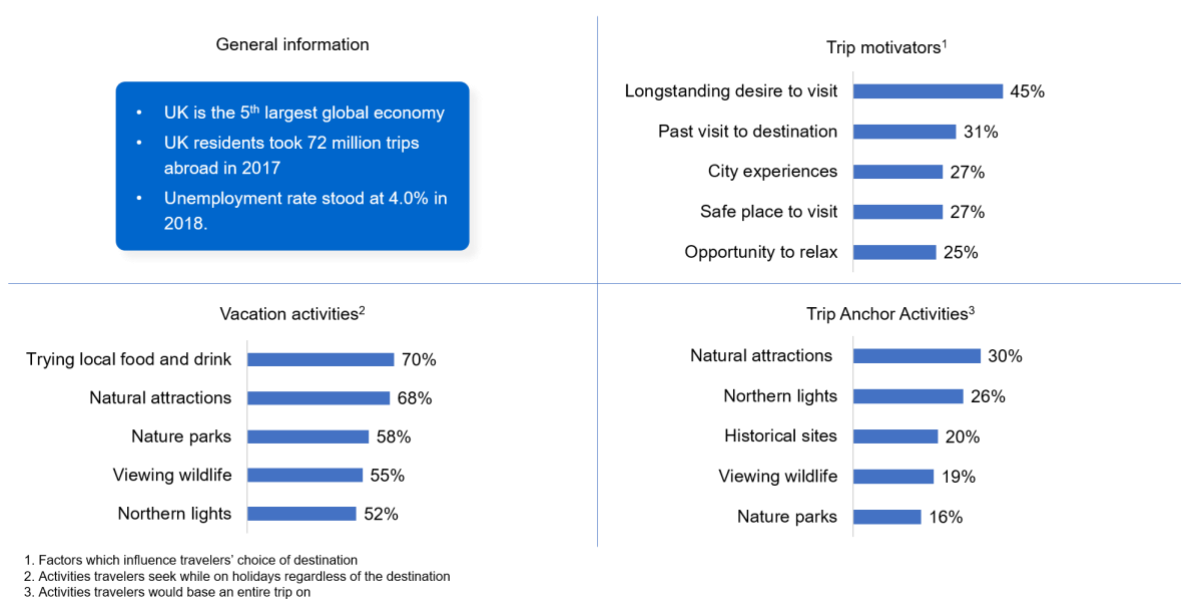
As far as older UK tourists (+55) are concerned, they are more interested in trying local food/drink, seeing natural attractions or viewing wildlife than younger tourists. However, travellers aged 25-34 prefer shopping for luxury items and participating in outdoor activities such as camping, zip lining, scuba diving, skiing, etc.

When it comes to trip anchor activities, British travellers' top five activities are: **visiting natural attractions** (30%), **northern lights** (26%), **historical, archaeological and world heritage sites** (20%), **viewing wildlife or marine life** (19%) and **nature parks** (16%). Within group ages, +55 travellers choose cruises and guided tours whereas 25-34 British travellers prefer activities such as camping, agricultural/farm tours and golfing.

### UNITED STATES

The United States is the **World's largest economy**, with approximately 24% of global GDP. The

#### UK Tourists Profile



unemployment rate was 3.9% in 2018. The US is also the **2<sup>nd</sup> outbound tourism market** behind China, with an expenditure of US \$135 million in 2017. Malawi had **36,000 visitors** in 2017, 14,700 being on vacation. That number has decreased since 2015 (16,200) although it has significantly increased since 2016 (9,500).



Factors which influence American travellers in their destination selection are the **opportunity to relax, unwind and decompress** (44%) closely followed by the **previous visitation to the destination** (43%). In the third place, they try to find a **destination that fits their budget** (36%), followed by the fact that it is a **great family destination** (32%) and it is a **safe place to visit** (31%).

