Tourism Recovery and Resilience: Victoria Falls Data Tracking
Key Findings 2019-2021
Prepared Feb 2022

Executive Summary

This report provides the results of an industry survey conducted in early 2022. The survey sought to provide market-level data for 2021 on occupancies, tourist profiles, product performance, marketing yield and revenue recovery[1]. The data has been compared to 2020 and 2019 to show trends over time.

The sample of survey respondents crosses a broad spectrum of industry categories, representing large and small businesses in accommodation, tour operating, destination management companies (DMCs), restaurants, and experiences. As such the sample can be said to be representative and makes up approximately 20% of the total sector. Annex 1 provides more detail on the sample.

The ability of the tourism market to recover from difficult conditions is reliant on securing a diverse, resilient tourist base, providing a demand-driven offer and experience, and growing market connectivity, revenues and jobs. The report provides some answers to the following questions:

1. **How does the industry engage with the market?**
   2021 shows a recovery from very poor market engagement in 2020, but still lags behind pre-pandemic levels in 2019. More firms are using Instagram, membership associations and print media than in 2019, and all firms have increased their average level of engagement with Facebook, direct offline bookings, Instagram, membership associations and print media – exceeding 2019 levels.

2. **Which types of booking channels generate most revenues?**
   In 2021, revenues are still predominantly driven by OTAs and DMCs at 36%, but this is a decline from 45% in 2019. By contrast direct offline channels produced 32% of revenue in 2021, a marked increase from 19% in 2019.

3. **What kinds of products are perceived to be doing best?**
   Traditional products are perceived to be in decline by 60% of respondents in 2021, compared to 52% in 2020. 23% of respondents perceive emerging products to be growing in 2021.

4. **How is the market mix (type of tourist) changing?**
   In 2021, 'traditional' tourists generated 42% of firm revenues compared to 57% in 2019. However, newer profiles took market share, generating 58% of revenues in 2021, compared to 43% in 2019.

5. **What occupancies are accommodation providers recording?**
   At 21%, 2021 shows a mild recovery in average occupancy. It was 14% in 2020, and 58% in 2019.

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[1] Unfortunately, firm revenue recovery data was not fit for analysis and will need to be re-collected at the end of 2022.

Key Findings

1. **How does industry engage with the market?**

On average, firms reduced their market engagement in 2020, undoubtedly due to the COVID-19 pandemic. 2021 shows a climb back towards the 2019 baseline, yet still approximately 6% behind.

A range of 18 different booking and marketing channels (shown in table 2) were listed in the survey, and firms identified whether or not they engaged with the channel, and to what extent. Firms also indicated how many direct relationships they held with Destination Management Companies (DMCs). Together, these three factors comprise a market engagement score for each firm. A 'positive score' requires a firm to perform equal to or better than the sample's average level of engagement in 2019 – meaning that a positively scoring firm sits above the average of its peers in the last recorded pre-pandemic year (2019).

Table 2: *Percentage of Firms with Positive Market Engagement Scores: 2019 – 2021*

	Firms		
	2019	**2020**	**2021**
Percentage of Operators with a Positive Market Engagement Score	36.67%	16.67%	30%

The table below shows which marketing or booking channels are being most used by industry. At baseline in 2019, firms reported the highest engagement through Facebook, with DMCs, their direct website enquiries, TripAdvisor, direct offline bookings, Instagram and hosted agent educationals. Of the four social media channels, Facebook and Instagram were the most popular, and of the four online travel agencies included, TripAdvisor was the preferred agency.

In 2020, engagement levels across nearly all booking and marketing channels decreased, with firms relying on Facebook and Instagram for their marketing and booking efforts, but also maintained some engagement with direct website enquiries, direct offline bookings and TripAdvisor.

While 2021 engagement per channel is decreased from the baseline in most cases, comparisons between 2020 and 2021 show a marked improvement in most instances, hinting towards the idea of recovery. Figures denoted in green illustrate channels in which engagement have improved

2021 shows an market engagement improved from 2020, but still down from 2019.
However, more firms are using Instagram, membership associations and print media than pre-pandemic .

beyond the initial baseline level, hinting not only towards the idea of recovery, but to the notion of improvement. This is relevant for Instagram, membership associations and print media.

Table 3: *The Percentage of All Firms Engaging with Each Channel.*

Rank[2]	Booking / Marketing Channel	2019 (Baseline)	2020	2021	2021 vs. 2019
1	Facebook	100%	91%	100%	0%
2	Direct Website Enquiries	97%	84%	80%	-17%
3	Direct offline bookings	94%	69%	90%	-4%
4	DMCs	91%	69%	87%	-4%
5	TripAdvisor	84%	66%	73%	-11%
5	Instagram	84%	72%	93%	9%
7	Hosted Agent Educationals	81%	44%	63%	-18%
8	Trade Fairs	69%	28%	37%	-32%
8	Hotel Desk / Concierge	69%	50%	53%	-16%
10	Market Rep Consultants	66%	44%	47%	-19%
11	Associations / Memberships	63%	53%	80%	17%
12	Print Media	53%	34%	63%	10%
13	Booking.com	50%	50%	43%	-7%
13	Twitter	50%	38%	43%	-7%
15	Expedia	47%	44%	40%	-7%
16	Embassies	50%	41%	50%	0%
17	Tourradar	28%	13%	3%	-25%
18	Snapchat	25%	13%	13%	-12%

As depicted in the table below, all operators decreased the number of channels with which they interacted between 2019 and 2020 and relationships with DMCs similarly declined. 2021 shows minimal improvement, however, what can be seen is a stabilization and slight uptick; indicating recovery is underway.

