

**THE SWAZILAND TOURISM POTENTIAL**

**By**

**NTFOMBIYENKHOSI S. MTHETHWA**

**Submitted in partial fulfilment of the requirements for the degree of  
MASTERS IN BUSINESS ADMINISTRATION**

**Graduate School of Business, Faculty of Management  
University of Natal (Durban)**

**Supervisor  
MR MARC SALENCE**

**September 2003**

**CONFIDENTIALITY CLAUSE**

**15 September 2003**

**TO WHOM IT MAY CONCERN**

**RE: CONFIDENTIALITY CLAUSE**

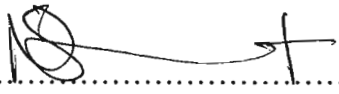
Due to the strategic importance of this research it would be appreciated if the contents remain confidential and not be circulated for a period of five years.

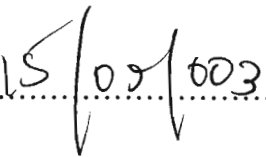
Sincerely

N. S. MTHETHWA

**DECLARATION**

This research has not been previously accepted for any degree and is not being currently submitted in candidature for any degree.

Signed.....

Date.....

096956

## **ACKNOWLEDGEMENTS**

I am sincerely grateful to Mr Marc Salence of the University of Natal, Durban for his supervision, assistance and valuable suggestions during the preparation of this dissertation.

Also, I am indebted to Mr Gideon Mahlalela (CEO) of Swaziland Railways for the information he provided me during the course of this study.

Most importantly, I would like to thank my mother for her continuous patience, support and encouragement throughout all my years of study.

Lastly, I want to give the adoration and praise to the Almighty God, without whom I am nothing.

## ABSTRACT

This study is an evaluation of the factors influencing the delivery of Swaziland tourism industry towards its full potential. It will provide recommendations on what Swaziland can do to improve the delivery of this industry. The reason could be that, Swazis are not frequent tourists and do not consider tourism as an important income to the country. Also, there are no clear marketing strategies and policies put in place to address the tourism industry. Again, the capital output is low resulting in tourism employees not attending tourism workshops (e.g. Indaba Forum, Durban). Both employees in the Tourism and Customs departments are not well trained to deal with tourists. On this basis, there is a need to re-skill staff members in the industry so as to empower them with relevant skills.

At the end, suggestions are made that Swaziland needs to introduce specific tourism programmes at all levels of education (schools, communities, technicon, private sectors and university). This will propel their endeavour to improve the delivery of the tourism industry towards its full potential. The tourism programme must be monitored to ensure that it is accomplishing the recommended objectives. Monitoring will detect any problems that arise so that remedial measures can be taken before problems become serious. An evaluation at the end of the project is crucial. The evaluation should investigate issues like knowledge, land use, attitude, culture and beliefs of the country.

The programme should expand to its stakeholders, Customs department, networking with other government ministries (Ministry Of Education, Ministry Of Foreign Affairs and Trade) so as to share a wealth of resources that the tourist destinations provides. The result of this research will be of great importance because it could double the number of tourist's arrival to the Kingdom Of Swaziland. The study has used a case study method.

## TABLE OF CONTENTS

	PAGES
<b>CHAPTER ONE: INTRODUCTION</b>	
1. Introduction	1
1.2 Background of the study	2
1.3 Motivation for the study	8
1.4 Importance of the study	9
1.5 Problem statement	10
1.6 Objective of the study	10
1.7 Research methodology	10
1.8 Ethnical requirements	13
1.9 Limitations of the project	13
<b>CHAPTER TWO: THE THEORETICAL CONCEPTS OF THE TOURISM INDUSTRY</b>	
2.1 Introduction	14
2.2 Theoretical models	14
2.2.1 Driving forces	14
2.2.2 Tourism trends	19
2.2.3 Gaps model of service quality	20
2.3 Definition of the tourism industry	21
2.3.1 Tourist appeals	22

2.3.2 Why tourism is an attractive development option	23
2.3.3 Disadvantages of the tourism industry	26
2.4 Factors influencing the achievement of the tourism industry towards its potential	29
2.5 Technology and the tourism industry	34
2.6 The Value chain	36
2.7 The Competitive strategies	38
2.8 Conclusion	39
 <b>CHAPTER THREE: SWAZILAND TOURISM INDUSTRY</b>	
3.1 Introduction	41
3.2 Country profile	41
3.2.1 Politics	43
3.2.2 Population	44
3.2.3 Economy	45
3.2.4 Infrastructure	47
3.3 Gaps model of service quality	49
3.4 The Current tourism attractions	52
3.5 The Tourists areas	55
3.6 Swaziland tourism investment opportunities	58
3.7 The Brand key	63
3.8 Factors influencing its delivery	71

---

3.9 Role of Government in the tourism industry	78
3.10 The Competitive strategies	79
3.11 Conclusion	86
<b>CHAPTER FOUR: DATA ANALYSIS</b>	
4.1 Introduction	87
4.2 The Findings of the research	88
4.3 The Gaps in the Swaziland tourism industry	89
4.4 The Trends	93
4.5 Recommendations	95
4.6 Conclusion	96
<b>CHAPTER FIVE: RECOMMENDATIONS AND CONCLUSION</b>	
5.1 Introduction	98
5.2 The Training and education in the tourism industry	99
5.3 The Suitable tourism marketing strategies	100
5.4 Recommendations	104
5.5 Conclusion	107
<b>BIBLIOGRAPHY</b>	109
<b>Personal Conversation</b>	110



---

<b>Anonymous Authors</b>	111
<b>Websites</b>	111
<b>LIST OF FIGURES</b>	111
Figure 1: The Map of Swaziland	42
Figure 2: Umhlanga “Reed dance	54
Figure 3: The Brand key	67
<b>LIST OF ABBREVIATIONS</b>	111

# **CHAPTER ONE: INTRODUCTION**

## **1.1 Introduction**

This dissertation is divided into five chapters. Chapter one provides the broad framework of this research. It contains a general introduction, background to the research, motivation for the research, importance of the study, problem statement and research objectives. It also gives the research methodology such as research design, population target and data sources used in the research. It also deals with methods used to generate the data, the limitations of the project, the literature review with the contextual analysis and recommendations.

With the advent of the Kingdom of Swaziland's full independence with bygone African traditions, there has been an increase in the flow of tourists from all corners of the world into the country (<http://www.welcometoswaziland.com>)

Tourism has become one of the world's biggest industries and it is a major and dynamic component of the world's economy. Already, in terms of direct and indirect employment generation, tourism is the largest industry in the world and could become the largest single sector of the world trade in the next century. Swaziland is a member of the International Tourism Organisation (ITO), World Trade Organisation (WTO) and Southern African Development Community (SADC). It is a secure hub from which all the surrounding major attractions of Southern Africa are easily accessible. Both Swaziland and South Africa share borders and there are socio-cultural links between the people of the two countries. The relationship of the two countries does not hinge only on economic terms but it extends into other spheres such as culture, values and attitudes. This has seen the touring of people in the Southern region for social, economic and political reasons (Lascurian & Selman, 1991).

Nash (1981) defines tourism simply as the activity undertaken by a person at leisure who also travels in normal day-to-day life and work involving journeys to and stays at sites away from the usual places of residence.

This paper grapples with the nature and factors influencing the delivery of tourism industry, the strengths and recommends suitable tourism marketing strategies to improve Swaziland's tourism industry to its fullest potential. The recommended intervention activities may be

monitored and evaluated at the end of the paper. The evaluation shall seek to assess the impact on the intervention culture and perception of tourists. With reference to the attitude of tourists, a number of researchers have concluded that, tourists are becoming more discerning, seeking activities, arrangements and experiences that depend crucially on high quality and cultural environment (Romeril 1985 & Tyler 1989).

The research also shows the impact of Swaziland's tourism industry in employing Swazis. Amongst them (Swazis), there are those involved in cross border trading, selling craft and other items to the tourists.

## **1.2 Background of the research**

Throughout its history, Swaziland is renowned for its rich, deep -rooted culture and scenic beauty. This small and independent sovereign state forms part of the vibrant South African region. It reflects both traditional and modern administration with peace and social stability, the cornerstone of its foundation to progress. Under the leadership of King Sobhuza II (1899-1982), the world's longest reigning monarch, Swaziland received her Independence from the United Kingdom in 1968. After his death, one of his sons Prince Makhosetive was introduced to the nation as the Crown Prince. He was crowned in 1986 as King Mswati III.

With a population of over 985 000 million, average annual growth rate of 2.8 %, about 60 % aged 21, 77 % live in rural areas and the remainder in urban areas, Swaziland's resource base for tourism is phenomenal (<http://www.welcometoswaziland.com>)

It is well placed between the South African provinces of Mpumalanga and KwaZulu- Natal and ideally located next to the Mozambique. To the North is Kruger Park and in the south are the game reserves of KwaZulu-Natal as well as the main route to Cape Town. Johannesburg is mere 370 km away and Mozambique's coastal capital, Maputo is 160 km distant and Swaziland can be reached by road, rail and air. There are regular daily short flights from Johannesburg, Durban and Maputo. The international airport serves the region efficiently, road infrastructure provides convenient access to South Africa and Mozambique and the railway passes from north to south through the lowveld. Indeed, the kingdom does attract tourists particularly from these areas.

Some of the features that make Swaziland an incredible attractive proposition include the accessible wildlife, varied and impressive scenery, historic culture, adventurous trails and unlimited nature, a generally sunny and hot climate. It has a rich heritage of ancient rock

(Sibebe Rock), mountainscapes, indigenous plants and colourful birds offering the explorer a wealth of options for walking, cycling, and horse riding and driving through the country's natural environment. Committed marketing and exposure are backing all these unique aspects of this heritage to the global market.

Traditional beliefs, rituals and practices run stronger and deeper in Swaziland than anywhere else in Southern Africa. Swazis have maintained their distinctive colourful traditional attire (known as emahiya) worn by all at ceremonies and marking specific occasions. The monarch plays a fundamental part in the life of the nation and is an integral part of Swazi life that does much for national unity. The major traditional ceremonies are held annually; the Incwala and Umhlanga "Reed Dance". When duty calls, there is no contradiction for the majority of Swazis in leaving an air-conditioned office in town and shedding a three-piece business suite in favour of the traditional clothes and skins of emahiya. They take their place with the regiments to perform the task or ceremony for which the nation has been summoned.

Watching the regiments wearing the traditional dress of their great fathers, singing the songs of their ancestors and performing the ancient rituals dances, only the glimpse of a wristwatch or mobile phone will remind you that this is not the Swaziland of a hundred or two hundred years ago.

Although, it is the smallest country in the Southern hemisphere just over 17 000sq km with a limited area of approximately 193 km from north to south and 145 km from east to west, the national diversity is unusual. Our tourists are guaranteed that they will safely sleep under star-studded skies to the sounds of crickets and the stillness of the night. It has accessible good conference and exhibition facilities, wide range of sporting facilities, good communication and medical services, cheerful and friendly people. It is renowned for its excellent handmade crafts for those who appreciate the finer things (African Art) in life and these are produced and sold along the roadsides amongst spectacular scenery. Ofcourse, the low crime rate makes Swaziland shopper's paradise and an almost complete tourist destination. This is Swaziland where people nature the past and modern life meet (<http://www.welcometoswaziland.com>).

Not withstanding all the above-mentioned advantages, Swaziland has not been able to grow her tourist industry to its fullest potential. The focus of this paper is on the factors influencing the delivery of Swaziland tourism industry' potential.

Smith (1989) says there is no universal accepted definition of tourism since what constitutes a “tourist” and the “tourism industry” is still a matter of debate. Tourists are regarded as belonging to a wider subset comprising of visitors and travellers who travel primarily for either pleasure or business such as visiting friends and relatives. Relatedly, tourists demand a range of activities in the destination area.

Gilbert (1990) argues that tourism requires a range of essentially non-industrial resources that provide an input to the tourism produce. Such “free resources” include climate, scenery, beaches, wildlife and the culture of the host country. Tourism is therefore a nebulous phenomenon characterised by an amalgam of fragmented trades, organisations and activities. The idea of tourism as a single industry has come in for criticism with some authors suggesting that tourism cannot properly be described as an industry because it does not produce a single and distinct product. Therefore, tourism as an industry is difficult to define (Lickorish 1988).

Tourism development in Swaziland has largely been a missed opportunity. Had its cultural holidays been announced or put on the yearly calendar, Swaziland would probably have been one of the most visited places in the world. The Swaziland tourism industry has been protected from foreign competition, limited international investment in tourism facilities, long – stay tourist (limited flow of international visitors) and protected itself from the easily identifiable needs of the privileged class. As such, the potential of the tourism industry to spawn entrepreneurship to create new services e.g. local entertainment, handcraft, to “drive” other sectors of the economy, to strengthen rural communities, to generate foreign exchange and to create employment, has not been realised.

### **ADVANTAGES OF THE TOURISM INDUSTRY**

Tourism can be an engine of growth, capable of energising and rejuvenating other sectors of the economy. Tourism does bring substantial economic and social benefits. The protection of the environmental resources is essential for the continued success of any tourism destination since a positive attitude to tourism is required from the local community (Sharpley & Telfer, 2002).

Perhaps more than any other sector, tourism has the potential to achieve the objectives of the Reconstruction and Development Programme (RDP) of a government. Tourism create opportunities for the small entrepreneur, promotes awareness and understanding among different cultures, breeds a unique informal sector, assist in preserving the environment, create economic linkages with agriculture, light manufacturing and curios (art, craft and souvenirs), creates linkages with the services sector (health, beauty and entertainment) and provide dignified employment opportunities. Many international tourist destinations have successfully used the tourism industry to encourage other sectors of the economy and to generate new and innovative employment opportunities (Lickorish, 1988).

While there is no doubt that growth will continue, there is no guarantee that growth will be sustainable. The tourism industry will fully be able to act as an engine of growth for the economy to achieve the socio- economic objectives set by the government. Action policies and strategies are necessary to ensure that Swaziland realises its tourism potential as well as to avoid the mistakes that other destinations have made.

Romeril (1985) states that natural assets and attractions such as the sun, sea and the sand have usually been the major reason for a destination's popularity. The tourism industry tends to develop in areas, which are able to provide natural amenities together with human assets such as exotic cultures, values, beliefs and historic sites. Indeed, there is no tourist activity, which does not involve the use of natural, human resources and the environmental resources. The natural and built environments not only provide features which attract tourists directly but also support the tourism industry by serving other functions such as heat, food and sanitation facilities.

Tourists are attracted to warm, relatively dry climates where precipitation and fresh water supplies are scarce. Jackson (1984) suggest that tourist's water use can be over three times higher than the consumption by local residents and their development may require the construction of a new water supply reservoir. Perhaps, the weakest economic linkages with Swaziland tourism industry exist in the service sector (entertainment, beauty services and banking). The most obvious and immediate benefit of tourism is the job creation and the opportunity for people to increase their income and standards of living. Employment is generated in hotels, restaurants, construction and capital goods industries when new hotels and resort complexes are built.



Tourism has created jobs opportunities and has added income. Also, there is a “feel good factor” when further investment is attracted in developing further prosperity. Likewise, a great awareness of environmental issues by organisations means that care, conservation and preservation issues are addressed. Treasured buildings are restored, amenities for everyone to enjoy are introduced and visitors are valued for the contributions they can make to the environment.

The Swaziland tourism industry has been and continues to be faced with a number of impediments to its further growth and development. Some of the factors influencing the delivery of Swaziland tourism industry’s potential as well as immediate problems are identified below.

### ***Tour operators***

False expectations about tourist destination areas disseminated by tour operators, travel agents, the media, and official tourism organisation really influence the delivery of Swaziland tourism industry. It would help dispel these misconceptions if the national tourism organisation (Swaziland Tourism Authority) were to collaborate with tour operators and travel agents to publish and disseminate honest and updated information that is also in good taste.

The Swaziland Tourism Authority need to be more aggressive and imaginative in distributing this information abroad both directly to tourists (while they are on route to the destination area) and to the agencies they are likely to visit in preparation for the trip. At present, many host countries appear not to provide adequate information on the choices they have on offer on tour guides and airlines. Hotels personnel and others who come in contact with the tourists need proper training so as to explain their country’s culture, history and geography.

### ***Role in the economy***

Tourism currently plays a relatively small role in the economy of Swaziland. Swaziland has for a number of years seen a disappointing slow down of inflows in Foreign Direct Investment (FDI), the government is taking aggressive steps and making collaborative efforts to create an investor and friendly business environment. Careful consideration is being given to infrastructural development as well as policy and legislative changes since the growth of Swaziland’ economy is critically dependent on such provision and measures. Economic

growth, social development and poverty eradication are essential to meet global and national sustainability and are accordingly the overriding priorities in this developing country.

Global economic instability has been very evident during 2002. The weakening of consumer and business confidence across the globe and a marked decline in demand and economic activity contributed to a drastic fall in output growth in general. Being extremely vulnerable to what happens in the global village, the growth of Swaziland's small, open and export – driven economy was directly and indirectly impacted. The drop in commodity prices and the weakening of its currency did not bode well for the kingdom with a reduced rate of net inflows in foreign direct investment aggravating the already- serious unemployment situation. In the restructuring exercise involving the Southern African Development Community, the New Partnership for Africa's Development (launched earlier by the African Union) represents the hope of stronger and more effective continental organisation (Swaziland Review Of Industry, 2003).

The interdependence between African countries transcends boundaries and the New Partnership for Africa 's Development is determined by placing these partners and neighbours on the path of sustainable socio economic development. Efforts have been deepened to create the necessary conditions for increased investment with the Swaziland government continuing to establish infrastructure so as to unlock the country's economic potential.

### ***Environmental factors***

The impact of tourism on environmental quality should be of interest and relevance to academics, decision makers and tourism operators alike. The evermore-apparent concern about environmental issues such as pollution and habitat destruction are factors influencing the delivery of Swaziland's tourism industry. This may show an interest in the relationship between tourism development and the use of environmental resources and may be prone to change the attitude towards environmental quality amongst tourists and the hosting country (Keyser, 2002).

Likewise, pollution does cause hazards to human health, harmful to living resources since the Swaziland industry relies partly on amenity value over the potential threat passed by pollution to the success of destination areas. The tourism industry itself has been and is still a major contributor to environmental pollution in many parts of the world.



### *Art and crafts*

Policies are broad guiding principle providing the framework for the integrated development of tourism in the area including the rationale for achieving the objectives to tourism development and the roles of all organisations and individuals concerned (Sharpley, 1997).

Policies to stimulate the arts and craft often appear to be an influence in the delivery of tourism industry in Swaziland. Any tourism development policy should be integrated into broader development strategies. The manufacturing of craft objects being used in the tourist facilities should be encouraged. The government as well as private institutions can apply an important role in giving technical assistance and vocational training and skills to people engaging in handcraft. Marketing arrangements for local craft are often felt to be inefficient and distribution through government shops and cooperatives have been suggested as a way of increasing returns to the craft men.

Tourists probably buy local products more as souvenirs to evoke the visited places for themselves and friends than as objects of cultural value. Also, the preservation of simple historic buildings and traditional environments for enjoyment by tourists and local people needs to be more vigorously pursued (Schandler, 1990).

These days, there is a great emphasis on Total Quality Management (TQM) especially in the industry and this indeed is the key requirement of successful operations. Tourists rightly expect to be served properly, to follow their past time in a safe and healthy environment, to enjoy really excellent facilities and have easy access to the museums, castles and other aspects of the natural heritage. Unless such outlets are well run, the Swaziland tourism industry cannot grow to its full potential.

### **1.3 Motivation of this study**

As a developing country, Swaziland needs to improve its tourism industry to its full potential through The Ministry of Tourism, Environment and Communications facilitating and providing the appropriate incentives for private sector investment in the tourism industry.

The result of this paper will be of great importance because it will double the number of tourist in the country by adding highly needed up-to-date tourism marketing strategies for its

improvement. It aims to develop the Swaziland tourism industry as a national priority in a sustainable and acceptable manner so that it will contribute significantly to the improvement of the quality of life for every Swazi. As a lead sector within the national economic strategy, a global competitive tourism industry will be a major force in the reconstruction and development efforts of the government.

#### 1.4 Importance of the study

1. To double the number of tourists arrivals to the kingdom of Swaziland by building some linkages between government institutions, NGOs, hotels and the South African countries in terms of proximity to other major tourist destination.
2. To focus on good service delivery, monitor and evaluate performance
3. To utilise resources in a responsible manner as well as establish and sustain a lean and efficient cooperation
4. To strive for transparent and open communication in all tourism industry activities.
5. To create significantly more tourism related jobs by building viable strategic partnerships and alliances.

With little attention being paid to the tourism industry, there is an avalanche of literature on the factors influencing the delivery of Swaziland tourism industry ranging with management. Very little has been done to analyse such literature that formally and fairly captures the financial needs of the tourism industry and the management part of it.

See p.2 Draft Proposal

Design from Proposal

These values seek to expose some of the factors influencing tourism delivery in Swaziland through research. In particular, the issue of VISA acquisition to Swaziland and its use to access the South African Game Reserves. Although research so far has acknowledged the significance of the industry, no business analytical tools have been used to diagnose it so as to broaden our understanding. There are no tourism marketing strategies designed thus an indication that the Swaziland tourism industry is not taken as a business but a mere survival option for the unemployed.

Lathan (1990) acknowledges that there has been little academic research and attention paid to the factors influencing the achievement of the tourism industry. There have been conflicting views in research studies as to whether the tourism industry lead to improved market share or

not. The result of this study will be unambiguous with respect to the possible benefit of the tourism industry.

The research shall seek to unveil some of the factors influencing the delivery of Swaziland tourism industry's potential. It also seeks to expound solutions in terms of culture, globalisation and other organisational requirements.

See p. 2  
Para 4  
Draft

### 1.5 Problem statement

What are the factors influencing the delivery of Swaziland tourism industry towards its full potential. Cordial relations between Swaziland and the Southern African countries have seen tourist links between these countries, growing from strength to strength. For most countries, the tourism industry has become an important means of promoting economic development and a major source of income.

Zimbabwe SA

see  
p. 1  
Draft  
para 4

### 1.6 Objectives of the study

1. To examine the current tourism industry situation in Swaziland
2. To determine the gaps in the current tourism industry and the government role-play in an effort to support tourism education and training in improving its delivery.
3. To establish suitable marketing strategies and recommendations regarding the development of the tourism education, training towards its delivery in Swaziland.