When they go on vacation, Americans are fond of activities like **trying local food and drinks** (71%), closely followed by visiting **natural attractions** like mountains or waterfalls (69%), **hiking or walking in nature** (59%), **nature parks** (55%) and **viewing wildlife or marine life** (54%).

Within group ages, travellers aged 25-44 are more likely to enjoy activities such as nightlife, shopping for clothes/shoes, spa/wellness and culinary tours. They are also interested in breweries/wineries.

Regarding the trip anchor activities, American travellers choose **natural attractions like mountains or waterfalls** in the first place (34%), followed by **northern lights** (28%), **cruises** (24%), **historical, archaeological or world heritage sites** (23%) and **viewing wildlife or marine life** (20%).

Younger travellers (25-44) also value going to amusement/theme parks in their top 10 activities.

## GERMANY

Germany is the **largest national economy in Europe** and the **4<sup>th</sup> largest economy in the world**, with 4.6% share of global GDP. In 2018, unemployment rate stood at 3.6%, the lowest level since German reunification. Germany is the **3<sup>rd</sup> largest outbound tourism market**, with an expenditure of US\$ 89.1 billion, increasing 9.4 % in 2017. Germany had **8,000 visitors to Malawi** in 2017. Out of those, 4,5 thousand were on vacation, a figure that has increased since 2015 (2,8 thousand).

When choosing a destination, Germans are influenced by **the longstanding desire to visit the place** with 45%, followed by the **past visitation to the destination** (28%). In third place, they choose a destination to have the **opportunity to relax, unwind and decompress** (25%), closely followed by **seeing a great deal** (24%) and a **safe place to visit** (23%).

For vacation activities, German travellers are generally keen on **trying local food and drink** (66%), followed by **hiking or walking in nature and nature parks** both with 59%. They also enjoy **natural attractions** like mountains or waterfalls (57%) and **viewing wildlife or marine life** (52%). On the

## US Tourists Profile

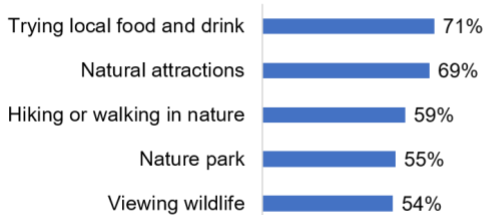
### General information

- US is the largest global economy
- US is the 2<sup>nd</sup> largest outbound tourism market
- Unemployment rate stood at 3.9% in 2018.

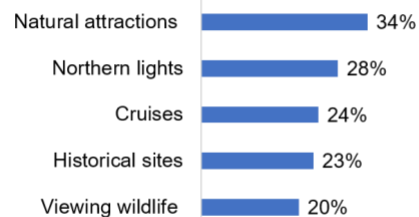
### Trip motivators<sup>1</sup>



### Vacation activities<sup>2</sup>



### Trip Anchor Activities<sup>3</sup>



1. Factors which influence travelers' choice of destination

2. Activities travelers seek while on holidays regardless of the destination

3. Activities travelers would base an entire trip on

other hand, Germans aged 45-65 prefer guided city and nature tours in comparison to the younger travellers (25-34) who are more likely to choose active outdoor activities, seeing spring blossoms, self-guided driving tours/road trips, visiting amusement/theme parks, nightlife or attending festivals or shows.

The top trip anchor activities chosen by Germans when travelling are: **natural attractions** like mountains or waterfalls (36%), **nature parks** (32%), **viewing wildlife or marine life** (30%), **hiking or walking in nature** (26%) and **northern lights** (24%).

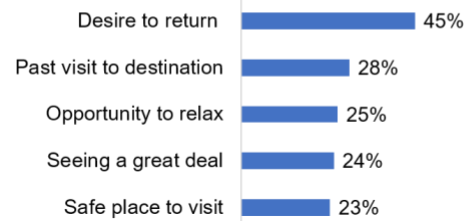
German tourists aged 45-64 tend to like viewing wildlife, trying local food/drink, visiting historical sites and guided tours more than 25-34 travellers who anchor a trip around self-guided tours (with a very high level of interest, unique to the German market), kayaking, camping and attending shows or festivals.

