

# CITY OF WINDHOEK TOURISM STRATEGY



# 2021 TO 2025



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## ABBREVIATIONS

BON	Bank of Namibia
B&B	Bed & Breakfast
BEE	Black Economic Empowerment
CBD	Central Business District
CCTV	Closed-Circuit Television
COW	Municipal Council of Windhoek
COPPS	Community-Oriented Policing & Problem Solving
GDP	Gross Domestic Product
GRI	Global Review Index
GRN	Government
GSTC	Global Sustainable Tourism Council
HKIA	Hosea Kutako International Airport
KPI	Key Performance Indicator
LED	Light Emitting Diode
M&E	Monitoring and Evaluation
MET	Ministry of Environment and Tourism
MICE	Meetings, Incentives, Conferencing and Exhibition
Namwater	Namibia Water Corporation
NDP-5	Fifth National Development Plan
NMT	Non-Motorised Transport
NSA	Namibia Statistics Agency
NTA	Namibia Training Authority
NTB	Namibia Tourism Board
N\$, NAD	Namibia Dollar
OTA	Online Travel Agencies
PPP	Public Private Partnership
RDB	Rwanda Development Board
SADC	Southern African Development Community
SME	Small and Medium-Sized Enterprise
T&T	Travel and Tourism
UK	United Kingdom
UN	United Nations
UNWTO	United Nations World Tourism Organisation
USA	United States of America
USD	United States Dollar
USP	Unique Selling Proposition
ℓ	Litres

# 1. EXECUTIVE SUMMARY AND INTRODUCTION

## 1. EXECUTIVE SUMMARY

The Municipal Council of Windhoek (hereafter referred to as “the City of Windhoek”, “COW”) aims to take up a more active role in the development of a sustainable tourism sector in Windhoek. The purpose of this strategy was to assess the competitiveness of Windhoek as a destination and to develop initiatives that will improve the City’s competitive position to attract more tourists and improve visitor satisfaction.

Tourism is a key enabler for economic development and is one of the fastest growing sectors worldwide. The T&T sector creates one in ten new jobs globally. In Namibia, the tourism sector grew by 0.3% in 2019, outperforming overall GDP which contracted amidst a recession (World Travel & Tourism Council, 2020). The Namibian government recognises the sector’s potential for growth and contribution to GDP and included it in NDP-5 and through MET’s development of specific plans to increase the T&T sector’s value proposition. However, the impact of the current Covid-19 pandemic is disastrous particularly for the tourism industry and has caused significant economic losses especially to Namibia and its tourism industry. The Namibian tourism industry will have to transform in order to become more resilient and will have to focus on a strategy of sustainable development in conjunction with disaster risk reduction and climate change.

Despite the growth experienced in the sector before Covid-19, Windhoek has not fully positioned itself as a destination for tourism and finds itself largely acting as a transit city for tourists travelling across Namibia. A local hotelier has stated that leisure tourists have an average length of stay in Windhoek of 1 night, compared to 2 to 3 nights by business travellers and 4 nights by conference attendees, consequently, Windhoek as a city does not benefit as much as it could from tourism. The economic value generated from tourism is wide and far reaching and would improve the livelihoods of the city’s residents as it creates opportunities for increased economic activity.

The Windhoek T&T sector is faced with several challenges, the most crucial being that of transforming its tourism products and generating tourism due to the impact of Covid-19, followed by the decreasing availability of water, safety and security of tourists and residents the lack of industry alignment. Several areas for improvement and possible opportunities have been identified. A SWOT analysis was performed, which provides a bird-eye view of the current status of tourism in the Windhoek. Windhoek-based T&T service providers and stakeholders were consulted during the development of this strategy.

Six themes were identified, which are the areas of improvement that COW will focus on over the strategic period. The strategic overview is depicted overleaf.



The strategy is aligned to the COW Transformational Strategic Plan 2017 – 2022 and will support the realisation of that strategy. The entire organisation is responsible for the implementation of this strategy. COW is committed to building networks and engaging with stakeholders to ensure the effective implementation of the strategy.

## 1.1 Background and Introduction

### 1.1.1 The purpose of the tourism strategy

This strategy has been developed to identify key initiatives and objectives that should be implemented to better position Windhoek as a destination that attracts more tourists and encourages them to extend their stay in the City. Windhoek is in competition with other destinations in Namibia for tourists and must identify and develop activities, services and infrastructure required to facilitate local tourism. The tourism strategy therefore aims to address the following:

- Who are the tourists that come to Windhoek and how can the Windhoek T&T sector get them to extend their stay in Windhoek and spend more money in the City?
- What are the activities and resources that can be developed to attract more tourists to the City?
- What are the current challenges to developing a sustainable T&T sector in Windhoek and how can the sector overcome them?
- Who are the key stakeholders involved in Windhoek's T&T sector and how can they better collaborate and partner to improve the destination's offerings and competitive position?

The strategy is localised to the municipal area of Windhoek (the Khomas region) and includes the game farms and nature reserves outside Windhoek and any other T&T initiatives in the Khomas region.

### 1.1.2 The strategy development process

A comprehensive review of tourism development and promotion initiatives in the city of Windhoek were identified through desktop studies and through stakeholder interviews. A total of 28 T&T sector stakeholders were interviewed during the information gathering stage. Most of the interviews were conducted with industry association bodies and only a small number of interviewees were direct T&T suppliers. The interviews were conducted to ascertain the views and experiences of the local T&T stakeholders regarding the strengths and weaknesses of Windhoek as a destination, key opportunities for improvement and the expectations that stakeholders have regarding COW's role in the sustainable development of the sector as a local authority. In addition to external stakeholders, internal stakeholders from other departments in COW were interviewed to identify initiatives that their departments will already implement in line with pre-existing strategies and that will be beneficial to the local tourism sector.

A benchmark desktop study was conducted to identify the initiatives that three similar cities to Windhoek have successfully implemented to facilitate the development of their tourism sectors. Kigali was benchmarked as tourism was instrumental in turning the country around from one that was completely dependent on foreign aid in 1995 to one that only received 17% of its national budget from aid in 2018. Hence Kigali presents a notable case study. Nairobi in Kenya is comparable to Windhoek in many ways in that it is surrounded by several nature reserves, boasts significant historical and cultural assets that it uses for tourism offerings and has a growing "slum tourism" market that Windhoek may learn from. Johannesburg is a commercial metropolis that faces stiff competition for leisure tourists from cities like Durban and Cape Town, like how Windhoek competes with Swakopmund and Etosha and other game reserves for leisure tourists. The key learnings and recommendations that could be implemented in Windhoek have been included as initiatives and activities.

Further desktop studies were performed on to identify the global and national trends in tourism to better position Windhoek in terms of market segmentation and to offer services that tourists have come to expect as standard, such as digital platforms.

The strategy and its initiatives considered the results of the baseline study for the assessment of sustainable tourism development in Windhoek that was conducted by Prof. Dr. R. Hartmann and Ms. E. Eckert of Hochschule Bremen in 2019.

Several COW workshops were facilitated to develop the strategy (high-level statements, strategic themes, objectives and initiatives) after the information-gathering stage.



## **2. THE TOURISM SECTOR**

## 2. THE TOURISM SECTOR IN A NUTSHELL

### 2.1 What is Tourism?

The United Nations World Tourism Organisation (UNWTO) defines tourism as “people travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure and not less than 24 hours for business and other purposes”. Therefore, a tourist is essentially anyone who is away from home for more than 24 hours, but less than one year. This challenges the perception that tourism is only limited to holiday activity and means that every visitor (both locals and international travellers) to an area is a tourist.

This broader identification of who constitutes a tourist widens the scope of goods, services and infrastructure required to increase tourism in Windhoek and stimulate the economy.

The tourism value-chain is wide and far-reaching. Tourism involves almost every sector of the economy and creates jobs across the economy. The various amenities and facilities used by tourists create opportunities for enterprise development and therefore create jobs.

The tourism value chain developed by UNWTO and adapted for Namibia is illustrated below.

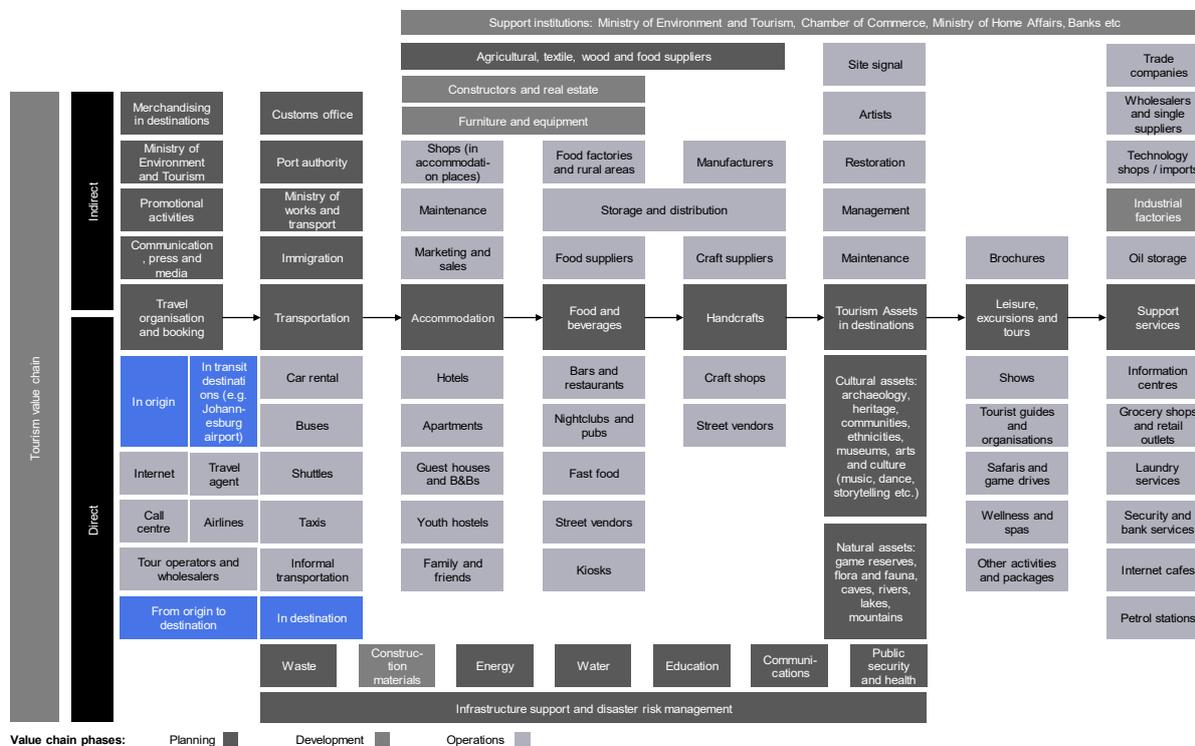


Figure 1: Tourism value chain

Local authorities have several roles to play to enhance tourism. Their primary role is centred on planning and demand forecasting, including providing infrastructural support and undertaking promotional activities. Local authorities are responsible for providing and sustainably managing the resources available to locals and visitors.,

Local authorities can benefit from tourism through the increased economic activity as illustrated in the value chain. Tourists consume basic services such as water and electricity which increases the revenue that local authorities can earn. Local authorities can further benefit from tourism by developing tourism-related products and services to participate in the operational aspect of the value chain and increase revenue.



Figure 2: Benefits of a thriving tourism sector

## 2.2 Global Megatrends in Tourism

Ten key trends have been noted in tourism (Horwath HTL, 2015), which indicate what destinations can invest in to cater for market segmentation.

 <p><b>Silver-haired tourists</b></p> <p>The world's population is ageing, and attitudes towards aging have changed. The older demographic is amongst the fastest growing segment in tourism. They have amassed wealth, travel longer and require comfort not luxury. Account for increasing growth of multi-generational travel as they can afford to travel as a family.</p>	 <p><b>Gen Y and Z</b></p> <p>Gen Y prioritises spending on experiences instead of material goods and Gen Z prefers short, visual communication. They are more educated, and have information readily available at their fingertips.</p> <p>They are driven by being able to make a difference.</p>
 <p><b>Growing Middle Class</b></p> <p>Global increase in average incomes and decrease in poverty is giving rise to a growing middle class population. Most of the world's middle class will come from Asia, who have large cultural differences. They are learning English, and compare information online and are therefore more independent.</p> <p>Opt for value for money.</p>	 <p><b>Emerging destinations</b></p> <p>Growing increase in travel to emerging countries with higher growth in visitors than developed and Western markets</p> <p>Travel to Africa and Asia is on the rise.</p>
 <p><b>Political instability and terrorism</b></p> <p>Tourism as a sector is highly affected by external shocks and regional events. The global rise in terrorism, intolerance and tensions is accompanied by an increasing issuance of media travel warnings, security checks and fewer investors in the sector.</p>	 <p><b>Technological R(e)volution</b></p> <p>Technology is reshaping the way business is done as more and more service providers integrate technology in their service offerings and interactions with clients.</p> <p>Technology is used for everyday activities and is shaping guest expectations.</p>
 <p><b>Digital channels</b></p> <p>With the rise of social media, and increased use of mobile devices, travel begins (itinerary) and ends (reviews) online. Online travel agencies are on the rise, and competitors are getting wider everyday. Guests can become marketers for service providers and destinations and influence perceptions.</p>	 <p><b>Loyalty</b></p> <p>There is a drastic change in traditional loyalty systems. Establishments motivate different behaviour using different incentives (e.g. tag us in your pictures for free transportation).</p>
 <p><b>Health and Wellbeing</b></p> <p>Consumers everywhere are becoming more health conscience and tourists want to travel without leaving their healthy lifestyles behind. This is coupled with an increase in special dietary requirements (vegans, pescatarians, banting diets etc.). Wellness travel is a growing sector in all demographics</p>	 <p><b>Sustainability</b></p> <p>As one of the world's highest growth sectors, tourism is one of the key drivers of socio-economic change, hence sustainability is critical. Destinations and establishments must operate sustainably to maximise resources and positively contribute to communities.</p> <p>Growth in eco-tourism worldwide.</p>

Figure 3: Global tourism megatrends

The middle-class population worldwide is growing rapidly and before Covid-19, it was projected to be 4.9 billion people by 2030. The projection was that most of the rising middle class would come from the Asia-Pacific region. The rise in average income levels would change the profile of the international traveller and therefore their expectations.