### 1.7 Research methodology

Plan of the section

Research design

Research Method

Data Collection

Primary Data

Secondary Data

Method of Data Gathering (Instrumentation)

Personal interviews (Travel Agents, Department of Tourism in Swaziland and Swaziland Tourism Authority (STA))

Questions (personally administered)

see Chpt 2 p. 1  
Introduction  
Mazengwa

### 1.7.1 Plan of this section

This section covers the research methodology. It looks at research design, population group to be researched and the main targets of the research. It also pays attention to the data sources and methods used in data acquisition. It rounds off by discussing the data analysis.

write

### 1.7.2 Research design

According to Cooper and Schindler (2003), a research design is the blue print for fulfilling objectives and answering questions. Selecting a design can be complicated by a very large variety of methods, techniques, procedures, protocols and sampling plans. In terms of design, this research shall be descriptive in nature and it shall expound most of the issues raised in the above-mentioned objectives. Descriptive studies are more formalized studies that are typically structured with clear investigative questions.

See  
Chpt 2  
p. 2  
para 1

### 1.7.3 Research methodology

A qualitative research technique shall be used to generate data in this research. Qualitative techniques are important for historical review; group discussions (personal interviews included) and case studies could be both qualitative and quantitative. Information required is considered qualitative if it cannot be analysed by means of mathematical techniques. Qualitative method is largely used as part of exploratory investigations.

There are debates in research cycles as to which method or technique is more suitable or scientific. Some general opinions are that structured and quantitative methods are more scientific and thereby better. In all instances, the most suitable method depends on the research problem and its purpose. In essence, each method has its own right and merits. At this stage of the research, it is valuable to apply a small scale of personal interviews in order to clarify the research question.

Qualitative research allows for in-depth analysis of problems, opportunities and situations in the business environment and it has the potential of being less costly. On the other hand, qualitative technique can be subjective, non representative and non systematic and therefore will be suitable to the Swaziland tourism industry.

#### 1.7.4 Data Collection

The research shall make use of two kinds of data sources. It shall depend on the primary and secondary data. Hawkins and Tull (1998:80) define secondary data as "data that were developed for some purpose other than helping to solve the problem at hand". Although secondary data can provide more insight into the research problem at hand, its great disadvantage is that it has been conducted to solve a specific problem. As a result the data obtained from secondary sources may not be totally applicable to the Swaziland tourism industry. Through creativity such results can supply excellent background information for future research. In this case, previous data researched by other scholars is useful. In order to attenuate the limitation of this data source, primary data sources shall be used.

See p. 3 Draft Malingwa para 3

Primary data is "data collected to help solve a problem or take advantage of an opportunity on which a decision is pending. The primary data shall include one-to-one interviews with the people in the Swaziland tourism industry" (Hawkins & Tull, 1998:80).

As above

#### 1.7.5 Method of data gathering (Instrumentation)

The research shall make use of personal interviews. These interviews shall focus on thirty respondents. The thirty people will ensure critical data analysis. The mini-survey shall take the form of personal interviews with key respondents informants from the government, and leaders in the tourism industry. Hawkins and Tull (1998:132) define a personal interview as "the administration of the questions in face-to-face setting". In this way, the interviewer will be able to ask follow-up questions that may otherwise not be captured by the questionnaire.

p. 3 Draft para 4

Personal interviews will be conducted for data collection using structured questions. Personal interviews have been selected because of its high response rate as compared to other forms of interviews such as e-mail and mail interviews. Such interviews will start by asking questions on a more general perspective on tourism delivery to a more specific focus on the management problem at hand.

x

In designing the questions, attention shall be paid to fundamentals of questionnaire design such as language, cultural patterns and respondent characteristics. This means that the design of the questions shall specifically suit the data requirements, that is, data pertaining an international language (English). Observations shall be a critical tool. The qualitative research

Almost verbatim

↳ see p. 3 para 5

technique will go a long way to generate data useable to make informed (partial) conclusions about the factors influencing the delivery of the tourism industry in Swaziland.

See

4

Para 1

Mazeyu

Draft

### 1.8 Ethnical Requirements

As in other parts of business, all parties in research should exhibit ethical behaviour that guides moral choices about individual behaviour and relationships with others. There shall be some ethical considerations. The goal of ethics in research ensures that no one is harmed and suffers adverse consequences from research activities. Identity of respondents, names, address and privacy in general shall be protected. There are questions that interviewees may not be willing to answer. This right shall be respected and where questions are not directly answered, the research shall be analytic and deductive. In short, the research shall observe the code of informed consent meaning the interviewees shall be voluntary, the people shall be entitled to know the subject of discussion and have the right to terminate the interview.

p. 4

Draft

### 1.9 Limitations

There are number of problems that arise when trying to gather data on the factors influencing the delivery of tourism industry. The tourism industry lacks a regulatory framework through which data can be manipulated to the fullest advantage of researchers.

see Chpt 2

p. 6

para. 6

1. Research was not well funded and this tended to restrict travelling where it was necessary.
2. The tools of fishing information about this tourism industry are not adequate when using a questionnaire.
3. Limited time and financial constraints made it impossible to follow an exhaustive quantitative methodology.
4. Not many authors have written books on tourism.

## **CHAPTER TWO: THE THEORETICAL CONCEPTS OF THE TOURISM INDUSTRY**

### **2.1 Introduction**

This chapter focuses on the theoretical models and concepts of the tourism industry. In particular, issues such as technology and the value chain shall be defined. It exposes the theoretical underpinning factors, for example, the industry analysis, driving forces, tourism trends, tourist appeals, advantages and disadvantages of the tourism industry. It also reviews the theoretical literature on the factors influencing the delivery of the tourism industry such as inadequate education and training, poor planning and development controls, funding tourism development, limited infrastructure, myopia, service delivery and tourism technology.

Several attempts have been made by various scholars to define these terms but it seems there is no agreed definition. Some of the problems of defining such elusive terms shall be discussed. This provides the points of departure for subsequent chapters.

### **2.2 THE THEORETICAL MODELS**

#### **2.2.1 DRIVING FORCES**

Tourism industry conditions change because important forces are driving tourists to alter their actions. The following are the dominant driving forces that the tourism industry management will need to take into consideration in crafting suitable marketing strategies so as to attract a greater market share within Southern Africa. Tourists are the most important driving force in the tourism industry. Today, new consumers are dictating the pace and direction of industry changes.

Fundamental changes are characteristic of the tourism industry. Tourists are more experienced travellers and they have changed values, particularly with respect to different environment cultures. They do things ‘just for the fun of it’ rather than to be seen doing it. Shorter and more frequent breaks, more activity and healthy living are hallmarks of a new lifestyle brought about by flexible and more free time. Tourists are more independent and are hybrid consumers, spontaneous and unpredictable. They want to be in charge and to be different from the crowd. These changes in consumer’s behaviour and values provide the fundamental driving force for the tourism industry. The increased travel experience, flexibility and

independent nature of the tourists generate demand for better quality, more value for money and greater flexibility in the travel experience (Poon, 1998).

### *The new tourist*

The term ‘ new tourists’ refers to consumers who are flexible, independent and experienced travellers, whose values and lifestyles are different from those of the mass tourists. New tourists are fundamentally different from the old and are the most important driving force in the tourism industry. It is the consumers and not the producers who are driving the tourism industry.

New tourists are more experienced, more ‘green’, more flexible, more independent, more quality conscious and ‘ harder to please’ than ever before. The motivations of the old tourist are different from those of the new. For the old tourist, travel was a novelty; it mattered not where they went, once they got to a warm destination and could show others that they had been there. Quality of services was relatively unimportant. Vacation was an escape from work and from home. By contrast, vacation is an extension of life for the new tourist. New tourists go on vacation to experience something different. For the new tourists, quality value for money is premium.

Old tourists tended to be homogeneous and predictable. If they went first class, they went first class all the way. They felt secure by traveling in numbers and took vacations where everything was pre-paid and pre-arranged. New tourists, on the other hand, are not like their predecessors; rather, they are spontaneous and unpredictable. They are hybrid in nature and do not consume along linear predictable lines. The hybrid consumer may want to purchase different tourism service in different price categories for the same trip (e.g. travel tourist class and stay in five – star hotel). These new consumers want to be different from the crowd. They want to affirm their individuality and they want to be in control.

Demographic changes are also reflected in the new consumers. On the other hand, the population is ageing, household size decreasing and more income is available per household. Changing lifestyle and changing demographics of the tourists are creating demand for more targeted and customized holidays. Families, single parent households, people whose children have left home, ‘ gourmet’ couples with double income and no kids.



### *New technologies*

Information technology and tourism seem to be unlikely, if not unthinkable bedfellows. The partnership of technology and tourism conjures images of computer-aided hospitality, guided tours and humanless hotels. The apparent mismatch between tourism and technology can be reconciled when it is considered that tourism is an extremely information – intensive industry. Also, the rapid development of information technologies facilitates the speed and efficiency with which the industry' s information is proceeding, stored, retrieved, distributed and otherwise manipulated.

The partnership of information technology and tourism delivery has grown even stronger since the deregulation of the US airline industry in 1978. Deregulation has made information technologies even more indispensable to the tourism industry. The situation has been further complicated with a large volume and wide array of rapidly changing information such as new airlines, new fares, new routes, forever changing prices, more alternatives, more confusion and a whole new vocabulary (yield management, no frills, frequent and flyers awards)

A whole system of computer and communication technologies including computerized reservation system; electronic funds transfer; digital telephone networks; smart cards; satellite printers and mobile communications is being used by hotels, travel agencies and cruise ships. All sections will have to become users of information technology in order to ensure their own survival and competitiveness. Information technology will leave no section in the tourism industry untouched. No section will escape its impacts (Poon, 1998).

Many industry departments are already users of information technologies. Travel agents use computerized reservation systems to obtain information, make bookings and sell travel. Hotels use the technologies to carry out their office, back office and food and beverage operations to entertain their quests and to distribute their bed nights in the marketplace. Airlines use information technologies for almost every aspect of their operations from schedule generation to flight planning, reservations, sales and analysis.

### *More experienced tourists*

The growing experience of tourists is one of the most important factors that will change tourist demand. Tourists will be more discerning and will demand quality services as well as choice and flexibility in their travel and tourism consumption. The growing number of

experienced tourists and the expanding range of their national and cultural backgrounds is challenging traditional patterns of industry service. As travel experience and sophistication continue to develop, tourists will tolerate fewer constraints on international travel and will expect greater choice and flexibility in itinerary (World Travel overview, 1988/9).

### ***Growing tourist's preferences for different products***

Different tourists have different needs resulting in a world for something different. New innovative and well-packaged products offering variations as a result of ongoing research and development can only enhance the image and well being of the industry.

### ***Change values***

The arrival of the jet age, paid holidays and growing affluence has made travel and leisure an integral part of daily life in developed and developing societies. Emerging changes in the values of industrial societies from the obsession with having to the fulfilment of being, the pursuit of happiness and healthy lifestyles, the growing consciousness of nature and things natural will affect the ways in which travel and leisure are bought and consumed. It will compel suppliers to re-think the manner in which they package and deliver the holiday experience. Increasingly, leisure will not be an escape from daily life, but will be an extension of daily life and its packaging will need to reflect these changing values.

In the industrial society, values of being have been crowded out by values of having: possession, property, wealth, consumption, egoism are ranked above community, tolerance, contentment, modesty, meaning and honesty. The environment is treated and exploited as if resources were inexhaustible and infinite (Krippendorf, 1986).

### ***Changed lifestyle***

There are number of changes in people' s lifestyles that have a profound impact on travel. One observer argues that society has moved through three key phases between the industrial era and the present. Firstly, from one in which people live to work, secondly to one in which they worked to live and today, to one in which there is a new unity of everyday life. In the third phase, the polarity of work and leisure is reduced. Travel and leisure have become an integral part of daily life. These changes in the role of travel and leisure in society as well as changes in the workplace and the practice of more healthy living, all have implications for the tourism industry (Krippendorf, 1987 b).

### ***Healthy living***

Good health and a healthy lifestyle are increasingly in vogue. The focus on healthy living manifests itself both in the intake of food and in the care of the physique. This can be observed by the proliferation of health spas, fitness centers and health food shops the world over. A 1980s California slogan sums up the phenomenon this way: ‘ It does not matter if you win or lose, it is how you look’.

This health fad relates to the broader yearning for things natural. It is a reflection of society’s needs to balance itself, the need to balance pollution, rapid urbanization, societal perversions and environmental destruction, with a more humane and conscious approach to human being. Many observers currently believe that this focus on health is just a fad, like bell-bottom jeans, however, cast in the light of the environmental.

### ***Changing workplace and workstyle***

The growing use of the Internet by individuals and households across the world is a favourable impact on the potential for the rapid growth in the tourism industry. The changing nature of work and the workplace are largely due to changes brought about by the increasing use of microelectronics. Two trends can be identified with respect to the impact on travel: a reduction in the amount of people to people contact in the workplace and the movement towards flexible schedules and computer commuting.

New information technologies, by virtue of their ability to transmit, store, process and manipulate information, as well as to distribute it to areas where it is needed, can minimize the need for personal contact. Witness the number of managers and executive officers who have ‘ personal computers. If a manager needs to know, for example, the production or efficiency levels within the plant on a particular day, there is no need to contact the floor supervisor, to conduct lengthy discussions over the matter or to even discuss the issue over lunch. The information is readily available to the manager at his / her computer fingertips. The increasing alienation of person from person in the work place, as well as the increasing de-personalization and computerization of the environment will reinforce people’s desire for people contact. This is likely to be the trend no matter how user friendly the man/machine interface becomes. One can observe, for example, the increasing use of music and plants in offices in an attempt to humanize and naturalize the work place.

### **2.2.2 THE TOURISM TRENDS**

There are some of the discernible trends that are likely to affect the tourism industry in the next decade. But technology is just “the” issue for tourism industry.

#### ***Technology***

It is clear that, the quality of information technology utilized by the travel industry will increase. Even so, there is growing evidence that many developing countries some not traditionally identified with tourism are beginning to promote their countries as potential destinations. There is clearly a growing awareness in the developing countries of the potential benefits to be derived from participation in international tourism.

#### ***Marketing Strategies***

For travel companies to develop an effective competitive strategy, they need to harness the technological changes, lower the cost of distribution and improve the service provided to the consumer.

The travel agency is another marketing strategy. It invests resources in the development of computer software to improve and speed up the access and the carrier’s database of travel products so as to enhance the customer service. At the same time, the company provides a pleasurable shopping experience for the customer. The ambience of the retails in retail outlets is relaxed and the staff is professionally trained to sell the travel products. The consumer can peruse the printed information in comfort and also sit and watch videos of the travel products.

Other marketing strategies that can be employed include segmenting the market and generating travel offerings for particular segments. Agencies can combine with local retailers to have joint marketing ventures, for example, winter ski holidays; the agency can collaborate with a sport retailer to provide special offers of ski clothes. New technologies can be employed to assist marketing ventures. Micro- computers and word processors can help in the administration of surveys to find out what the demands are in the local market place e.g. local businesses to advertise its particular travel products.

#### ***Social and lifestyle changes***

In the principal tourism markets the population and especially the “travelling population” have increased their personal disposable income very considerably in recent years. They are more mobile, take more frequent trips and travel further away from home. A growing and

substantial number are sophisticated travellers. New aspirations or objectives in travel, leading to intense segmentation and specialization has altered seasonal patterns and type of services demanded notably an increasing insistence on quality. Substantial benefits for the industry follow major improvements in seasonal flow and such improvements can continue as marketing expertise improves. But destinations in demand have altered. For some, the tide is going out, presenting great difficulties for the local trade and infrastructure.

### ***Demographic Trends***

The major world tourism in the older industrialized countries, are affected by major changes principally the increase in the proportion of older people in the population and a corresponding reduction in children, younger people and in the active population making up the labour force. Such changes have both good and bad effects on tourism flows. The situation may well alter in the future but demographic influences by their nature are longer term in their impacts.

### ***Economic influences***

New emerging industrialized countries benefit from new technology, that represents a second industrial revolution. They can and do become rich very quickly. There has been a correlation in the past between GDP and tourism expenditure that in industrialized countries may rise at twice the GDP rate of increase. This may no longer be true in all cases as structural change weakens the propensity to consume rather than save. Economic and can have major effects and sometimes volatile impacts on tourism flows as inflation and variation in exchange rates influence travel movement to a major extent. These influences and instabilities are likely to be features of future expansion (Medlik, 1991).

### **2.2.3 THE GAPS MODEL OF SERVICE QUALITY**

This research shall use the Gaps Model of Service Quality when discussing the factors influencing the delivery of the tourism industry. This model addresses the gaps between where the Swaziland tourism industry is and where it wants to be.

The model serves as a framework for service or organisation attempting to improve quality service and service marketing. It positions the key concepts, strategies and decisions in service marketing in a manner that begins with the customer. It also builds the organisation's tasks around what is needed to close the gap between tourist expectations and perceptions.



This model begins where the process of improving service quality begins: by gaining an understanding of the nature and extent of the customer gap (Zeithaml & Bitner, 2003).

With this kind of analysis calls the need to harness suitable tourism marketing strategies employed by their counterparts in the tourism industry. Thompson et al (2002) and Lynch (1997: 101)'s discussion of Porter's generic model shall be used in order to understand the strategies that can be used by the tourism industry.

Also, it is important to know how the tourists respond to competition within their business environment. Kotler (2002) has suggested numerous strategies of responding to competition. Strategy recommendation is the cornerstone of this research. Interviews with the Ministry responsible for tourism development will be sought in order to get a clearer picture of marketing strategies being pursued by government. Suggestions by key respondents will be considered alongside with those suggested in the research.

### **2.3 DEFINITION OF A TOURISM INDUSTRY**

The tourism industry is in crisis, a crisis of change and uncertainty, a crisis brought by the rapid changing nature of the tourism industry itself. In the year 2006, tourism will look nothing like it used to be. The industry is in metamorphosis and it is undergoing rapid and radical change. New technology, more experienced consumers, global economic restructuring and environmental limits to growth are only some of the challenges facing the industry. Creative gales of destruction and more stormy weather lie ahead. The era of sunny weather management is over (Poon, 1998).

Today, the industry is being transformed and the rules of the game are changing and they are changing for everyone. Some players are winning and others are dying. Today, winning does not just mean surviving but it means leading. It means becoming a leader in a new and profoundly changed tourism industry. Competitive strategies are more important than ever to ensure that the industry sections and tourism destinations stay ahead of the game: for to lead is to win.

Reference will be made to the works of Hunter and Colclough (1995) who describe tourism as a diverse, social activity involving millions of individuals who travel either internationally or within their own country, participating in a multitude of activities. It is supported by a vast,

yet fragmented industry which provides tourist with transport, accommodation, attractions, refreshment facilities, information services, souvenirs and so on. Shortly, tourism is “a multidimensional, multifaceted activity which touches many lives and many different economic activity.

Tourism involves the process of travelling to places away from where people normally live and work. It also involves business people since our increasingly interconnected world relies heavily on business travel and on people who negotiate trade and enterprise and organise conventions, exhibitions, conferences and trade fairs. Some people hope to learn a new skill from their travel such as horse riding or archaeology while others want to sample new cultures and customs. Tourists and visitors need to exercise respect, tolerance and care towards the place they are visiting. Sustainable tourism means encouraging people to follow particular codes.

Gilbert (1990) says that tourism, as an industry is very difficult to define since it arises from the broad nature of both tourism as a concept and of the service inputs involved in satisfying tourist’s demands and needs. It embraces various other trades and industries including the airline, rail, cruise, tour wholesalers, retailers a variety of attractions as well as a wide range of other private and public services and facilities. Some of these services inputs are crucial to tourism while others are supportive.

Pigram (1990,6) argues that the tourism industry should adopt a “ safe minimum standard” approach to development, which minimises the risk that irreversible changes will foreclose these hidden values for future generations. Given the great diversity of tourists and the tourism industry, it is not surprising that opinion in the tourism literature on the specific and net effects of tourism on environmental quality can appear confusing and is not infrequently flatly contradictory.

### **2.3.1 TOURIST APPEALS**

There is no question that tourism delivers benefits but it is not perfect. Art, music, architecture, engineering achievements and many other areas of activity have tourists appeal.

### ***Fine Arts***

Such cultural media as painting, graphic arts, architecture and landscape architecture constitute an important motivation to travel. A recent trend in resort hotel operations has been the display of local art and craft objects within the hotel so that the tourists/guests may become acquainted with the art of local people. These objects maybe for sale thus become valued souvenirs. Art festivals often include various types of fine arts together with other cultural expressions make them more broadly appealing.

### ***Music and dance***

The musical expression and resources of a country are among its most appealing and enjoyable aspects. In fact in some countries the music is a major source of enjoyment and satisfaction to tourists. Resort hotels, particularly can bring to the tourists opportunities for enjoyment of local music at its best. Evening entertainment programmes, concerts, recordings and sound production systems all aid in presenting this aspect of the art of the country. Tourists appreciate community concerts, parades and welcoming ceremonies.

### ***Ethnic Dancing***

It is another exciting and appealing aspect of a country's culture. The color, costumes, music, setting and skill of forms and execution add to the appeal. Almost all countries have native ethnic dancing with local shows; nightclubs and community programmes present additional opportunities.

### ***Handcraft***

To satisfy tourists, gifts and souvenirs offered for sale should be handcrafted or manufactured in the country of region where the purchase is made. There is much dissatisfaction in purchasing a craft article that you should later discover was made in another country.

## **2.3.2 WHY TOURISM IS AN ATTRACTIVE DEVELOPMENT OPTION**

Holder (1988) provides a list of positive infrastructure benefits from tourism including improved communication systems, developed and upgrading of human-made attractions, recreational and health facilities. Economist tend to depict the obvious benefits of tourism in the way of creating jobs, providing foreign currency exchange, generating an inflow of capital and expertise. All of these are needed in many of the societies that have attempted to develop substantial tourism industries since World War II.



Also, historic sites, monuments and buildings can be the great tourist attractions and tourism itself allows their restoration and preservation for the benefit of the local community and beyond. Such restoration and preservation for the tourist market has been noted as a significant benefit in many areas around the world.