## German Tourists Profile

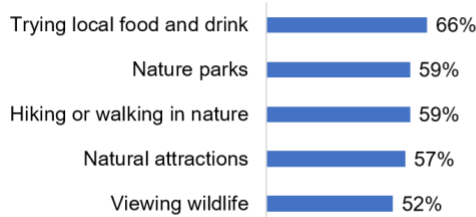
### General information

- Germany is the 4<sup>th</sup> largest global economy
- World's 3<sup>rd</sup> largest outbound tourism market
- Unemployment rate stood at 3.6% in 2018.

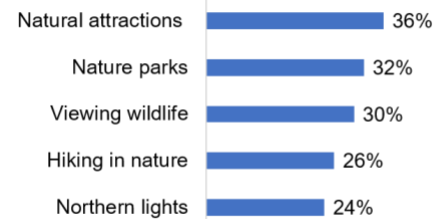
### Trip motivators<sup>1</sup>



### Vacation activities<sup>2</sup>



### Trip Anchor Activities<sup>3</sup>



1. Factors which influence travelers' choice of destination

2. Activities travelers seek while on holidays regardless of the destination

3. Activities travelers would base an entire trip on

## AUSTRALIA

Australia is the **13<sup>th</sup> world economy**, with 1.7% share of global GDP. Last year, the unemployment rate stood at 5.3%. It is also the world's **6<sup>th</sup> largest outbound tourism market**, with a total spending of US\$34.2 billion in 2017, growing by 7.7% year over year. **9,000 Australian visitors** travelled to Malawi in 2017, the highest value since 2015 (7,000 visitors). The number of Australian travelling to Malawi on vacation has decreased from 3,100 to 1,500 visitors from 2015 to 2017.

Generally speaking, when choosing a destination, Australian travellers are motivated by the **longstanding desire to visit a place** with a 35% and the **perceived safety** of the destination with 34%. **City experiences** (31%) and **cultural experiences** and **desire to return to a destination**, both with 30% are also some important factors they take into account.<sup>4</sup>

Regarding the vacation activities, Australians seek when travelling regardless of the destination, the general tendency is **trying local food and drink** with 65% closely followed by **natural attractions or waterfalls** with 64%. In third position, Australians look for **nature parks**, immediately followed by viewing wildlife (51%) and historical, archeological or world heritage sites (49%).<sup>5</sup>

Within group ages, older Australian travellers (55+) are interested in: City based activities: trying local food, visiting city parks, art galleries and guided city tours. They are also keen on wildlife viewing, historical sites, Indigenous culture, guided train & boat tours. However, younger travellers: (25-34) are fond of nightlife, camping, zip lining, downhill skiing adventure sports.

The trip anchor activities (i.e. activities travellers would base an entire trip about them) Australians are mostly attracted to are **natural attractions** (31%), **northern lights** (24%), **historical sites** (22%) closely followed by **trying local food/drink** (20%) and **visiting nature parks** (19%).<sup>6</sup>

Older Australian travellers (55+) also value cruises, visiting historical sites, exploring indigenous culture and guided tours. On the other hand, younger travellers (25-34) enjoy food& drink festivals and nightlife, amusement/theme parks and shopping.

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<sup>4</sup>This information has been taken from Global Tourism Watch 2018 Australia Public Summary Report. In particular, these data respond to the question "factors which influence travelers' choice of destination ».

<sup>5</sup>This information answers the question "activities travelers seek while on holiday regardless of the destination ».

<sup>6</sup>These data correspond to the activities travelers would base an entire trip on.

