



# ZIMBABWE'S AVIATION INFRASTRUCTURE EXPANSION AND MODERNISATION EXPECTED TO DRIVE THE COUNTRY'S TRAVEL AND TOURISM INDUSTRY





The Government of Zimbabwe (“government”) is undertaking a rehabilitation, expansion and modernisation program of its aviation infrastructure, a move that is expected to drive Zimbabwe’s travel and tourism industry. Until the recent refocus of the government under the new leadership, the country’s aviation industry was on a downward spiral. Except for the three main international airports, Robert Mugabe, Joshua Nkomo and Victoria Falls Airports, the domestic airports were not receiving much infrastructure improvement attention. The deteriorating state of the airports led to a reduction in the number of international airlines servicing the Zimbabwe destination, including a drop in the number of international tourists. According to a report by the African Development Bank (“AfDB”), more than 20 scheduled airlines discontinued services in Zimbabwe, including major carriers such as Air France, KLM, Lufthansa, Swiss Air and British Airways between 1997 and 2007. International tourists were very static at an average of 260 000 between 2006 and 2015, with 2011 being an outlier where international tourists shot to 381 261.

To show its seriousness, the government has positioned the travel and tourism industry higher up the ladder of sectors expected to play a significant role in turning the economic fortunes of the country. Tourism and Hospitality comes third, after mining and agriculture, in terms of expected contribution to the national economy.



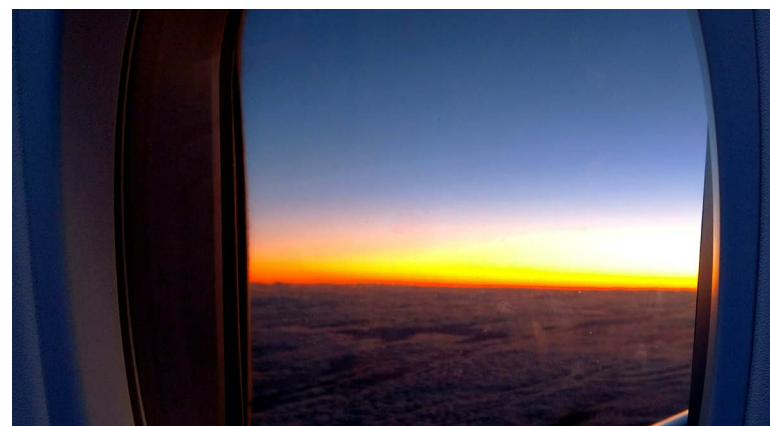
As espoused in the National Tourism and Growth Strategy (2021), the tourism and hospitality industry is targeted to become a USD5 billion economy by 2025, from the current estimate of USD850 million for 2022. Mining and agriculture, the other two significant sectors, are primed to become US\$12 billion and US\$8 billion industries respectively. According to previous ZTA annual reports, at pre-Covid 19 levels, tourism and hospitality contributed an average of 5% to the nation's GDP and was estimated to be employing around 7% of the country's workforce. While its contribution to exports has fallen especially between 2017 to 2022, at its peak, tourism and hospitality was contributing approximately 20% (ZTA annual reports). Going forward, the government is priming the tourism and hospitality industry to become the third largest contributor to exports, after mining and agriculture.



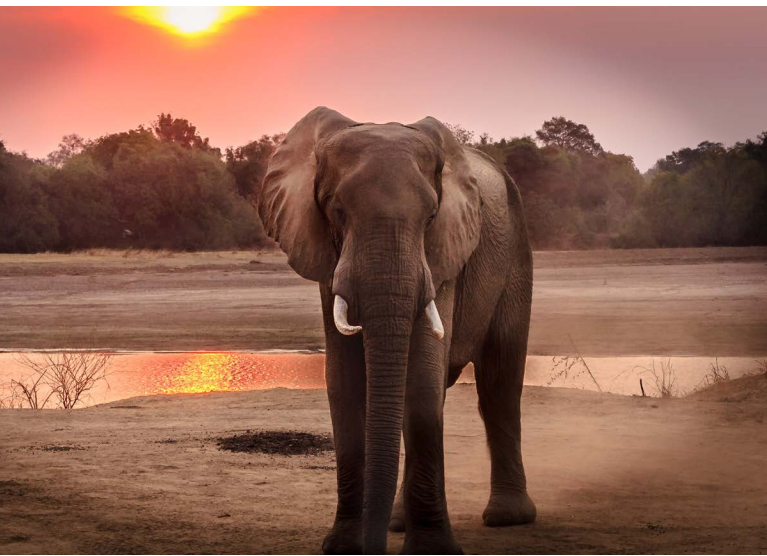
Noting the critical role played by the aviation industry in the facilitation and growth of the tourism and hospitality industry, government has committed itself to the provision of a “reliable, safe and world-class air transport infrastructure and services” (National Tourism and Growth Strategy).

Some of the main strategies being pursued by the government include undertaking the rehabilitation and upgrading of the aviation infrastructure at the country's several airports as well as continuing to liberalise the air transport market in the spirit of the Yamoussoukro Declaration that calls for opening up and liberalisation of the skies between African nations. Through these actions, government is aiming at increasing access to the international market as well as promoting local network and connectivity in terms of routes, frequency and reliability of air services.