There are many studies in literature, which emphasises the actual or potential benefits of tourism to the wildlife of an area. Tourism may result in a creation or continued existence of a wildlife park. Luxmoore (1989) concludes that wildlife tourism and controlled hunting are amongst the less intensive forms of wildlife exploitation and are generally of greater benefit to wildlife conservation than more intensive forms of wildlife exploitation and production.

Tourism need not be an agent of collapse but it can be used as a means of reinforcing cultural history and practices. It demonstrates how a direct involvement in traditional culture can change attitude, instilling a respect for other ways of life. Through its inherent message of goodwill, hospitality, trust, service without servility, tolerance, interaction and communication, tourism is a most effective mechanism for fostering national and international exchange and understanding among people. It is therefore an effective nation-builder, a strong incentive and reason for peace.

The share of international tourists received by developing countries is relatively small and highly skewed. The number of tourists that a country can attract will depend on a variety of factors not least on the distance of the receiving country from the main tourist generating countries. In general, the more distant country, the more costly the total trip and the fewer number of tourists it will attract. Despite this, many developing countries regard tourism as being an important part of their development strategies.

### ***Income Redistribution***

The flow of tourists from developed to developing countries has the effect of redistributing income. Most developed countries 'hard' currencies helps to alleviate the often-chronic foreign exchange gaps of developing countries. At this stage, I agree with Robert Erbes who states that developing countries should not regard tourism as 'manna from heaven which can provide a solution to all foreign exchange settlement difficulties'. In some countries, the development of tourism and its amenities can be entirely based on foreign capital while managerial expertise and servicing are often ignored. In one sense, tourism industry can be

seen as bridging the development gap between two very unequal economies and desperate societies. There is no particular reason why the tourism industry should be an inefficient earner of foreign currency relative to other sectors.

### ***Employment***

As often observed, popularised positions emerge from the growing body of literature on the benefits that tourism has on the host populations. The service aspect of tourism is often seen as a benefit to developing countries because of the jobs created, both directly in tourism and indirectly through linkages. At the initial stage of tourism development, local people can fill many of the low-skill jobs with the main expertise being provided by foreign labour. Where tourism does generate employment, it will clearly have an economic impact enhanced by the multiplier effect on incomes and government revenues.

### ***Government Revenue***

As with any other economic activity, tourism generates revenue both direct and indirect for the government. When people are employed in the creation or operation of a project, the government receives revenue from income tax, payroll tax and VAT on goods bought. The spending of salaries and wages creates further employment and tax revenues. The operation of a tourism establishment contributes in many ways to government revenues from company and property taxes to import duties on alcoholic beverages and gambling taxes. Tourism's contribution to government revenue is derived mainly from airport taxes, fees and levies. These taxes are used to maintain and upgrade essential infrastructure such as airports for tourism marketing activities.

### ***Freedom From Trade Restrictions***

Unlike commodity and other forms of trade with their tariffs, quotas and other obstructions, tourism has been characterized by a relaxation of barriers. The removal of currency restrictions on travel and improved international relations has made tourism one of the few developing countries exports relatively unhindered by trade restrictions. Marketed social changes in attitudes to holidays and travel in the developed countries make it unlikely that governments would now impose travel restrictions as part of their economic protection measures ( Sharpley & Telfer, 2002).

### **2.3.3 DISADVANTAGES OF THE TOURISM INDUSTRY**

Tourism is a doubled-edged sword. Many tourism destinations benefit from the flows of tourists and the hard currencies they bring. However, they have not completely avoided some of tourism's negative consequences including: prostitution, crime, environmental degradation, commercialisation of culture and changing societal norms and values. These factors, if left unchecked, will continue to limit the growth of the tourism industry. Tourism as it developed in the 60s and 80s is self-destructive. It destroys the very things tourists come for and it is a classic case of killing the goose that lays the golden egg (Tyler, 1989:38).

#### ***Pollution***

Most of the environment impacts of tourism occur at the destination. However, there are also impacts in areas of origin while tourists are travelling. For example, the output of aircraft, ferries, coaches, cars, and promotional material consumes productive and energy resources, and generates waste in origin areas. Travel generates pollution in the atmosphere and adversely affects the environment of the areas that are travelled through. Pollution can cause hazards to human health, harm to living resources and ecological systems, damage to structures and amenities, and interfere with the legitimate use of the environment. As an activity dependent on the quality of resources, tourism is affected negatively by pollution stemming from other industries. However, tourism also generates pollutants.

Vegetation cover may also be lost through trampling by walkers or crushing by tourist vehicles. Loss of vegetation cover in this way is frequently accompanied by soil compaction and a loss of soil structure leading to increase surface water run-off, soil erosion and a decline in species diversity. Depuy (1987) argues that the pressures from wildlife tourism are gradually destroying the natural environment of some African countries.

Co-operation between the tourism industry and environmental organizations does appear highly desirable. This might even extend to the tackling of global environmental issues. Smith and Jenner (1989) further suggest that the threat to winter skiing may force the tourism industry to add its voice to those calling for action to combat the pollution contributing to global warming. They argue that the "bottom line" for tourism is that if the industry fails to become involved in the "green" movement, it will not be able to influence environmental policies that affect it and will become a target for environmental campaigners.

### ***Social Impacts***

Social scientist generally focuses on the consequences of tourism ranging from the introduction of drugs, prostitution and gambling to forms of subtle racism, psychological colonialism and cultural imperialism. Shortly, the implication of this style of criticism is that, whatever the economic benefits these largely unquantifiable (social) costs are of sufficient weight to argue against further expansion of tourism.

It would also appear that moral values can be influenced by tourism and several researchers have based their studies on the issues of criminality, gambling and prostitution. Gasparavic (1989) stresses tourism-related impacts on the moral values, arguing that the increasing incidences of stealing, begging, drug usage and prostitution are directly attributable to a growth in tourism. Some investigations have reported a direct relationship between the growth of tourism and an increase in crime.

Tourism also contributes more widely towards perceived investments in new tourism infrastructure as a result of problems associated with the overuse of the city centre by tourists. These problems include traffic congestion, insufficient coach and parking facilities and over-concentration of tourists at major heritage sites within the city (Jackson, 1984).

Three aspects of the social impact of tourism are considered in this section. We start with an explanation of the demonstration effect, and then consider specific impacts on language and health.

### ***Demonstration effect***

Residents are aware of the differences between themselves and tourists, and often attempt to copy the behaviour and lifestyles of tourists. Young people are usually the most susceptible to the influence of the demonstration effect. Locals may become dissatisfied with their own standards of living or way of life, and try to copy the habits and way of life of tourists. This may include discarding traditional dress, and purchasing products used by tourists. Because of the demonstration effect, the consumption patterns of a society may change. People living in rural areas may be inspired to move to cities or to emigrate, to access jobs that can provide incomes similar to those of tourists. Some researchers have also investigated cases where women started working in the tourism industry and earning an income, which distorted traditional power relationships (where power is associated with money).



Tourism can act as a powerful agent of change. However, we cannot link all changes in societies and cultures to the presence of tourism. Tourism is but one driver in societal change (Poon, 1998).

### ***Prostitution***

Indeed, Papadopolous (1988) argues to an over-emphasis of the link between moral decline and tourism, for example, prostitution and gambling occur everywhere and are not the prerogative of a particular developing country without a tourism industry. Although prostitution cannot be blamed on tourism alone, it may contribute to sustaining this societal problem. Certain Asian destinations are infamous for their sex workers, and many tourists choose to visit these destinations with the express purpose of indulging in sexual activities that may be prohibited or strictly controlled in their area of origin. The exploitation of local women and men is often related to the relative wealth of tourists.

### ***Crime***

The tourist host relationship is often characterized by inequalities in material status. Tourists are normally in a relaxed mood while on holiday, and may not be as security-conscious as normal. The result is that some residents, perceiving tourists to be wealthy and soft targets, may commit acts of crime against tourists. Such crimes may range from pick-pocketing and mugging, through to rape and murder.

### ***Gambling***

Casinos and other gambling facilities are often major attractors at tourist destinations. Local residents may not be able to resist the temptation of possibly 'earning' some quick money and participate in gambling activities. Unfortunately, these residents are often the ones who can least afford to gamble, and may lose all of their money in their quest for wealth. Associated with the financial problems created by gambling may be other social vices, such as alcoholism and drug abuse. The evidence on the effect of gambling casinos on local residents is inconclusive, with some studies indicating no direct relationship. Others, however, lay the blame for an increase in gambling by residents solidly at the door of casinos.

### ***Language***

Language and literature are crucial elements of local culture and not often considered when the impacts of tourism are reviewed. International tourism may imperceptibly introduce

vocabulary and elements of unfamiliar languages to the local languages of a destination. Inevitably, these languages are those of the nations that have the highest propensity to travel. When two language groups make contact, the group with the greater incentive (not necessarily the lower power or status group) will learn the other group's language. When locals learn the language of the main source markets to a destination, their motivation is often commercial.

There is, however, some evidence that the peculiarity of a local language or dialect may be maintained, despite an influx of tourists either as a conscious attempt to strengthen the cultural identity of the host community, or an attraction for tourists. For example, the Welsh Tourism Board encourages young people to learn Welsh, their traditional language (Keyser, 2002).

### ***Health***

It is not only tourists who may be affected by disease when they travel to exotic destinations. Contact with tourists may introduce disease to host communities. A similar point is made by Cohen (1982) that the impact of tourism on the health of local people is of increasing concern particularly with reference to HIV / AIDS and other transmitted diseases. UNAIDS (1999) estimates that some four million people in the SADC region have AIDS, with a further six million HIV positive. This amounts to five percent of the population and the economic and social costs of HIV/AIDS are immense. The growing problem of prostitution and tourism supports the spread of HIV/AIDS.

## **2.4 FACTORS INFLUENCING THE DELIVERY OF THE TOURISM INDUSTRY**

There are a number of factors influencing the delivery of tourism industry to play a more meaningful role in the national economy such as poor service delivery, road safety, tourism security, inadequate education and training. There is a general culture of poor service in the tourism industry and related sector resulting in little excitement in delivering service or to go the extra mile to satisfy the customer.

### ***Inadequate Education and Training***

While the tourism industry has tremendous potential to create jobs, inadequate education and training influences the delivery of the tourism industry. The government has recognised that appropriate skills and experience are necessary to facilitate employment growth as well as

international competitiveness. With the projected staffing needs of the tourism industry and the current lack of physical capacity to deliver education and training, the industry will increasingly be faced by a critical shortage of skills.

Tourism education and training is one of the fundamental pillars of the development of a new responsible tourism in any country. The main principles governing the approach to education and training are to promote the involvement of private sector and private sector institution in the provision of education and training, to develop and invest in an education system that will lead to self sufficiency and reduce reliance on imported skills and to encourage the media and NGOs to become partners in the tourism education and awareness process.

### ***Poor Planning and Development Controls***

An underlying concept in planning tourism is that, tourism industry should be viewed as an inter-related system of demand and supply factors. The demand factors are inter- national and domestic tourist markets and local residents who use the tourist attractions, accommodation and other tourist facilities and services. Attractions include, cultural theme parks, zoos, and botanic gardens. Accommodation includes hotels, motels, guesthouses and other tourist's facilities such as travel operations, restaurants, shopping, medical, money exchange, postal facilities and services.

In order to market the facilities and services, usable tourism infrastructure is required which includes transportation (air, road, rail etc) water supply, electric power and telecommunications. Provision of adequate infrastructure is also important to protect the environment. It helps maintain a high level of environmental quality that is necessary for successful tourism and desirable for residents. The effective development, operation and management of tourism require certain institutional elements. These elements include:

- Organizational structures, especially government tourism offices and private sector tourism associations such as hotel associations.
- Tourism-related legislation and regulations, such as standards and licensing requirements for hotels and tour and travel agencies.
- Education and training programmes, and training institutions to prepare persons to work effectively in tourism industry.

- Availability of financial capital to develop tourist attractions, facilities, services and infrastructure, and mechanisms to attract capital investment.
- Marketing strategies and promotion programmes to inform tourists about the country or region, and promotion programmes to inform tourists about the country or region, and induce them to visit it, and tourist information facilities and services in the destination areas.
- Travel facilitation of immigration (including visa arrangements) customs and other facilities and services at the entry exist points of tourists.

The institutional elements also include consideration of how to enhance and distribute the economic benefits to tourism, environmental protection measures, reducing adverse social impacts, and conservation of the cultural heritage of people living in the tourism areas.

As an inter-related system, it is important that tourism planning aim for integrated development of all these parts of the systems, both the demand and supply factors and the physical and institutional elements. The system will function much more effectively and bring the desired benefits if it is planned in an integrated manner (Thomson & Learning, 1994).

Emphasis is given to formulating and adopting tourism development policies and plans for an area in order to guide decision-making on development actions. The planning of tourism however should also be recognized as a continuous and flexible process within the framework of the policy and plan recommendations. There must be flexibility to allow for policy and plan recommendations adapting to changing circumstances. Planning that is too rigid may not allow development to be responsive to changes. There may be advancement in transportation technology, evolution of new forms of tourism and changes in markets trends. Even though allowed to be flexible, the basic objectives of the plan should not be abrogated although the specific development patterns may be charged. Sustainable development must be maintained.

Tourism development planning should make recommendations that are imaginative and innovative and must also be feasible to implement. The various techniques of implementation should be considered throughout the planning process. This approach ensures that the recommendations can be accomplished and provide the basis for specifying the implementation techniques that should be applied (White Paper, 1996).



### ***Funding Tourism Development***

The unavailability of finance to develop and promote the tourism industry does influence the delivery of the tourism industry. It is critically important for the industry's further growth and development. A number of policy guidelines should guide the increased financial commitment to the development of the tourism industry. While the exact nature and the extent of these should be properly assessed and evaluated, the following measures should be considered: to promote partnerships for the provision of funding between and among government local and international private sectors and donor agencies and to help in facilitating access to RDP and donor funds for the tourism industry particularly for the purpose of pump-priming small business, community tourism projects as well as demonstration projects.

### ***Poor Transport***

Transport in particular influences the achievement of the tourism industry. It is an irreplaceable component of tourism experience and always a part of the tourism path. More so, it is a crucial vehicle of access to tourist destination services.

### ***Myopic private sector***

Another major influence facing tourism industry is the short-sighted private sector. Hotels and many other tourism establishments tend to have a rather limited view of the product they offer. If a visitor is harassed on the road, street, over-charged by a taxi driver, the environment destroyed by insensitive development, it is not considered as the hotel concern. Experience indicates that, hotels that have taken a much broader view of their product tended to be more successful.

Economic development and sustainability are needed to ensure trust and quality life in all countries. However, quality is a dynamic and subjective concept when it is specifically applied to tourism experiences. The mature leisure and business traveler has increasingly become sensitive to quality considerations at tourism destinations. Thus the suppliers of tourism services in the less developed world have to be aware of their requirements and expectations in this area and respond to them. In its work programme, the World Tourism Organization is guided by the understanding of quality in tourism process that implies the satisfaction of all the products, service and requirement needs (White Paper, 1996).

## **Harm to the tourism industry**

the human and natural environment pertains to sustainability that is a long-term concept. Maintaining the sustainability of tourism requires managing environmental and economic impacts, establishing environmental indicators and maintaining the quality of tourism products and tourists markets. There can be no sustainability without quality.

The less developed countries can start at any time their work on quality criteria in tourism development and this will help to better characterize and monitor their tourism products, define the desired quality levels for their tourists' products to be targeted to their actual and potential visitors. This will help facilitate and better manage its own work and create a competitive environment for their tourism industry (Benavides & Ducey, 2001).

## **Safety and Security**

A tourism product or service cannot present damage to life, damage to health and other interests and integrity of the consumer even if we talk about adventure tourism. "Security standards are normally established by law and the key issues are the attendance to emergencies. In the tourism industry, accommodation facilities and clean. Food safety standards often established by law must be of various types of food outlets, for street vendors to luxury gourmet restaurants."

This determinant requires that physical communication away with to allow the use of mainstream communication irrespective of their natural and acquired differences.

## **Tourism Promotion and Marketing**

While transparency is understood as one of the most effective and can be

## **Role of Communities**

Communities do influence the development of tourism. A community actively participates in the development of the community.

- To participate in all aspects of tourism including being tourists
- To exploit opportunities for tourism training and awareness, finance and incentives for tourism development
- To support and promote responsible tourism and sustainable development
- To actively participate in and promote responsible tourism

## **2.5 TECHNOLOGY AND THE TOURISM INDUSTRY**

There is a strong correlation between technology and the values chain in the tourism industry. Technology plays an important complementary role in engineering the tourism industry. The applications of technology to the travel and tourism industry allow producers to supply new and flexible services that are cost- competitive with standardized and rigidly packaged options. Technology gives suppliers the flexibility to move with the market and the capacity to diagonally integrate with other suppliers to provide new combinations of services and improve cost effectiveness.

A whole system of information technologies is being rapidly diffused throughout the tourism industry. And no section will escape its impact. Technologies will have the impact of increasing the quality of services delivered to consumers and generating completely new services even flexible holidays.

### **2.5.1 An Information-Intensive Industry**

The information – intensity of tourism is a key driving force in the rapid diffusion of technology in the tourism industry. No section in the tourism industry will be untouched by the information technology.

Tourism is a very information and intensive activity. In few other areas of activity are the generation, gathering, processing, application and communication of information as important for day-to-day operations as they are for the tourism industry. Unlike consumer durables and industrial goods, the intangible tourism service cannot be physically displayed or inspected at the point of sale. Travel and tourism services are normally bought well before the time of its use and away from the place of consumption. In the marketplace, tourism is almost completely dependent upon representations and descriptions (information) in printed and

audio-visual forms thus communications and information transmission tools are indispensable to the tourist trade.

Tourism involves the movement, accommodation, entertainment and general servicing of clients from one geographical location to another. These activities must be combined differently, integrated and ‘packaged’ to suit complex and rapidly changing consumer requirements. Services such as hotel bed nights car rental, package tours and airline seats are not physically transferred to travel agents who in turn stock them until sold to customers. Rather, it is information about availability, price, quality location and convenience of these services that is communicated and processed. Similarly, actual moneys (payments or revenues) are not transferred from travel agents to travel suppliers or commissions from the travel supplier to travel agents. Rather, in the balancing of accounts, it is mainly information in the form of debts and credits that are transferred through plastic cards and other electronic payment systems.

Nevertheless, information is the cement that holds together the different producers within the tourism industry – namely airlines, tour operators, travel agencies, hotels, car rental, cruise lines and other suppliers. The links between and among tourism producers are provided not by goods, but by the flow of information.

The relationship between airlines and travel agents is governed by flows of information. Information on flights, service availability, schedule and route changes, confirmation and commission flows from bookings and revenues flow from travel agent to airlines. In the case of consumers information in the form of airline tickets, hotel and car rental bookings, travel counselling, and holiday guarantees are received from suppliers. A matching information transaction (payment) flows from consumers to suppliers.

In the tourism industry, it is not travel agents or hotels or airlines that are using technology but all of them. The technology is so comprehensive and intertwined that it is not only videotext or satellite printers or smart cards that are being used but a whole system of radical new information technologies. Airlines have emerged as the dominant technology. The rapid diffusion of a system of information technologies has four key impact, namely: it will improve the efficiency of production, improve the quality of services, lead to the generation

of new services (image communication, satellite printers, flexible holidays) and lead to the spread of a whole new industry best practice.

The new best practice will change the organizational and managerial common sense for best productivity and most profitable practice in the tourism industry. Therefore, it is not just technology that is being diffused throughout the tourism industry but a whole new industry common sense and a new tourism.

## **2.6 THE VALUE CHAIN**

The value chain is an important tool for tracing the process of value creation in the tourism industry. A value chain is an analytical tool developed for tracing the process of value creation in an industry and is made up of primary and support activities, both of which create value (Porter, 1987).

Understanding how an industry creates value is the key to understanding the role of each section in the industry. It is also a key in understanding why and how each section's position could change as the rules of the game changes. The value chain was developed in the 1980s and mainly will be applied to the travel and tourism industry to provide insights into how the industry creates value. The boundaries within the tourism industry are becoming increasingly blurred. Sections are crossing each other's borders more than ever before: banks move into travel agencies; insurance companies acquire hotel interests; airlines provide credit card; department stores operate travel agencies; and pleasure-boat companies move into hotels.

Tourism will alter the process of value creation in the tourism industry and it will change the relative positions of different sections in the industry. Sections that are closest to the consumers and those that can most efficiently control the production, manipulation and distribution of the industry's information, are expected to gain. Travel agents, airlines and suppliers on site are all expected to increase their influence on the industry's wealth – creating process. The role of tour operators is expected to decline and airlines will continue to dominate the industry's value chain. Some activities will take on added importance in the industry's wealth, creating process, for example, human-resources development, retail distribution, product development, retail distribution, product development, service delivery, customer service and client management.



### **2.6.1 The Tourism system**

The travel and leisure experience is a living experience. Almost everything one would normally do at home, one does on holiday such as eating, drinking, sleeping, playing, shopping, travelling, driving, renting a car, making telephone calls, taking beauty treatments, working, swimming sunbathing, attending shows and live performances, ‘play mass’ and paying bills. Together all of these elements of the leisure experience make up an industry with enormous wealth and creating potential.

Nine sections make up the tourism industry. These core industry sections are organized in a systemic flow of production namely: the airlines, holiday makers, hotels, on site service providers, incoming agents, tour operators, financial services suppliers and travel agents are the producers of travel and tourism services. These sections are organized to deliver services to the ninth section tourists and passengers who are the consumers of the industry’s output.

The services of airlines (e.g. transportation, baggage handling), hotels, (e.g. bed – nights, check in food and drink) and other suppliers on site (e.g. trains, car rentals, guest houses, restaurants, sports and entertainment) constitute the main ‘products’ of the tourism industry. In the delivery of these products, the distribution channels of the industry are of fundamental importance. This is so because the products of the tourism industry are invisible services, incapable of feel, smell, touch and inspection at the point of sale.

Although airlines and other suppliers sell directly to the passenger and tourists too, travel agents and tour operators perform the main distribution function for the tourism industry. Financial service suppliers facilitate payment transactions for services bought from suppliers (e.g. airlines and hotels) and services (e. g package tours and airline tickets) sold to customers.