Table 1: *Interaction Indicators Showing Changes in Channel Engagement between 2019, 2020 and 2021*

	Firms		
	2019	2020	2021
Median Number of Marketing and Booking Channels in Use	11	9	11
Median Number of DMC relationships maintained	20	11.5	12.5

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[2] Rank is sorted by each channels' use, in descending order, predicated on 2019 baseline values.

The following figure shows the average self-reported engagement that firms had with each channel.

Figure 1: Comparing Average Market Engagement with Different Booking Channels
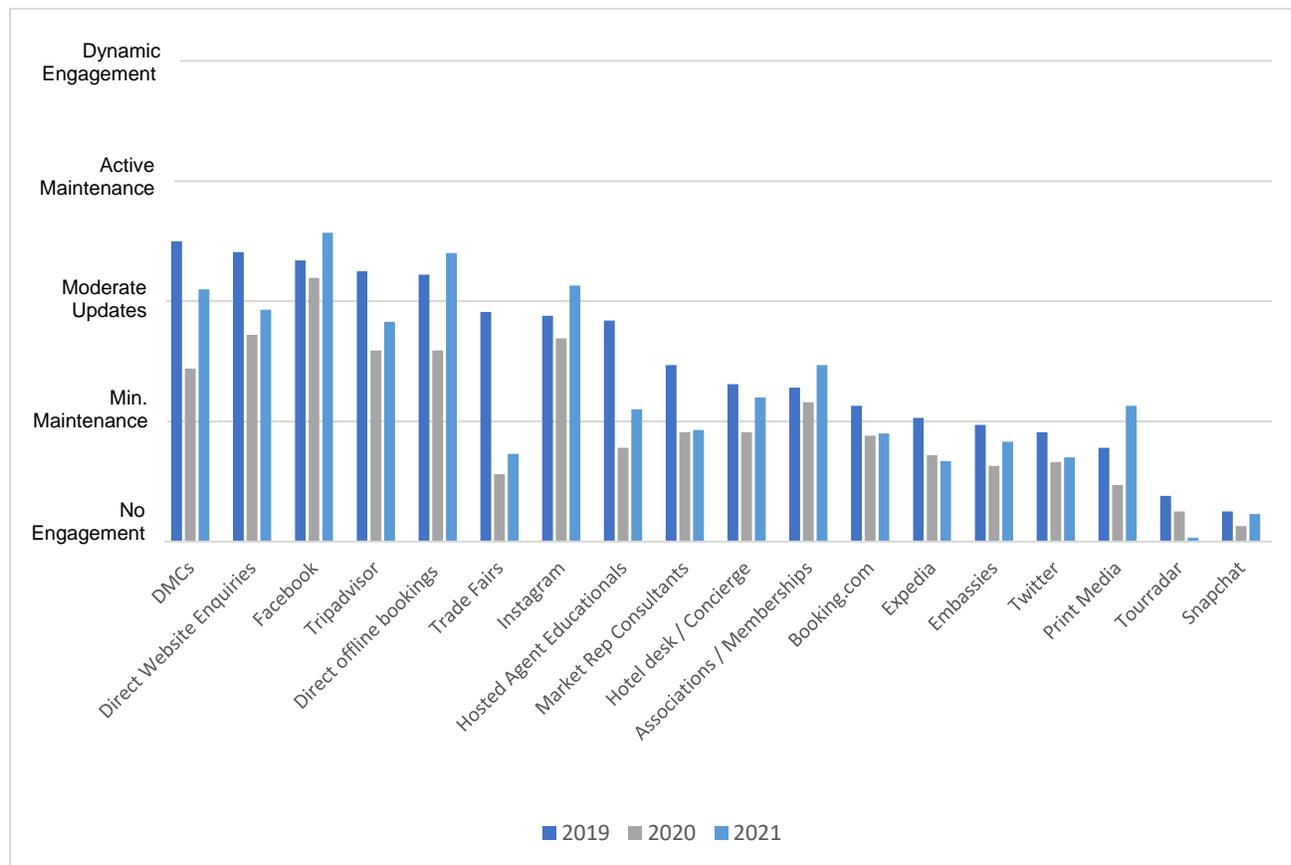
From this data we can see that some booking/marketing channels have higher industry engagement in 2021 than they did pre-pandemic in 2019. This includes Facebook, direct offline bookings, Instagram, membership associations and print media. All other channels are being less maintained than pre-Covid.