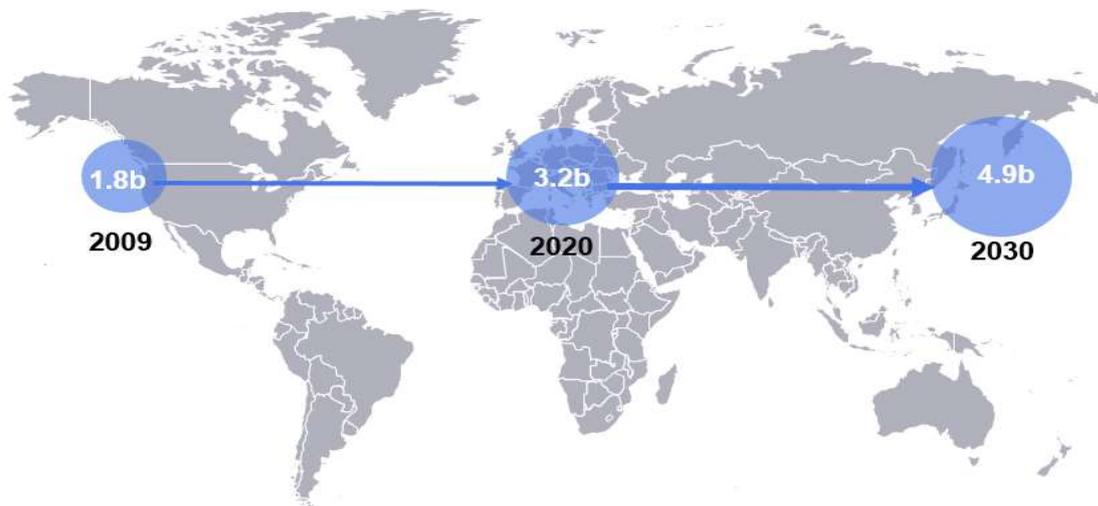


Figure 4: Global middle-class population

Globally, tourism directly contributes to **1 in 10** jobs, and **25%** of all net new jobs created in the last five years were within the travel and tourism sector (World Travel & Tourism Council, 2020).

## 2.3 How Selected African Cities Have Successfully Developed Their Tourism Sectors

A benchmark desk study was performed on three African cities that have successfully developed their T&T sectors to identify what the Windhoek T&T sector can learn from them and implement to make Windhoek more competitive as a destination. The results of the desk study are summarised below:

### 2.3.1 Lessons Learnt from Kigali, Rwanda

Kigali is known for being a clean, green and safe city. Kigali replaced Windhoek as the cleanest city in Africa and is further heralded as the safest city in Africa and the 11<sup>th</sup> safest city in the World. Rwanda's cleaning initiatives and the ban on plastic bags are globally well known and have contributed to the country's reputation as a destination that has successfully implemented eco-tourism that preserves the environment and sustainably benefits the communities who receive visitors.

Tourism has been identified as a key economic driver for Rwanda and was instrumental in the turning the economy around from one that was 100% dependent on aid in 1995 to only receiving 17% of the national budget from aid in 2018.

Rwanda has established itself as a luxury and high-end tourist market. Most of Kigali's leisure tourists intend to do gorilla trekking, an activity that is relatively expensive compared to other activities in Africa. In addition to luxury tourism, Kigali has established

itself as a major business hub and as a choice destination for Meetings, Incentives, Conferencing and Exhibition (MICE) in the region.

Kigali's tourism sector was enhanced by the successful implementation of the following initiatives, which Windhoek can learn from:

- i. Rwanda formed the Rwanda Development Board (RDB) to oversee all policies related to the investor experience. The RDB successfully implemented policy reforms that were geared towards improving tourism, including:
  - Creating a business conducive climate – it is easy to do business in Rwanda;
  - Implementing a clear strategy for tourism – Kigali's target tourist segments were clearly defined, and the city positioned itself to attract those segments;
  - Increasing investment in tourism infrastructure development – more than 2 billion United States Dollar (USD) was invested in the sector in 2018;
  - Easy access to Rwanda – Visa-free access to all Africans and a visa on arrival for all other nationalities;
  - Initiatives to encourage longer stay in Rwanda – tourists receive a 30% discount on the gorilla visit permit if they stay in the country for 6 nights or longer; and
  - Incentives for certain T&T businesses – for instance, airlines and shuttles importing tourists are exempt from certain taxes.
- ii. Kigali is known by the international market as Rwanda made significant investments to market and improve the country's image abroad. One such investment is the "visit Rwanda" shirtsleeve that is worn by Arsenal Football Club players.
- iii. RDB undertook extensive marketing campaigns to educate the Rwandan public about tourism and increase tourist acceptance in local communities.
- iv. Locals are being equipped to enhance the visitor experience as Rwanda attracts investment in training and skills development for entrepreneurship and jobs related to tourism.

### 2.3.2 What Windhoek Can Learn from Nairobi, Kenya

Nairobi has successfully established itself as an attractive destination for the African tourist market. The city is only 15 minutes away from a national park and is, therefore, able to comfortably provide tourists with both a city and safari experience. Furthermore, Nairobi offers several wildlife sanctuaries where visitors can interact with rescued wild animals. Kenya has established themselves as conservation champions by undertaking decisive actions such as that of the Kenyan President burning 100 tons of ivory in 2016.

Nairobi further boasts excellent museums, cultural and historical sites that invite visitors to share in the city's rich heritage. Visitors can include activities like spending the day with

the Maasai people in their ancestral homelands and visiting other villages on their itineraries. The city is further known to offer great street cuisine options and has a buzzing and active nightlife. Nairobi's "slum tourism" market is a growing one as more tourists show an interest in visiting a shantytown in the city and interacting with its residents.

In terms of business travel, Nairobi is a globally accepted choice destination for MICE and was included in the top five MICE destinations in Africa in 2019. This is further supported as several global companies including Mastercard, Heineken, Toyota etc. choose to base their regional headquarters in Nairobi.

Nairobi's success can largely be attributed to the following:

- i. Successfully addressing the risk of terrorism as militant attacks continue to be the greatest risk to Kenya's T&T sector. Law enforcement's preparedness and response to terror attacks are said to have greatly improved since the Westgate Mall attack in 2013 and hotels are increasingly signing up as members of the Safe Hotels Alliance, a global organisation that independently assesses and certifies hotels on their safety and security practices.
- ii. Nairobi offers many safe and reliable travel options including buses, matatus (public transportation) and Uber. Furthermore, the country invested in upgrading its rail infrastructure to accommodate express trains that can be used to travel between major towns in Kenya and to Dar es Salaam in Tanzania.
- iii. The widely accepted and easy to use M-Pesa mobile money dissuades tourists from carrying cash and consequently improves their safety while in Kenya.
- iv. Kenya continues to reinforce its conservation stance, as seen with its rollout of the ban on plastic bags in 2017.
- v. Kenya offers visa on arrival entrance to all Africans visiting the country for 30 days or less.
- vi. Cultural tourism and especially slum tourism have successfully included the participation of local communities in tours. The community interacts with tourists to share their heritage, culture and daily lives and often receive financial support such as investments in their business endeavours from tourists.

### **2.3.3 Lessons Learnt from Johannesburg, South Africa**

Johannesburg is an economic powerhouse that is traditionally considered to cater to business travellers instead of to leisure tourists.

Aside from being a centre of commerce with an established MICE sector, Johannesburg has a vibrant art, music, theatre, dance and fashion scene. Furthermore, the city is rich in history, heritage and culture and offers several cultural tours such including the Soweto township tours and visits to historical sites, museums and cultural villages.

In addition to arts and culture, the city offers exciting food and beverage experiences like wine and craft festivals, street food and culinary workshops. Shopping accounted for 50% of international visitors' spending in 2017, which is to be expected as Johannesburg has some globally renowned malls such as Mall of Africa.

The City of Johannesburg has undertaken the following initiatives to boost tourism:

- i. Implementing various solutions to boost crimes against tourists. South Africa was named as the fourth most dangerous country in the world in 2018, hence making tourists feel safe and keeping them safe is key to sustainably developing the City's T&T sector. One proposed safety initiative is to deploy a Tourism Safety Ambassador program that will train and utilise unemployed youths to keep tourists safe. In addition to law enforcement initiatives, the provision of safe and reliable transportation such as the Gautrain and Uber have contributed to improving the overall safety of tourists.
- ii. South Africa gazetted a Tourism Black Economic Empowerment (BEE) Sector Code in 2015 to transform the tourism sector and increase the participation of previously racially disadvantaged persons in tourism. Enterprises involved in the T&T sector are assessed and scored to encourage companies to procure goods and services from more black-owned businesses. The South African Department of tourism further supports this process by providing a publicly accessible online database of BEE suppliers and the types of goods and services that they provide.
- iii. A Tourism Grading Council was established to benchmark and grade the quality of accommodation establishments and MICE venues according to globally accepted standards. The Council awards stars out of five based on the assessment performed by its accredited grading assessors and shares the results on its website. This Council provides vital quality assurance on tourism products in South Africa.
- iv. Two websites that provide centralised information on where to go and what to do in Johannesburg. Both websites include up to date event calendars and have functionality that enables visitors to plan their itinerary on the site. T&T businesses can register themselves on the sites to increase their visibility and obtain publicity. Furthermore, Visit Joburg has a free app for mobile devices that offers a one-stop-shop that tourists can use to plan their trips and activities in Johannesburg.

## 2.4 The Macro-economic Environment and Tourism in Namibia

The Namibian economy experienced healthy growth from 2010 to 2015 with an average annual growth rate of 5.7% in Gross Domestic Product (GDP), partially fuelled by the expansion of public debt, private consumption growth driven by real wage increases and private sector expansion, as well as political and economic stability which attracted foreign direct investments. Foreign direct investment and government spending were directed towards large scale infrastructure development. The decline in the construction

sector when the projects were completed had a significant knock-on effect on other sectors, causing more reductions.

Namibia experienced a technical recession in 2017 due to the slowdown in construction and declining commodity prices that negatively affected the mining sector. The recession was prolonged as GDP further contracted in 2018 and 2019.

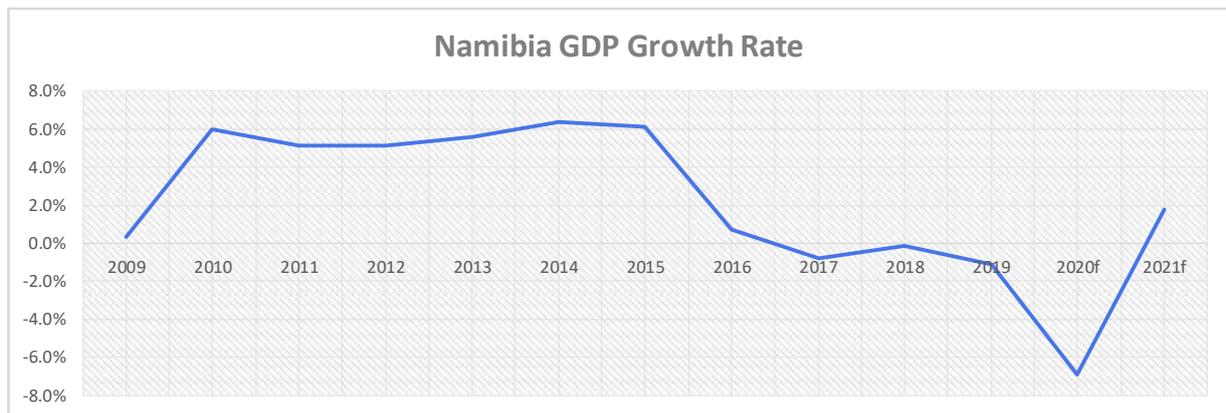


Figure 5: Namibia GDP growth rate

Bank of Namibia (BON) forecasts that the economy will contract by 6.9% in 2020 due to the impact of COVID-19, followed by a marginal recovery of 1.8% in GDP in 2021 (Bank of Namibia, 2020) as part of the economic outlook published in July 2019.

The Travel and Tourism (T&T) sector is expected to be amongst the sectors most negatively affected by the travel bans that were instituted to stop the spread of COVID-19 in 2020. BON estimates that hotels and restaurants will contract by 58% in 2020 and by a further 1.4% in 2021 before gradually recovering. Recovery in the T&T sector is expected to be slow as tourists need to financially recover and become confident that they are safe while travelling. The travel patterns that existed before Covid-19 are changing and safety and feeling safe are key indicators for destination of choice.

Before the outbreak of COVID-19, tourism outpaced all the major GDP activities including mining and fishing and was reported to be the only sector that experienced growth during the recession. T&T had a total (direct and indirect) contribution of N\$ 28.6 billion (14.7%) to GDP in 2019 and had an average growth rate of 0.3% in 2019, which is higher than the average decline of 1.1% in GDP from 2018 to 2019 (World Travel & Tourism Council, 2020).

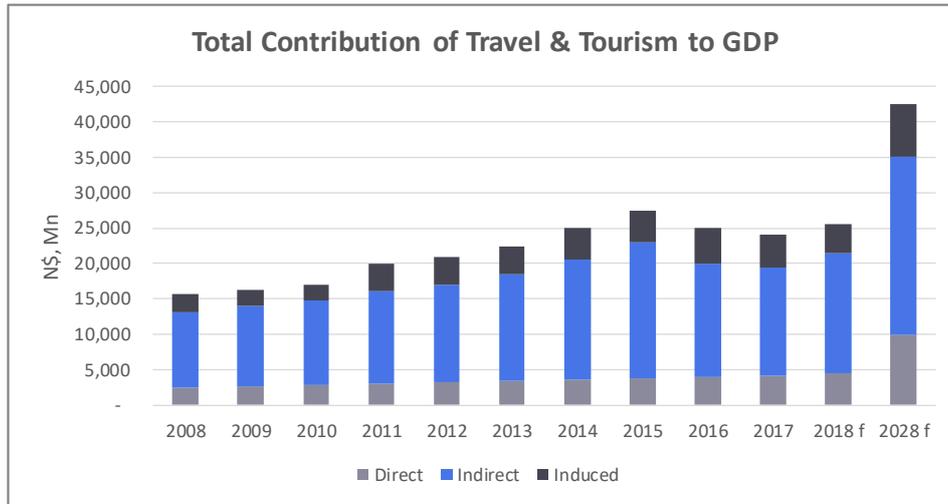


Figure 6: Travel & tourism's contribution to GDP (World Travel & Tourism Council, 2019)

Before COVID-19, growth in the sector was forecasted to be 6.6% per annum from 2018 to 2028 (World Travel & Tourism Council, 2019). Namibia was ranked 34<sup>th</sup> out of 185 countries in terms of long-term growth of the T&T industry (World Economic Forum, 2017).

Leisure travel is estimated to have accounted for 81% of T&T's overall contribution to GDP in 2019, with the remaining 19% being from business travel. Regional travel presents a key opportunity as an estimated 74% of spending was from domestic spending, and only 26% was from international visitors spending. The tourism sector contributed a total of 114,600 direct and indirect jobs (15.4% of employment) to the Namibian economy in 2019 (World Travel & Tourism Council, 2020).