Marketing and promotion agencies also play an important role in the tourism industry. They market and promote the destination in the market place, develop marketing strategies, design and implement marketing campaigns, collateral materials (e.g. brochures, videos) on behalf of tourist destinations, airlines, hotels groups and other suppliers. Hotel representatives also represent hotels and resorts in the market place. They play the role of ‘middle men’ for hotels, acting on their behalf in negotiations and communications with tour operators and consumers. Some hotel representatives even handle the reservations on behalf of hotels. Finally,

government supported tourist boards represent and promote the destination in the marketplace.

Financial service suppliers are important facilitators in the travel and tourism value chain. They not only provide travellers cheques, charge cards, credit cards and currency exchange, but also travel insurance services, travel payment system, and even tour operator and travel agency services. Financial services suppliers are increasingly crossing their borders and diagonally integrating into the tourism industry. Companies, like American Express, are even moving beyond the financial services and traditional travel and leisure activities, and now provide the services of complementary airport lounges to their Gold Card members.

Consumers constitute the final, but by no means the least important element of the tourism system. As we have discussed above, consumers are no longer passive acceptors of standardized and rigidly packaged holidays but there are more mature, more experienced, more 'green', more flexible and infinitely more independent. Consumers are the most important link in the tourism wealth creating system. The travel and leisure industry will be more consumer- rather than producer driven. For those who can anticipate and cater to needs of the new consumers, the prospects for creating wealth are enormous.

## **2.7 THE COMPETITIVE STRATEGIES**

A strategy is a set of principles developed by an organisation to give it direction and to allow it to continuously adapt to its changing environment. The more rapid the change in the firm's environment, the more important becomes conscious strategy formulation and implementation. The tourism industry is undergoing rapid and radical transformation; therefore, competitive strategies are more important than ever for the survival and competitiveness of the industry.

The objective of strategy is to enable a company to defend itself to enjoy a long life, to grow and to be strong and profitable. Such strategies may be explicit or implicit. Strategy may be implicit in the way that some companies operate, for example, running a lean organisation. On the other hand, strategies can be consciously and explicitly developed, for example, the development of Computerised Reservations Systems (CRS) to control the distribution of airlines seats. This latter process of conscious strategy formulation is what is commonly referred to as strategic planning.

Competitive strategies refer to the broad formulae that determine how a business is to compete, what its goals should be and what policies will be needed to carry out these goals (Porter, 1980). Competitive strategies are conscious policies and procedures developed by companies in order to “strategically align themselves with the turbulent environment and select appropriate strategies to create defensive competitive positions” (Tse and Olsen, 1991). Competitive strategies are therefore reflected in the targets, goals and objectives set for an organisation. In turn, they influence the allocation of resources, policies toward human resources, division of responsibilities and even corporate culture.

The notion of competitive strategies has grown in importance and popularity with the tourism industry. Competitive strategies, however, have not been specifically designed for tourism rather they are based upon the application of concepts borrowed from the manufacturing sector. Unfortunately, they continue to leave ‘many questions unanswered’ (Olsen, 1991).

### **2.7.2 Let quality be the guide**

Another key component of competitive strategies for the tourism industry is building quality products and services. In this regard, the issues of quality as they relate to the private sector are no different for the public sector. However, government must take steps to professionalise the tourism industry and enforce standards.

The tourism industry provide tourists with accommodation, guided tours, car rental and other services while governments assist with the marketing and promotion of the destination as well as providing infrastructure, training and other services including taxation. Despite this “hand-in-hand “ relationship, there is evidence that the private and public sectors at times work at odds with each other. Private and public sector cooperation is key to the success of any tourism destination. When strengthening private and public sector cooperation it is necessary to develop new institutions and to foster cooperation at the regional level.

## **2.8 CONCLUSION**

The tourism industry opportunities can hardly be considered separately from the rest of the economy such as safety and security for both visitors and investments. Among the less developed countries, only a few have varied economy and can influence distribution networks. The tourism option has to be analysed objectively, with a creative mind without any



positive or negative bias. Indeed, tourism can contribute significantly to the solution of the factors influencing its delivery. A new tourism needs to be formed.

## **CHAPTER THREE: THE SWAZILAND TOURISM INDUSTRY**

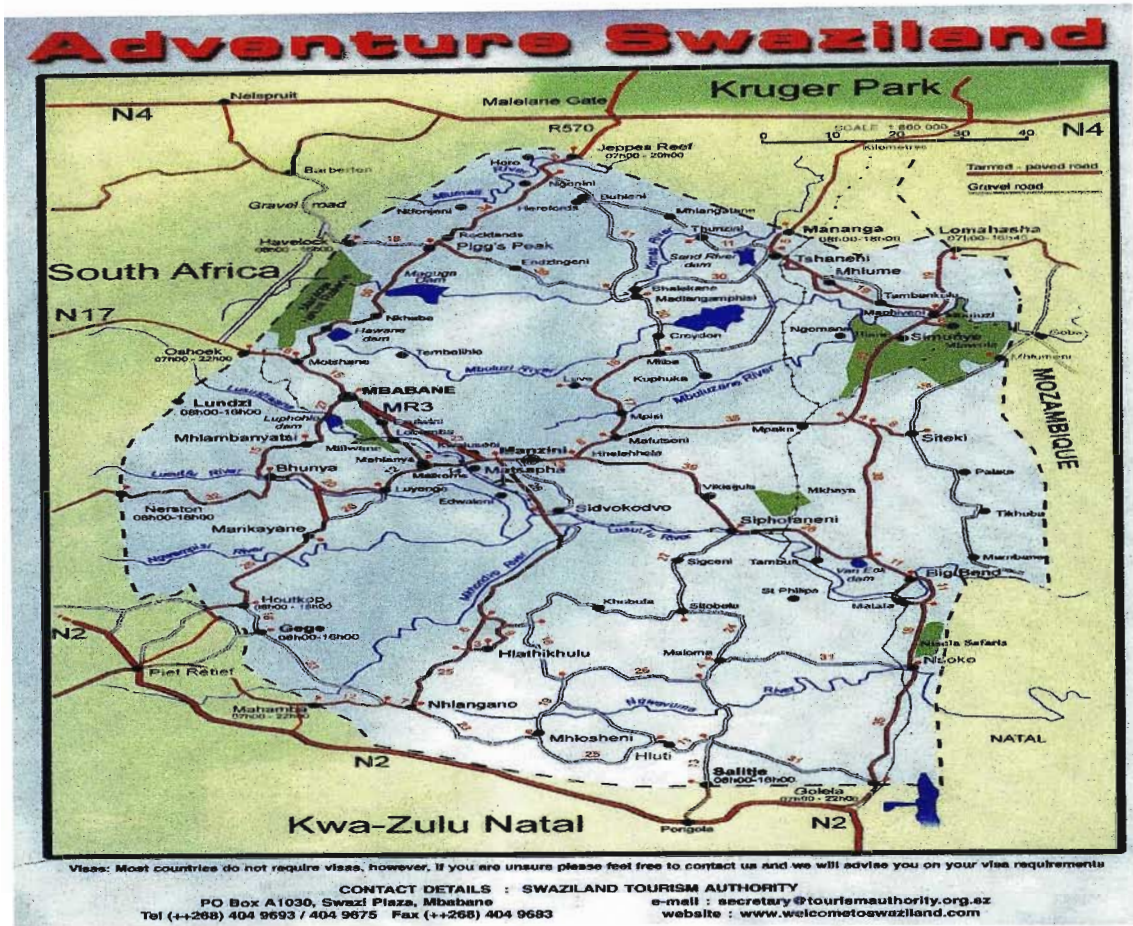
### **3.1 Introduction**

This chapter gives the history of tourism industry in Swaziland, how it is structured with the products and service it provides to its targeted customers. It exposes the theoretical factors influencing its achievement such as the poor service, political commitment, limited infrastructure and lack of training skills in the tourism industry.

### **3.2 Country Profile**

Swaziland is a small country located in Southern Africa, engulfed by the Republic of South Africa in the North, West and South whilst Mozambique is in its Eastern boarder (see Fig.1 map of Swaziland). Swaziland's tourism effectiveness lies in its diversity: accessible wildlife, unsurpassed scenery, unspoiled wilderness areas, moderate climate, unique historical culture and sites, adventurous tails, breathtaking views, unlimited nature and its "Africanness". All these make Swaziland a desirable tourist destination. The tourism industry is therefore of great strategic and economic significance to Swaziland. This significance not only relates to Swaziland's competitive advantage as far as the quality and uniqueness of its tourism resources are concerned, but also in terms of the economic growth and job creating possibilities. Most importantly is that, the tourism industry can only grow and contribute to the economy if it is carefully managed.

The following is the Map Of Swaziland, showing all the tourist attractions (e.g. Nature Reserves, Dams and Casino).



**Figure 1: Map of Swaziland**

The country measures 17,000 square kilometres and has four geographic regions. The west side is the mountainous High-veld with gorges, waterfalls and rivers as well as the Malotja Game reserve which is a major tourist attraction. Next is the Middle-veld, which is endowed with fertile soils where most of the country's farming takes place. This region also has the largest industrial area, Matsapha Industrial Site, which is home to the sophisticated Inland Clearance Depot (IDC) whose business is to facilitate rapid movement of goods. The Low-veld is a sub-tropical region and it is where most of the country's sugar cane is grown. The eastern side is the Lubombo plateau, which exhibits climatic conditions similar to those of the middle-veld. Contrary to its size, the country is quite industrious and is often referred to as the 'Switzerland of Africa'.

### **3.2.1 Politics**

Throughout its history, the kingdom of Swaziland is a fully independent country with its people staunchly committed to safeguarding their cultural, social and natural heritage for future generations. Swaziland gained independence in 1968 after more than 50 years of British rule. Known, as the “place of Kings” Swaziland is Africa’s last truly traditional Kingdom. The King is the head of state and he appoints the Prime Minister who is the head of Government. At the very heart of this strongly traditional society is the Ngwenyama, the father and the life force of the nation, the King. Without the King, it is believed, there would be no Swaziland and it is true that his persona is firmly woven into every aspect of the Swazi lifestyle. It is difficult to talk of Swaziland without speaking of the King and it is difficult to talk of the King without speaking of tradition.

It possesses a wealth of attractions such as a diverse and colourful culture, a beautiful and varied landscape, abundant wildlife and a warm, friendly people. Its special attraction is, its unique blend of traditional, modern and ancient customs that are inextricably woven into the everyday fabric of today’s life.

There have been periods of panic in the past few years where labour unions suddenly became militant. The issues they raised were more political than labour related. Realising this, the country’s authorities instituted the Constitutional Review Commission, which is currently drafting the country’s new constitution. It is anticipated that after this exercise has been completed, political issues will be deliberated upon in proper forums, not in labour constituencies.

Within these core principles, government has nevertheless shown itself responsive to the need for change and has accommodated public voice at all times in the development of the nation. Consultative processes are seeing to the drafting and establishment of new constitution and continual evolution of the national development plan. The country has enjoyed long periods of relative political stability and tranquillity among troubled nations and is still considered a safe haven for tourists and foreign investments.

Swaziland is a member of the Regional Tourism Organisation of the South Africa (RETOSA) the tourism marketing arm of the South African Development Community, which promotes Southern Africa as the world’s leading ecotourism destination. In this sphere RETOSA is engaged in a five year plan with a range of promotional materials being used by tour operators from sources markets. Activities are targets in priority markets that include Great Britain,

Germany, Switzerland, Australia and the SADC region itself. Tourism trade fairs and exhibitions include the worlds largest tourism fair held in Bellin, the World Travel Market in London and South African “ Indaba” while other markets such as Scandinavia and Sweden have also been investigated. Through membership of regional tourism groups workshops are sponsored for the travel and hospitality industries to learn more about the countries tourism attractions.

Classified as a middle developing country, Swaziland today faces enormous changes and challenges economically, politically and socially. A greater commitment to action is being called for with programmes that are geared to achieve improved results in socio-economic development.

### **3.2.2 Population**

The population of the country is about one million people, the majority of which resides in the rural areas (about 77%). High population numbers have created pressure for change in traditional household structures and farming systems. Traditionally, the average Swazi household would engage in subsistence farming and whatever is left would be sold to earn income. Land shortages, coupled with spells of droughts have forced the majority of males to move to urban areas and to migrate to South Africa in search of formal wage employment (The National Development Strategy-Vision 2022). Consequent to the increased migration of males, an increasing proportion of families are effectively headed by females and generally have inadequate access to the necessary resources for decent living.

Half of the country’s population is under the age of 15 years, which represents a unique demographic profile. The formal labour force comprises over 98,000 people (2002 estimates) and has been growing at the rate of 1.7% per annum. Unemployment is about 30% and each year 10,000 well-educated school leavers come onto the market with only 20% being able to find jobs.

In the past, official policy on population control has been weak and indecisive. Whereas the country’s first Development Plan after independence noted the problems posed by high population growth, it suggested that the issue was best left to individual families to resolve. It was not until the past two years that the Government established a Population Unit within the Ministry of Economic Planning and Development to deal with population issues. The unit will, among other things draft the country’s population policy.

The country is further faced with yet another challenges, that of high HIV/AIDS prevalence rate. Since the mid-1990s, the HIV/AIDS crisis has continued to pose a serious threat to economic growth and development. The devastating effect is reflected in the life expectancy index for Swaziland that has fallen from 47 to 44 years. The current food crisis in Swaziland has been compounded by the effect of HIV/AIDS in the country with an alarming number of adults infected. The intensity of this pandemic represents the most important health challenge facing humankind as well as the biggest threat to the economic and social development of the Kingdom of Swaziland.

Encompassing both the private and public sector, an HIV/AIDS Emergency Special Committee has been set up with an action programme and plan still being developed. Financial resources are also being utilised to educate the nation and to provide care and counselling to those who are suffering. A number of non-governmental organisations have been appointed for educational purposes and to mobilise resources. Within local fundraising initiatives assisting in meeting the costs of coping with the disaster, non-governmental agencies, donor organisations and representatives of a broad spectrum of society supplement and strengthen the government's disease prevention efforts. In recognition of this need for collective effort, the government is taking into consideration an effective tax relief mechanism for those who contribute to efforts against the pandemic. Programmes that have been reinforced for 2003 are home-based care and expanded voluntary counselling and testing services. An allocation has also been provided for orphan support.

According to the 2002 antenatal attendee figures, 45% of the country's pregnant women are infected with the virus, which causes AIDS. In response to these alarming figures, HIV/AIDS has since been declared a national disaster. Mortality from this pandemic is high among the economically active and children under the age of five years. This will have adverse consequences on the human resource needs of the country (Swaziland Review Of Industry, Commerce And Tourism, 2003).

### **3.2.3 Economy**

Swaziland's economy has been the most open in Southern Africa. The country is now home to over fifty foreign firms from South Africa, the United States of America, United Kingdom, Japan, the Republic of China (Taiwan) and Germany, among others. The companies operate



mainly in the manufacturing sector, which accounts for about 35% of GDP and forms more than 50% of all FDI activity.

Foreign Direct Investment (FDI) is playing a crucial role in economic growth and development. It is not surprising, therefore, that many developing countries, Swaziland included, in their quest to spur economic growth, have made notable efforts to attract Foreign Direct Investment in the last decade. In addition, the shortage of capital for financing production and trade has led governments to intensify their efforts to attract FDI. Although total flows to the developing world have been increasing in the recent past, the distribution is grossly uneven. In particular, Sub-Saharan Africa has lagged behind in attracting inward FDI. It remains a challenge for most governments of countries in this region to persevere with reforms already under way, especially in the era of globalisation, a phenomenon that has taken the world economy by storm.

In contrast, FDI has the appeal of bringing additional resources such as technology, management know-how and access to export markets that are desperately needed in developing countries. In addition, FDI has the ability to create employment opportunities for developing countries, most of which have high unemployment rates.

### ***Economic Performance***

Gross Domestic Product (GDP) is currently \$1.2 billion and is growing at an average rate of 2.5% per annum. Swaziland is one of the few countries in Southern Africa, outside South Africa, that has recorded impressive growth rates after independence. Over the period 1968-1996 the economy grew at an average annual rate of 6.5%. The impressive growth rates translated to increase per capita income, which grew at 3.3% per year. High economic growth rates were recorded inspite of the acceleration in the population growth rate from 2.8% over the period 1968-1976 to 3.2% over the period 1976-1996.

Since the 1990s the economy has been on a downward trend. Per capita income has been declining in a rather faster pace with a significant contribution also coming from the acceleration in population growth. Major factors contributing to the falling economic growth included declining Foreign Direct Investment (FDI) inflows in the 1990s coupled with long spells of drought periods experienced between 1989-1994.

Rapid industrialisation during the 1980s shifted the economy from an agricultural based one to an industry-based economy. Nevertheless, to the extent that a large proportion of the manufacturing is agro-based (mainly sugar, wood pulp and citrus canning), the backbone of the Swazi economy is still agriculture and consequent to that, climatic conditions play a major role in determining growth (Swaziland Review Of Industry, Commerce and Tourism, 2003).

### ***Availability of Labour***

The available labour pool is a product of an excellent education system. The country has 121 well-equipped secondary schools, which place great emphasis on pre-vocational education. There are a number of institutions (university, technical, vocational, commercial and teacher training) that play role in the provision of training for national workforce requirements. The education system of the country is undergoing a major revamp where emphasis is on life skills. There is an on-going pilot project, which was initiated to introduce business-oriented subjects in a selection of schools throughout the country.

In a country where education is not compulsory, 25% of the population attend school, and that is a major achievement. The literacy rate is currently estimated to be around 75%. All levels of schooling are available and these are pre-primary, primary, secondary and tertiary levels. The country boasts of third level institutions offering internationally recognised levels of technical, commercial and vocational training. The University of Swaziland offers a wide range of degree and diploma courses in business, engineering and humanities. The potential for Swaziland to grow its tourism industry, to double its contribution to national income is very real. An additional advantage of the Swazi workforce is its ability to speak and understand English.

### **3.2.4 INFRASTRUCTURE**

#### ***The Road and Rail network***

Although Swaziland is a land-locked country, access to the finest ports in South Africa and Mozambique is made possible through a modern road and rail network. The Ministry of Public Works and Transport is responsible for the planning, development and maintenance of the road network including regulation of private transportation services, civil aviation and railways.



The government has spent quite a substantial amount of money to improve the road network rated as in good condition with a highway system extending for some 3400 kilometres in the country. Policy measures aimed at improving the existing physical infrastructure are in place and these should enable the country to take full advantage of regional integration initiatives.

Also, renovations have taken place at Matsapha International Airport with funding from the government of the Republic of China and it is centrally located 8 km from Manzini and 40 km from Mbabane. The Royal Swazi Airways operate scheduled air services and suitable connections to numerous major regional cities. Tourists can use the frequent direct links available such as Johannesburg, Cape Town, Maputo, Harare, Gaborone, Harare, Maputo, Dar-es-Salaam and Nairobi.

### ***Telecommunications***

A major programme for the digitalisation and upgrading of the country's telephone network was completed in 1999. Swaziland's telecommunication system has become one of the most advanced on the African continent with the commissioning of the cellular network. Automatic international calls are easy to make and tourists can use the mobile phone communication. International code for Swaziland is +268 (from RSA: 09268). The Internet has also become an integral part of communication in the country with the establishment of several Internet service providers.

### ***Electricity***

Currently the Swaziland Electricity Board (SEB) is responsible for supplying power to households and businesses in the country and is servicing over 31,000 clients. It is envisaged that a more efficient power supply will be ensured with the 400kv-electricity project, which involves Swaziland, South Africa and Mozambique.

### ***Water***

The Swaziland Water Services Corporation (SWSC) undertakes the provision of water for industrial purposes. Industrialists have no problem in obtaining reliable water supplies and adequate sewerage disposal. In its commitment in supplying safe drinking water, the SWSC continuously monitors the quality of water it supplies against guidelines set by the World Health organisation.

### **3.3 THE GAPS MODEL OF SERVICE QUALITY**

The service blue print assists the tourism industry to determine whether the industry is providing a quality service to its tourists by meeting their expectations. It is important for the tourism industry to spend more time and energy finding out what their tourists really want. Tourists go where they are wanted and stay where they are well treated.

The gaps model of service quality brings customer focus and service excellence together in a structured and practical way. It focuses on strategies and processes that firms can employ to drive service excellence while maintaining a focus on customers. The gaps model will be used to frame this paper and the following analysis has been performed with the adoption from the Gaps Model Of Service Quality (Zeithaml & Bitner, 2003).

#### **3.3.1 The Provider Gaps**

The gaps model positions the key concepts, strategies and decisions in services marketing in a manner that begins with the customer and builds the organisation's tasks around what is needed to close the gap between customer expectations and perceptions. The central focus of the gaps model is the customer gap, the difference between customer perceptions and perceptions. The tourism industry needs to close this gap between what tourists expect and receive in order to satisfy and build long-term relationships with their tourists.

The right approach to retain tourists starts with trying to understand them more than to work out what to do with the knowledge. Now tourism industries have some of expensive new electronic gadgetary at their disposal to help them manage their tourist relationships and most have found it hard to use it effectively. Some tourists may be able to find answers to their own questions more quickly on a website than on the telephone especially if the latter involves waiting on hold for 20 minutes. These gaps can be due to the following:

#### **3.3.2 Not Knowing What Customer Wants**

Many reasons exist for managers not being aware of what tourist expects: they may not interact directly with tourists, be willing to ask about expectations and be unprepared to address them. When people with the authority and responsibility for setting priorities do not fully understand tourist's service expectations, they may trigger a chain of bad decisions and suboptimal resource allocations that result in perceptions of poor service quality.

As the Swaziland tourism industry has seen the need to be tourists-driven, it strives to offer the highest quality tourist destination and is flexible to the tourist's ever-changing needs and different family structures. It tries to go beyond their expectations and employees in the tourism department feels so involved and recognised thus making the channels of communication easier as the tourists complains are being conveyed to the management. Employees are sometimes able to anticipate their expectations better than the tourists themselves.

### **3.3.3 Not selecting the right service design and standards**

The tourism management sometimes perceives that the tourists expectations as unreasonable or unrealistic. They believe that, the degree of variability inherent in service defies standardisation therefore setting standards will not achieve the desired goal. When service standards are absent or when the standards in place do not reflect tourist's expectations, quality of service as perceived by tourists is likely to suffer. In contrast, when there are standards reflecting what tourist's expect, the quality of service they receive is likely to be enhanced. The physical setting in the Swaziland tourism industry is designed to make their stay more memorable and exciting therefore setting a defined tourist performance standards has a powerful positive effect on closing the tourist gap.