In 2021, firms are using Facebook, direct offline bookings, Instagram, membership associations and print media on average more than pre-pandemic

2. **Which types of market engagement generate most revenues?**

The survey examines the proportion of revenue generated by seven different booking channels across 2019, 2020 and 2021. As this value is reported via the *proportion of turnover*, a decrease in turnover would not change the proportion itself. It is noticeable that there has been a dramatic shift from firms generating turnover through DMCs/Tour Operators, to having a larger proportion of trade generated through direct offline bookings.

Table 5: *Percentage of trade (revenue) generated by specific channels*

|	All Firms		
	2019	**2020**	**2021**
Direct Website Enquiries	15.15%	12.46%	14.77%
Online Travel Agencies	16.30%	14.23%	13.22%
Trade Fairs	5.11%	1.33%	1.75%
DMCs/TOs	44.86%	39.31%	36.39%
Direct Offline Bookings	19.31%	31.41%	32.00%
Hotel Desks/Concierge	5.92%	7.50%	8.39%
Market Rep Consultants	2.96%	1.95%	2.14%

In 2021, direct offline bookings produced 32% of revenues – an increase from just 19% pre-pandemic. While still dominant, revenues from OTAs and DMCs are down.

Note: As figures in each cell are averages of the respondent as a group, a summation to 100% cannot be expected – however, each firm's individual reporting was ensured to sum to 100%.

3. What kinds of products are set for growth?

Creating a more diverse product base and allowing for innovation is an important resilience strategy. Respondents pre-classified the destination's main products into 'traditional' or 'emerging'. Only DMCs, Tour Operators and accommodations responded as they have a holistic overview of all the products.

Figure   2:   Product   classification
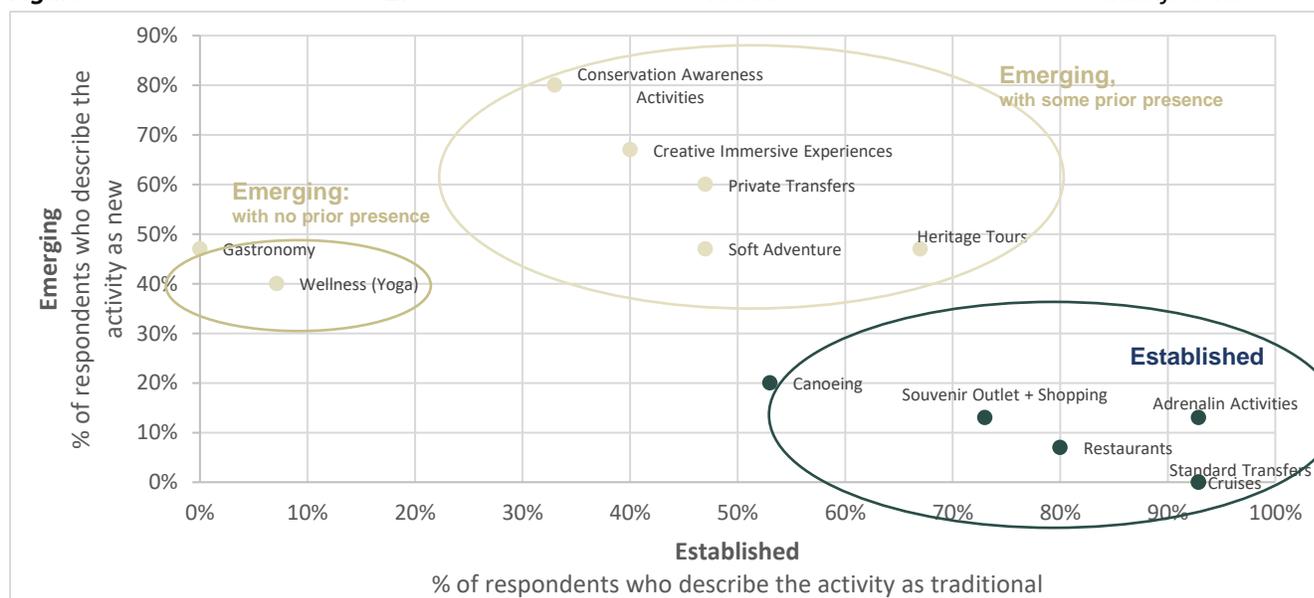
In 2021, respondents perceived change in the appeal and performance of various products. In general, the data shows trends in stronger growth of emerging products, and a decline of the traditional.