The COVID-19 pandemic has seen the sector, as well as the world, greatly impacted. WTTC worked closely with sector associations, members and Governments to restart the Travel & Tourism sector. The SafeTravels Protocols and Stamp was launched due to the need for a global coordinated approach to recovery and to achieve effective recovery protocols by developing meaningful action plans that optimise sector-wide recovery efforts..

Part of the protocols include providing the public & private sectors with the insights & toolkits for interaction & implementation to ensure that people are and feel safe. It is paramount to have common rules. Ultimately, a future of travel which is safe, secure, seamless and provides an authentic and meaningful experience to the traveller across the journey is envisioned; one which supports the livelihoods of millions and contributes to sustainable economic growth.

Protocols are published for eleven industries, namely; hospitality, attractions, outdoor retail, aviation, airports, short term rentals, cruise, tour operators, convention centres and MICE, car rental and insurance. The protocols align the private sector behind common

standards to ensure the safety of its workforce and travellers as the sector shifts to a new normal.

Equally, the World Travel & Tourism Council (WTTC) developed different recovery scenarios for the Travel & Tourism sector and the economic impact from COVID-19. It is currently not possible to approximate when the T&T sector may return to the growth outlook that was projected before the outbreak of COVID-19. The WTTC has recommended five measures that governments can put in place to minimise the impact of COVID-19. COVID-19 demonstrates that tourism is a sector that is highly susceptible to external shocks, hence disaster risk reduction management to tourism should be a vital aspect of tourism strategy development.

## 2.5 Namibia Tourism Trends

Statistics and trends on visitors to Namibia are reported in the annual Tourism Statistical Report published by the Ministry of Environment and Tourism (MET). The latest available report was published for 2018 information.

Namibia received a total of 1,659,762 foreign arrivals in 2018, which is a 3.9% increase from 2017 (2017: 2.1% increase). In 2018, 94% of all visitors were tourists, and the remaining 6% was shared amongst returning residents, same-day visitors and others (Ministry of Environment and Tourism, 2020). The seasonality of tourist arrivals is well spread out over the year, as depicted below.

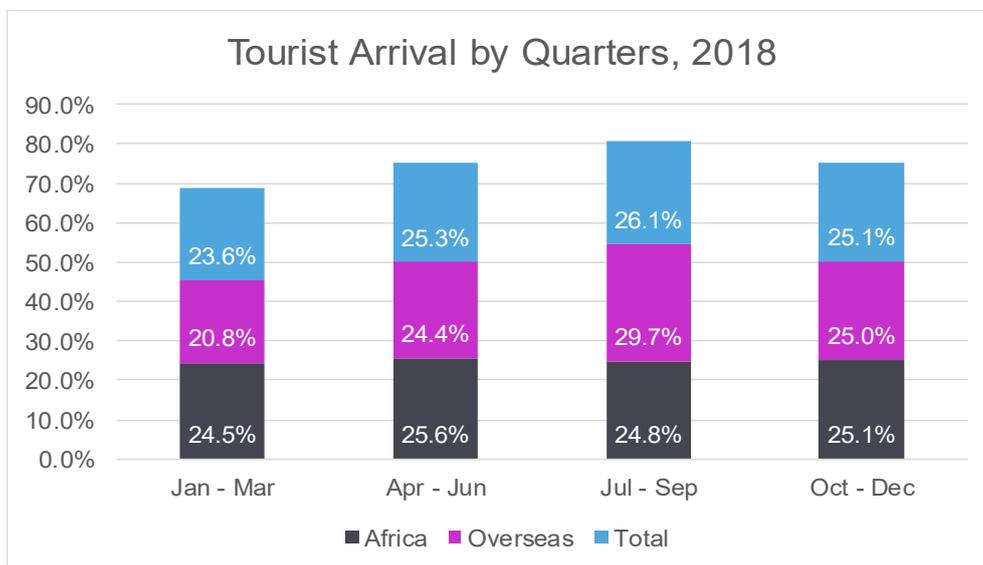


Figure 7: Tourist seasonality 2018

Hosea Kutako International Airport (HKIA) was the point of entry for of 25% entrants to Namibia, while 56% and 12% of all entrants were from the Northern and Southern border posts, respectively (30.8% from the North-eastern border posts). The remaining 7% of all visitors arrive through the Trans-Kalahari border post and other airports. Only 28% of

visitors enter Namibia through air travel. This indicates that a high number of arrivals are from the regional market and enter Namibia by road. Angola, South Africa, Zambia and Zimbabwe accounted for four of the top five arrivals. Germany is the only non-African country in the top five at fourth place and Angola remained the number one tourist market with 489,013 visitors in 2018. The top five list is complemented by tourists from Botswana, France, the United Kingdom (UK), the United States of America (USA) and the Netherlands to complete the top ten tourist markets for Namibia. Despite the USA's presence in the top 10 markets, tourists from North America declined by 8.4% in 2018 compared to an increase of 11% in 2017.

In 2019, the top ten overseas markets were Germany, France, UK, USA, the Netherlands, Switzerland, Italy, Belgium, China and Scandinavia. The overseas market largely visited for holiday purposes (57%), as only 10% of this market visited for business purposes and only 8% travelled to visit friends and family.

In 2018, 59% of all visitors were male and 41% were female. Fifty-one per cent (51%) of entrants cited their reason for travel as visiting friends and family. Only 35% of tourists reported visiting for holidays, whilst 12% of visitors travelled for business purposes. The average length of stay was 16 days in 2018 compared to 19 days in 2017.

The increase in the number of visitors from China slowed to a 0.1% increase in 2018, compared to a 16.6% growth in 2017. Despite the slowdown in the number of visitors from China, Asia is a growing source market for Namibia in line with the global megatrends, making it viable for targeted investment.

Sixty-six percent (66%) of visitors from the European market were over 40 years of age and 62% of visitors from North America were above 40 years old in 2018. All in all, 50% of total visitors were above 40 years old in 2018. The global trend of ageing tourists is clearly observable in Namibia.

Air Namibia brought in 41.1% arrivals by flight in 2018, an increase from the 34.4% share in 2017. South African Airways lost ground by carrying 21.9% of visitors arriving by flight, a fall from the 30.1% reported in 2017. Qatar Airways carried the third-highest visitors arriving by air with a market share of 8.6% in 2018.

The arrival statistics provide insight on how COW might position and effectively market Windhoek as a destination, such as:

- Promoting Windhoek to regional tourists, and not only international visitors;
- Promoting Windhoek at the border posts (the North in particular) and not only at HKIA;
- Increasing activities, facilities and amenities that appeal to the growing Asian market;

- Catering to the needs of visitors over 40 years old such as investing in activities that appeal to the multi-generational travel market; and
- Marketing on airlines that bring in a large share of visitors to Namibia.

## 2.6 What are the National Plans for Tourism?

The Southern African Development Community (SADC) developed a protocol on the development of tourism which recognises tourism as a priority sector for Southern Africa. SADC has identified tourism as a vehicle for sustainable development for the betterment of livelihoods in the region. SADC is cognisant that tourism can be a powerful catalyst for inclusive economic growth if properly harnessed and carefully developed and urges member states to improve their quality of service, safety standards, and physical infrastructure as a means of attracting tourists and investment to the region.

Locally, tourism is pegged as a sector that has the potential to contribute to Namibia's long-term economic success and is included under the pillar of economic progression in Namibia's Fifth National Development Plan (NDP-5). NDP-5 includes a goal to attain structural transformation through value addition, part of which will be achieved by leveraging the potential of tourism in Namibia. The Government (GRN) aims to achieve growth in the sector by increasing awareness and marketing, facilitating investment in infrastructure and supporting the diversification of tourism products. MICE and cultural and creative sectors within tourism have particularly been noted as areas for possible diversification, although the industry has been transformed by technology due to the impact of Covid-19, and the latter needs to be endorsed.

Due to Covid-19, many businesses have learnt to meet via Zoom, Microsoft Teams, Skype and many other platforms. Online webinars, conferences etc. have become the new lifestyle and will continue as such. This will have a negative impact for the MICE industry, hence upgrading the technology that is offered in existing venues in order to host online meetings and events should be considered in the future.

MET developed the National Tourism Investment Profile and Promotion Strategy 2016 to 2026 to develop and implement strategies that will improve Namibia's competitiveness as a destination. MET recognises that continuous investment in the sector (infrastructure, services, marketing, training etc.) is required to remain competitive. The policy acknowledges that both the public and private sectors play important roles in improving the sector's efficiency, skills development and the quality of service provided. MET further aims to improve the benefits that local and indigenous communities receive from tourism.

The tourism investment strategy identifies nine core growth targets, many of which could be implemented in Windhoek. The identified subsectors for growth are as follows:

- a) Wildlife tourism;
- b) Trophy hunting tourism;
- c) Coastal tourism;

- d) Community based tourism;
- e) Cruise tourism;
- f) Circuit development/ route development model;
- g) Luxury affordability;
- h) MICE tourism; and
- i) Medical tourism.



## **3. TOURISM IN WINDHOEK**

### 3. TOURISM IN WINDHOEK

As of September 2019, a total of 1,766 Windhoek-based T&T businesses were registered with the Namibian Tourism Board (NTB).

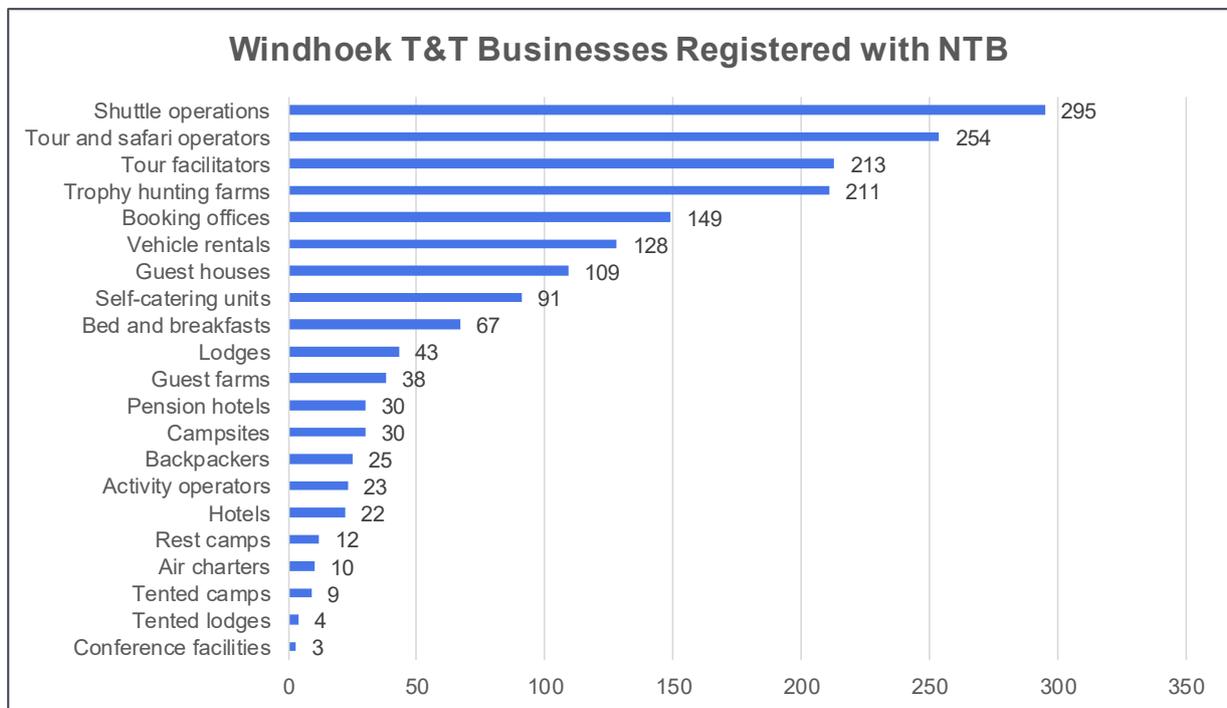


Figure 8: Windhoek T&T businesses registered with NTB

It should be noted that some of the organisations registered in Windhoek have head offices located here, however, they operate elsewhere.

Of all Windhoek T&T businesses that are registered with NTB, 39% are accommodation establishments, 24% are vehicle rental and passenger transportation companies and 29% are activity and tour operators and facilitators. Bed nights in Windhoek are estimated to exceed 550,000 beds and the average occupancy rate is 60% which shows that Windhoek can accommodate more visitors. The highest occupancy rates are between August and December. Almost half of all accommodation establishments indicated occupancy rates of over 70% in November and December. The lowest occupancy rates are between January and March.

NTB does not register eateries and clubs, however, it is estimated that there are 42 clubs, 280 restaurants and 51 coffee shops in Windhoek.

In addition to registered businesses, many T&T businesses that are operating but are not registered with NTB. Over 300 accommodation providers in Windhoek are registered on Airbnb, 125 of which are classified as houses. Furthermore, NTB is unable to regulate

Online Travel Agencies (OTA) such as Booking.com and Expedia as they are international internet-based organisations that are not registered in Namibia.

More than 90% of tourists who arrive by air land at HKIA (Ministry of Environment and Tourism, 2020), however, the T&T stakeholders who were interviewed indicated that tourists are spending less time in Windhoek and increasingly use Windhoek as a gateway city. Key reasons cited are that there are few activities to keep tourists busy and that the operating hours of most businesses are limited. Changes in flight schedules have exacerbated this trend as more flights land at 07h00 and depart at 19h00, making it easier for tourists to leave Windhoek immediately after landing and drive into Windhoek on the day of departure. Tourists who opt to stay in Windhoek often do so on their last night, by which time they have exhausted their budget and thus have less money to spend in Windhoek.

Business travel is commercially relevant to Windhoek as it has the potential to result in investment and increase foreign direct investments in Namibia in all sectors. Hence business travellers should be catered for and not neglected.

Review Pro is a tool that aggregates the guest ratings of accommodation establishments from online feedback platforms to generate a Global Review Index (GRI). The scores take both the quality of the establishment and the quality of service provided into account. Namibia has historically been awarded a GRI of 83% to 86%, which indicates that Namibia's accommodation facilities are generally globally competitive. Therefore, the availability and quality of accommodation is not a constraint in growing tourism in Windhoek.

A survey conducted in 2019 on tourists visiting Windhoek provided the following insights into how tourists experience Windhoek (Hartman & Eckert, 2019):

Kristuskirche was the top attraction for the survey respondents, with four of the top five attractions being near one another in the CBD. Katutura was the fifth most visited attraction overall; however, it was the top attraction for African tourists.