### **3.3.4 Not delivering to service standards**

Although guidelines exist for performing services well and treating tourists correctly, high quality service performance is not a certainty. Standards need to be backed up by appropriate resources (people, systems and technology). Also, it must be effectively supported, that is, employees in the tourism department must be trained, monitored, measured and compensated on the basis of performance along those standards and even when standards accurately reflects the tourist's expectation. If the industry fails to provide support for them and if it does not facilitate, encourage and require their achievement, the standards do no good.

When the level of performance service delivery falls short of the standards, it falls short of what tourists expect as well. The Swaziland tourism industry recruits people who are inexperienced and put them in their specific roles with no conflict instead they compliment each other as a team. They become empowered and creative with the support of the industry's culture in their daily work. Employees have some of the required resources to carry out the

service including technology and support systems. Being proactive and not defensive, it helps the industry if there is a crisis, it is able to handle that crisis and recover it quickly.

To deliver better service performance, issues such as recruitment, training, motivation, job design and organisational structure must be addressed across functions if they are to be effective. Indeed, ensuring that all the resources needed to achieve the standards are in place reduces the tourist gap.

### **3.3.5 Not matching performance to promises**

Promises made by the tourism industry throughout its media advertising, sales force and other communications may potentially raise tourist expectations that serve as a standard against which tourists assess service quality. Therefore, the discrepancy between actual and promised service has an adverse effect on the tourist gap. Broken promises can occur for many reasons: over promising in advertising, inadequate coordination between operations and marketing, differences in policies and procedures across services outlets.

Tourism industries frequently fail to capitalise on opportunities to educate tourists to use services appropriately. They also fail to manage tourist's expectations of what they will receive in service transaction and relationships. One of the major difficulties is that, tourists communications involves issues that cross disciplinary boundaries. Because service advertising promises what people do, this type of communication involves functions rather than marketing department. This is due to what people do; it cannot be controlled in a way that machines that produce physical goods can be controlled. When employees who promote the service do not fully understand the reality of service delivery, they are likely to make exaggerated promises or fail to communicate to tourism service aspects of intended to serve them well. The result is poor service quality perceptions.

The Swaziland tourism industry has its own way of servicing tourists that is original, simple, spontaneous and informal. The promotion strategy is not so expensive nor over promising for the industry as the Swaziland Tourism Authority (STA) promotes the industry. Instead of the promises, it always tries to be in the public eye, causing a sensation. Tourists normally get more than they expect.

It can be concluded that STA management tries to close the gaps by keeping the tourists satisfied as well as the employees motivated and always willing to deliver the service.



### **3.3.6 Tourist expectations**

Ziethmal and Bitner (2003:532) define customer expectations as the standards of or reference points for performance against which service experience are compared. In the tourism industry, usually tourists expect excellent service that provides comfort, attention, and excitement, moving from one tourist destination to the other. The Swaziland tourism industry needs to close the gaps in delivering a quality service by excelling and tourists must get more than they expect.

## **3.4 THE CURRENT TOURIST ATTRACTIONS**

### **3.4.1 The Cultural Heritage**

Swaziland's strong historic culture makes it an ideal tourist destination. The promotion of her unique culture, ancient customs and traditions serves as the most important focus for creating a product image. Committed marketing and exposure are backing the unique aspects of this heritage to the global market.

The Swaziland National Museum plays an essential role in preserving past traditions and culture for future generations. It protects and displays traditional Swazi ethnological instruments and materials and it also responsible for the natural cultural heritage programme that prepares publications in Swazi culture and industry. An outreach educational programme on the importance of cultural and environmental preservation is conducted here.

The Swazi Cultural Village, an open-air living museum in the Mantenga Nature Reserve is a faithful replica of a polygamous Swazi homestead of a century ago. This "pride of the Swazi people" is used to display the way of life through demonstration of traditional dances and displays of craft and traditional artefacts. Ongoing development aims to improve facilities on offer.

### **3.4.2 Ritual Ceremonies**

The proud Swazis have always maintained their traditional tribal values than any country in the Southern Africa. Two major traditional ceremonies are held annually: the Incwala "Festival of First Fruits" and Umhlanga "Reed Dance".

The most important ceremony is the sacred Incwala (Festival of the first fruits) held usually in December or January with the date chosen carefully by astrologers. It is essentially a ceremony of Kingship, a mystical rite of powerful spiritual significance for the nation and is meant to renew the strength of the king and the nation for the coming year. The king and the nation are inextricably one and the cleansing and renewal ceremonies performed during the Incwala affect both king and nation. The Incwala is really a process rather than one ceremony and everybody takes part in the dancing that is “not watched”. The Incwala is said, “not to be watched” so tourists have to participate in this sacred ceremony.

The process starts at the last new moon of the year (December / January). Runners are sent to the sea to fetch water and on their return, rituals are performed parts of which involve the singing of sacred songs and performing ritual dances. Young men gather at the Royal residence and sing the king’s praises and fetch special branches that are used to construct a shelter in which the secret parts of the Incwala are performed. The Incwala ends in a huge festival celebration during which the king ceremonially eats of the first fruits of the new harvest. Traditionally the nation does not eat of the new harvest until this occasion. Dancing, singing, feasting and meditation accompany the entire six-day ceremony.

### **3.4.3 The Umhlanga (Reed Dance)**

The colourful Umhlanga “Reed Dance” is a fascinating ceremony that takes place annually around August / September depending in the moon phase (see Fig. 2). The girls in their teens and early twenties (tingabisa) of the country gather together wearing the colourful tradition costume to pay homage to the king and Queen Mother who is known as the Indlovukati, the “She Elephant”.



**Figure. 2 Umhlanga “Reed Dance”**

The final days are most spectacular to tourists from different countries when thousands of girls return to the kraal. The seemingly never ending line of girls, dance several deep, moving through the veld like a giant, brightly marked snake. Refreshed after a night’s sleep, they arrive in the Royal enclosure dancing, singing and ululating to deliver their bundles of reeds. The reeds are used to rebuild the windbreak of the Queen Mother’s Residence and symbolize the loyalty of the maidens (Swaziland Leisure and Activities, 2003).

#### **3.4.4 Handicrafts Industry**

Swaziland’s handicrafts are a major tourist attraction drawing people to visit the country as well as earning foreign exchange. Craft oriented operations comprise of an essential sector of the economy, producing a diversity of goods for local and export markets while providing substantial employment opportunities and generating incomes.

Within an extensive range of quality craftwork featuring prominently in specialist stores and roadside markets and stalls, the handicrafts produced here are widely recognised as being among the most creative in Africa.

The formal craft sector comprises a number of manufacturing concerns, specialising products such as mohair fabrics, ornamental candles tapestries and glassware. The informal sector, in which much of the work is that of individuals living in rural areas, continues to create employment and to keep traditional skills alive. Leather items include traditional sandals and

bags and traditional Swazi prints and batiks are very popular with tourists. Many items reflect techniques passed on from generation to generation while others have an Oriental touch showing the influence of the National Handcraft Centre.

Through the efforts of several enterprising craft companies such as Tintsaba Craft at Piggs Peak, basket weaving has become an artistic medium, using skills of over 600 women working in a developed project in rural northern Swaziland. Regular handicraft training workshops are held as well as sessions on pattern and quality upgrading.

As a result of the ongoing training, improvement in design work and refining of skills, the craft produced are of a high artistic quality and the beautifully patterned baskets are a far cry from the former traditional food bowls.

### **3.4.5 Natural Features**

Swaziland includes a great range in altitude from about 120 metres in the east to over 1860 metres in the Northwest. The unique, ancient rock (Sibebe), formation found here are of noteworthy geological and archaeological interest. The colourful diverse fabric is vividly evident in varied physiographical regions. The landlocked country has within its borders every feature of the terrain of the African continent except for desert.

### **3.4.6 Landscape**

Swaziland is a country of exceptional natural beauty divided to four distinct geographic regions namely: the Higveld, Middleveld, Lowveld and the Lubombo plateau. A car can easily explore these regions on mostly tarred roads without the need to travel great distance.

The vegetation varies accordingly to these geographical regions from the high summer rainfall area of the highveld in the west, to the drier lowveld areas in the east. Summers in the highveld are temperate and hot in the lowveld, winters in the highveld are beautifully sunny during the day with chilly mornings and evenings while the lowveld winters are always warm. The smallest region, Lubombo plateau rises to 600 meters and is bordered by Mozambique. This unexplored area is dissected by three main rivers separating the country from Mozambique's coastal plain and has abundant unusual plant and animal life.

## **3.5 TOURISTS AREAS**

Although this is a small country, the natural diversity is unusual with options that are unlimited. The four distinct geographic regions, with their varying climates and



characteristics may be seen as the main tourist areas in Swaziland, providing year-around enjoyment of a country that exhibits political stability and a low crime rate (Fig. 1).

### **3.5.1 Mbabane, Ezulwini Valley and Manzini**

Mbabane markets offers opportunities to visit handcraft centres for bargains that include exclusive decorators items while modern shopping complexes provide every request. The royal area of Lobamba is a source of great interest for visitors, while centrally situated, Manzini makes an ideal base from which to explore.

Apart from being scenically beautiful, the main route from Mbabane to Manzini passes many major attractions and crosses through the heart of the mystical Ezulwini Valley, the “Heavenly place”. This lush playground is the home of several luxurious hotels and a casino. Exciting tours may be arranged and opportunities for sports enthusiasts abound. Also, located here is the oldest and most frequented game park in the kingdom (Mlilwane Wildlife Sanctuary).

### **3.5.2 Piggs Peak and the North**

This popular resort is located in the highveld considered by many to be the most scenic region with mountains transversed by rivers that cut deep gorges in the dramatic landscape. The largest game reserves (Malolotja Nature Reserve) in the country is an unspoilt area of Africa with low shrub land and dense bush while two of the highest mountain as well as waterfalls may be found in another nature reserve.

### **3.5.3 Nhlangano and the South**

A picturesque route in this pretty district takes visitors and tourists through a magical area ideal for picnics. A well-structured wildlife sanctuary (Nisela Safaris) provides game viewing opportunities while whitewater rafting is popular at the Great Usuthu River.

### **3.5.4 Eastern Swaziland**

The Lubombo Area is made up of mountains ridges broken by the gorges of three rivers with a reserve that is 18 000 hectares in extent.

### **3.5.5 Accommodation**

A wide range and quality accommodation is a major asset. Swaziland boasts a broad spread of standards, size and location from luxury international hotels with spirits facilities to homely lodges and guesthouses specialising in personal service and rustic, traditional style establishments. There are also perfect locations for conferences and travelling is easy with all main roads being tarred and well maintained. Tour operators offer various outings and safaris may be tailor-made to suite personal requirements. Crafts and cultural tours provide a taste of the fascinating history and traditional lifestyle. The cheerful and friendly people are renowned for their excellent handmade crafts.

### **3.5.6 Sports, Adventure and Leisure Activities**

Focusing on the sustainable development of the naturally intact eco-environment that Swaziland possesses, these interest options lend towards the country being earmarked as a primary destination for visitors seeking outdoor experiences. With a natural heritage of rock structures, mountains, caves indigenous trees and plants, birdlife, rivers and bushlands, the country offers a range of trails through unspoiled landscaped of nature lovers.

Adventure sports include anything from abseiling and paragliding to caving, horse riding, mountain biking, and 4 x 4 trails. Water sports include white water rafting, sailing and water-skiing. There are also a number of thermal springs in Swaziland.

A sport, youth and culture section of the Ministry of Home Affairs cordials sports events and year round enjoyment of sporting activities is offered. There are several golf courses, among them the outstanding 18-hole championship course at the Royal Swazi Sun Hotel and those clubs in major centres. Tennis squash and bowls facilities are available and the varied terrain makes Swaziland an ideal country for tourists.

### **3.5.7 For the Wildlife Enthusiast Tourists**

Tourists can take open Land rover drives, guided walks or relax near a secluded waterhole. Swaziland's parks are uncrowded and suited to self-discovery. Chase the Big 5 at Mkhaya, Nisela and Hlane or share special mounts in a nature reserves with a bushbuck or butterfly. Tourists can witness Swaziland's remarkable biodiversity from the mountain heights of Malolotja, Mlilwane and Phophonyane game reserves to the Lowveld plains of Mlawula and Mbuluzi.

### **3.5.8 For the Discerning Tourists**

Tourists can visit the cultural village (Mantenga Cultural Village), the National Museum and King Sobhuza Memorial or hire a Swazi guide for a feast of stories and humour. Guided tours include trips to Bushman paintings, the worlds oldest mine (43 000 BC), traditional healers and remote rural villagers in these rural communities, tourists will discover the depth of Swazi hospitably – walking diversity paths with herd-boys drinking traditional brew with elders and joking with farmers in their fields.

Travelling is about discovery, so tourists need not to be shy to stop, divert or double-back for that lasting Swazi memento or furnishing. Further a wondering route of roadside stalls from Piggs Peak to the bustling markets of Mbabane, Ezulwini and Manzini or visit the famous craft outlets at Ngwenya, Mantenga and Malkerns. Tourists can mix their journey with coffee-shop stops, restaurants and picnics in the park. Indeed, Swaziland is a place to slow down, relax and enjoy.

Everyone has his or her own passion for adventure and leisure. Swaziland offers the freedom to plan it and enjoy it! Being a small country, blessed with diversity supply means that your time is spent creating experiences and not travelling between them. Add to this mild sunny weather and the peace of one of the world's most friendly and stable countries and you have a haven for exploration.

### **3.6 SWAZILAND TOURISM INVESTMENT OPPORTUNITIES**

Swaziland offers a unique experience for tourist with considerable interest shown by both region and international tourists. Undeveloped potential for growth exists particularly in the fields of game viewing, African cultural and handicrafts.

Tourism depends entirely on the quality of the resources and the political stability of the destination visited. Swaziland, so much a part of Africa, needs the growth and development that tourism can offer to improve the quality of her people's lives. The natural resources of the world are disappearing at an alarming rate and there is already a trend in developed countries to rediscover the unspoiled, natural areas of the world. Better and quicker transport will make distance one of the minor stumbling blocks when planning a vacation in future. The magic of Africa is still the continent's strongest selling point and visitors from Europe,

Asia and North America will gladly invest in a holiday in Swaziland because of its uniqueness, which should be kept intact.

For Swaziland to achieve its vision of growing to its fullest potential in the tourism industry, the government aims to capitalise fully on the national resources exceptional environment, cultural traditions and people. While the emphasis is on products and services that show potential for strong local involvement, specific tourism opportunities include the following.

- Tourist accommodation at new game parks and lodges in the areas served by the Lubombo SDI, as well as Maguga Dam and other service locations.
- Development of traditional sports games and dance displays at authentic villages and parks.
- Construction and expansion of amount and recreational facilities for domestic tourists.
- Development of long distance hiking trails incorporating the proposed walk to the sea and Royal route together with appropriate accommodation and other amenities along the routes.
- Tourism and environment combinations to accelerate new investment in infrastructure and tourism facilities.

Swaziland's millennium project also aims to accelerate new investment in infrastructure and tourism facilities. The establishment of partnership is encouraged between the private sector and local communities. Large-scale projects needs to be financially and environmentally available acceptable to local Swazi culture in keeping with the image it wish to portray in the market place.

Investment areas include the Maputo and Lubombo Spartial Development Initiatives (SDI), Maguga Dam and proposed tourism and bio diversity corridors. Already at an advanced stage, the Lubombo SDI is a concerted programme by the governments of Swaziland, Mozambique and South Africa aimed at ensuring that new investment occurs rapidly thus converting the designated area into an internationally competition zone of economic activity and growth.

This eastern area of Swaziland is an agrictourism investment zone with exceptional potential for tourism and significant advances for agricultural development. Core infrastructure

components of the initiative comprise the upgrading and construction of transport routes for a concentration on commercial traffic.

For investors in the private sector, the Lubombo SDI provides a foothold in one of the most important tourism development initiatives on the continent. The initiative aims to link the Kingdom of Swaziland with the South African Provinces of Mpumalanga and KwaZulu-Natal as well as Mozambique via a network of new highways and rail links. The area includes a potential cross border “peace park” involving Swaziland’s Hlane Royal National Park.

A series of theme routes is to incorporate wherever possible all five areas that compromise the Southeast tourism sub region of Africa. The vision of the South East African Tourism Communities is to increase visitors number along with their length of stay and expenditure by developing, positioning and marketing this sub region as a diverse unique and competitive tourism destination that offers complementary products of a high standards and present value of money. The aim is to stimulate the flow of tourist traffic within these boundaries namely Swaziland, Mozambique and South Africa.

### **3.6.1 Tourism As A Business**

Tourism has become a very competitive business. The competitive advantage no longer lies in natural resources only, but increasingly in the level of technology, information and innovation offered. Therefore the future of the Swaziland tourism industry will not only be defined by wildlife parks, beautiful scenery, cultural diversity or offer resources but rather by how well such resources are managed and to what extent they complement human skills and innovations. Swaziland has already a well-established network of nature reserves that cater for the environmentally sensitive visitors and tourists.

The World Tourism Organisation in its 1995 review of Africa tourism, considered Swaziland to be “one of the most” promising tourism destination on the African continent. However, Swaziland has not yet been able to realise its full potential in tourism and the contribution of tourism to employment, small business development, income and foreign exchange earnings remains limited.

### **3.6.2 Tourism and the Creation of Jobs in Swaziland**

Tourism is the world’s largest generator of jobs and if properly organised and focused, the tourism sector can create many jobs within a short period. Many of these jobs are in the

informal sector where people are less educated and more in need of specific training. Many tourist destinations have successfully used the tourism industry to encourage growth in other sectors of the economy and to generate new and innovative employment opportunities. The possibilities to stimulate growth both direct and indirect in the Swaziland tourism industry are:

- Creating opportunities for the small entrepreneur
- Opening economic opportunities for agriculture, curios (arts, crafts, souvenirs)
- Establishing a unique informal sector
- Promoting awareness and understanding among different cultures
- Helping to save the environment
- Establishing linkages with the services sector (entertainment, health, education, banking and insurance)
- Providing dignified employment opportunities and allowing rural people to share in the benefits of tourism development, while promoting more balanced and sustainable forms of development. Tourism provides an alternative to urbanisation, permitting people to continue a rural family existence but franchising both women and the youth.

The above is suggested in the Swaziland Tourism Authority (STA) as an example of how jobs can be created in just one sector of the tourism industry, if one quarter of the tourism accommodation establishments (not to mention restaurants and fast food outlets) in Swaziland began to offer live entertainment to guests, at an average of three entertainers per group, hundreds of entertainers could be employed within days. If large resorts opened their doors one day a week to encourage craft providers to market their products to visitors (on condition that everything sold is actually made by the entrepreneur, with a working demonstration of the skills) many employment and business opportunities will be created for the surrounding local communities.

### **3.6.3 Ministry of Tourism, Environment and Communication**

Acting as a catalyst for all tourism activities within the kingdom, the Ministry of Tourism, Environment and Communication is responsible for developing and promoting this vital industry as a national priority in a sustainable and acceptable manner. The main elements of the marketing strategy comprises the following goals:

- Positioning Swaziland differently in different markets.



- Developing strong product lines to meet visitors needs
- Taking full advantage of regional International trends and opportunities
- Full integrating into the international tourism industry.

#### **3.6.4 Stake holders**

Swaziland is ideal as a destination both in its own right and as part of a multi – destination turnip. Stakeholders are intent on creating a district image for Swaziland as a country that is desirable to visit both as a destination in its right and in combination with travel to neighbouring destinations. Intensified market analyses are being undertaken examining the preferences exhibited by tourists from other countries as well as the different areas of interest. With plans prepared for their upgrading sites of historical cultural and natural interest are promoted regionally, while a new range of diversified ecotourism attraction is being identified and developed.

#### **3.6.5 The Tourism Authority Act 2001**

The Tourism Authority Act 2001 set out the establishment of the Swaziland’s Tourism Authority. The objectives of this Authority lie in coordinating and facilitating the development and monitoring and marketing mechanism of the tourism industry. Its various functions see to the promotion of local and foreign investments in the tourism industry.

- Translation of the general and specific objectives of the natural tourism policy into strategies and plans for effective and efficient implementation.
- Act as a mouth piece for the industry establishing Swaziland’s image in the tourism world through marketing and public relations campaigns in local, regional and international markets.
- Registering licensing and monitoring of all participants in the tourism industry while promoting their interest on a natural regional and international basis.
- Promoting and facilitating the development of tourism infrastructure, facilities and services while identifying and encouraging expansion by the existing industry and defining strategic zones.



### **3.6.6 Involvement of Local Community Tourism**

In an effort to make tourism available to all sectors of the local population, development of community-based tourism is a prime area in the objectives of the Swaziland Tourism Authority (STA). With a department specialising in identifying sustainable tourism projects in rural areas, the STA has appointed two officers to carry out the responsibility of working with rural communities to enhance and develop potential sites for tourism projects around the country.

The approach to this development is a form of tourism that is owned, driven and controlled by members of the communities, a process that should guarantee maximum benefits derived from the resource base for tourism in their area. The by-product for this is that conservation would also benefit as communities realise the need for sustainable use of their resources.

### **3.6.7 The Hotel and Tourism Association**

Another action promotional aim is the Hotel and Tourism Association. Intensified efforts towards making the country a more competition tourist attractive include promotional campaigns carries out internationally and locally. Numerous initiation and projects are designed to provide further accommodation facilities and improve entertainment attractions.

## **3.7 THE BRAND KEY**

### **3.7.1 Branding Swaziland**

It is the Brand that differentiates a product from a competitor's. A brand is the collective sum of its (Swazi) history, its culture, its products and services, its people, its customers, its financials, its operations and its leadership. The brand must be a reflection of the core Values that must remain inviolate and the brands ambassadors will be the positive Swazis. They all have a responsibility to reflect the country 's brand values in everything that they do then they can close the gap between the perceived brand promise and the actual brand promise. Collectively they can influence the economic engine of the country.