Table 6: *% of firms reporting perceived change in product performance (2019-2020) and (2020-2021) across all firms*

| Activity	2019 → 2020				2020 → 2021			
	Decline	Growth	No Change	Don't know	Decline	Growth	No Change	Don't know
Established Products								
Established Products Average	52%	18%	29%	2%	60%	20%	14%	7%
Standard Transfers	67%	7%	27%	1%	74%	9%	13%	4%
Adrenalin Activities	60%	13%	27%	0%	57%	13%	26%	4%
Cruises	40%	13%	40%	7%	43%	35%	17%	5%
Canoeing	67%	7%	27%	1%	65%	13%	9%	13%
Restaurants	40%	40%	20%	0%	48%	43%	0%	9%
Souvenirs & Shopping	40%	27%	33%	0%	70%	9%	17%	4%
Emerging Products								
Emerging Products Average	37%	35%	23%	5%	48%	23%	18%	19%
Private Transfers	40%	47%	13%	0%	57%	30%	9%	9%
Conservation Awareness	47%	53%	0%	0%	43%	39%	13%	13%
Soft Adventure	47%	27%	27%	1%	48%	22%	17%	17%
Heritage	40%	33%	27%	0%	69%	13%	22%	22%
Creative/Immersive	40%	47%	7%	6%	48%	22%	17%	17%
Wellness	33%	7%	47%	13%	39%	9%	30%	30%
Gastronomy	13%	33%	40%	14%	30%	26%	17%	27%

In 2020, on average 52% of the sample felt that established products had experience some degree of decline, whereas only a 37% average of respondents felt a decline within the emerging product category. A similar trend can be observed in 2021, with an average of 60% of firms noting a decline in established products, versus 48% noting the

In 2021, 23% of firms felt that new 'emerging' products were growing, compared to 20% who felt that more traditional products were growing.

decline in emerging products. Upon inspection, a similar result can be seen when firms report on growth within product types. On average, 18% of firms felt established products had grown in 2020, versus 35% of respondents feeling that emerging products had grown in the same timeframe. Finally, in 2021, 20% of firms felt that established products had grown, versus 23% feeling that emerging products were growing.

4. How is the market mix (type of tourist) changing?

Creating a more diverse tourist base is an important resilience strategy. Respondents pre-classified the destination's main tourist typologies into 'traditional' or 'emerging' (see Annex for classification).

Figure 3: *Defining Traditional and Non-traditional Consumer Segments[3]*
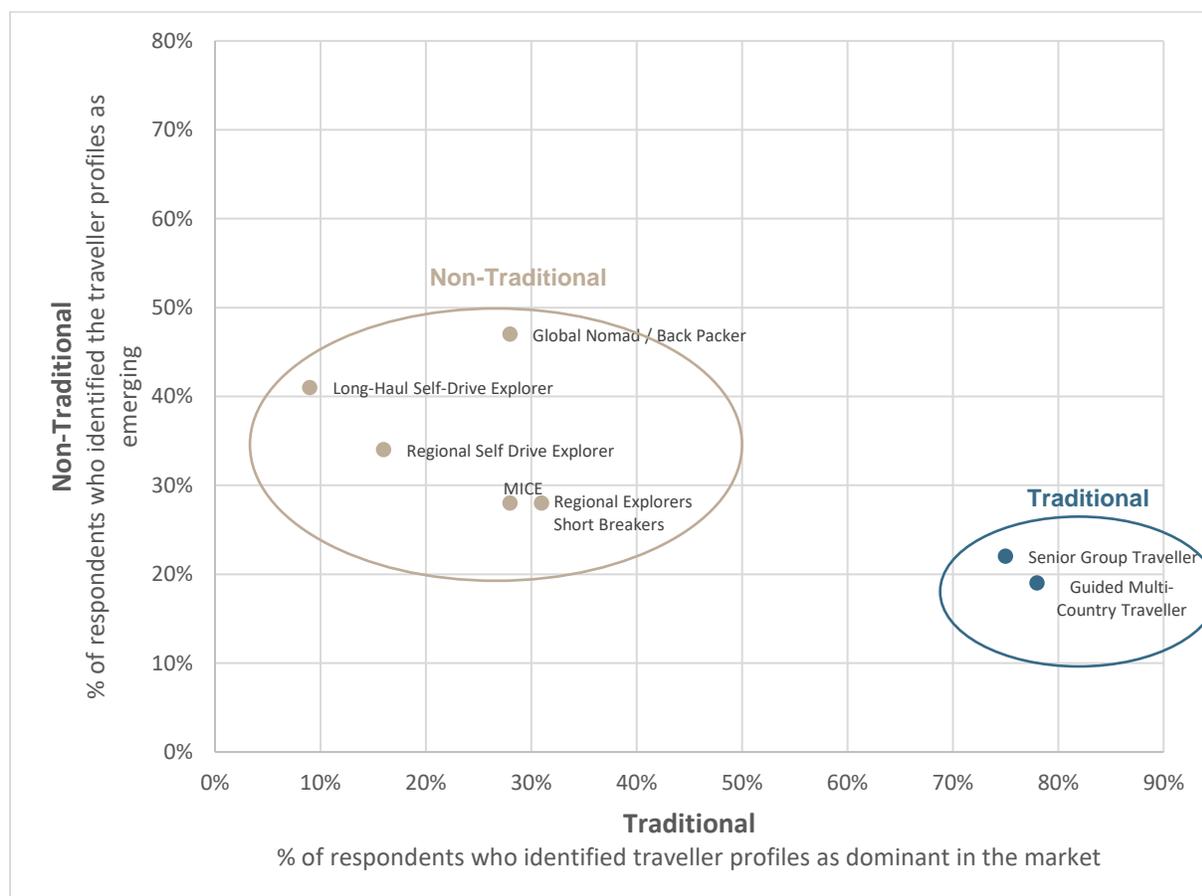
The survey captures the estimated proportion of revenue derived from each market profile as a baseline from which changes in market share from traditional and emerging consumer bases can be measured. In 2019 'traditional markets' of Senior Group travelers and Guided multi-country travelers collectively contributed 57% of revenue for project supported firms, while the remaining six traveler profiles 'the emerging category' contributed 43%.