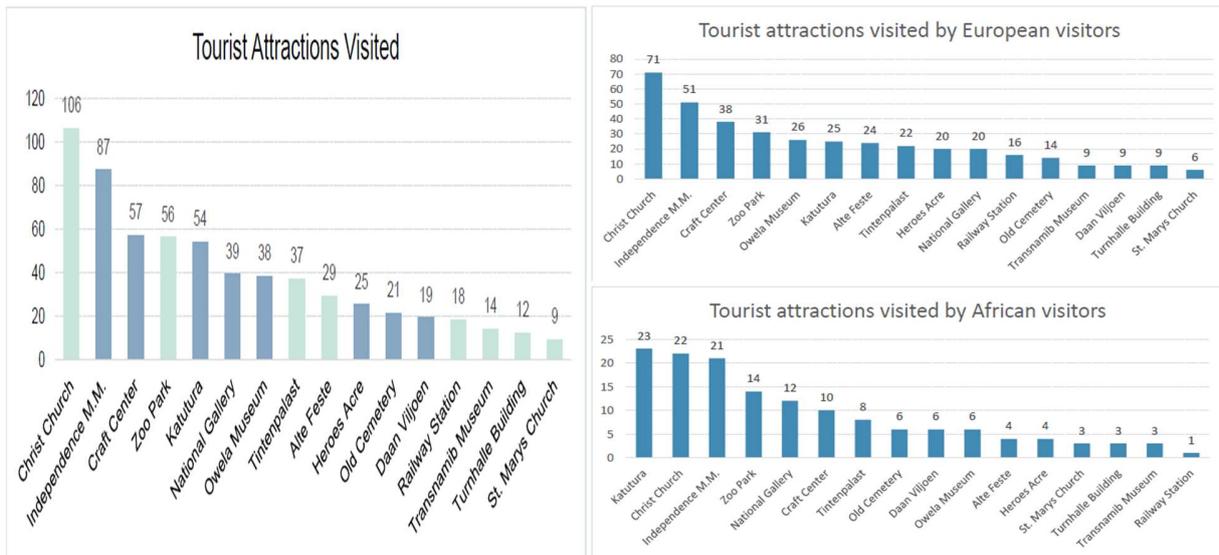


Figure 9: Top tourist attractions in Windhoek (Hartman & Eckert, 2019)

The most frequent means of transportation for tourists have high CO<sub>2</sub> emissions as 60% of visitors use their own car or a rental. Given two main means of transportation, 45% of tourists indicated that they also walk to get around. Overall, only 24% of tourists reported using low-impact mobility to get around Windhoek.

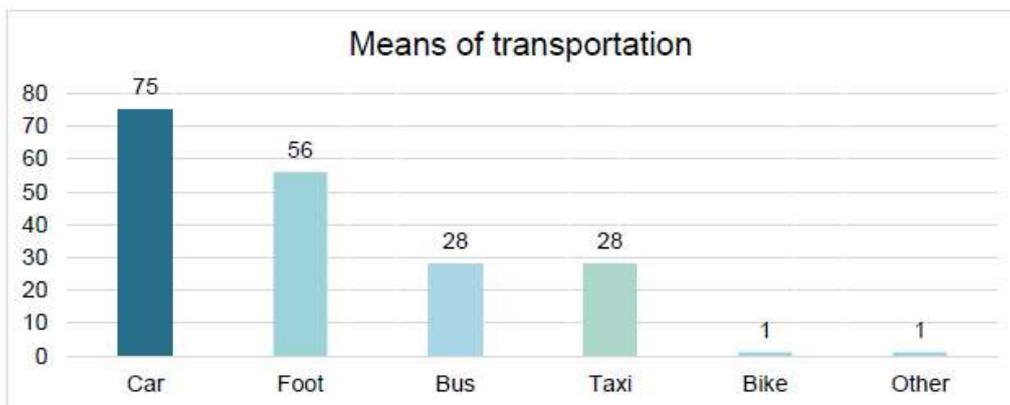


Figure 10: Main means of transportation by tourists in Windhoek (Hartman & Eckert, 2019)

The overall perception and satisfaction that tourists have about Windhoek as a destination is good, at an average score of 3.76, 5 being the highest.

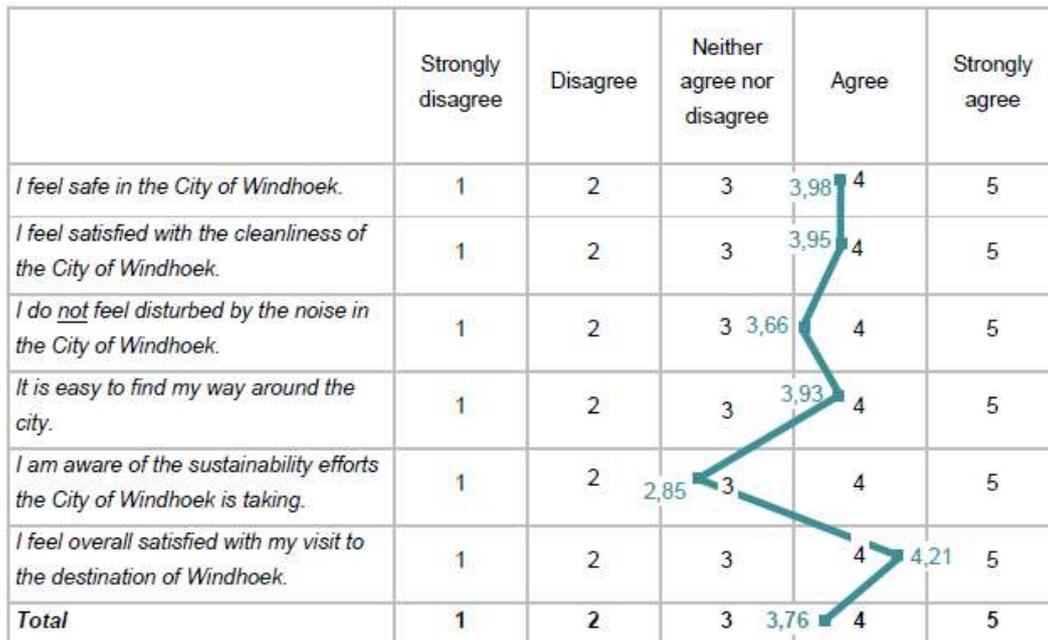


Figure 11: Survey results concerning visitor satisfaction (Hartman & Eckert, 2019)

The survey identified areas for improvement, particularly the promotion and communication of cultural and historic heritage sites, and the involvement of residents in tourism activities.

### 3.1 Problem Statement: Key Challenges that Windhoek’s T&T Sector Faces

Namibia receives a growing number of foreign arrivals each year, with 1.6m foreign arrivals reported in 2018 of whom 400,000 (25%) arrived via HKIA. The Namibia Statistics Agency (NSA) reported that the Khomas Region has the highest annual population growth rate of 3.9% (Namibia Statistics Agency, 2016), which is attributed to high birth rates and urbanisation. Hence, Windhoek is receiving a growing number of residents and visitors each year which points to the need for constant investment to upgrade and maintain infrastructure for the provision of basic services to the growing population. Certain key resources have already been noted to be under strain and could cripple the T&T sector if not properly mitigated.

#### 3.1.1 Water and Tourism



##### *The water crisis and its impact on tourism*

Windhoek currently faces water shortages due to the prolonged drought which has resulted in low dam levels. Should COW be unable to provide consistent water supply throughout the day, tourism will suffer severely as tourists expect water to be supplied without disruptions. Restrictions would lead to cancellations, a decline in bookings and intour operators designing their itineraries to exclude an overnight in Windhoek thereby resulting in fewer tourists spending time in Windhoek. There is a need for a disaster risk

plan to assist accommodation establishments and protect tourism in Windhoek should there be water restrictions.

Seventy per cent (70%) of Windhoek's potable water is supplied by the Namibia Water Corporation (Namwater) who have indicated that they were unable to meet Windhoek's water demand and could only supply a fraction (30%) of the total demand before the rainy season in 2019.

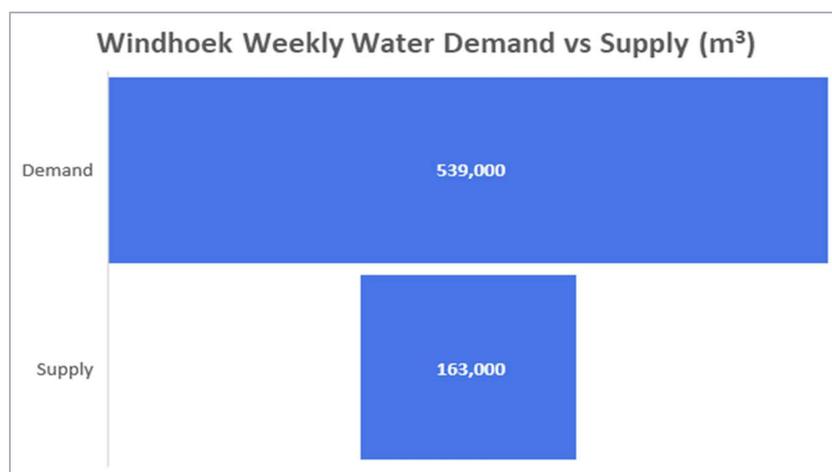


Figure 12: Windhoek water demand vs supply

COW implemented penalty tariffs for high water usage in 2019, however, only a few households in Windhoek had sufficiently reduced their water usage in 2019.

Interviews and surveys that were conducted with accommodation providers in Windhoek reflected that only 50% of respondents have an existing emergency contingency plan in the event of a “day zero” scenario like Cape Town (Liebenberg, 2019 Draft). This indicates that the hospitality industry is largely unprepared to mitigate and minimise the potential impact of water restrictions on guests, despite it being likely to materialise with the water restrictions.

### 3.1.2 Safety, Security and Health and Safety



#### *The status quo and perception*

T&T stakeholders who were interviewed have stated that there is a general perception by both residents and visitors that Windhoek is not a safe city. Perceived danger reduces the amount of activity offered and the level of participation and turn-out at events.

Stakeholders are under the impression that petty crime is rising, particularly crimes against tourists, and are concerned that tourists are an attractive target for criminals. Crimes against tourists often go unpunished as tourists do not stay long enough in Namibia to face the accused in court, as required by Namibian law. Consequently, few offenders are convicted for their crimes, which encourages them to keep committing crimes against tourists.

Stakeholders have relayed experiencing crimes targeted against tourists, such as car break-ins and slashed tyres in areas frequented by tourists. T&T stakeholders have reduced T&T activities in these areas to keep tourists safe, which is ultimately not in the best interests of the communities who operate in the affected areas.

Windhoek City Police provided the following statistics of crimes against tourists that were reported in Windhoek from 2016 to 22 September 2019 to ascertain the accuracy of the perceived increase in crimes against tourists.

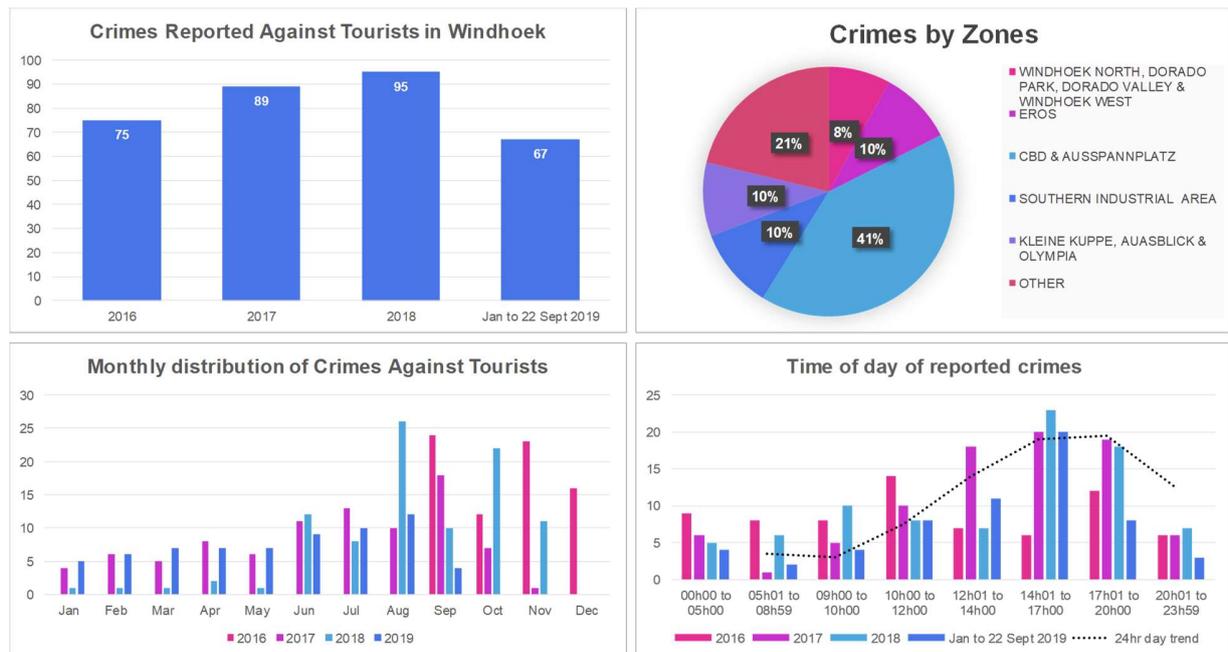


Figure 13: Crimes against tourists in Windhoek (2016 to Sept 2019)

The statistics confirm that the annual reported crimes against tourists have been steadily rising over the past four years. In 2018, 62 crimes were reported from January to September, which is lower than the 67 reported in 2019, and indicates that that the overall number of crimes committed in 2019 may have exceeded those in 2018. More crimes occur during the tourism peak season when Namibia receives more international visitors. Forty-one percent (41%) of all crimes against tourists were reported in the Southern Industrial area. Theft out of motor vehicles and theft constituted 37% and 34% of all crimes committed over the four-year period, respectively. Armed robbery was the third most frequent crime in 2017 and 2018. The statistics further indicate that crimes against tourists peak between the hours of 14h00 and 17h00.

The statistics above provide insights that will assist us in combating crimes targeted against tourists and will guide the measures that COW will implement to improve the safety of tourists in Windhoek.

### 3.1.3 Industry Alignment



#### *How do stakeholders currently interact with one another?*

A recurring opinion is that few stakeholders in the tourism industry are interested in finding solutions together. Surveys sent out by academics, T&T associations and representative bodies in the industry receive only a handful of responses as few stakeholders respond and participate in initiatives in the sector. The Eco Awards platform was the noted exception that reported good industry participation.

The tourism industry in Windhoek is largely considered to be apathetic, resulting in a perceived lack of coordination. The tourism business survey conducted by Burmeister and Partners in 2019 reveals that tourist orientated businesses in Windhoek are not good at marketing themselves. Although 73% of respondent tourism businesses indicated that they had good marketing and sales skills, only 21% had a website. Besides this, only 18% of respondent tourist businesses were registered with an official tourism association and only 15% were graded.

Only 23% of respondent businesses have ever participated in local forum meetings, while only 16% participated in local economic development meetings, 8% in local police forums and only 16% attended or participated in investment conferences or trade fairs (Burmeister & Partners Consulting Engineers; Urban-Econ Development Economists, 2019).