The current government's flagship aviation infrastructure rehabilitation and modernisation project is the Robert Mugabe International Airport, the country's largest airport. The project is being funded by the Chinese government through a loan of US\$153 billion. Upon completion, expected to be in the first half of 2023, the airport will have the capacity to handle approximately 6.7 million passengers annually, from the current 2.5 million passengers. Due to the country's tourism attractiveness and the improving investment climate, the upgraded airport is seen contributing significantly to the growth of both the leisure and Meetings, Incentives, Conferences and Exhibitions (“MICE”) tourism business as the airport will be able to attract more long-haul flights from deep within the leisure tourism and MICE source markets.



Already, the Victoria Falls International Airport that was commissioned in 2016 has started reaping benefits of the expansion and modernisation drive, as this improved the airport's capacity to handle wide-bodied aircrafts. The number of airlines flying into Victoria Falls has increased exponentially, with SA Airlink, Kenya Airways, Ethiopian Airlines, Air Botswana, FastJet, Eurowings Discovery and the latest addition, South African Airways, having added the Victoria Falls into their destinations



It is noteworthy that the number of international tourists registered a 67% increase to an average of 436 000 between 2016 and 2018, compared to the 2006-2015 average (ZTA annual reports). The highest number of international tourists was 551 440, which was achieved in 2018 (ZTA annual report, 2018). The huge boost to the tourism industry is the coming of Eurowings Discovery, which made its maiden Frankfurt-Windhoek-Victoria Falls flight in March 2022. This is very important for the tourism industry as the flight connects the Victoria Falls, and the country in general, to the huge and lucrative European tourism source market. Ethiopian Airlines also recently added Joshua Nkomo International Airport to its routes, making it its third route in-

bwe after the Victoria Falls and Robert Mugabe International Airports. The performance of the upgraded Victoria Falls Airport after its commissioning is testimony to the strong link between the developments in the aviation infrastructure and tourism and hospitality. It is also noteworthy that pre-Covid 19 pandemic tourism statistics for Zimbabwe show that the proportion of international tourist arrivals, especially from Europe and the Americas, was increasing, a trend that is expected to continue given the observed increase in the number of international airlines flying into Zimbabwe.

Anticipating that the completion of the Robert Mugabe International Airport will also lead to an increase in the number of international tourists into the country from various destinations, like has happened with the Victoria Falls International Airport, the government has embarked on a systematic rehabilitation and modernisation program of the other smaller domestic airports and airstrips. With improved handling capacities, these smaller airports are expected to enhance domestic connectivity within the country but especially with the main international airports, thereby playing a significant role in the domestic transfer of international travellers. The Buffalo Range Airport, located in the southeast, saves as the gateway to the Gonarezhou National Park, which is part of the Great Limpopo-Transfrontier Park. This is a tourist system that includes the Kruger National Park in South Africa, Limpopo National Park in Mozambique as well as the Gonarezhou National Park, Manjinji Pan Sanctuary and Malipati Safari Area on the Zimbabwean-side.



The Buffalo Range Airport, which is functional, has had its terminal building refurbished and its runway redeveloped. At the present time, the terminal has capacity for about 200,000 passengers a year.

The other functional domestic airports are the Masvingo, Hwange National Park and Kariba Airports, which are all small airports used mainly by small, chartered aircraft. The Masvingo Airport provides access to the Great Zimbabwe National Monument, a UNESCO World Heritage Site.

The Hwange National Park Airport is within the Hwange National Park, a park that “provides some of Africa’s best wildlife viewing opportunities and boast of tremendous selection of wildlife with over 100 mammal species and nearly 400 bird species” (Zimbabwe National Parks & Wildlife Management Authority website). Kariba Airport provides access to Kariba Dam, which ranks among the largest man-made lakes in the world and is known for its amazing sunsets, scenery, fishing and other water sports as well as game viewing. While the Masvingo and Hwange National Parks Airports are undergoing terminal building upgrades and runway redevelopment and expansion,

-there are reports that the government intends to relocate the Kariba Airport to a site that can allow construction of a new and much bigger airport with capacity to handle more than 100 000 passengers per annum. The current site does not allow for the envisaged expansion because of a mountain range in approaching the current runway as well as the presence of overhead electricity pylons on the other side.

Government has also started work on the non-functional airstrips in Binga and Mutare. The Binga Airport, on completion, is expected to enable further development of Binga as a tourist destination. Binga, which is on the other side of the Zambezi River and Kariba Dam, boasts of beautiful sand beaches, natural hot springs as well as being the centre of the country’s rural cultural tourism. The Grand Reef Airport in Mutare, which will serve as the gateway to the scenic Eastern Highlands that incorporate Nyanga, Chimanimani and Vumba Mountains, is also under construction. The current development works in these airports include the rehabilitation of the runway as well as the airport buildings.





The aviation industry has arguably been the backbone in the development and growth of the global tourism and hospitality industry. Air transport facilitates people's mobility, making long distance travel faster and safer. Zimbabwe, already boasting of three international airports, is set to benefit immensely from the domestic airports' refurbishments, rehabilitation and modernisation program, as it will ensure that other tourist attractions in other parts of the country are easily accessible. Given the observed decreasing length of stay for international visitors, domestic air connectivity makes it easy for tourists to complete their visit to various tourist sites in a shorter time than restricting them to must-see tourism sites only. While developments in the international airports will improve the country's accessibility from the various international source markets, the improved local air connectivity is expected to expose almost all of the country's main tourist attractions, enabling tourism consultants to come up with various tourism packages that benefit from the country's diverse and rich attractions. There is no doubt that the refurbishments and modernisation of the country's aviation infrastructure and facilities will be a game changer for its tourism and hospitality industry.

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