# Australian Tourists Profile

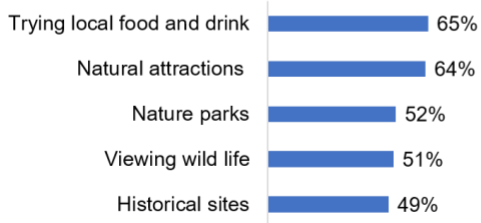
## General information

- Australia is the 13<sup>th</sup> largest global economy
- World's 6<sup>th</sup> largest outbound tourism market
- Unemployment rate stood at 5.3% in 2018.

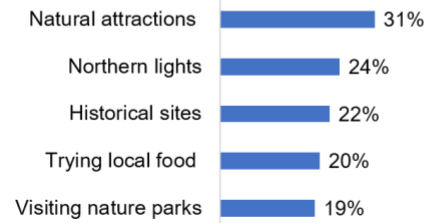
## Trip motivators<sup>1</sup>



## Vacation activities<sup>2</sup>



## Trip Anchor Activities<sup>3</sup>



1. Factors which influence travelers' choice of destination  
 2. Activities travelers seek while on holidays regardless of the destination  
 3. Activities travelers would base an entire trip on

## 9.7 Annex 7: List of documents for secondary data source

- i. Tourism Department Statistic Data 2015-2017
- ii. African Parks Annual Report 2018
- iii. Domestic Tourism Strategy 2018-2023
- iv. National Wildlife Policy 2018
- v. Final Report on Ecotourism Market Assessment 2012
- vi. National Tourism Policy 2019
- vii. Malawi 2020 Tourism Development Strategy
- viii. Malawi Growth and Development Strategy III
- ix. Malawi Cultural Policy 2015
- x. When Animals sing and Spirits dance. Gule Wamkulu: the Great Dance of the Chewa. Claude Boucher 2008
- xi. Digging our Roots. Claude Boucher 2002
- xii. Malawi Tourism E-brochure
- xiii. Malawi Brochure 2018 edition
- xiv. Marketing Strategy framework 2017-2021
- xv. Putting Malawi on the map as an attractive tourism destination 2014
- xvi. Ministry of Industry Trade and Tourism Strategy Plan 2016-2021
- xvii. The best of Malawi 2019 Brochure
- xviii. Travel trends Report 2018 Trek-Soft
- xix. Africa Tourism Monitor 2018
- xx. World Travel and Tourism Council. Malawi Economic Impact Report 2018
- xxi. National Tourism Investment Master Plan. Current state assessment Report. Deliverable for Phase 2.AVASANT ( no validated by the Tourism Department) 2018

## 9.8 Annex 8: List of topics for interviews and focus group discussions

### TOPICS

- Malawi within the international, national and regional strategy
- Involvement and point of view about Malawi as an ecotourism destination
- Current market strategy
- Marketing actions related to target markets
- Target markets gaps
- Best practices in Community Tourism and other Malawian ecotourism products
- PPP projects
- Deeping on target markets trends, profile and tourists behaviour
- International markets data
- Regional and local markets data
- Malawi within the international, national and regional context
- Attractiveness of the sites
- Ecotourism activities linked to the accommodation
- Green and responsible actions
- Identity specific material and in-material elements and differentiation keys from other destinations
- Analysis about current situation of curious vendors and other activities linked to tourism
- Identifying potential activities for future
- Link with local communities
- Awareness about tourism as a source of income
- Current and potential initiatives