In addition to private sector collaboration, there is a need for the T&T industry to cooperate with local and regional planning authorities to ensure the success of Windhoek's T&T sector. Therefore, COW has a crucial role to play in ensuring stakeholder alignment and sector development.

### 3.1.4 Other Concerns Raised by T&T Stakeholders

#### *Events and activities*

There is not much activity in the city centre after five as most establishments close at 17h00 or 18h00 during the week. On Sundays, activity slows down at 13h00. Tour operators face the dilemma that tourists arriving late or during the weekend have very little to do, worsening the trend of tourists using Windhoek as a gateway city.

Stakeholders have further highlighted that there are no designated tourism economic zones and central places for tourism activity in Windhoek. Stakeholders have suggested the creation of a tourism hub in Windhoek which would allow tourists some independence and encourage them (particularly those on self-drives) to spend more time and money in Windhoek.

### *Marketing and promoting events and activities*

Stakeholders agree that events and activities are not sufficiently marketed and are hard to find. Windhoek is lacking one central and visible place where tourists can get information about activities in Windhoek. Stakeholders agree that COW has an important role to play in marketing the activities and events in Windhoek and the surrounding areas, on a central platform. Most events are currently advertised in the newspapers; however, few tourists buy newspapers while in Namibia. Furthermore, a few stakeholders are concerned that road signs and signage to places of interest are insufficient, not optimally placed and not as visible as they should be.

The tourism information office is not optimally located and is hidden away in the municipality. The container at the Hilton Hotel parking lot may lead to confusion as it is no longer functional but is still branded as a tourism information desk.

A grading and registering system for the tourism establishments and services needs to be implemented as an income stream for the City of Windhoek. The process can be linked to the Certificate of Fitness and can incorporate sustainability and climate change, reflecting the City as a city that is progressive and contributes to climate change, thereby assisting with the accreditation of Windhoek as a sustainable destination.

Tourism distribution channels and marketing: Tourism distribution channels link the tourist with the tourism attractions/ businesses. Tourism distribution channels are also referred to as intermediaries (middleman). Traditional tourism distribution channels include travel agencies and tour operators. Newly developed tourism applications have changed the structure of the tourism system. The latest technology advancements now enable tourists to directly communicate with tourism attractions/businesses when doing business transactions. Thus, for COW to compete within the tourism space, it is important to stay updated with the latest travel applications that influence tourists' behaviour.

Tourism-orientated businesses in Windhoek lacked appropriate digital marketing and connectivity. Only 21% of tourist orientated business had websites and only 50% had business emails. In addition, only 17% of accommodation establishments were promoting themselves through Airbnb (Partners, 2020; Burmeister & Partners Consulting Engineers; Urban-Econ Development Economists, 2019). The lack of websites and digital marketing in this industry is of grave concern as this is an industry that relies heavily on digital media platforms to promote itself. Many tourists investigate their options and make online bookings.

Destination marketing embodies the concept of collaborative marketing and coordination between different stakeholders to achieve a single goal, mainly to increase the number of tourists and their spending impact on an area as a whole.

However, Windhoek can only be successfully marketed as a destination attraction if all

intertwining elements pertaining to the City’s tourism system are in place and fully functioning. This includes the number one marketing tool that tourists use to learn more about a certain destination - the official website.

The current Namibian Tourism Board website (<http://www.namibiaturism.com.na>) has limited information about Windhoek and has technical difficulties on the pages that should promote Windhoek, such as clumsy layout and photos that do not load. This type of occurrence might dissuade potential tourists from visiting Windhoek as it suggests a lack of professionalism and the ability to provide a good tourist experience.

COW needs to enhance its online presence which includes **upgrading the website** and incorporating more **interactive features** into its design. There is a need to promptly address **access to tourism information** with the COW website. The current website does not possess the necessary appeal to keep tourists intrigued but is rather basic, as illustrated below:

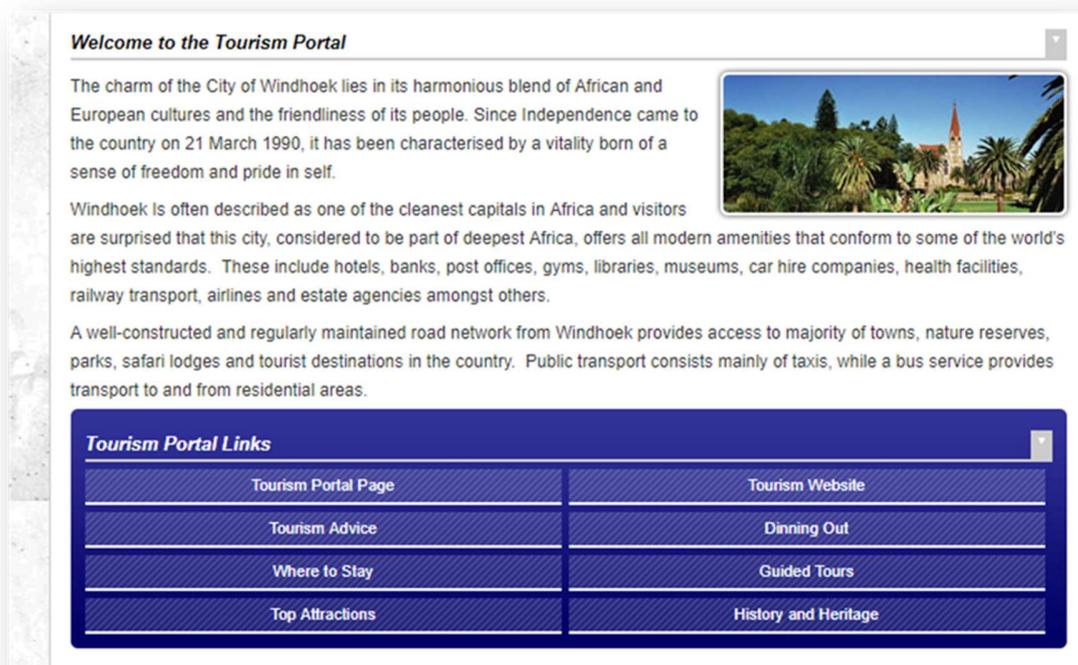


Figure 14: Extract of the City of Windhoek's website, 2019

In addition, it was found that Windhoek has good signage in general, but that the tourist information office near Post Street Mall is hidden away in a corner, whilst the office near the Hilton Hotel is currently being obscured by construction work taking place in the area.

It is proposed that the **tourism information centre be relocated** to an area where it is more visible to visitors.

Furthermore, it was found that the tourism information office needs better signage to make it more visible. Windhoek has well-located and visible signage; however, some **signage will have to be reviewed**.

#### *Educating the public and raising awareness*

Several stakeholders have opined that the Namibian public does not understand the dynamics of tourism, its impact on them, the economy and the role that they can play in the sector. Tourism affects everyone in the economy and stakeholders have identified a need to educate the public and raise awareness about tourism so that residents can be more open to participating in tourism and be friendlier and more patient when interacting with tourists. Buy-in from the public will allow more T&T activities and sites to be developed in suburbs away from the CBD and in informal communities, allowing those communities to benefit from the opportunities that the sector provides and to possibly act as brand ambassadors for Windhoek as a destination.

#### *Visitor guidance and education*

The strategy should instil professionalism in the management of guided tourism. Tour guides can serve a primary source of educating visitors on the local expectations and cultural shocks.

#### *Registration and compliance*

There is no centralised department to advise or assist new business owners with the registration and compliance requirements for new tourism-related enterprises, which is a barrier to entry that negatively impacts the extent which the local community can participate in tourism. T&T businesses are required to comply with the Namibian Companies Act, tax laws, local authority regulations and with NTB requirements. Stakeholders have further commented that the regulations are onerous and consist of administrative red tape which does not encourage participation in tourism. An accessible and centralised location for dispatching information, such as a website would stimulate more entrepreneurship in the sector.

#### *Maximise existing infrastructure*

Promote touristic transportation as a product, e.g. specially designed buses that are tourist friendly and only geared towards tourist needs/ hotspots/ destinations.

### *Capitalise on Windhoek's untapped potential*

Windhoek's unique geology: The City presents an interesting geological setting that also, to a large extent, influences the settlement and development patterns. Promotional activities should be geared towards fostering an undertaking of key geological features including springs, mountains, and the mineralogy of the area. Windhoek is blessed with natural infrastructure and designing tourism activities based on its natural setting (e.g. hiking trails) could enhance the unique value proposition and attract visitors.

Biological resources: The Windhoek locality presents an interesting plant diversity which largely remains un-explored. Illustrating local tourism that is tied to plant diversity could be of interest to academics from a research perspective and to plant fanatics and conservationists. An example is the Aloe plant which is of medicinal significance and is connected to the social fabric of Windhoek.

History and cultural heritage: Windhoek remains an epitome and melting point of various cultures and presents an interesting fusion of Afro-Euro traditions. Hence cultural diversity could be an interesting selling point from a marketing perspective. Oral history has an immense potential and could be of interest to those seeking a thorough understanding of the Namibian society on the go.

### *Mechanism for Review*

The strategy should prescribe a mechanism for review. As an action, there should be a dedicated research and development desk focusing on the visitors' experience. For international visitors, HKIA could be a good place to reach visitors and gain an insight on visitor experience.



## **4. WHAT COW IS ALREADY DOING**

## 4. WHAT COW IS ALREADY DOING THAT WILL IMPROVE TOURISM IN WINDHOEK

COW has identified several other initiatives in other strategies that will benefit Windhoek's tourism sector. The initiatives primarily relate to the investment in infrastructure to ensure that residents continue to receive basic services in Windhoek. COW also aims to improve the public transportation system, improve the flow of traffic and the ease of access for pedestrians and cyclists.

### *What City Police is already doing to improve safety and security*

COW's safety initiatives are geared towards crime prevention in line with City Police's mandate.

City Police has implemented zonal policing by separating Windhoek into designated zones and managing and reporting crimes per zone which increases visibility, allows for rapid response, ease of monitoring and creates ownership and accountability by police officers.

Crime prevention is further enabled by the police gathering data on crime, analysing trends and appropriately responding to the trends to discourage similar crimes. Involving the community in policing efforts by forming partnerships, working together to solve problems and providing education and awareness is a key component of building trust with the communities and building effective partnerships that solve and reduce crimes.

Using technology such as surveillance, dispatch and monitoring equipment allows law enforcement to increase the speed of response and conclude investigations faster, thereby dissuading crime.

In addition to reducing crime, law enforcement aims to gather enough evidence during crime investigations to increase the chances of conviction. Offender profiling is an important aspect of prevention as it can be used to suppress gang activity and reduce the chances of repeat offenders. City Police analyses the actual crimes committed annually to identify prevalent crimes and high crime areas and set goals for crime prevention and reduction in the next year.

### *What the Smart Cities and Transport Unit are working on*

Planning by the Smart Cities and Transport Unit is primarily focused on gearing Windhoek towards becoming a Smart City. The initiatives that relate to tourism are:

- **Public safety and security** – CCTV Cameras are being installed all over Windhoek to curb crime, including crimes targeting tourists.
- **Wi-Fi access** – COW aims to make Wi-Fi accessible at key areas in Windhoek. This would provide online accessibility for tourists and will enable them to find their

way around, including finding their accommodation, where to eat and any other activities that they may be interested in. Ideally, the Wi-Fi will be free, however, the ICT department is still performing feasibility studies.

- **Open data channels (Internet of Things)** – COW plans to avail general information to residents and visitors which will include:
  - ✓ reviews on restaurants;
  - ✓ information on where to find traditional (or any other) cuisine;
  - ✓ events around town (cycling etc);
  - ✓ identify popular spots for tourists and how tourists can get there safely.

The information from these channels will be used to improve the services provided to residents and visitors.

- **Public transport** – COW aims to promote and increase the use of non-motorised transport (walking and cycling) for residents and visitors. Non-motorised transport is a form of smart travelling. Plans on this include providing rental bicycles, improving the sidewalks and related infrastructure, as well as expanding the roads to include cycling lanes. COW's objective is to encourage people to use public transport rather than their private cars as their main mode of travelling. Plans are underway to make public transport more convenient. For instance, COW aims to improve the reliability of municipal buses with a few initiatives like creating an app that will allow travellers to see the bus routes along with the location of buses and their estimated arrival times. Furthermore, COW wants to increase the number of buses available in Windhoek and ensure that all routes have enough coverage. Additionally, COW is developing a mobile phone app that will enable users to identify parking areas in Windhoek.
- **Land use management** – There is a drive to increase recreational parks and commonly shared public spaces around Windhoek. This includes closing off certain streets on specified days to allow pedestrians and cyclists only.
- **Customer care** – Web portals and apps will be developed and availed to the public to enable them to better interact with us to comment and make suggestions on how COW can improve Windhoek for residents.

The Non-Motorised Transport (NMT) strategy addresses the development of safe routes for pedestrians and cyclists in Windhoek. Tourists currently use pay-and-drop transport (radio taxis) instead of public transport and there is no integration between pay and ride and public transport. The NMT strategy aims to improve access to public transport loading areas and for its integration into the road network and to integrate public transport with walking paths.

The NMT strategy includes long-term plans to create safe spaces for pedestrians and cyclists, which will be rolled out in gradual phases. Certain areas will be closed off to cars and will be used for various activities and events instead. Possible events include closing

off a street and introducing cafes, cycling areas, food carts, local artists and other amenities that people can make use off while walking or cycling.

### *Solid Waste Management Department initiatives*

Solid Waste Management aims to provide a clean environment for both residents and visitors. Many of the visitors to Namibia are from Europe and are health and green conscious. The formal parts of Windhoek are doing well as there is a world-class standard system in place. Most residents are conscious of keeping the city clean as littering is minimal and is mostly only an issue in the informal parts of Windhoek. COW needs to drive a change in people's attitudes and encourage them to look after their environment. As this is a national issue, it needs intervention by the top leadership in government, which the President initiated in 2018. Namibia can learn from Rwanda's success in this regard.

COW's overall strategic plan includes making significant investments in waste management infrastructure such as incinerators that will burn waste while simultaneously producing electricity. The incinerators will increase the capacity of the existing landfill (Kuperberg) and therefore, expand its lifespan. These initiatives can only be implemented in the long-term as they require funding that is not currently available.

The Solid Waste Management department will ensure that Windhoek's solid waste management keeps to the standards of disposal sites as approved by MET through environmental clearance. The set standards ensure that the waste disposal methods used are hygienic and do not pose any threats to residents and that the waste does not pollute groundwater sources.

COW further plans to promote recycling. The whole of Africa only recycles about 5% of waste and Namibia has close to the same ratio. Namibia does not have the manufacturing base for recycling locally with recycling materials being exported to South Africa, therefore a local disposal plant will be beneficial. Namibia should consider banning plastic or introducing more environmental levies as the country does not recycle enough.