In 2020, slight shifts in market share started to occur. Traditional markets contributed a total proportion of 44% of revenue for all firms in the sample - a slight decrease from 2019 figures. This change in trajectory continued in 2021, with traditional profiles dropping to 42%. This is indicative of a changing 'dominant' market type in the face of the pandemic.

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[3] SAVE has been included as an additional non-traditional profile since the 2020 survey was conducted.

Table 7: *Percentage of trade (revenue) generated by different traveler types*

	Firms		
	2019	**2020**	**2021**
Traditional			
Senior Group Traveler	21.67%	14.5%	18.4%
Guided Multi-Country Traveler	34.87%	29.63%	23.7%
Traditional Total	**57%**	**44%**	**42%**
Non-traditional			
Regional Explorers – Short Breakers	16.73%	35.5%	33.6%
Long-haul Self-drive Explorer	8.5%	3.33%	2.83%
Regional Self-drive Explorer	3.17%	7.07%	4.57%
Global Nomad / New Generation Back Packers	9.2%	3.93%	10.6%
MICE	4.67%	5.3%	6.03%
SAVE	1.2%	0.73%	0.27%
Non-traditional Total	**43%**	**56%**	**58%**

In 2021, 'traditional' tourists generated 42% of firm revenues – compared to 57% in 2019. However, newer profiles took market share, generating 58% of revenues in 2021, compared to just 43% in 2019.

Alongside considerations of changes in revenue between 2019, 2020, and 2021, changes in consumption patterns were explored qualitatively through the survey. Noticeable variations in activities, consumer spend, destination access, length of stay and group size were captured, and the qualitative sentiments summarized.

Activities:

(2020):

- A common sentiment is that visitors to the destination in 2020 participated in fewer activities than usual, notably less canoeing, high adrenalin activities and reduced day crossings.
- There was also mention of higher demand for exclusive, private activities in smaller groups, likely in response to the pandemic.
- Some comments referred to a more local, and typically younger traveler profile, while other observations referred to a higher demand for cultural tours.
- About a quarter of respondents felt that there was not enough business in 2020 to be able to meaningfully comment on changes.

(2021):

- Visitors in 2021 participated in less adventurous activities and spent more time de-stressing and reconnecting with nature. Cruises remain a highly requested item, with a sharp decline in more high end activities.
- More individuals are interested in conservation and cultural activities.
- Increased family trips as opposed to historically larger groups.
- More demand for smaller, intimate accommodations rather than hotels.

Spend:

(2020):

- Consumer spend has decreased across the destination, not only due to lower occupancy levels, but because tourists tend to be local residents who are more budget conscious and spend less. Interestingly, the sentiment from several operators is that there is now an expectation for discounts from the local resident market, who have come to rely on these incentives to travel.
- A contrasting observation is the willingness to pay more for exclusive, private activities, although this view was less widely shared across operators than the feeling that travelers spend less overall.

(2021):

- International tourists appear more generous with tipping, more interested in charity and are more community aware.
- Spend on activities remains lower than pre-pandemic spend.
- More demand for cheaper accommodation rather than hotels.
- Significant mention of increased spending by local and regional travelers.

Entry + Access:

(2020):

- Entry into Victoria Falls has been governed by travel restrictions through most of 2020, creating a common sentiment of limited access which has been challenging to navigate.
- These regulations mean that international travelers now enter by air, with specific mention of older travelers and individuals travelling for business flying into the destination as land borders are closed.
- Conversely, local market access is by road, an option which is preferred by families. However, the poor quality of the road network was highlighted as a barrier to access, decreasing the attractiveness of the destination.

(2021):

- Entry into Victoria Falls has been governed by travel restrictions through most of 2020, creating a common sentiment of limited access which has been challenging to navigate.
- These regulations mean that international travelers now enter by air as border closures have rendered road access almost impossible.

Length of Stay:

(2020):

- While there were varying responses as to whether the average stay had increased, decreased, or stayed the same, a large proportion of operators feel that visitors now stay for longer.
- A common observation is that the average stay has increased to between 3-4 nights, up from the traditional 2-3 night stay operators saw previously.
- There is some indication that special offers and packages could be incentivizing guests to stay longer.

(2021):

- While there were a few varying responses as to whether the average stay had increased, decreased, or stayed the same, a large proportion of operators feel that visitors now stay for marginally longer to accommodate the restrictions that the pandemic has created. One respondent remarked that "the length of stay has increased due to border closures in region, with PCR costs involved and in light of difficulty of travelling here".