## 9.9 Annex 9: List of Key Informants (Interviewees)

Name	Organization
Charles Kachelenga	Department of Tourism
Brighton Kumchedwa	National Parks and Wildlife - Director
Blessing Walawala	Department of Museums and National Monuments - Deputy Director
Medson Makuru	Chongoni - Site Manager
Steve Roberts	Blue Zebra Eco-lodge - Manager
Robert Roots	Kande Horse - Manager
Bentry Kalanga	Tongole Wilderness Lodge - Sales Manager
Tim Bellack	Ntchisi Forest - Manager
Philimon Mpuwe	Mzuzu Sanctuary. Environmental Education Programme
Dyce Kamwana	Mzuzu Sanctuary - Manager
David Barton	Kanda Beach Resort - Founder and owner
Cameron Major	Mushrooms Farm Lodge
Charlie T. Msusa	Public-Private Partnership Commission - Director
Ranjan Perera	Serendib Hotel and Resorts
Innocent Kaliati	Responsible Safaris - Sales Manager
Ranjab Perera	Ku Chawe Inn, Sunbird
Richard Chimwala	Mvuu Camp & Lodge Liwonde National Park
Julie Schofaman	Mumbo Island. Kayak Africa
Claude Boucher	Mua Mission
Ganizani Phiri	Dedza Pottery - Tour guide
	Chongoni Rock art - Tour guide

## 9.10 Annex 10: List of Participants

### Inception Report Presentation and Workshop with Stakeholders, Lilongwe 28th October 2019

Name	Organisation
Gray Munthali	CCCEM
Chikondi Bulangete	DoT
Mtegha Bywell	DoT
M. Munkhondya	CCCEM
Fixon Mkanda	DoT
Yamikani Phiri	DoT
Maurice Leston Chikanga	DoT
Francisco Dodoma	DoT
Ian Musyani	DoT
Nellie Kondwani	DoT
Isaac Katopola	DoT
Sarah Njanji	DoT
Tamanda Kaleke	DoT
Alice Magombo	DoT
Adams Chavula	CCCEM
R. Mwanga	MITC
Acha Chawinga	DoT
Yamikani Kaliati	DoT
Noah Nansongole	DoT
Sosten Lingwalanya	DoT
Dyson Banda	DoT

Data provided by Department of Tourism



## Focus Group Discussions. Nkhata Bay on 30<sup>th</sup> October, 2019

Name	Organization
Mavuto Simwaka	DOT
Wilford Kaunda	Nkhatabay council
M. Gondwe	Local government
Soviet Chilinda	Tour Guide Association
Shadreck Malemia	DOT
Wezzie Lwara	DoT
Nicholas Kamzimbi	Curious vendor
Mc Donald Liwonde	Curious Chair person
James Phiri	N.Lodge
Matthews Mbwe	Curious vendor
Bob Chimonjo	Curious
Mike Kasumbu	Handcrafter
Frank Mkanse	Curious Vice chair Person
Francisco Dodoma	DoT
Fixon Mkanda	DoT
Martin Munkhondya	Local Consultant

## Chembe Village on 4<sup>th</sup> November, 2019

Name	Organization
Anthony Kalumba	Mudzi Lodge Operator
Lackson Maliwanda	Cape Maclear Tour guide
Mc Philip Mwithskons	DNPW – LMNP
Kay De Silva, Warm	Heart Adventures
Allan Joffe	Cape Maclear Lodge owners association
Julie Schofaman,	Kayak Africa