Although, the benefits of having a good reputation are many, they come down to one single element; a strong reputation will create a strategic advantage for their country in an increasingly competitive marketplace. As much as it is an intangible asset, a good reputation generates tangible results:

- The ability to command a premium price for products and services

- The ability to attract and retain mutually beneficial stakeholder relationships
- The ability to attract the best talent
- The capacity for image resilience so that negative developments and events are not cataclysmic to the brand. Reputation is essentially a piggy bank of credibility. If properly managed and replenished, reputation can be a powerful buffer against adversity. They need to create this buffer for Swaziland so that individual events cannot detract from the brand.
- Reputation management is a natural extension of brand care. Good reputations sell goods and services while the poorly managed ones destroy shareholder's value.

### **3.7.2 Swaziland Tourism Authority Vision**

To transform the image of Swaziland locally and internationally by: creating, coordinating and integrating a compelling Swazi brand proposition.

### **3.7.3 The Concept of the Swaziland Tourism Authority (STA)**

- The STA was created as a direct response to the need to communicate to the rest of Swaziland's vision as a leading emerging market.
- Numerous, though uncoordinated marketing initiatives were being undertaken but were not leveraging off each other or maximising efficiencies.
- Public, private sector partnership fully funded by Government at the moment but as they move into roll-out stage, they hope to shift that balance. Companies are beginning to realise that if they collectively build a better country then they will benefit and are therefore and happy to engage and support their efforts.

### **3.7.4 The Swaziland Tourism Authority Mandate**

- To focus efforts on Tourism, Trade and Investment and these are the three areas that will generate jobs which in turn will help reduce poverty, crime and many other negatives they are experiencing
- Manage Brand Perceptions
- To coordinate marketing efforts of all Swazis messaging from individuals to Corporate and Government. If they all speak with one language, all promote the country in the same way then they will have billion of rands worth of messaging reaching the globe instead of a little bit here and a little bit there.

- To create information and news proactively rather than reactively. At worst, it has sometimes reacted to incorrect or negative reporting and it encourages proactivity

### **3.7.5 Role of the Swaziland Tourism Authority (STA)**

Building on the original platform, they have further defined themselves as an enabler to:

- Provide leadership and a birds-eye-view
- Co-ordinating role-sharing research, looking for synergies in all marketing efforts
- Leverage initiatives (soccer)
- Creates strategic frameworks and share learnings
- Encourage patriotism and national pride, without that there is no point in marketing to the national community. It needs to align Swazis, give them the correct information so that they can speak with authority about the abundant successes.

### **3.7.6 How is Swaziland Currently Positioned?**

And so, its positioning is... Swaziland, Alive with Possibility!

It often has positive headlines due to its unique traditional culture and the aura of the Monarchy. Now it moved into brand roll out where it tries to ensure that every brand interface is consistent with the brand values. The country does that by working hand-in-hand with the Tourism department, Ministry of Agriculture and Cooperative, Swaziland National Trust Commission (SNTC), Swaziland Environment Authority (SEA), Swaziland Tourism Authority (STA), Swaziland Investment And Promotion Authority (SIPA) and key stakeholders. These departments will translate the brand essence for their use and ensure that it is appropriate for their business objectives.

The STA task is to make sure that the perception is correct and accurate. If it does not actively position Swaziland then the international media will advertise the country according to their own agendas. Swazis themselves often endorse the positive perception and the STA has started a number of channels of communication to enable it to support its mandate. It is engaging with “Front liners” that is, companies and organisations have to sell Swaziland first before they can sell themselves.

An example of how stakeholders will translate the mother brand positioning for use:

- Mbabane and Manzini are both cities “Alive with Possibility” but the

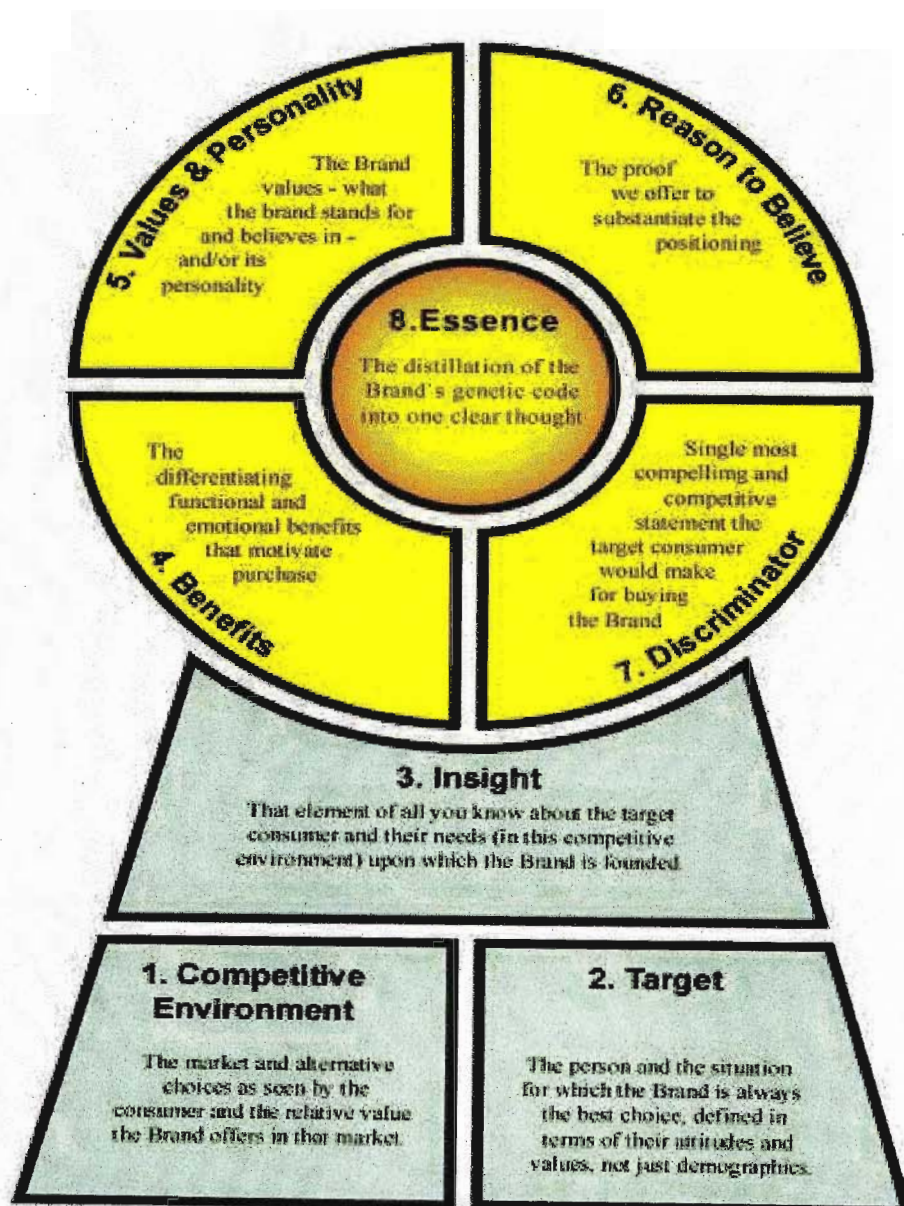
- Who you are
- What you have
- How you do things..... is completely different and will result in different communication but with the same “ take out.”

### **3.7.7 Website – <http://www.welcometoswaziland.com>**

- This is a website dealing with Tourism, Business and Investment
- Building communication links with Swazis abroad
- Emphasis on infrastructure, investment and tourism
- Simplifying government information and access
- All government departments and tourism businesses are being asked to promote this web address for uniformity and ease of access

The “Brand Key” developed by Unilever has been adapted to the Swaziland Tourism Industry. The brand key is used in making sure that the industry is well defined and briefing for advertising. Central to this theme is, the understanding of tourist’s needs, defining the target markets, defining the country’s differentiator and providing a series of “reasons to believe” in the brand.

**3.7.8 The Unilever Brand Key has been depicted to the Swaziland Tourism Industry as follows:**



**Figure 2: Unilever Brand Key (Adapted from [www.imc.org](http://www.imc.org))**

### ***Competitive environment***

- The tourism industry is highly competitive and volatile in nature.
- Swaziland tourism industry provides most enjoyable tourists destinations at the lowest cost. Tourist's destinations are many in number and provide tourists vast choice of service and the tourism department have to come with innovative service to impress its tourists.

### ***Target***

- Swaziland tourism industry appeals to broad spectrum of tourists (young, middle and old aged).
- It is able to serve sophisticated, demanding and easy-going tourists.
- It has the ability to manage the coexistence between leisure and business travellers attracted to a broader range of the quality handcraft the country manufactures. Fun lovers.

### ***Insight***

- It has a collective African culture for enjoyment and sharing. Swaziland tourism industry sees itself in entertainment and leisure.
- Touring around Swaziland is memorable, affordable and entertaining. It provides good tourists attractions and tourists never feel bored in their long hours of touring.
- There is a growing realisation in the world that the dominant world powers may not hold all the solutions.
- In searching the world's better tomorrow, success depends on finding sustainable, creative solutions to every person's needs.

### ***Benefit (Functional)***

- Boundless opportunities (unlimited and continuous)
- It strives to offer the best cultural tourist attractions with quality handcraft to all tourists at the lowest cost.
- It is flexible enough to rapidly respond to the more independent, unpredictable and ever changing tourist's needs.
- Growth (dynamic stability with consistent and forward momentum, solution evolution, thriving and shaping change in a positive way)

- Fresh solutions that are sustainable and have impact and benefit all (solutions which build and bond communities, Win-win solutions, collective ownership, the whole is greater than the sum of the parts)

### ***Benefits (Emotional)***

- Touring around Swaziland is a pleasure and fun to tourists
- The transformation of you, me and us (experiences and solutions which change lives, fervent belief in a better tomorrow)
- The art of the possible, quantum leaps with the intensity that encompasses all of the senses

### ***Values***

- Buntfu (peaceful, respect for others, people's values, hospitality and warmth, welcoming, embraces all)
- Transparent (approachable, real)
- Perpetual Optimism (fervent belief in a better tomorrow, open-minded and positive)

### ***Personality***

Energetic, vibrant and colourful (it has the best of Africa, passion and friendly people)

- Creative ingenuity (innovative, fresh, different and practical)
- Caring strength (empathetic)
- Youthful spirit (exploring nature, pioneering)
- Can Do attitude (open-minded, determined, a hunger to succeed with and through others, there is always a way, continual learning, vigorous, responds readily and proactive)

***“No other continent stirs the imagination like Africa”***

*Ron Irwin, Brandchannel*

### ***Reason To Believe***

- It is a peaceful country
- It has a very strong culture and the aura of the Monarchy
- Having accomplished some resources, Swazis need to demonstrate the beauty of their country and its people.



- It has ordinary people doing extraordinary things.
- It is about who it is, what it has and how it does things that make it a unique country.

### **Extraordinary People**

- Courage and determination
- African soul, spirit and energy
- Tenacious boundary breakers and daring pioneers
- Incredible achievements

### **Rigour and Vigour**

- Unique combination of governance, democracy, Monarchy, infrastructure and entrepreneurial skills

### **Unique Approach**

- Learning nation
- Ability to quantum leap
- Active adaptability
- Agility
- Collaborative approach

### ***Discriminator***

- Swaziland, a country at the Southern tip of Africa can inspire the world to a new way of doing things because its unique combinations creates refreshing possibilities.

### ***Essence***

- Swaziland is a memorable cultural experience

### **3.7.9 What it would like from the Brand Champions**

- Think big
- Treat everyone with dignity and respect
- Take personal responsibility in marketing the country
- Learn the National Anthem
- Do not be territorial but create a Swazi team

- Showcase “ can do” nation
- The more consistency, the more successful we will be
- Promote the country website
- Ensure every brand interface is world class and reflects the Swazi values
- Spread positive stories about their country
- Focus, focus, collaborative focus

*People tend to remember the best of the past and predict the worst of the future*

Indeed, the brand key is the starting point. The next step will be turning Brand Key into communication, aligning and inspiring Swazi leadership thus getting as many people as possible to attend the workshops, to live the brand and understand the benefits for all of them. Also, inspirational vision need to be communicated consistently and repeatedly with a total commitment “walking the talk” are the most important things. Surely, Swazis are ready and willing to invest in National Pride, they just need to provide the mechanism.

### **3.8 FACTORS INFLUENCING THE DELIVERY OF SWAZILAND’S TOURISM INDUSTRY**

#### **3.8.1 Introduction**

The Swaziland tourism industry has tremendous potential to create jobs compared with other countries and this is still not happening in Swaziland. The reasons for this are not easily identifiable but could include the following:

- Firstly, the government tourism is not recognisable for its potential as a job creator. It will take time to develop a tourism culture where people will experience the general benefits of a healthy tourism industry.
- Secondly, the tourism and hospitality sectors rely mostly on their own resources to train for their own needs. Since 2002 the whole tourism scene has changed and this in tourism demands needs analysis and more skills training.
- Thirdly, the whole educational system is still in turmoil and restructuring exercises and tertiary instructions did not necessarily address the real issue as far as education

and training is concerned. Currently, middle management skills in the tourism industry have been created by a number of related degrees and diplomas but none are specific to the tourism industry. Most of the time facilities and departments are more concerned about survival than addressing the needs of society.

On the positive side, the Government realised that proper training is vital for further tourism development and that there are at present shortcomings that need to be rectified “ perhaps the greatest deficiency in the tourism industry in Swaziland is the absence of adequate education, training and awareness opportunities”. The previously neglected groups in society are highly disadvantaged.

One of the key vehicles for doing so is educating and training the basic necessity that the majority of the population has not had access to. This is perhaps a simplistic way of looking at the problem as the complexity of the tourism industry warrants special measures to deal with the problem. The Government has subsequently taken the initiative, formulating guidelines and policies, as well as establishing special task groups and committees, in order to identify needs and to regulate the industry.

The existing training capacity falls far short of the needs of the industry. There is also a critical general need for community wide tourism awareness programmes as well as an urgent need for teaching wide range of basic skills to persons who are the first line of contractors with the tourist. The data suggest that Swaziland is not capable with its present out put of satisfying more than 5% of its training needs.

It is important to note also that training is very unevenly spread among the four district regions namely Highveld, Middleveld, Lowveld and Lubombo to a lesser degree and lacks proper training facilities. These discrepancies become more evident since every year institutions offering courses related to tourism and the hospitality industries are fully subscribed and hundreds of prospective candidates cannot be accepted to the courses. There seems to be a need for more tourism training institutions and a better utilisation of existing resources.

The other problem that needs to be addressed is whether existing courses and programmes offer fulfil the needs of industry. Most of the occupations in the hospitality, travel and tourism

industry are well defined and students can study fulltime, part-time or through correspondence at the University, technical and private colleges. The University of Swaziland (UNISWA) forms a focus for the academic and cultural activities of the kingdom. It has undergone a phase of development and expansion in responding to emergent needs, providing courses relevant to the needs of the workforce while the Swaziland College of Technology (SCOT) is the principal institution of higher-level technical and vocational education and training offering a range of Hotel and Catering and technical courses.

The Vocational and Commercial Training Institute (Gwamile Voctim) offers technical, vocational and commercial. The duration of these courses varies from a specific number of hours to a few years. At the completion of such a course the candidate receives a certificate and diploma. In most cases accreditation bodies oversee the content of the lowest levels, e.g. cleaners and porters, are mainly done on an in-house basis.

Course offered at the “traditional “ tourism-training institutions are well accepted in the industry. The existing institutions would be able to handle any normal increase in tourism levels by doubling up classes if necessary. Some of the problems that do exist are the following:

- Only a limited number of students can be enrolled;
- Tuitions fees are high;
- Institutions are usually in or around the larger cities and therefore discriminate against students from rural areas.

The main concern seems to be in the informal sector, where the training needs still have to be identified. This process should be initiated by Government but needs the full support of commerce and industry as well as input from education and training institutions. As previously mentioned, there is an urgent need to provide more training opportunities in the tourism and hospitality sectors, but existing institutions cannot efficiently deal with this demand as it involves new curricula, increasing student numbers and increases in staff. This implies that a new line of thought regarding tourism teaching and training should be developed.

The building of training centres in the rural areas linked with modern technology could supply some of the answers to the problems. The development of the necessary infrastructure i.e.

trained, lesson materials and educational facilities should receive priority treatment. This whole effort should also be community driven with strong support from business and industry.

### **3.8.2 Poor service delivery**

The poor products and services of the tourism industry are influencing the delivery of Swaziland tourism industry's potential. With good products and services, there is an opportunity for the Swaziland tourism industry to invest in itself and enables the firms to carry out market research in ensuring that it is selling the right product at the right place. Tourists are more likely to return to the industry when they have received good service and have enjoyed the products and will rightly complain if they have not. As long as the service they received over the counter was matched by the efficiency of the bookings itself, that is, flight on time, the hotel room clean, comfortable, adequate meals served by pleasant waiting staff, then the tourist will be delighted.

These days, there is a great emphasis on Total Quality Management (TQM) especially in the industry and this indeed is the key requirement of successful operations. Tourists rightly expect to be served properly, to follow their pastime in a safe and healthy environment, to enjoy really excellent facilities and have easy access to the museums, castles and other aspects of the natural heritage. Unless such outlets are well run, the Swaziland tourism industry cannot grow to its full potential.

### **3.8.3 Limited Involvement of local committees**

Another major problem facing the Swaziland Tourism industry is the poor investment of local committees of the industry. The tourism industry perhaps more than any sector provides a number of unique opportunities such as small guesthouses, tavern, shebeens, and theatre and laundry services. Despite these obvious and available opportunities many factors limit the meaningful involvement of local committees in the tourism industry namely: the lack of know-how and training, lack of finance, lack of information and awareness and the lack of incentive to reward private enterprises that build or develop local capacity and create job opportunities.



### **3.8.4 The Commitment on Politics**

A number of Swazis have not been involved in the planning, decision-making investment, development or promotion of the tourism industry. Committees have not been respectively involved in major investment decision for areas in which they live.

A great deal of work has to be done by both the government and tourism private sector to address previous imbalances to win back the support of the previously neglected groups and to demonstrate that tourism can benefit all Swazis.

The concerns and anxieties of the local groups need to be understood and adequately addressed in building a successful tourism industry in Swaziland. Some of these concerns are:

- Tourism is a white man's thing and not for us – tourism is perceived as catering to the predominantly white upper and middle classes. There is a belief that “tourism is what whites do when they go to Malolotja Nature Reserve”
- Complete lack of knowledge and understanding of what tourism really is and there is a perception that tourism refers only to people travelling around and staying in hotels. The wide opportunities offered by tourism are not appreciated.
- Lack of training opportunities for local people in society affectively limits meaningful participation in the tourism industry.
- Lack of involvement since Swazis are not tourists at all.

To succeed any tourism development policy, Swaziland must seek the meaningful involvement of the communities, not only in the supply of the labour services but also in entrepreneurial activities.

### **3.8.5 Limited Infrastructure**

There is a limited infrastructure in the rural areas that severely limits the participation of rural communities in the tourism industry. Also, the absence of adequate transportation services effectively prevent rural communities from participation in the industry both as potential supplies of products and services and as tourists themselves.

### **3.8.6 Lack of Appropriate Institutional Structures**

The lack of commitment in the Swaziland tourism industry is partially evident from the institutional provisions made for the sector. At the national level, tourism shares the portfolio

with Environment under the Ministry of Tourism, Environment and Communications. While at the first sight, these two seems to be ideal partners in reality, environment and tourism exist under one roof but do not work closely together. The Swaziland Tourism Authority (STA) has attempted to fill the gaps in many instances carrying out the functions of national government- grading and classification of hotels, licences, research and development training, marketing promotion and product development.

Swaziland Tourism Authority (STA) is the statutory body mandated with the marketing and promotion of tourism in Swaziland. STA will have private sector member's play a leading role becoming self- financing for its core activities through the introduction of levies on tourism products and services and other charges. It will be actively involved in regional initiatives to promote tourism. At the regional level, tourism organisations are still in disarray with some regions way ahead in terms of their tourism structures, marketing and promotion. At the private sector level, there are many bodies representing specific interests from car rentals and tour operators to guesthouses and hotels.

It is critically important to develop inclusive, effective national, regional and local structures for the development management and promotion of the tourism sector in Swaziland. The exact nature and organisation of these structures must be influenced by the vision and objectives set for the sector.

### **3.8.7 Training in the tourism industry**

In many countries, the growth of tourism as an industry is severely limited by the lack of adequately trained personnel. Where the industry has developed in spite of this constraint, the quality of service provided to the visitor has frequently been the causality. Unpleasant stays in hotels, negative experiences in rail and road transportation, and delays at airports are, for example, commonly attributed to the lack of facilities. However, the real problem is rather a lack of professionalism in the approach to human resources and their development.

Educators often make clear distinctions between education and training. Training is seen as highly structured method of instruction and skill development for specific tasks, such as hotel housekeeping, accounting, front desk management, and maintenance. Education on the other hand, is directed toward expanding one's awareness of the human environment and how to cope with this environment rather than exclusively developing job-related information and



skills. This often leads to the negative perception that training is less important than education. In the tourism industry, both levels of instruction should be applied, and it is essential to direct curricula towards the different outcomes of training and education.

The compilers of the Swaziland Tourism Authority stressed the point that skills development “are not intended to be seen as preparing individuals for the isolated performance of routine task in an unchanging environment but rather the development of the necessary competences which can be expertly applied in a particular context for a defined purpose”. Skills development should result in skilled performance such, as is the work of ‘skilled craft workers skilled managers and skilled professionals’.

This broad definition of applied competence or skills is essential in a rapidly changing world. This is where tasks seldom stay the same and where the adaptability of people to new demands and opportunities is as fundamental to employment or income security as it is to growth. In Swaziland related tourism education and training has been maintained at SCOT and in some of the private institutions. The involvement of University in skills training is at this stage negligible.

Swaziland started fairly late in the race to attract tourist from all over the world. This announcement, by late Tourism Minister George Vilakati is just the kind of marketing drive needed to bring Swaziland under the attention of overseas visitors. These efforts have now been boosted by international tourism marketing campaign, set to put Swaziland firmly on the map of favoured tourist destinations around the world to which more people will be exposed world wide. A combination of print and outdoor advertising sells Swaziland not only as a destination of diversity, but also as a place of renewal and sanctuary for the soul – along with a sophisticated infrastructure. Swaziland has the potential to compete with the best.