### *Initiatives to supply reliable electricity and stimulate economic activity*

COW has identified several initiatives to keep Windhoek lit and provide enough electricity to residents and visitors, including:

- Installing street lighting along the river walks in certain areas like Klein Windhoek;
- Installing high mast lights to improve lighting and safety across Windhoek and assisting City Police with mounting their cameras on the streetlights and powering them with electricity;
- Changing streetlights to Light Emitting Diode (LED) lights which are more energy-efficient and that will enable more streetlights to be installed in Windhoek;

- Investigating the possibility of building renewable solar plants to make Windhoek greener;
- Considering using the hot springs to generate electricity in the longer term;
- Providing electricity to the various street markets to enable hawkers and vendors to do business at night;
- Assisting the ICT department with the free Wi-Fi project by giving them access to the fibre cables to aid in the installation of access points across Windhoek;
- Electrifying about 1,000 houses (2019/ 2020) to improve the economic activities in those areas;
- Investigating the feasibility of using solar heating facilities to heat public pools so that they remain open throughout the year; and
- Improving the Christmas lights to attract people to the city centre at night.



# **5. COW'S STRATEGY GOING FORWARD**

## 5.COW'S STRATEGY FOR THE DEVELOPMENT OF SUSTAINABLE TOURISM IN WINDHOEK

### 5.1 SWOT Analysis – Tourism in Windhoek

Windhoek as a destination has several strengths that should be protected and leveraged to further develop and grow the tourism sector.

Weaknesses are existing factors in Windhoek's T&T sector that are somewhat within the control of T&T stakeholders and that currently hinder the growth and development of a sustainable tourism sector in Windhoek. The Windhoek tourism sector should collaborate to mitigate and reduce weaknesses.

Certain infrastructural developments by COW will benefit Windhoek's T&T sector and create growth opportunities in the tourism sector.

Tourism is a sector that is significantly exposed to external threats (e.g. tourists' perceptions) that are beyond the sector's control and the Windhoek T&T sector is no exception. Although threats are largely beyond the sector's control, they must be identified to enable T&T stakeholders to best position themselves to minimise the impact of the identified threats.

The SWOT analysis provides a bird's-eye view of the status of tourism in Windhoek and is depicted overleaf.



Figure 15: SWOT analysis

## 5.2 Identifying Windhoek’s Competitive Advantage as a Destination

Identifying Windhoek’s Unique Selling Proposition (USP) is crucial to developing a sustainable tourism sector in the city. The following USPs are currently identifiable, however, they will be investigated in detail when developing a brand for Windhoek as a destination during the implementation of the strategy. Equally, a program promoting activities that focus on sustainability and climate change needs to be developed to create new selling propositions.

### *Music, arts, culture and heritage*

Windhoek was the location of many of the major colonial historical events since the German occupation of Namibia. Several historical sites and museums can still be visited today. Windhoek has a rich history that can be retold and shared by many of its residents and a buzzing jazz culture which can be traced back to the city's history. The City is well suited to visitors and residents who are interested in learning more about Namibia's history.

Windhoek is a central place where all the cultural groups converge, hence it is possible to position the city as one where tourists can engage with and experience all of Namibia's cultures and traditions. Investing in the development of cultural tourism opens the door for a wider range of people to participate in and benefit from Windhoek's tourism sector by sharing their culture and telling their stories. The following are notable suggestions on how to further develop the Windhoek's T&T sector by using the City's cultural resources.

1. Convert the Alte Feste into a tourism centre which comprises of coffee/food shop with local food, monetary exchange, business centre, tourism guards/ambassadors for walking tours, using the venue for events, virtual shows and cultural exhibitions;
2. Research and develop cultural culinary tourism for the domestic market;
3. Develop a culinary week ending with exhibitions at the showground;
4. Create a monthly cultural events calendar to promote open spaces within the City; and
5. Digitalise and create virtual reality tours of the museums to be accessed through the City tourism portal.

### *Establish Namibia as a travelling corridor*

Due to Covid-19, many countries are establishing corridors where tourists can travel for a number of days in order to be safe. There is opportunity to develop Windhoek as a corridor by partnering with accommodation establishments, tour guides and restaurants to become safe spots for visitors travelling through Windhoek in order to restart tourism, create employment and generate income.

### *Regional tourists travelling for medical reasons*

Namibia has experienced growth in medical tourism, especially from Angolan visitors who remain the number one visitor to Namibia. Angola has a shortage of doctors and other medical practitioners, with CEML Angola reporting a ratio of two doctors per 100,000 people (2012 statistics, latest). NSA's latest statistics indicate that Namibia has 40 doctors per 100,000 people, a ratio that twenty times that of Angola's. Namibia receives so many Angolan tourists for medical purposes, that some Angolan medical insurers have

arranged for Namibian healthcare providers to attend to their insured members. Therefore, Angola is a viable target group for this type of tourism.

Medical tourists often have a longer average length of stay as they remain in the area to recover from surgical procedures. Windhoek is home to many excellent private healthcare practices and hospitals, including Lady Pohamba Private Hospital which was selected as a winner in the healthcare sector on a global level by the Achievements Forum, which is based in the UK in 2019. Several African nominees were considered, including Ongwediva Medipark and Groote Schuur hospital in South Africa. The facilities are awarded based on the outcome of an independent international evaluation. This competitive advantage is under threat and should be protected as more private healthcare facilities open in the northern regions and many Angolan healthcare tourists opt for them as the facilities are close to the border.

COW should explore partnering with and investing in guesthouses for patients and family who need to stay for more than a week, develop packages and provide tour guiding services to generate income for COW.

#### *People travelling for sporting events*

Global trends indicate that consumers are becoming more health-conscious and are taking proactive steps to care for themselves, including exercising more. This trend is reflected in the tourism megatrend of growth in the wellness travel sub-sector (Section 2.2). The growing interest in health and wellbeing is visible in Namibia, particularly in Windhoek, as weekend sporting events become more common. Many lodges on the outskirts of Windhoek have hosted hikes, trail runs and obstacle courses which have attracted several visitors to the city. Several annual events have been established such as the Nedbank City Dash, which received 500 more participants than expected in 2019. Windhoek with its rolling hills and mountainous terrain has the potential to host more sporting activities for runners, hikers and cyclists. Similarly, the Auas mountains are perfect for hosting activities such as ziplining and bungee jumping that appeal to adventure tourists. A sport and adventure marketing campaign for Windhoek should be created.

#### *People travelling for sustainability and climate change*

The emerging traveller would like to make a difference and contribute to preventing climate change. Programs should be developed in order for COW and the Windhoek T&T sector to become leaders in sustainable tourism. COW should capitalise on the numerous existing sustainable attractions.

### 5.3 Strategic Overview and Strategic Direction

The mission signifies the purpose of the development of this strategy and COW's role in Windhoek's T&T sector. The vision signifies what COW envisions for the Windhoek T&T sector and is the overall goal that COW will work towards.



Figure 16: Strategic overview

This strategy is aligned with the COW Transformational Strategic Plan 2017 – 2022 and will support the realisation of that strategy. COW is committed to moving as one organisation in one direction to realise the achievement of this strategy.

COW's overall vision is to realise a thriving, dynamic and sustainable T&T sector in Windhoek that stimulates and contributes to overall economic activity. COW envisions that growth in the T&T sector will create opportunities where value can be generated and realised by different members of Windhoek's community.

COW's purpose is to be a catalyst in the sector by playing an active role to create an environment that encourages the sustainable development of tourism in Windhoek.

The strategic themes are the key areas that COW will focus on over the strategic period to guide the achievement of the vision.

## 5.4 Vision, Mission and Values



### **Vision:**

*To ensure a safe, dynamic and sustainable tourism environment for economic growth in Windhoek by 2025*

**City:** *To be a smart and caring city by 2022*



### **Mission:**

*To be a catalyst for sustainable development and growth of tourism in Windhoek*

**City:** *To enhance the quality of life for all our people by rendering efficient and effective municipal services*



### **COW's Values:**

The values define who COW is as an organisation and direct COW's standards of behaviours. The values give COW one identity when interacting with one another and with all stakeholders.

- **Teamwork**

*"Let's hold hands with all stakeholders and do the right thing for tourism"*

- **Customer Focus**

*"The well-being of our guests remains our primary concern"*

- **Communication**

*"We are transparent and innovative in communicating with stakeholders through open dialogue"*

#### **City:**

- ✓ *Teamwork: Let's do the right thing, right, together*
- ✓ *Customer Focus: We render friendly, fair, simple, fast and effective service to all residents*
- ✓ *Communication: We are transparent and keep our staff and stakeholders well informed*
- ✓ *Fairness and Equity: We treat staff and stakeholders the same and with respect*
- ✓ *Integrity: We are trustworthy, responsible and honest in all our dealings*

## 5.5 Critical Success Factors

COW identified 21 critical success factors for the development of sustainable tourism in Windhoek. The following factors are necessary to the successful implementation of the tourism strategy:



Figure 17: Critical success factors

Secure water supply is critical to developing a sustainable T&T sector as water restrictions will likely diminish accommodation bookings and cause Windhoek to have fewer visitors. Improving safety and creating the perception that Windhoek is safe will increase visitors and participation in events and activities. Tourists and residents should be able to move around easily and feel safe while doing so.

Information on events and activities should be readily accessible, marketed and updated on time to enable tourists to include Windhoek in their itinerary. Extended operating hours will increase the amount of time and money that tourists spend in Windhoek. Furthermore, Windhoek must be branded as a city that offers something unique and enjoyable to visitors and should be marketed to increase its visibility and become a destination that tourists want to go to.

Public education that highlights the potential of tourism and how it is beneficial to local communities will create buy-in from locals and cause them to be more welcoming and accepting of tourists. Locals will identify and pursue economic opportunities for themselves, which will increase T&T orientated entrepreneurship. The increased competition will improve the quality of services provided and increase accountability amongst T&T stakeholders. A business-conducive climate is needed to stimulate the development and growth of Small and Medium-Sized Enterprises (SMEs) in the T&T sector.

Continuous investment in infrastructure is necessary to cater to growing visitor and resident numbers, which requires the buy-in of relevant stakeholders to prioritise and approve the identified investments considering the constrained resources.

Collaboration between T&T stakeholders, COW and the relevant regional and national government bodies is necessary to ensure that the various roles within the sector are effectively attended to and challenges addressed.

## 5.6 Strategic Themes, Objectives and Projects

Six strategic themes and 11 objectives were identified. The themes are the key areas in which the Windhoek T&T sector must excel to create a sustainable tourism industry, whilst the objectives are the desired outcomes per theme.

Initiatives were identified for each objective and COW will play one of the following four roles in their implementation:

- **Dept. Lead Project** – The Department of Economic Development and Community Services in COW is responsible to lead and implement the project;
- **COW Lead Project** – Another department within COW is responsible to lead and implement the project;
- **Promote and Support Private or Public Sector Project** – The project is something that COW proposes for the development of the Windhoek T&T sector. The project needs to be promoted to the private or public sector for implementation as they need to take ownership and responsibility for leading and implementing the project. COW may contribute by promoting the project, providing funding, infrastructure, zoning or incentives.
- **Support Existing Private or Public Sector Initiative** – The project is a private or public sector initiative that COW may support by providing funding, infrastructure, zoning or incentives.

### Theme 1: Improve the Safety and Security in Windhoek

COW aims to improve the safety of residents and visitors in Windhoek and to change the perception that Windhoek is not safe.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Position Windhoek as the number 1 safest city in SADC by 2022	<ul style="list-style-type: none"> <li>• Implement zonal policing</li> </ul>				
	<ul style="list-style-type: none"> <li>• Conduct intelligence led policing</li> </ul>				
	<ul style="list-style-type: none"> <li>• Implement Community-Oriented Policing &amp; Problem Solving (COPPS)</li> </ul>				

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
	<ul style="list-style-type: none"> <li>Leverage the use of technology to prevent crime</li> </ul>				
	<ul style="list-style-type: none"> <li>Conduct and conclude investigations to reduce crime and increase conviction rates</li> </ul>				
	<ul style="list-style-type: none"> <li>Engage the Ministry of Justice to develop a solution for the timely resolution of crimes against tourists</li> </ul>				
	<ul style="list-style-type: none"> <li>Set annual goals to reduce prevalent crimes and increase overall safety in Windhoek</li> </ul>				
	<ul style="list-style-type: none"> <li>Train City guides to become guards/ ambassadors in order to ensure tourist safety</li> </ul>				
	<ul style="list-style-type: none"> <li>Create a neighbourhood watch program for tourism</li> </ul>				
Educate and create safety awareness amongst tourists and residents of Windhoek	<ul style="list-style-type: none"> <li>Run targeted campaigns and roadshows (for product and service providers and residents)</li> </ul>				
	<ul style="list-style-type: none"> <li>Disseminate information on safety and road safety at the airport and on incoming flights to HKIA</li> </ul>				
	<ul style="list-style-type: none"> <li>Share statistics and strategies on crimes against tourists with T&amp;T stakeholders to identify trends and potential hotspots</li> </ul>				
	<ul style="list-style-type: none"> <li>Encourage tour operators to meet and greet their clients at the airport (to discuss safety and other issues)</li> </ul>				

Table 1: Theme 1 objectives, projects and responsibilities

### 5.6.1 Theme 2: Spearhead the Development of a Sustainable Tourism Industry in Windhoek

The sector should aim to create economic value for all T&T participants in a sustainable manner. The T&T sector should conserve the three pillars of sustainability (economic, social and environmental) by:

- Positively impacting affected communities and preserving their culture, heritage and way of life;
- Preserving and respecting the environment including the local flora and fauna;
- Creating value and opportunities for sustainable economic development.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Encourage investment in sustainable tourism by 2025	<ul style="list-style-type: none"> <li>Reduce business registration process to 2 days in line with the "Doing Business in Namibia" project initiated by MICT led by the Business Registration Section in COW</li> </ul>				
	<ul style="list-style-type: none"> <li>Develop and add toolkits on how to start T&amp;T businesses on the website</li> </ul>				
	<ul style="list-style-type: none"> <li>Implement software and IT solutions (ERP) that allows for digital authorisation to fast track approvals in progress</li> </ul>				
	<ul style="list-style-type: none"> <li>Request EOIs to develop potential tourism products</li> </ul>				
	<ul style="list-style-type: none"> <li>Assign responsibility to follow up on PPP applications and their approval</li> </ul>				