Group Size:

(2020):
- The majority of respondents feel that group sizes have decreased on average, with smaller groups of between 2-10 individuals the most common group size. Private, family travel has become more prominent, with less large groups visiting the destination.
- About a fifth of respondents, however, felt that there has not been enough business to make a comparison on meaningful changes in this regard.

(2021):
- The majority of respondents still feel that group sizes have decreased on average, with smaller groups of between 2-10 individuals the most common group size. Private, family travel has become more prominent, with less large groups visiting the destination.

5. **What occupancies are accommodation providers recording?**

All accommodation providers across the destination saw large decreases in occupancy levels, with significantly fewer tourists visiting Victoria Falls in 2020. 2021 shows hints of recovery, with all firms increasing their average annual occupancy by approximately 7% to 21%.

Table 8: *Average Annual Occupancy for Accommodation Providers*

	Firms		
	2019	**2020**	**2021**
Average Annual Occupancy for Accommodation Providers	58%	13.67%	21%

IMPLICATIONS AND LEARNINGS

Findings from the survey clearly present a tourism market that is significantly altered from its conventional state. The cessation of global travel in 2020 and much of 2021 led to a decline in visitation, occupancies, market engagement and revenues as firms scrabbled to adjust to the shocks. Prolonged disruption has also led to changes supply and demand with newer tourist profiles taking market share from the traditional tourists and newer products in the ascendance over the more traditional ones.

There are encouraging signs of recovery across most of the data points in the survey. Of particular interest is the increase of industry's use of Facebook, membership associations and print media, and the performance of direct offline bookings as a business tool – far higher than pre-pandemic levels. There have been moderate improvements in occupancy – reaching 21% in 2021 compared to 14% in 2020.

For firms to see recovery to pre-pandemic levels and then growth, several market conditions need to hold, many of these are dependent on international travel regulations which will continue to govern tourism access.

We Are Victoria Falls will continue this survey once a year in order to track progress, and thanks all participants who gave up their valuable time.

The survey was administered by We Are Victoria Falls with support from the Zimbabwe Destination Development Program – a project of the IFC, the Ministry of Environment, Climate, Tourism and Hospitality Industry, and the Ministry of Transport and Infrastructural Development.

Annex 1: Survey Sample

Table 1: Sample of Responding Firms

	Firms
Number of Firms in the Sample	n=30
DMC	15.38%
Full-Service Tour Operator	15.38%
Accommodation Provider	46.15%
Experience Provider	15.38%
Restaurant	7.69%
Total	**100%**

Annex 2: Market Engagement Scoring Methodology

In order to define 'positive market engagement', a series of formulae were derived, whereby crucial elements contribute equally to the ability of firms being able to be classified as having a positive market engagement.

$$Positive\ Market\ Score\ (\%)_t = \frac{\sum_{i=1}^{n} Score_{i,t}\begin{cases}0,\ score_{i,t}<3\\1,\ score_{i,t}=3\end{cases}}{n_t} \tag{1}$$

$$Score_{i,t} = [X_{i,t} + Y_{i,t} + Z_{i,t}] \tag{2}$$

$$X_i = \begin{cases}0,\ Number\ of\ used\ channels_{i,t} < median\ of\ used\ channels_{2019}\\1,\ Number\ of\ used\ channels_{i,t} \geq median\ of\ used\ channels_{2019}\end{cases} \tag{3}$$

$$Y_i = \begin{cases}0,\ Number\ of\ DMCs_{i,t} < median\ of\ DMCs_{2019}\\1,\ Number\ of\ DMCs_{i,t} \geq median\ of\ DMCs_{2019}\end{cases} \tag{4}$$

$$Z_i = \begin{cases}0,\ \dfrac{\sum Channel\ scores_{i,t}}{median\ of\ used\ channels_{2019}} < \dfrac{Median\ of\ channels\ scores_{2019}}{median\ of\ used\ channels_{2019}}\\[2ex]1,\ \dfrac{\sum Channel\ scores_{i,t}}{median\ of\ used\ channels_{2019}} \geq \dfrac{Median\ of\ channels\ scores_{2019}}{median\ of\ used\ channels_{2019}}\end{cases} \tag{5}$$

As shown in **(1)** the positive market score is a function of the score obtained in **(2)**, whereby a firm would need to obtain a score of three in **(2)** to be defined as having had a positive market engagement from the baseline. Equation **(2)** is comprised of three elements, X_i, Y_i, and Z_i. X_i is defined in **(3)** whereby a firm can score a value of 1 if the number of market channels[4] used by the firm, in the measured year, is greater or equal to that of the median number of channels used in the baseline year (2019); otherwise, the firm is assigned a value of 0. For Y_i, equation **(4)** applies. This measurement operates in a similar way to **(3)**, whereby a firm scores a value of 1 if the number of DMCs utilised by a firm, in the measured year, is greater or equal to that of the median DMCs used in the baseline year. Lastly, Z_i is denoted by equation **(5)**, whereby a firm score a value of 1 if the sum of the firm's channel scores[5] divided by the median of used channels in the baseline year, is greater than or equal to the median of channel score in the baseline year, divided by the median of channels used in the baseline year.