Martin Munkhondya

Rhoda Mollande,

Acha Chawinga

Constance Makonokaya

Francisco Dodoma

Fixon Mkanda

Local Consultant

Local Consultant

Department of Tourism, Mangochi District

Department of Tourism, Mangochi District

DoT

DoT







## 9.11 Annex 11: Field mission Itinerary

Itinerary for the fieldwork October and November 2019

DAY	ACTIVITY/TIME	LOCATION	RESPONSIBLE
<b>Day1- 28<sup>th</sup> October, 2019</b> <b>Arrival Of The consultancy Team</b> <b>Monday</b>	9- 11 am: Logistic issues 11:00-12:30 Meeting DoT 12:00 Lunch 13:00- 15:00: Workshop with stakeholders Night Lilongwe	DoT Conference   BICC	
<b>DAY 2 29<sup>th</sup> October 2019</b> <b>Tuesday</b>	9:00-10:00am Depart Lilongwe for Ntchisi Forest Lodge Hold discussions with the unit manager 10:12:00 Lunch at the Lodge Night Lilongwe	Ntchisi Forest Lodge	DoT/The Consultancy Firm
<b>DAY 3: 30<sup>th</sup> October, 2019</b> <b>Wednesday</b>	11:00-12:00 Early Lunch at Bua Lodge 12:00-15:00 Proceed for Nkhatabay and en route visit Kande Horses and Kande Beach Proceed Further to Nkhatabay for Mayoka Village Lodge. Hold Focus Group Discussions with stakeholders Night at Mayoka Village Lodge.	Bua Lodge  Kande Horses and Kande Beach Resort  Mayoka Village Lodge	Operator, Consultancy & DoT   DoT, Operators Consultancy firm.
<b>DAY 4 Oct 31<sup>st</sup>, 2019</b> <b>Thursday</b>	08:30-12:00am Depart for Mzuzu and visit The Mzuzu Nature Sanctuary. Hold Discussions. 12:00 noon Lunch in Mzuzu 13;00-17:00pm Depart for the Stone House, Visit Mantchewe Falls, Lukwe Eco-camp and Mushroom Farm Lodges and hold discussions Night at Mzuzu	Mzuzu  Stone House Lukwe Ecocamp Mushroom Farm	All       All
<b>DAY 5 November 01, 2019</b>	8:00am14:00 Depart o Lilongwe		All

<b>Friday</b>				
<b>DAY7 November 3, 2019 Sunday</b>	8:30am Depart Lilongwe for Mua Cultural Centre and Museum and en route hold Discussions with Department of Museums and monuments at Chongoni Rock Paintings 10:00-11:00am.  Lunch at Dedza Pottery 12:00  Depart Dedza Pottery to visit Mua cultural centre and Museum. Hold discussions. 15:00-16:00  Proceed to Lake Malawi National Park  Night at Lake Malawi National Park-Chembe Village			All      Mua     Lake Malawi National Park
<b>Day8, November4, 2019 Monday</b>	8:30am Visit chembe Village and hold a focus group discussion at Golden Sands Holiday Resort. Visit Kayak Africa to proceed to Mumbo Island  Lunch at Chembe Eagles Nest. 12:00Noon.	Golden Sands Conference.		All
<b>Day8, November5, 2019 Tuesday</b>	Depart Cape Maclear for Liwonde National Park  8:300am. Hold Discussions with operators at Mvu Camp and Lodge and Hold Discussions with Wilderness Safaris  10:30- 11:30am  Lunch at Mvu Camp 12:00noon.  Depart Liwonde National Park proceed to Blantyre via Zomba Kuchawe Inn and Queens' view and hold discussions with Kuchawe inn Management.  3:30-5:30pm Proceed to Blantyre  Night in Blantyre			All   Mvu Camp and Lodge
<b>Day9, November, 2019.</b>	<b>6<sup>th</sup></b> 08:3016:30 Hold a focus group discussions with <ul style="list-style-type: none"> <li>• PPPC and hold discussions</li> <li>• African Parks and Hold Discussions</li> <li>• Responsible Safaris</li> </ul>	Blantyre		All

<b>Wednesday</b>	<ul style="list-style-type: none"> <li>Ku Chawe Inn, Sunbird Lunch in Blantyre</li> </ul> <p>Travel Back To Lilongwe</p>
<b>Day 10, 7<sup>th</sup> November, 2019</b>	<p>9:00 Interview with Charles Kachelenga Lilongwe Tourism Department Director</p> <p>10:00 Interview with Director of National Parks and Wildlife Reserves.</p>
<b>Thursday</b>	End of the mission and fieldwork

		
Responsible Safaris	Serendib Hotel and Resorts	Mua Mission
		
Cape Mc Clear FGD	Mumbo Island	Ntichisi Forest Lodge