Despite the importance of tourism as a source of job creation and the importance of quality service as a determinant in the customer’s satisfaction with the tourism product, relatively few tourist business invest in employee training and attempt to improve the conditions of employment. The rates of employee turnover in tourism and hospitality are among the highest of any industry. Many businesses find it difficult to attract enthusiastic and committed employees. Some employers complain about the poor quality work they receive from their

staff, yet refuse to provide real incentives for good performance and to invest in training to improve morale and productivity.

### **3.9 THE ROLE OF GOVERNMENT IN THE SWAZILAND TOURISM INDUSTRY**

There is considerable debate about the role of government in the tourism industry. One proposition is that in most developed countries government has tended to play the role of supporting tourism development, as mentioned above by providing infrastructure and a representative national tourism authority. Many governments offer investment incentives to encourage development.

The Swazi government will establish an inter- Ministerial Committee for tourism sector development chaired by the Ministry of Tourism Environment and Communications, involving related Departments and Public Enterprises. This will aim to establish tourism as a national priority and coordinate Government actions to create an enabling environment for sustainable growth in the sector.

The Swaziland Tourism Authority (STA) will act as secretariat to this committee. The responsibilities of the committee that will work through the relevant line-Ministries will include:

- Promoting awareness of the country's tourism policy amongst members of Parliament, the traditional authorities, through the Government and public enterprise and service agencies and to the general public through schools, local Government and the mass media.
- Instigating studies and activities that will promote recognition of the contribution of tourism to the economy and the sustainable future development of the country.
- Identifying and implementing incentives for investors interested in community – involved and environmental beneficial tourism development.
- Improving the arrival experience for tourist at boarder post and the airport including better information and signage, longer opening hours and more friendly and efficient services e.g. visa requirements and issuing procedures
- Provision of improved tourism access and development on the basis of integrated area plans whilst minimising negative and enhancing positive environmental impact.
- Taking action to limit the spread of crime, in particular tourist-related crime

- Facilitating donor support for tourism-related development programmes, particularly in the area of human resource development.

The government is well aware that appropriate skills and experience are necessary to stimulate job creation (as well as international competitiveness). With the projected staffing needs of the tourism industry and the current lack of physical and financial capacity to deliver education and training the industry will increasingly be faced with a critical shortage of skills. The role of government is to formulate policy and create where possible the necessary infrastructure. It is also the duty of other role sections to share the responsibility with regard to the tourism training and education.

Tourism education and training is recognised as one of the fundamental pillars of a responsible tourism dispensation in Swaziland. The following principles form the basis of the government's approach to tourism education and training: encourage the tourism private sector to increase its commitment to training, to make training more accessible to previously neglected groups of society and to encourage the local media and NGOs to become partners in the tourism education and awareness process in Swaziland.

### **3.10 COMPETITIVE STRATEGIES FOR THE TOURISM INDUSTRY**

The tourism industry is the largest in the world and it will continue to grow and as it grows, it will offer enormous opportunities for creating wealth. With the decline of traditional exports such as sugar, coffee, cocoa, bananas and citrus, many developing countries will find that they have no choice but to turn to tourism. Even the former Eastern Block countries and the socialist countries of China and Cuba are attempting to develop tourism in a major way. The fact is that across the globe, dependence on tourism will increase.

Today, the issue is not whether to develop tourism but rather how to develop the industry in such that the local communities benefit, how to use the tourism industry to regenerate other sectors of the economy such as agriculture, manufacturing and services. Also, how tourism can create a sustainable economic and environmental basis for the future and how to limit tourism destinations to ensure adequate air access in a deregulated air transportation market (Thomson et al, 2001).

### **3.10.1 Competitive strategies are necessary for the Swaziland tourism industry**

In attempting to address the negative impact of tourism, a completely new tourism is fast emerging to challenge the old. A new tourism with its concern for nature and with an orientation towards what is flexible and individual is fast gaining ground. Although, it has already begun to take shape, new tourism will not just happen, it has to be planned and consciously created. It has to be willed into being. Competitive strategies are therefore critically important for Swaziland tourism destinations to sail the tourism course. This is so because:

- Comparative advantages are no longer natural
- Tourism is a volatile, sensitive and fiercely competitive industry
- The industry is undergoing rapid and radical transformation and the rules of the game are changing for everyone
- What is at stake is not just tourism but the survival of tourism-dependent economies
- The future development and viability of tourism-dependent economies will depend not only on tourism but also on the entire service sector.

Comparative advantages are no longer natural. They are increasingly man-made, brought on by the mastery of science, technology, human intelligence and innovation (Rada, 1980). Competitive strategies and creative use of human intelligence, innovation and creativity to create defensible competitive positions are critically important in order to convert natural advantages into competitive success. Those tourism destinations that believe that they can continue to survive because of their God-given gifts of nature, sun, sand sea and ski slopes are in for a rude shock.

Today, it is not just the whiteness of the sand, the hotness of the sun, the slope of the snow terrain, or the nature of the hotel, that will determine competitive success. More important than the mere existence of natural attributes is the quality of human beings who deliver services around them (e.g. hotel staff, tour guides, boat operators, customs and immigration officer).

Competitive strategies are also necessitated by the volatility and sensibility of the tourism industry. Tourism is perhaps the only industry that a bad press for example a riot, political events, domestic disturbances and hurricanes, can destroy overnight. Competitive strategies

are therefore necessary in order to give tourism destinations the capability to anticipate change, the flexibility to accommodate change and the robustness to weather the storms.

The tourism industry is fiercely competitive and increasingly so. Competitive strategies are increasingly necessary to stay ahead of the game. Unfortunately, advertisement and promotions in the marketplace and generous incentives to attract foreign investment to build hotels are often considered to be the requirements for success. Despite the increased competition and the radical transformation of the industry, Swaziland tourism industry is still considered as an easy laid-back industry not sensitive to the environment and local cultures.

This recipe may have worked in an environment where paid holidays, the jet aircraft and cheap package tours offered tourists a chance to visit a warm destination. Tourism industry is radically changing. Traditional best practices are now obsolete. The rules of the game are changing for local suppliers, governments, international deregulation, new technologies and new consumers have profound implications for the travel and tourism industry. No destination will escape their impacts. Competitive strategies are as necessary for government and tourism destinations as they are for industry players.

What is at stake here is not just survival of a tourism industry but the survival and viability of tourism-dependent economies and the delicate environments on which the world depend. New strategies of development are needed. Tourism has a key role to play in transforming small island economies into viable entities and strategies have to be developed to assist destinations to use the presence of a tourism industry to regenerate their agriculture.

Tourism destinations need to develop strategies that allow them to forge linkages with agriculture, manufacturing and the wider service sector. Tourism has an important role to play in fuelling growth in the service sector. To make this possible, entirely new strategies of development based on the concepts of flexibility, specialisation and focus are needed.

To take advantage of the opportunities that the tourism brings and to stay ahead of the game, competitive strategies are vital. Four crucial strategies for the competitive success of the Swaziland tourism industry are identified. These strategies are as follows:

- Put the environment first
- Make tourism a lead sector



- Strengthen distribution channels in the marketplace
- Build a dynamic private sector

Already, there is growing awareness among tourism destinations of the disadvantages that tourism brings. This, in turn is changing the approaches to the way in which the industry is being developed. The emerging trend is toward more planning, monitoring, assessment and a more cautious development of the tourism sector. Tourism destinations are realising that they have to put their environment first (<http://www.welcometoswaziland.com>).

### **3.10.2 Foster a culture of conservation**

A sustainable approach to the development of tourism can only be achieved if the government, private sector and the local population work hand-in-hand to achieve this goal. To build this strong partnership, conservation must become a way of life and it must become an essential part of the society and culture of the country. If a strong partnership exists locally and pervades the culture and orientation of the country then tourists can be encouraged to fall in line to “see and enjoy but do not destroy” the environment.

However, tourists will be hard-pressed to fall in line with conservation if there is no appropriate infrastructure for environmental conservation (e.g legislation and its enforcement, incentives, appropriately located receptacles for rubbish and recyclable materials). Also, if streets are dirty with the local population being careless. The development of a culture of conservation can be achieved through creating awareness of environmental problems and opportunities through leading by example and encouraging the press to take appropriate action (Ghauri, 1985).

### **3.10.3 Create awareness**

A fundamental part of cultivating a culture of conservation is developing awareness of the environment among the local population the business community and incoming tourists. This can begin at schools, through awareness campaigns, competitions, organizations (NGOs), environmental pressure groups and the press. The press and pressure groups have a particularly important role to play in creating awareness of the environment.

Environmental conservation can also become an important pillar in attracting tourists. If the governments of Swaziland could establish at least one significant protected area in each

destination and implement a coordinated environmental mandate, this could have important consequences for the future of tourism in the country. The action could help to generate awareness at the marketplace among potential visitors and investors of the conservation efforts of the country. Positioned as a beautiful country, complemented by rich culture, and tolerant way life, Swaziland can become the place on earth where one will want to live, work, play and be. Imagine the economic impact that this positioning will have in areas such as tourism, health, financial, professional, business and environmental services.

#### **3.10.4 Encourage press to take appropriate actions**

The press have particularly important roles to play in preparing people for the tourism industry. It can develop awareness of the negative impacts of old tourism and the positive gains that some have made in building the tourism industry.

While the press and many a pressure group have made brilliant strides in the creating an awareness of the ills of the old tourism, they still lag behind in the role of creating an equally explicit awareness of the positive role the tourism industry can play and is playing. The 'green initiative' taken by conscious governments and suppliers have not been given the attention they deserve - perhaps because they less juicy. While one recognizes the need to be critical of tourism, failure to give coverage to the positive examples deprives the tourism community of learning from the examples that others have set.

In this regard, it is critically important that the press maintains integrity and is not sidetracked from covering the real issues. For example, apart from the degree of 'spice' in the news, the press might not be inclined to cover the negative environmental impacts of certain industry because of the amount of advertising revenues they generate. It is not enough to talk about the environment and wish that the problems would just go away. It is important that the Swazi government lead by example, that is, to ensure that their own actions, policies and expenditure patterns are conservation conscious.

Many Swazi economics depend on a dominant export for their sustenance. The benefits derived from these major export industries usually accrue to the local economy in the form of government revenues through taxation and government participation in investment. This means that the government is forced to play major role in the economy sometimes creating over half of the employment in the country.



### **3.10.5 Make tourism a lead sector**

Despite the importance of tourism to the Swazi economy, there is still some reluctance to let tourism become its engine of growth. Development is still largely wedded to the physical goods sector namely agriculture and manufacturing.

The real limiting factor in preventing the Swaziland tourism industry from playing a lead role in the economic development is the fact that the view of tourism remains confined to tourists, hotels, sun and sand. The broader 'axial' possibilities that the presence of a tourism industry brings are not fully grasped. The potential of the tourism industry to create linkages with the rest of the economy is still seen to lie in producing locally the things hotels need such as linens, towels, food and furniture, in other words, the things one can see and touch.

Tourism is not seen as having the capability to be flexible and focused industries, be it in field fashion, entertainment, environment and health. The real potential of tourism to regenerate the agriculture and manufacturing sectors and to render competitive advantages to the services sector, is yet to be realized. In order to make tourism a lead sector, it is important to realize tourism's axial potential, to adopt new development strategies and to develop the services sector.

### **3.10.6 Development Tourism's Axial Potential**

One of the major economic curses associated with the spread of tourism in the developing world is the high leakage of tourist's expenditure. Although tourists spend a large proportion of this expenditure locally, it is "leaked" back into the economies of the tourists in order to import items for servicing the tourism trade and pay for advertising and marketing. The need to find solutions to this problem of limited economic benefits for host destinations is a major challenge facing the tourism industry. The concern with leakages in the tourism sector has attracted a great deal of research and analysis.

Tourism is an axial industry offering key opportunities for wealth creation. A number of services are directly and indirectly activated by the presence of a tourism industry- from air transportation, insurance, car rental, marketing and promotions to food and beverages, furniture and fixtures. No other goods, service and activity can replicate the unique opportunities that the tourism sector provides. The wealth creating effects of the tourism industry go much further than the bed-nights and airline seats that are consumed. One reason

for this is that, the final touches (values) are added at the destination, be it the basket of the fruit or flowers in the room, the unexpected toothache, the guided tour and other services. Most importantly, the presence of tourists in the country could lead to impulse shopping and purchases that are increasingly facilitated by the credit cards. This can lead to the purchase of items greater in value than the price of the holiday package itself (Poon, 1998).

Equally, unlike other industries, tourism brings consumers to the product. Apart from the normal consumption of sun, sand and sea and recreation, their presence in the country allows visitors to inspect other goods and services for sale in the region. Bringing visitors to the goods and services also has the advantage of sampling (e.g. food) as well as the opportunity to consume services e.g. business clients who rarely have the time for routine dental check-ups and it provides an atmosphere in which consumption of items is possible. This means that when tourists buy Swazi food and other items “back home” they not only purchase the item, they also buy the experience that goes with it.

It is these kinds of possibilities for linkages between tourism and the rest of the economy that are not realised in Swaziland. The real potential of the Swaziland tourism industry does not lie in building more hotels and trying to locally produce the items that these hotels use. The real potential of the tourism sector lies in:

- Using the presence of a tourism industry to market high-value-adding goods and services
- Using the presence of hundreds of tourists in Swaziland to overcome the limitations of small market size and distance from the major centre of metropolitan consumption. Tourists present in Swaziland can become an important source market for product testing, product launch and marketing. The opportunity must not be missed, for example, to spawn a high-fashion industry based on casual elegance for warm-weather destinations.
- Reversing the historic patterns of imported consumption patterns by encouraging visitors to eat and buy locally. Possibilities for these are enormous as the trend toward healthy eating and organic consumption could spawn markets for speciality agriculture (e.g. organic agriculture, cut flowers). This could provide an important impetus to diversify the export oriented agriculture sector. In fact, producing organically grown fruits and vegetables for the hotel sector is producing for an export market.

In order to realise the axial potential of the tourism industry, it is necessary to adopt completely new approaches to tourism and to focus on developing the service sector.

### **3.11 CONCLUSION**

The Swaziland tourism industry is entering the most existing and challenging times of its history but this industry is heavily dependant on the quality of its work force. The future of the Swazi tourism industry will depend to a great extent on the education and training of people who will come into direct contact with the tourist and will eventually be responsible for "selling" a good product. Marketing alone will not sell the country to the overseas visitor unless a quality service accompanies it, and a quality service can alone be achieved if people are properly trained.

Educational and training institutions should form a partnership with the tourism industry, local communities and government in order to provide the kind of training needed at the different entrance levels. Each of the four regions has its tourist appeals that require specific needs that should be addressed differently according to the circumstances. For the purposes of this study Swaziland will be used as a study area to establish what resources are available in tourism education, training and research, as well as assessing the needs for tourism training.

## **CHAPTER FOUR: DATA ANALYSIS**

### **4.1 Introduction**

This chapter deals with the main findings of the research. The findings mainly centre on the issues raised in the research objectives. In Swaziland, the tourism industry has been identified as one of the potential generators of employment opportunities and economic wealth. It is predicted that the global economy of the 21<sup>st</sup> century will be dominated by travel and tourism along with the information technology and telecommunication.

The success of the tourism industry achieving its target by creating jobs is however dependent on various factors. These factors include proper policy, planning and development co-ordination, statistics research industry standards and regulation: provision of infrastructure and major public attractions: marketing services; the provision of investments incentives: and tourism manpower planning and education services including establishing training and education standards. The tourism industry is predominantly service-based and its success depends on the quality of personnel working in the industry. Furthermore, the growth of both the national and regional tourism industry is dependent on the industry gaining international status. This will only be possible when the workforce is properly trained, to ensure that services offered are of an international standard.

When people are provided with training, their awareness increases and they are able to identify more niche markets. This provides the impetus for an industry and to expand at an exceptional rate. The future growth of the Swaziland tourism industry will be unnecessarily constrained without development and delivery of the relevant training programmes. A co-ordinated strategic planning process is required between the training providers in order for the tourism industry to develop into an effective economic sector. Strategic planning between different role-players needs to be co-ordinated and is best implemented by establishing one controlling individual charged with achieving the pre-defined training objectives, rather than expecting the co-ordination of training institution with vested self-interests (Swaziland Tourism Authority Strategic Plan, 2003).

The provision of good quality education is required to prepare a workforce equipped with skills. It should be based on responding to the needs of the tourism sector as perceived by employees and professionals who work in that sector rather than on the pre-conceived ideas of



a group of 'specialists' removed from the practical interface of the industry. It therefore becomes essential to conduct a "needs" analysis to determine the necessity and characteristics of the education and training requirements of the tourism industry. Due to number of providers within the tourism industry being vast and difficult to characterise, interviews with Travel Agents, the Ministry of Tourism, Environment and Communication, Swaziland Tourism Authority (STA) was undertaken to determine the factors influencing the delivery of Swaziland tourism industry's potential. Results from the interview serve to indicate possible trends within sectors of the industry that can be used to inform the needs analysis, highlighting areas in which further investigation is required.

## **4.2 THE MAIN FINDINGS OF THE RESEARCH**

### **4.2.1 Funding**

It is apparent that funding remains a problem at educational institutions. Respondents indicated that they are unsatisfied with funding in the tourism departments and institutions.

### **4.2.2 Marketing**

Respondents indicated that the suitable tourism marketing strategies are totally inadequate.

### **4.2.3 Qualifications of staff members involved in tourism teaching and training**

Its obvious from the study that staff at the university is well qualified and, in most cases possesses postgraduate qualifications. The qualifications of university staff are more discipline -focused with little indications of tourism or related qualifications. This should not necessarily be seen as negative. As soon as more exposure and involvement with the industry takes place, it will necessitate these persons getting to know nuances of the industry. There are several people in position of Master's and Doctor's degrees who would be able to advance and supervise within research. A further positive factor is that this group of respondent has many years of teaching experiences.

Personnel at tertiary institution are well trained and experienced. Although not many staff possesses postgraduate qualifications, the majority of qualifications are industry driven. The staff seems to be experienced in the tourism and hospitality sectors.

In some cases private college respondents did not complete this section. Due to this lack of information, a proper evaluation is difficult. The reason for this lack of feedback can be

found in the fact that the private colleges employ the services of temporary personnel and this information is therefore not available.

Based on information received, it is apparent that a high standard is maintained at some of the colleges. Staff are adequately qualified and experienced in tourism industry. Indication is however that qualification are lacking in the presentation of some courses. Private colleges have an important roll to play in the teaching and training of tourism-based courses. These roll will become more important should the predicted growth in tourism become a reality.

### **4.3 THE GAPS IN THE SWAZILAND TOURISM INDUSTRY**

#### **4.3.1 The need for tourism training in Swaziland**

The interviews indicated that all sectors consider some form of tourism training essential for the industry. Although it is not possible to determine the growth potential of the industry, indications are that long-term prospects for growth within the province are good. As it will take time to co-ordinate training programmes and to train people to function effectively in the industry, it is likely that it will take approximately four years before the first tourism specific students are available to the industry. It is therefore considered necessary for training to be embarked upon as soon as possible.

#### **4.3.2 Tourism Awareness Training**

A number of sectors identified a need for tourism awareness training, aimed at their own industry as well as businesses and communities in general. Frontline staff, namely people in direct contact with the tourist were identified as key elements in promoting the tourism field and were therefore considered most in need of awareness training. This was emphasized in the hospitality and service provision sector that have a large unskilled labour force many of who are in direct contact with tourists.

Awareness training is considered important to their personal development and the tourism industry is likely to improve their contribution to the industry. Courses offered by the Ministry of Education for domestic servants were mentioned as being suitable for the training of cooks and cleaners in the hospitality sector. Frontline staff requires a basic understanding of customer service as well as an understanding of intercultural characteristics and communication as well as the importance of the tourism industry to the economy of the



country. In addition to theoretical knowledge and practical skills need to be developed to enable staff to provide the required level of service.

The focus on the awareness training evident by the response indicates a field in its infancy. The natural progression in the development of an industry is for a raising of consciousness that will lead to a broadening of people's horizons. This is followed by an increase in identifying the potential of an industry and determining the feasibility of market niches. Harnessing the apparent and linkages of the different sectors provides a strongly competitive product characterized by the newly developing industry and which in turn strengthens and formalizes the new industry further. This leads to an increase in the demand for specialized training pertinent to the new industrial field. It is therefore considered that the tourism field in Swaziland is still in the initial stages of a new industry and the demand for specialized tourism training will increase in the future. The strength of the training demand will depend on the speed with which the tourism field develops.

Despite the awareness of tourism's potential among community leaders, it appears that this knowledge has not reached the community and service provider levels. This implies that service providers are relying on existing skills and developing products aimed specifically for the tourism market. It is considered that once intensive awareness training is embarked on, a need will quickly surface for more detailed formal training such as that provided by SCOT and the University. This will automatically lead to further development and growth in the tourism field.

#### **4.3.3 Information technology and marketing courses**

In addition to the large response for tourism awareness training courses, respondents indicated a need for more specialized training that would result in the production of tourism related information. Specifically mentioned were media production courses such as poster and brochure making. It was felt that the existing promotional material was not adequately distributed and that all participants in the tourism field would benefit from marketing courses.

Although some sectors did not provide training for employees, training is generally provided. The training is usually provided by the sector (in-house) but more specialized courses are contracted out to relevant specialists (out-sourced). The training provided is usually aimed at the personal development of staff and at increasing those skills required by the particular

sector. However, little of the in-house training delivered by these sectors is tourism specific. Most of the training is directed at increasing the skills required to provide the product, at increasing employee's life skills.

Some sectors encourage staff to upgrade their formal qualifications and provide incentives for training to become a life long process. This usually involves staff studying for additional tertiary qualifications. Although specialized certificate courses were also included, some sectors considered that there was a need for understanding the economy, changing legislation, environmental issues and policy. As the in-house training programmes are not currently fulfilling this need, consideration should be given to providing it by other methods.

#### **4.3.4 Tour guides and specialization**

A deficit in the current tourism industry identified by respondents was the need for tour guides. In addition, a need was identified for greater specialization and depth of the knowledge relating specifically to Swaziland. Training specialized tour guide and operators could generate this expertise. It was considered that people trained in this field could form a sector on their own. Some companies were not prepared to employ such people but were prepared to enter into partnership with them to strengthen an existing product and develop a new product.