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[4] The survey measured 18 channels in which firms can be actively participating; these channels are shown in table 2.

[5] See earlier footnote.

Annex 3: Product classification

From a list of 13 activities currently on offer in Victoria Falls, DMCs and Tour Operators defined each product as either established or emerging. These descriptions have been summarized in the figure below:

1. **Established**

   Strongly established activities that define the traditional offering of Victoria Falls:
   - Standard transfers
   - Cruises
   - Adrenalin activities
   - Restaurants
   - Souvenirs and shopping
   - Canoeing

2. **Emerging**

   a. With no prior market presence

   Products with limited to no prior representation in the market, with the potential to grow:

   - Gastronomy
   - Wellness

   b. With some prior market presence

   Products that are present in the traditional offering but have potential to expand into the emerging space. There is the most variety within this cluster, but all products within this category have characteristics which are recognized as both traditional and new, to varying degrees. Conservation awareness activities is the leading emerging activity group, while creative immersive experiences, private transfers and soft adventure offerings have similarly been identified as containing room for growth. Interestingly, despite heritage tours' established presence, there's still potential to increase market share in traditional heritage-based activities, likely connected to the move towards sustainable, responsible travel detailed below.

   - Conservation Awareness activities
   - Creative immersive experiences
   - Private transfers
   - Heritage tours
   - Soft adventure

Qualitative responses to the survey indicate that there is great potential to expand activities which allow travelers the opportunity to feel that they are directly contributing to the social and environmental development of the destination. In line with quantitative findings, respondents feel that conservation awareness activities have the greatest potential to expand, with activities allowing for social interaction between travelers and local communities also a promising experience offering. This is likely why heritage and cultural tours, a typically traditional offering, have been defined as an experience which is likely to become increasingly popular, because of the role these tours play in defining responsible, sustainable travel.

Respondents were also aware of the sustainability movement, recognizing that firms that demonstrate that their operations are responsible and supportive of local development are preferred by the global market. Potential lies in showcasing *"corporate social responsibility and environmental awareness"* as cited by one respondent, allowing travelers the chance to "*give back by engaging in volunteer projects at school, planting trees and being educated by anti-poaching units and conservation programs*". Another cited the importance of *"activities that demonstrate an awareness of, and sensitivity to, any negative impact to the environment*" explaining further that *"operations that are mindful of this trend will do well".*

Private, family-centered activities were also expected to gain popularity in the future, likely as a response to the COVID-19 pandemic. This aligns with quantitative findings indicating that private transfers have greater potential to expand than traditional standard transfer options. Additional activity suggestions were identified as: cycling, quad biking, motor biking and gorge hiking. Including sports like golf and tennis, specialist photography offerings, unique dinning opportunities, and star gazing were also mentioned.

Annex 4. Classifying tourist profiles

The traditional tourism market in Victoria Falls is strongly defined by two traveler profiles: Senior Group travelers and Guided multi-country travelers, as indicated in the figure 6. These two traveler types may be defined as:

➢ **Senior Group Traveler**: Mainly European/American groups of travelers between ages of 50-70. Book through specialist tour operators in country of residence, visiting multiple attractions around the country/region, usually linking highlights by air. Average group size is 16, main highlights are nature, culture, history. Safety conscious. Require excellent guiding and information. Well educated and curious - not flash spenders.