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
	status				
	<ul style="list-style-type: none"> <li>Implement an events calendar, regulate events and generate advertising revenue</li> </ul>				
Support sustainable tourism activities & relevant capacity building by 2025	<ul style="list-style-type: none"> <li>Request administrative fees for the application, registration and the evaluation of events held by external parties (financial and economic - regulation includes environmental aspects)</li> </ul>				
	<ul style="list-style-type: none"> <li>Raise funds (sponsorships and from budget) to host events (economic)</li> </ul>				
	<ul style="list-style-type: none"> <li>Charge fees (participation fees from service providers / entrance fees from the public) for COW's own events (economic)</li> </ul>				
	<ul style="list-style-type: none"> <li>Offer targeted training to BEE and SME T&amp;T service providers (economic and social)</li> </ul>				
	<ul style="list-style-type: none"> <li>Perform post-mortems (M&amp;E) to follow up on the training outcomes on a regular basis for a defined time period (economic and social)</li> </ul>				
	<ul style="list-style-type: none"> <li>Actively and consistently collect data on environmental, economic, social, cultural and tourism management issues. Frequently perform data analysis to discern information and consolidate with stakeholders</li> </ul>				
	<ul style="list-style-type: none"> <li>Set up systems that enable COW to collect data on how COW benefits from tourism related businesses in Windhoek. Frequently analyse data and report relevant information to councillors and other decision-makers</li> </ul>				
Create awareness of the importance of and the benefits of tourism amongst the community	<ul style="list-style-type: none"> <li>Revitalise the teens in tourism campaign</li> </ul>				
	<ul style="list-style-type: none"> <li>Identification and integration of relevant stakeholder groups and introduce a tourism forum to improve communication among the sector and enable cooperation</li> </ul>				
	<ul style="list-style-type: none"> <li>Revitalise the tourism awareness campaign roadshow in collaboration with stakeholders and incorporate schools and tourism students as part of the internships</li> </ul>				
	<ul style="list-style-type: none"> <li>Support and participate in awareness campaigns that are led by external stakeholders (e.g. Wilderness Safaris, the Birds Association, Scientific Society, Museum Association, HAN)</li> </ul>				

Table 2: Theme 2 objectives, initiatives and responsibilities

### 5.6.2 Theme 3: Ensure Customer Focus in the Sector by Improving Windhoek's Value Proposition

COW will develop tools, products and services to improve how tourists experience Windhoek as a destination.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Invest in digitalisation	<ul style="list-style-type: none"> <li>Develop a tourism App</li> <li>Create a website for Windhoek as a destination</li> <li>Develop e-brochures (digital tourist map) - offline PDF</li> </ul>				
	<ul style="list-style-type: none"> <li>Explore appropriate social media platforms (identify the most appropriate platform)</li> </ul>				
Product development	<ul style="list-style-type: none"> <li>Identify and conduct feasibility studies for projects and promote / support</li> </ul>				

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
	<p>tourism opportunities (new &amp; existing adventure activities) that are feasible - own activities</p> <ul style="list-style-type: none"> <li>Develop tourism sites and activities away from the Central Business District (CBD) and in townships and settlements. Example activities include shebeen hopping in Eveline Street, locals can participate in tourism by hosting guests for dinner in their homes whilst storytelling and residents can act as tour guides in their communities;</li> <li>Develop cultural villages and arrange cultural tours to showcase Windhoek's history and heritage;</li> <li>Develop street markets where tourists and residents can eat street food and buy arts and crafts. This could be combined with the development of a tourism hub, beer gardens and food trucks. Zoo park has been identified as a potential location for a tourism hub;</li> <li>Arrange lunch hour performances (music, arts and theatre) in open public spaces with local artists and students to encourage people to spend their lunch break outdoors, spend some money and provide artists with exposure;</li> <li>Engage NHC on ongoing development and promotion of heritage sites</li> <li>Develop Zoo Park and the Parliament Gardens into botanical gardens where picnics and performances can be held;</li> <li>Add cycle and pedestrian lanes in Windhoek and design scenic routes that tourists can take;</li> <li>Outdoor activities such as birdwatching, stargazing, bush sundowners with cocktails, bush dinners or camping under the stars in the Auas Mountains;</li> <li>Develop tour and programs for the local market</li> <li>Organise outdoor activities for families and kids such as scavenger hunts and tree planting events. Events can include activities that entertain kids, for example, face painting, three-legged racing, flying kites, hula hoop rentals, roller skate rentals, jumping castles and a kiddie's pool;</li> <li>Mountain adventures such as bungee jumping, mountain biking, hiking, quad biking, ziplining, abseiling, paragliding and 4x4 tours;</li> <li>Use the natural environment to host sporting events such as trail running, triathlons and BMX races;</li> <li>Implement a tourism levy</li> <li>Implement a certification system for tourism establishments and services</li> <li>Capitalise on the brand created by Windhoek Lager and arrange beer events where people can sample the local beers and craft beers, invite the thriving home craft brewers to participate and sell their wares. Investigate the possibility of arranging tours to breweries in Windhoek;</li> <li>Tourism development geared towards using the hot water springs;</li> <li>Tours focused on sustainability and climate change.</li> <li>Tourism development geared towards using the biological resources whilst preserving them; and</li> <li>Family fun activities like water parks and theme parks.</li> </ul>				
	<ul style="list-style-type: none"> <li>Informal market, informal settlement and shebeen tours (City operated)</li> </ul>				
	<ul style="list-style-type: none"> <li>Promote Township events - COW</li> </ul>				
	<ul style="list-style-type: none"> <li>Develop a tourism hub (tourism office space, traditional food stalls, curios, traditional attire, arts and cultural performances) (PPP) – develop one</li> </ul>				
	<ul style="list-style-type: none"> <li>Increase activities in and around the city (Zoo Park Amphitheatre, Post Street Mall) by motivating for hourly or weekday rates (City rate)</li> </ul>				
	<ul style="list-style-type: none"> <li>City Bus routes (hop on hop off schedule) – develop for tourism</li> </ul>				
	<ul style="list-style-type: none"> <li>Arts performances at the airport to coincide with arrivals &amp; departures</li> </ul>				
	<ul style="list-style-type: none"> <li>Encourage the development of a multi-cultural village (PPP) – where people live and showcase their daily lives</li> </ul>				
	<ul style="list-style-type: none"> <li>City accommodation (PPP) – bungalows, self-catering etc. (COW units)</li> </ul>				

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
	<ul style="list-style-type: none"> <li>City Tourist Info Offices / booking agent (competes) – approach the Ministry of Environment and Tourism in order to utilise the Alte Feste as a Tourist Centre</li> </ul>				
	<ul style="list-style-type: none"> <li>Development of arts and cultural routes (artists route, Katutura tourist route) - (will also be used for self-drives)</li> </ul>				
	<ul style="list-style-type: none"> <li>Develop a city artist mile/ route</li> </ul>				
	<ul style="list-style-type: none"> <li>Facilitate the promotion of arts in new developments (public arts) - incorporate arts, display and use of local arts etc. for new buildings</li> </ul>				
	<ul style="list-style-type: none"> <li>Develop market segmentation strategies (e.g. way finding project), upgrade the facilities to accommodate the identified segments and develop activities that appeal to the market segments</li> </ul>				

Table 3: Theme 3 objectives, projects and responsibilities

### 5.6.3 Theme 4: Maintain and Develop Infrastructure to Support a Growing Tourism Industry in Windhoek

It is necessary to make continuous investments in the infrastructure that supports the T&T sector to accommodate the growing population (both residents and visitors) in Windhoek. The T&T value chain (Figure 1) highlights the importance of planning for maintenance and upgrades to infrastructure that is used to supply basic services.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Increase the level of involvement of the Department of Economic Development and Community Services in the town planning process	<ul style="list-style-type: none"> <li>Facilitate assessment of current infrastructure (transport, water, accommodation etc.)</li> </ul>				
	<ul style="list-style-type: none"> <li>Enable activities and policies to be incorporated through all levels of spatial development planning i.e.: <ul style="list-style-type: none"> <li>% allocation in terms of land use to enable work (eco-tourism), live (master planning) and play (urban design, aesthetics and beautification of public spaces)</li> <li>Priority for urban design components and the cost and implementation thereof (e.g. public benches, public toilets)</li> <li>Integrate activities within the necessary planning policies e.g. need for integration of planning policies (town planning scheme) and tourism activities</li> </ul> </li> </ul>				
Facilitate the ongoing development of functional water and electricity infrastructure for the future	<ul style="list-style-type: none"> <li>2030 sustainability concept for water - reduce water demand by 30%</li> </ul>				
	<ul style="list-style-type: none"> <li>Implement daily water management - water marshal training (each building to have marshal)</li> <li>Isolate water leaks immediately</li> </ul>				

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
	<ul style="list-style-type: none"> <li>Mandatory implementation of water efficient equipment by businesses including tourism establishments by a specific date (2022): <ul style="list-style-type: none"> <li>Use business registrations and annual health inspections to monitor compliance</li> </ul> </li> </ul>				
	<ul style="list-style-type: none"> <li>Participate in the tourism water sustainability forum with external stakeholders</li> </ul>				
	<ul style="list-style-type: none"> <li>Water saving awareness campaigns at tourism establishments</li> </ul>				
	<ul style="list-style-type: none"> <li>Revive water saving tips and provide them to tourism establishments</li> </ul>				
	<ul style="list-style-type: none"> <li>Educate business establishments and the public on water recycling and harvesting options (water marshal training)</li> </ul>				
Advocate for the planning and maintenance of transportation networks by 2025	<ul style="list-style-type: none"> <li>Increase cycling lanes around the City (NMT)</li> </ul>				
	<ul style="list-style-type: none"> <li>Increase pedestrian walkways around the City (NMT)</li> </ul>				
	<ul style="list-style-type: none"> <li>Build a culture that encourages people to get out of their cars (walk, cycle, public transportation) - L/T</li> </ul>				
	<ul style="list-style-type: none"> <li>Provide bicycles for tourists on lease (e-bikes)</li> </ul>				
	<ul style="list-style-type: none"> <li>Develop an app with real live information on the buses and a USSD code that provides the location of a bus when requested by text</li> </ul>				
	<ul style="list-style-type: none"> <li>Develop additional bus routes during the day - continuous flow of traffic (start with minimal routes)</li> </ul>				
	<ul style="list-style-type: none"> <li>Revamp bus stops - to provide information and earn revenue from advertising</li> </ul>				

Table 4: Theme 4 objectives, projects and responsibilities

#### 5.6.4 Theme 5: Improve the Destination Marketing to Attract More Visitors

Improve the marketing of Windhoek as a destination to raise awareness of what Windhoek offers and attract more visitors.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Revise the tourism brand strategy	<ul style="list-style-type: none"> <li>Revise tourism brand strategy that addresses the USP and brand identity of Windhoek as a destination</li> <li>Roll out the brand strategy and present it to stakeholders</li> <li>Develop a domestic tourism marketing strategy</li> </ul>				
Market Windhoek more effectively as a unique, vibrant, all year-round destination by 2025	<ul style="list-style-type: none"> <li>Collect relevant data on visitors to Windhoek (MET, HAN, Home Affairs, NSA, NTB)</li> <li>Develop a tourism sustainable climate change strategy</li> <li>Develop a tourism marketing strategy</li> </ul>				

Table 5: Theme 5 objectives, projects and responsibilities

### 5.6.5 Theme 6: Improve Tourism Stakeholder Alignment for Tourism Development

T&T stakeholder collaboration and participation was identified as both a key challenge and a critical success factor for the development of a sustainable tourism sector.

COW will collaborate with T&T stakeholders to develop and implement solutions for industry-wide to the benefit of the entire T&T sector.

COW will open channels of communication by creating platforms for networking, participating in sectoral platforms when invited, performing familiarisation visits and providing relevant and timely feedback to stakeholders.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Facilitate linkages with the sector by networking and communicating with T&T service providers and stakeholders	<ul style="list-style-type: none"> <li>Develop cooperation agreements with stakeholders and industry to enhance tourism in the city (events together, campaigns together etc.)</li> </ul>				
	<ul style="list-style-type: none"> <li>Initiate the Windhoek tourism networking platform to link up, network and communicate with stakeholders</li> </ul>				
	<ul style="list-style-type: none"> <li>Conduct familiarisation visits with service providers and build meaningful relationships</li> </ul>				
	<ul style="list-style-type: none"> <li>Liaise with other departments in COW to ensure that infrastructural challenges are resolved and addressed</li> </ul>				
	<ul style="list-style-type: none"> <li>Secure departmental and council support for tourism initiatives</li> </ul>				
	<ul style="list-style-type: none"> <li>Secure local &amp; regional government buy-in for tourism initiatives</li> </ul>				
	<ul style="list-style-type: none"> <li>Support stakeholder transport initiatives and incorporate them in COW's programs</li> </ul>				

Table 6: Theme 6 objectives, projects and responsibilities



# 6. OPERATIONAL PLANNING MATRIX

## 6. OPERATIONAL PLANNING MATRIX – TURNING THE STRATEGY INTO REALITY

### 6.1 Operational Plan

Given the outcomes of the strategic planning workshops coupled with the strategic themes and objectives, an operational planning matrix was developed. This planning matrix will act as a basis for implementation, monitoring and for evaluation purposes. The planning matrix will be supported by internally developed action plans that aim to execute the planning matrix.

Definitions of the planning matrix components:

- *Theme* – the high-level areas of focus and pillars of the strategic plan in support of the high-level statements.
- *Objectives* – the set of goals that aim to realise a strategic theme.
- *Key Performance Indicators (KPIs) (Quantity, Quality, Time, Location)* – the key indicators related to the identified results. The indicators measure whether and to what extent the project achieves the envisaged results and effects. This component aims to establish SMART objectives. (Specific, Measurable, Achievable, Realistic and Time-bound)
- *Means of Verification* – these are the sources of information for key indicators related to the overall objectives that verify achievement. Means of verification aim to prove achievement of the objective.
- *Assumptions* – the external factors (factors outside of your control) and conditions which may negatively influence the achievement of our agreed objectives.
- *Responsible Person* – is the person or position that will be held accountable for the achievement of the objective.
- *Resources* – these are the additional requirements needed to accomplish the results, such as staff, budgets, equipment, systems, etc.