➢ **Guided Multi-country Traveler**: Mainly European/American groups of travelers between the ages of 25-60. Book through specialist tour operators in country of residence, visiting multiple attractions around the country/region by road. Average group size is 6, main highlights are nature, culture, history - include all main sites but with 'insider' views.
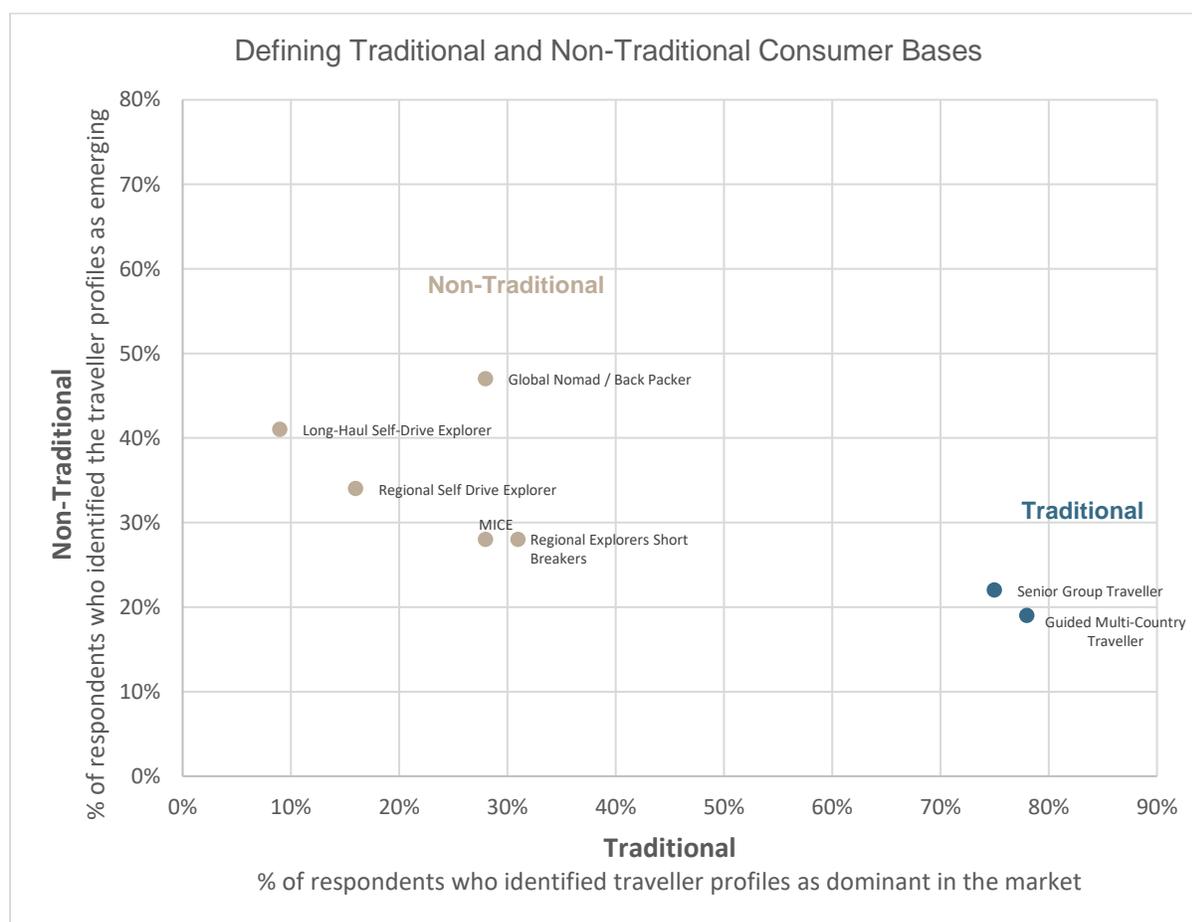
In the non-traditional space, there is market representation from Regional short breakers and Meetings, Incentives, Conferences and Events (MICE), although these groups are yet to be observed as dominant. Conversely, emerging consumer bases are defined as Back packers as well as both self-drive groups: Long-haul internationals and regional explorers. These 'non-traditional' six traveler types may be defined as:

➢ **Regional Explorers Short Breakers**: Regional residents travelling by air from urban centers in the region and HRE. Ranging from couples to multi-generational family and friends' groups; motivated by local events, special occasions (birthdays, weddings, anniversary, etc.) or public holiday travel(long-weekend}. Average size 4-6.

➢ **Long-haul, self-drive Explorer**: Mainly European travelers between the ages of 25-60 travelling on pre-booked itineraries with rental cars. Visiting multiple attractions around the country/region by road. Couples and families with children visiting main highlights around nature, culture, history - include all main sites but with 'individual' approach.

➢ **Regional Self-drive Explorer**: Regional residents (citizens) travelling by road with own vehicles on multi-day journeys through the regional. VF as turn-around point. Often multi-families with kids or public/school holiday travel (long-weekend}. Average size 6-8. Cost effective accommodation choice ranging from camping to more luxurious Airbnb property. Food & beverage choice important as are family friendly activities.

➢ **Global Nomad/ New Generation Back Packers**: Millennial/ Gen Z demographic, international and regional (Africa), expats - some with young children. Travel single, couples or family units. Interested in culture, art, food, novelty, authenticity and 'experience'. Usually gravitate to urban centers. They value thoughtful curation of their experience, designed interaction with local people, stay in less corporate accommodation (hotels, apartments or guesthouses), and can be mixed to high spenders. They may combine trips with work or work remotely - 'bleisure'.

➢ **MICE**: Meetings, Incentives, Conferences and Events.

➢ **SAVE**: Scientific Academic Volunteer and Education. SAVE travelers come from typically European and North American markets, with some regional representation. They are driven by the desire to engage in travel experiences involving close interaction with the nature, culture and people of that advance knowledge (their own or that of others). They spend long periods in a destination (3 weeks to 6 months) and are typically frugal spenders, relatively independent and likely to 'get off the beaten track'

Notwithstanding an expected handful of outliers in the tourism space that don't fit any of the aforementioned eight categories, the sum of these profiles should be sufficient to encompass almost 100% of the Victoria Falls tourism market.

Figure 3: Defining Traditional and Non-traditional Consumer Bases[6]

[6] SAVE has been included as an additional non-traditional profile since the 2020 survey was conducted.