## 6.2 The Planning Matrix

	<b>Key Performance Indicators</b> (Quantity, Quality, Time, Location)	<b>Means of Verification</b> (Sources of information that verify achievement)	<b>Assumptions</b> (What may go wrong that is outside of your control, to negatively influence achievement of the result)	<b>Responsibility</b>	<b>Resources</b> (Staff, Budgets, Equipment, Systems, etc.)
<b>Theme 1: Improve the Safety and Security in Windhoek</b>					
<b>Objective 1:</b> Position Windhoek as the number 1 safest city in SADC by 2022	Regarded as the number 1 safety country in SADC Zero crime in Windhoek by 2022	SADC crime statistics	None	CEO, Mayor, City Police, NDF, Nampol, Interpol	As per approved budget, technical material support, HR
<b>Objective 2:</b> Educate and create safety awareness among tourists and residents of Windhoek.	Continuously approved by council or accreditation by NQA Approved by FANATA % reduction in crime after approval. Number of tourist and residents informed or trained. International destination accreditation and auditing Location – Windhoek	Number of awareness and safety initiatives conducted, Promotional material	None	Head Economic Development, City police, Marketing, EDD (Global Sustainable Tourism Council) GSTC	As per approved budget

	<b>Key Performance Indicators</b> (Quantity, Quality, Time, Location)	<b>Means of Verification</b> (Sources of information that verify achievement)	<b>Assumptions</b> (What may go wrong that is outside of your control, to negatively influence achievement of the result)	<b>Responsibility</b>	<b>Resources</b> (Staff, Budgets, Equipment, Systems, etc.)
<b>Theme 2: Spearhead the Development of a Sustainable Tourism Industry in Windhoek</b>					
<b>Objective 1:</b> Encourage investment in sustainable tourism by 2025	Number of ECO Tourism Projects promoted for investment/ funding at investment forums attended  Annual maintenance of heritage sites	Projects funded and secured investment  Maintenance plan and budget maintenance report	Lack of projects  Lack of support/funds  Lack of investors' interest  Availability of funds  Cooperation between COW and national heritage council.	COW (EDD) & Tourism stakeholders  COW & NHC	Funds  Skills – to develop investment projects  Environmental Grants
<b>Objective 2:</b> Support sustainable tourism activities & relevant capacity building by 2025	Number of training sessions conducted  Number of awareness and educations campaigns  Number of mentorship linkages created/facilitates  (As per approved schedule)	Training report and attendance register  Promotional & education materials  Report on mentor success stories.	Funds availability & trainee dropout  Funds availability  Willingness to participate in mentorship programme	NATH, COW(EDD) Stakeholders  EDD, Marketing, stakeholders  COW (EDD) & HAN  Stakeholders (Tourism)	Funds, material, Time, HR & stakeholders  NTA (Namibia Training Authority)

	<b>Key Performance Indicators</b> (Quantity, Quality, Time, Location)	<b>Means of Verification</b> (Sources of information that verify achievement)	<b>Assumptions</b> (What may go wrong that is outside of your control, to negatively influence achievement of the result)	<b>Responsibility</b>	<b>Resources</b> (Staff, Budgets, Equipment, Systems, etc.)
<b>Objective 3:</b> Create awareness of the importance of and the benefits of tourism amongst the community	Results of a tourism perception survey Location - Windhoek Road Show to Schools	Number of awareness initiatives conducted, Promotional material	None	Head Economic Development, Marketing, EDD Academic Institution offering Tourism	As per approved budget

	<b>Key Performance Indicators</b> (Quantity, Quality, Time, Location)	<b>Means of Verification</b> (Sources of information that verify achievement)	<b>Assumptions</b> (What may go wrong that is outside of your control, to negatively influence achievement of the result)	<b>Responsibility</b>	<b>Resources</b> (Staff, Budgets, Equipment, Systems, etc.)
<b>Theme 3: Ensure Customer Focus in the Sector by Improving Windhoek's Value Proposition</b>					
<b>Objective 1:</b> Invest in Digitalisation	Apps Website Social Media Promotional Material	Lack of reading culture Availability of Funds Licenses Required (IOS etc)	None	Corporate communication ICT Marketing Tourism	Fund, material and technical support
<b>Objective 2:</b> Product Development	Packaging of services and activities Standards obtained Rating of hospitality Go / no-go decisions for each of the identified projects, based on the outcome of feasibility studies performed and project implementation plans for feasible projects	Funds availability standards in place	None	HAN COW – EDD Academic institutions offering tourism Hunting Association, Sports Associations Culture and Heritage Industry, MET	Fund, material and technical support

	<b>Key Performance Indicators</b> (Quantity, Quality, Time, Location)	<b>Means of Verification</b> (Sources of information that verify achievement)	<b>Assumptions</b> (What may go wrong that is outside of your control, to negatively influence achievement of the result)	<b>Responsibility</b>	<b>Resources</b> (Staff, Budgets, Equipment, Systems, etc.)
<b>Theme 4: Maintain and Develop Infrastructure to Support a Growing Tourism Industry in Windhoek</b>					
<b>Objective 1:</b> Increase the level of involvement of the Department of Economic Development and Community Services in the town planning process	Join the town planning committee  Immediately/ contribute  Incorporate tourism priorities in town plan.  Develop a tourism disaster risk reduction strategy	Minutes of the meeting	None	Manager: LED  Disaster Management  Earth check  African Centre for disaster studies  UNSDRR	As per operational budget
<b>Objective 2:</b> Facilitate the ongoing development of functional water and electricity infrastructure for the future	Number of meetings attended  Quality - Play a proactive role in spreading.  Windhoek	Relevant data collected.	None	SH: T	As per operational budget
<b>Objective 3:</b> Advocate for the planning and maintenance of transportation networks by 2025	Contribute to all planning activities.  QI-effective linkages between COW & stakeholders	Minutes of the meeting  Projects implemented	None	SH: T	As per operational budget

	<b>Key Performance Indicators</b> (Quantity, Quality, Time, Location)	<b>Means of Verification</b> (Sources of information that verify achievement)	<b>Assumptions</b> (What may go wrong that is outside of your control, to negatively influence achievement of the result)	<b>Responsibility</b>	<b>Resources</b> (Staff, Budgets, Equipment, Systems, etc.)
<b>Theme 5: Improve the Destination Marketing to Attract More Visitors</b>					
<b>Objective 1:</b> Revise the tourism brand strategy	Develop a brand strategy by June 2021	Strategy approved by council (CR)	None	SH: Tourism	As per operational budget
<b>Objective 2:</b> Market Windhoek more effectively as a unique, vibrant, all year-round destination by 2025	Develop Tourism promotion plan by 2020 December Facilitate the development of tourism products Tourism products developed for promotions Annually/ continuous review	Plan approved SE Forum	None	SH: Tourism	As per operational budget

	<b>Key Performance Indicators</b> (Quantity, Quality, Time, Location)	<b>Means of Verification</b> (Sources of information that verify achievement)	<b>Assumptions</b> (What may go wrong that is outside of your control, to negatively influence achievement of the result)	<b>Responsibility</b>	<b>Resources</b> (Staff, Budgets, Equipment, Systems, etc.)
<b>Theme 6: Improve Tourism Stakeholder Alignment for Tourism Development</b>					
<b>Objective 1:</b> Facilitate linkages with the sector by networking and communicating with T&T service providers and stakeholders	Stakeholder Engagement and Management Plan approved by SE  Create networks and platforms,  Exchange of relevant information  Number of engagements	Stakeholder Engagement & Management Plan	None	SH: Tourism	As per operational budget

## 6.3 Monitoring and Evaluation

Monitoring and Evaluation (M&E) is a core function of management. The purpose of M&E is to ensure that the long-term goals of the council are achieved. To perform effective M&E, COW needs to develop a system for monitoring and evaluation that is used throughout the organisation, i.e. an M&E framework should be developed at corporate level and each department must input and evaluate their activities using the official M&E framework.

The M&E processes should further be structured to contribute to improved service delivery and to improve COW's overall efficiency and effectiveness in performing its functions. Overall, two main questions should be asked during the M&E process, namely:

- Are we doing the right thing?
- Are we doing things right?

### 6.3.1 Monitoring & Evaluation Objectives

The objectives of M&E in the context of the Tourism Strategy are to:

- Improve the performance of Tourism in Windhoek as it relates to the city's economic development;
- Identify, at pillar, programme and project level, the inputs or resources required to execute projects;
- Identify the activities to be performed to execute the programme and project successfully and sustainably;
- Evaluate project outcomes against desired KPIs; and
- Evaluate the overall tourism impact to the destination (Windhoek).

An example of an appropriate Impact Monitoring Framework is depicted overleaf.

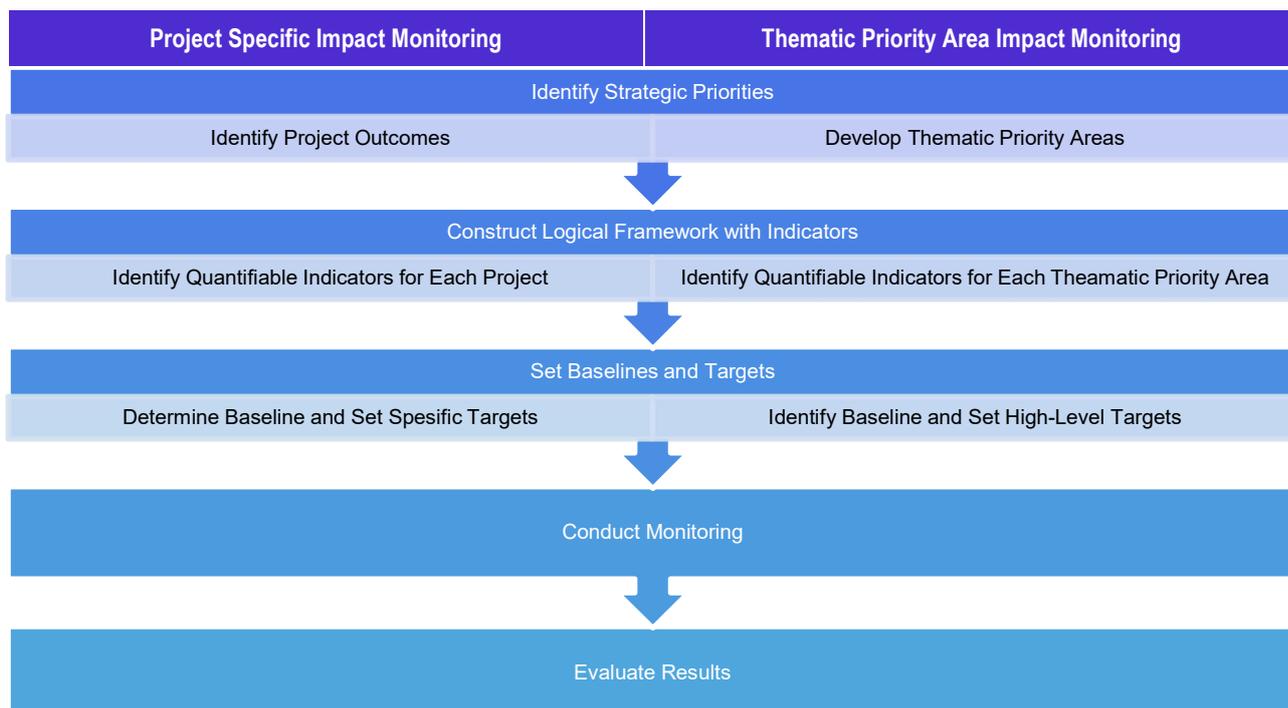


Figure 18: Impact monitoring framework

### 6.3.2 Project Scorecard

For each project, a project scorecard needs to be developed to track the project's implementation. Each project scorecard will focus on providing an overview of the project output and outcomes. Table 7 illustrates a basic project scorecard that should be updated on a weekly or monthly basis and includes an example of how to complete a project scorecard. Project specific outcomes are easy to attain and report on since each project's scorecard will contain the main outcomes. Before the study commences, each project needs to be benchmarked against available data which may include:

- What inputs are required for the project? E.g. resources and personnel
- What are the main activities of the project? E.g. Meeting or new infrastructure
- What are the project outputs or deliverables? E.g. Strategy document
- What is the desired outcome of the project? E.g. Main goal or objective

What impact should the project have? E.g. Number of jobs created.

Project Name:
Project Location:
Project Driver:
Project Funder:
Project Budget:
Project Man-Hours:
Project Kick-Off Date:
Project Deadline:
<b>Key Project Objectives (according to the terms of reference)</b>

Project Objective	Baseline Measure (before study)		Performance Measure (targets)	Target Achieved		
Project Objective 1				Yes / No		
Project Objective 2				Yes / No		
Project Objective 3				Yes / No		
Project Phase	Deliverable	Deadline	Actual Completion Date	Phase Budget	Actual Cost	Man-hours spent on phase
Phase 1	Deliverable 1 Deliverable 2					
Phase 2	Deliverable 3					
Phase n	Deliverable n					

Table 7: Project scorecard

### 6.3.3 Project Management Report

The project management report will summarise the active and future projects and should be updated on a monthly basis. This will provide Council and management with a quick overview of all projects and will assist with the identification of potential problem areas such as projects running behind schedule, projects going over their allocated budget or projects not achieving their targets. The project management report is illustrated in Table 7, which includes an example of how to complete a project management report.

Project Name	Project Location	Project Driver	Project Phase	Project on Schedule	Project within Budget	Project within Man-hours allocation	Project Achieved Targets
Project 1				Yes / No	Yes / No	Yes / No	Yes / No
Project 2							
Project n							

Table 8: Project management report

### 6.3.4 Thematic Priority Area

M&E at the Thematic Priority Areas are predominantly conducted at an issue, sectoral or programme level as identified in municipal strategies. Table 9 illustrates the thematic priority area assessment tool that can be used to monitor progress.

To perform effective M&E at thematic priority level, COW needs to select appropriate parameters against the thematic priority areas. Table 4 provides an example of indicators that could be used to track potential themes, based on pillar, sector or programme outcomes and deliverables. Data for each parameter can be obtained from several sources, including but not limited to, National Statistics Agency (NSA), community, business or industry-specific surveys, or programme and project inputs, activities, deliverables, outcomes and impact. Where data is not available, anecdotal data must be collected by means of stakeholder engagements or interviews with key stakeholders.

Key Performance Area: Tourism							
Pillar Objective:							
Standard Criteria	Indicator	Source	Benchmark	Failed to Achieve Standard	Target or Standard Range	Exceeded Standard	Comment

Table 9: Thematic priority areas assessment tool

Theme	Potential Indicators / Types of Indicators
Tourism - To improve on its tourism product offering to encourage tourists to extend their stay within COW.	<ul style="list-style-type: none"> <li>• Number of paid tourists at key sites</li> <li>• Number of signatures in tourist log-book (at OMD offices)</li> <li>• Number of visitors in lodges / places of accommodation</li> </ul>

Table 10: Example of indicators for thematic priority areas

### 6.3.5 Evaluation

By periodically analysing the data, COW will be able to determine the overall success of its interventions, as well as create a better understanding of resource and capacity utilisation. When scrutinising the outputs and outcomes of the pillars, programme and project, the following questions should be posed:

- Were the necessary resources and capacity allocated to the programme and project?
- Were the required project resources and capacity correctly estimated?
- Did the programme and project have the desired outcome and impact?
- Did the sum of all programmes and projects achieve the main pillar goals?

### 6.3.6 Reporting

Monthly and annual reporting needs to be implemented. Due to the frequency of availability of data, monthly reports should focus on projects updates, while annual reports focusing on strategic interventions and programmes.

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