#### **4.3.5 Inclusion of tourism courses**

Consultants, promotion officers and community-based organizations suggested that courses aimed specifically at the tourism product should be instituted rather than adapting existing courses from other sectors including token sections of tourism. This adaptation was particularly evident in the nature-based field with some trainers including tokens of tourism content within different subjects. It was suggested that re-curriculation should be undertaken to introduce tourism as a separate subject in formal training programs.

#### **4.3.6 Building capacity**

It is recognized that the tourism product cannot be totally provided for by the Government or larger organizations. There is a need for the smaller community provider. These community-based products serve as add-on attractions that are complimentary to products provided by the larger service providers and anchor facilities. However, developing this sector requires developing entrepreneurial skills, in addition to an intensive awareness training campaign and

life skills training programme. Currently, life skills training are sporadic but it is available to community's particularly disadvantaged communities.

Capacity building programmes, on the other hand, are aimed primarily at producing tourism artifacts not entrepreneurial skills. Few programmes are aimed specifically at previously advantaged communities who are also considered in need of training particularly awareness training. It is considered that community capacity building is required to ensure that a tourism product is produced while tertiary institute training ( e.g diplomas and degrees) is required to produce managers who will drive the tourism product produced.

Currently, middle management skills in the tourism industry have been created by a number of related degrees/ diplomas but none are specific to the tourism industry. Consultants consider it necessary to develop a specialized tourism-training course that would provide for a broad spectrum of skills within one person. This would alleviate the need to assemble a team of specialists to provide the required skills that is considered expensive.

#### **4.3.7 Bias towards community capacity building programmes**

Depressed economic trends combined with lack of investment capital seem to be focusing attention at a community level onto developing cultural and nature-based tourism products. This results in the perception that there is a great need for community capacity building courses and partnership formation especially with international tourists. It is considered that this may have put a bias on the results generated by this survey towards emphasizing the need for community capacity building and awareness of the tourism field at the expense of specific tourism training. While there is no doubt that instituting these courses will aid development of the tourism field, consideration should be given to supplying training for all levels of operatives required by the field.

#### **4.3.8 Strength of awareness training courses**

Awareness training was viewed as training aimed at raising the consciousness among staff on the position of tourism within the global and domestic spheres. Such benefits are to be accrued from the tourism field, the relation between the sector in which the staff work and the general regional tourism environment. It was thought that the training should be necessary for all staffing levels within organizations particularly as some management level personnel were not aware of how their businesses could be positioned to harness the apparent economic

potential of the tourism field. In addition, it was observed that awareness training on the implications of new legislation should also be included.

In most instances, companies required short courses in awareness training namely one to two day courses. If such courses were available, respondents indicated that they were prepared to consider a compulsory inclusion of the course in their staff training programmes. Some companies require that the courses be provided within the working environment offered by contracted specialists. The courses should emphasize practical skills.

#### **4.3.9 Awareness training for communities**

The promotion of tourism awareness among all types of communities was considered necessary. It was thought that this would allow communities the opportunity to identify ways of benefiting from tourism as well as becoming aware of their responsibilities in providing the requirements for a sustainable tourism environment. The need for community awareness training was strongly emphasized by those sectors closely interfaced with communities namely the publicity sector and the nature-based and community-based tourism providers.

#### **4.3.10 International Linkages**

However, it would appear that any tourism training facility will need to concentrate on more than simply training. This result indicates a need for the establishment of linkages with other partners who will provide the opportunity for international partnership such as that promoted by The World Wildlife Fund and the Wilderness Leadership School.

### **4.4 TRENDS IDENTIFIED FROM THE INTERVIEWS**

#### **4.4.1 Short term staffing requirement**

Staffing requirements of service providers in the Swaziland tourism industry are closely linked to the prevailing economic trends within the country. Government department and nature-based organisation are relatively optimistic about their staffing requirements.

Despite the current economic instability, key sectors such as the proposed airport development will however provide impetus to the growth of the Swaziland tourism industry. The long-term prospects therefore appear to be more positive and this should be kept in mind when assessing the need for training requirements.

Information on possible increase in the employment of tourism related sectors of the medium to long-term were difficult to assess and appeared to contradict the impression that the tourism industry is expanding. However, respondents did not indicate that tourism specific training should not be embarked upon. This trend was also encountered with the inception of the Nature Conservation training courses that have subsequently proved to be viable. A similar situation may prevail in the tourism field. It is considered that the economic climate is influencing the perceived need for trained personnel in the future and that planning of training should continue to ensure that personnel are available once the economic upswing is encountered.

#### **4.4.2 Perceived characterization of training courses required**

Training should be aimed at improving service provision within the industry. Additional outcomes should be the ability to interact with people of all cultures and improvement in business skills. Therefore courses such as: intercultural communication, general communication and languages were highlighted together with specialized courses such as: the first aid, hygiene, wine tasting and improved service ethics. Mentioning courses such as catered for business skills: financial, educational marketing, supervisory, interpretive, office skills, computer literacy, organizational literacy, public relations and statistics. While this list tends to be sector specific and not exhaustive, it could form the basis from which to embark on the curricula exercise.

The required qualification level varied from nil to postgraduate depending on the staffing level of the tourism industry under consideration. Thus tourism courses could be curricula to provide outcomes that would allow students the opportunity to accumulate credits and upgrade their qualifications. Currently, managerial staff has qualifications in related fields but these are not tourism specific. Practical experience has given these people the skills they require to be effective in their jobs. A need now exists for higher qualifications that are tourism specific.

The sectors indicate that they require short courses for staff development and that all training should be characterized by a high practical component with some sectors specifically mentioning the need for an in-service training period. This is similar to the training offered at UNISWA, SCOT and the private sector and possible that this is the type of training system that should be considered for the tourism industry.



## **4.5 RECOMMENDATIONS FOR THE DEVELOPMENT OF TRAINING IN THE TOURISM INDUSTRY**

### **4.5.1 Co-ordination of tourism training**

It has been suggested that for the tourism industry to develop effectively, a three-pronged strategy needs to be embarked upon namely, infrastructure provision, training and product development. All three strategies must come to fruition at the same time for the tourism delivery to be effective. It has also been suggested that it will take four years to produce the first tertiary trained, tourism specialists and this will not happen automatically. A dedicated professional will be required to co-ordinate the process.

For the industry of this potential magnitude, one person alone will not be able to produce effective results. Thus, it is recommended that at the very least, a core of specialists are assembled to determine a vision, plan policy and then detail operational strategy for the delivery of training programmes relevant to the tourism industry's needs.

### **4.5.2 Curriculation of tourism training with stakeholders**

In line with the national government requirements as well as the tourism industry's requirements, it is recommended that curriculation occur with the representation from all interested stakeholders. The curriculation exercise should be undertaken with each identified sector in the industry.

While cumbersome, this does allow for commitment and promotes a sense of ownership among stakeholders while producing a training course relevant to each sector of the industry.

### **4.5.3 Prior learning assessment**

As no formal tourism training has been available in Swaziland to date, many people working in the industry do not have formal tourism qualifications that can be used to determine their level of experience. Results show that in many sectors, employees do not have qualifications at all. In accordance with the Constitution of the Kingdom of Swaziland: everyone has a right to a basic education including adult basic education.

Somehow these people need to be given the opportunity to study further if they so wish. Curriculation with stakeholders in the tourism industry would allow for the determination of outcomes-based skills required in students. This would also allow for determination of skills



that people would have had to acquire before they can embark on a module of study. Showing proficiency in these pre-determined skills should allow people without formal qualifications to be able to enter into the next level of study.

#### **4.5.4 Suggestions for the possible structure of Swaziland Tourism Authority (STA)**

There are many factors that influence the delivery of the tourism industry. However, as mentioned previously, a strategy needs to be developed which focuses on at least three simultaneous movements. One of these movements should be the development of appropriate infrastructure to supply the tourist's requirements. In addition, there must be a concomitant drive towards the provision of a tourism product and lastly, there must be the training and development of skills required to deliver the tourism product effectively. Ideally, this three 'pronged' approach should be co-coordinated and the three factors brought to fruition at the same time thereby producing a holistic tourism package.

The purpose of this study is to focus on the factors influencing the delivery of Swaziland tourism industry's potential.

Results from the interview respondents indicate that, attention should be given to three main areas, namely: the awareness training, formal tourism training and the building capacity of participants in each sector of the tourism field. The capacity building must be relevant to each sector and directed at all levels of operation. The STA will need to produce relevant research that inform and direct the training programme.

#### **4.6 CONCLUSION**

The current tourism training and education situation in Swaziland is difficult to evaluate mostly because of a lack of relevant information. The diverse nature of the tourism and hospitality industry makes it difficult at this stage to ascertain the real needs of the different sectors of the industry.

Presently, tourism training is characterised by the lack of effective training for certain occupations. There is an over supply of manpower in some areas while there is a desperate need in other areas. Most of the tuition is taking place in "traditional" educational areas discriminating the poor rural areas. Apart from rectifying the wrong of the past, there is also a desperate need to review existing teaching methodologies and adapt new and more viable

approaches. These current efforts by the government and other bodies to rectify the situation are commendable, but it can only succeed if the problem is addressed holistically.

## **CHAPTER FIVE: RECOMMENDATIONS AND CONCLUSION**

### **5.1 Introduction**

This chapter focuses on the suitable tourism marketing strategy and the recommendations regarding the development of tourism education and training so as to improve the Swaziland tourism industry to its full potential.

The Swaziland tourism industry is poised for development with enormous potential benefit not only to those who are employed in the industry, but also to those who benefit directly. It is accepted that tourism is the key to economic empowerment because of the tremendous potential it offers for job creation and improving standards of living. The different facets of the industry are easily identified and training on various levels, for instance, the travel and hospitality sectors, have been in existence for some time. However, there are other facets of tourism that have not been explored to date.

Until recently, Swaziland tourism industry featured mainly overseas visitors who come here for the nature reserves (Malolotja Nature Reserve) and game reserves ( Mkhaya Game Reserve) Fig 1. There have been no local black tourists and there has not only been political change sweeping the country, but the tourism industry seems to have moved into the fast lane. Where the man on the street previously required no need for a minimum exposure to tourism, he is now confronted with the wide range of responsibilities on offer. The Government's contribution in promoting tourism through the RDP must not be underrated.

Even though there is a greater awareness of potential tourism offered to the man on the street, not much has happened in the industry to improve his situation. Wonderful initiatives are announced but often come to nothing for several reasons. One of these is, the lack of those who have to manage these projects.

Tourism research, education and training are not the responsibility of Government alone, but should be the concerted effort of everybody involved in the tourism and travel industry, business, education and training. Although this study was intended to investigate the factors influencing the delivery of the tourism industry, the study cannot be done in isolation and it has become necessary to substantially broaden the spectrum. The study has shown that our present institutions are mainly focused more on traditional fields of study and access is

limited to the more advantaged 'student'. The needs of all those requiring training are not adequately addressed.

The current tourism training and education situation in Swaziland is difficult to evaluate mostly because of the lack of relevant information. The diverse nature of the tourism industry makes it difficult at this stage to ascertain the real needs of the different sectors of the industry.

## **5.2 THE TRAINING AND EDUCATION IN THE TOURISM INDUSTRY**

On the basis of delivering high quality service, the training needs must be identified such as the need for in-service training for existing employees, basic training for new entrants and courses for public sector officials such (Department of Tourism staff, SNTC). The private sector will be expected to support the training of employees (Swaziland Tourism Authority Strategic Plan, 2003).

### **5.2.1 Technikon**

It is further apparent that tourism courses on offer at tertiary institutions are comprehensive and geared for a specific market and meet an essential need in the tourism industry. However, further development is needed to satisfy and maintain the changing needs of the tourism industry. The technikon (SCOT) will have to become involved in meeting the needs of communities as it still fall short in this area.

Because of its history in developing new courses and co-operating with industry, the technikon is perhaps best equipped to introduce relevant courses to cater for specific needs in the tourism industry.

### **5.2.2 Private institutions**

At present, the majority of private institutions are respectable, relatively well-developed teaching institutions and cater for a wide variety of needs including tourism teaching. The government is well aware of the key role these institutions are playing in training and education. It encourages this as part of a broader policy to increase access and labour market responsiveness. Unfortunately, most private institutions are situated in the urban areas that make it difficult to reach for those whom mostly required the facilities.

The kind of tourism courses on offer at private colleges are geared for a specific market in the tourism industry mainly the travel industry because they generate their own income only on those courses that are profitable. However, the existing infrastructure can be used to assist further in satisfying the training needs of the tourism industry.

### **5.2.3 University**

Universities worldwide are in a process of reconstruction in response to an increasingly competitive environment that is characterised by constant and rapid change. In order to respond to changing business and education environment, the University (UNISWA) should therefore identify alternative teaching methods and staffs needs to develop their own skills. Courses should be more flexible with more emphasis on initiative and entrepreneurial skills. The University should also train its students to source and apply information in the working environment.

Distance education, based on the principles of open learning and resource-based learning, has a vital role to play in the education of disadvantaged communities. This will enable more affordable education. A number of institutions are already involved in this type of training but a lot more needs to be done in a short space of time in order to fully enjoy the benefits such a system can provide.

## **5.3 THE SUITABLE TOURISM MARKETING STRATEGIES**

Swaziland is to develop suitable marketing strategies so as to project a positive identity as a unique and desirable country to visit by the international and regional tourism markets. The overall strategy is to develop Swaziland as a distinctive, fascinating, peaceful, safe destination, fully capitalising on its natural resources (environment, history, culture, its favourable location and people). These produce new and different products, services that will exceed the expectations of the discerning traveller.

Developing such strategies will hinge the gap between the current and the potential tourism industry thus bringing about an increased number of tourists and their spending in the country. Also, it will provide the logic that will guide and direct marketing efforts by STA. This goal will be to create a unique image for Swaziland as a desirable country to visit and re-visit.

In the international market, Swaziland will be positioned as a “must-see” destination because of its natural beauty, fascinating culture and diverse range of other attractions. This will include the following:

### **5.3.1 Promotional Campaigns**

Swaziland needs to undertake a campaign to promote itself during key periods of the year. Depending of availability of funds these campaigns will aim at increasing tourist flows in peak and traditional seasons (e.g Umhlanga and Incwala dance) in partnership with tourism partners. These campaigns will also aim at supporting the mobility of tourist around the country by highlighting events and attractions in the different regions.

A brochure and attractive website should be prepared for distribution to potential local and foreign investors, setting out details of the key investment areas such as Maputo corridor and Lubombo Spatial Development Initiative and the Maguga Dam.

### **5.3.2 Advertising**

Although Swaziland is a small country in the Southern Africa, the natural diversity is unusual with options that are unlimited. Advertising is to be placed in selected and electronic media to influence the identified domestic targets markets. This advertising will aim at generating brand awareness and interest and to provide platforms for the private sectors, regional and local tourism organisation. Swaziland is to continue developing effective marketing tools to market domestically and internationally. This include facilitating the production and distribution of:

- Road Maps
- Travel and tourism guide
- Website, fax on -demand and tourism data base
- Niche tourism brochures and folders for regional tourism organisation and the private sector
- Marketing infrastructure required for display at trade shows, exhibition, conferences and events.



### **5.3.3 Image Marketing**

The image will be built on the significance and history of its monarchy, the status that Swaziland has as an independent and stable African country and the overall physical landscape and attractiveness of its natural environment. Swaziland is to implement a major national image marketing campaign that will focus on dealing with the perceptions and realities of safety, security and crime and profiling the importance of tourism. Also, the adequate housing, sufficient suppliers of food and drinking water, access to quality healthy care and education systems finally employment for all. This campaign would constitute a heart and mind campaign aimed at local, national and international markets.

The unique traditional culture and the aura of the Monarchy will play an important role in attracting increasing numbers of tourists to Swaziland. Tourism will be used as a nation-building tool that preserve the history and strengthens the pride and knowledge in Swazi culture and traditions. The Tourism Authority will enter into a dialogue with the appropriate authorities to agree on the strategy for the promotion of culture and traditional ceremonies so as to contribute to tourism marketing and the country's development. Agreement will also be reached on measures to minimise the negative impacts of culture tourism.

In order to strengthen the quality and attractiveness of the tourism experience (health, safety, cleanliness, information and the scenic beauty), the government need to conduct training in the public sector, public awareness campaigns and use of the mass media. This will highlight the benefits of tourism and identify actions required to improve the tourism experience.

### **5.3.4 Attendance At Cultural Domestic Trade And Consumer Shows**

The Swaziland tourism development has largely been a missed opportunity. Swaziland needs to publish a calendar with specific dates of trade events and consumer shows it intends participating in throughout the year. Had its cultural holidays specific dates been announced or put on the yearly calendar, Swaziland would probably have been one of the most visited places in the world.

### **5.3.5 Relationship with Swaziland Tourism Authority (STA)**

Any effective international marketing campaign requires significant funding and this is not available in Swaziland. In order to optimise exposure and maximise returns for the regional tourism industry, Swaziland needs to align itself to and support the marketing programmes

implemented by Swaziland Tourism Authority (STA). It is focusing on core traditional markets and promotes awareness thus facilitating the development of tourism infrastructure, facilities and services in Swaziland.

The STA will develop and maintain a detailed tourism product inventory so as to establish a database of information on existing attractions including sites of cultural and historic interest (available as a publication and via the web). This information together with the market research will be used to identify and prioritise the specific product niches in which Swaziland has competitive advantages. Also, STA together with stakeholders will focus on the product niches which Swaziland has a competitive advantage in supplying.

Swaziland will also collaborate with the Swaziland Investment Promotion Authority (SIPA) in facilitating the development of conducive environment expansion on existing local and foreign investment in the tourism industry. It will help in promoting and facilitating the development of tourism infrastructure, facilities and services in Swaziland.

### **5.3.6 Utilising Swaziland Government Offices**

The marketing strategy aims to take better advantage of the international infrastructure of the Swaziland government in order to minimise costs. Swaziland will endeavour to establish strong cooperation relations with the Ministry of Economic Planning and Development, Ministry of Foreign Affairs, Ministry of Tourism, Environment and Communication, Embassy Houses, and Diplomatic Representatives. Systems will be created to ensure that these national government offices are kept abreast of tourism developments and that they consistently receive updated promotional material and product information.

The Ministry of Tourism, Environment and Communications is responsible for developing and promoting this vital industry as a national priority in a sustainable and acceptable manner. Main elements of the marketing strategy comprises of the following goals:

- Positioning Swaziland differently in different markets
- Developing strong product lines to meet visitor's needs
- Taking full advantage of regional and international trends and opportunities
- Fully integrating into the international tourism industry.

## **5.4 RECOMMENDATIONS**

The success and sustainability of Swaziland tourism industry will be based on the meaningful involvement of Swazis (themselves) in the tourism sector. Every effort will be made to encourage the participation and involvement of local people. The government need to introduce the promotion programme for domestic investment and small business development. The following suggestions can serve as a focus for a better tourism delivery in Swaziland towards its full potential:

### **5.4.1 General**

- In order to ensure a properly trained workforce in the Swaziland tourism industry, it is necessary to make a study of existing resources available in tourism research, education and training. While there are numerous tourism-related courses and research programmes offered, these are not co-ordinated. A lack of co-ordination across the region is evident and needs to be addressed.
- A database of tourism training and education should be compiled in order to facilitate planning, development and co-ordination of training activities, as well as to carry out needs assessments for the industry.
- An in-depth investigation is needed to establish the exact needs of the tourism industry on Swaziland tourism industry with a view of strengthening institutional capability and efficiency in delivering the quality and quantity of appropriate education and training required.
- Capacity building should be encouraged among the previously neglected groups and should address the specific needs of small, micro and medium-sized businesses (SMMEs) and emerging entrepreneurs.
- Must identify the list of tourist sites on the map and make them available to the boarder posts and hotels.

- Must specifically indicate the cultural dates (holidays) on the calendar

#### **5.4.2 Research**

- Tourism research has to be encouraged and funded.
- Where possible, people from local communities need to be trained and involved in tourism research projects in their own areas.
- Where possible, the expertise of overseas universities can be used to benefit tourism research and development in the country.
- Training of researchers with a previously disadvantaged background should become a priority.

#### **5.4.3 Training and Education**

- Different methods need to be introduced to create tourism awareness at all school levels and community.
- Need to implement training and awareness programmes that are aimed at changing negative attitude towards tourists so that Swazis appreciate the nature of tourism and be aware of the potential opportunities that can be exploited to achieve social, economic and environmental benefits
- Need to give priority support to community owned initiatives aiming to develop cultural, historical and natural sites and attractions with tourism potential.
- In order to increase its commitment to training, the private and business sectors must be involved in the provision of education and training.

- Ways have to be found to make tourism education and training more accessible to previously neglected groups of society in terms of appropriateness, affordability, location, duration, costs, packaging and language of instruction. It is envisaged that local communities around Enterprise Centres (SIPA) will become self sufficient by promoting the uniqueness of their own area and culture. Also, local training facilities focused on tourism, need to teach those skills required for managing their lifestyles and improving their quality of life. The necessary funds need to be raised to appoint experts to compile the courses and manuals for the proposed new offering. There are many unemployed but qualified educators who can assist with this process.
- Departments such as the university and the technicon need to be approached to provide support in training of trainers for arts and crafts producers.
- Current training curricula should be assessed, taking into account national government requirements as well as the tourism industry's requirements. This should occur with representation from stakeholders.
- Consideration should be given to modularisation of courses.
- Short courses should be certificated. On successful completion of a course, students should gain credits towards a higher formal training such as a Degree or Diploma.
- Courses should be self-paced and self-directed with multiple entries and exit points.
- Courses should be accessible to people with reduced education levels, as well as reduced tourism literacy.
- Need to raise awareness to her Diplomatic Embassy Houses and have volunteers to promote the country throughout the world.
- Attention should be given to three main areas: awareness training, formal tourism training and the capacity building of participants in each sector of the tourism field.

- An effective co-ordination forum for tourism training and education should be established where all institution involved in the field are represented. Closer co-operation between tertiary institution, government and non-government organization, business and the tourism industry is essential. This is to open up discussion among all interested/affected parties regarding a suitable model for co-operation between education and training institutions, the tourism industry and government.
- A task team should be established to determine a vision to plan policy and a detailed operational strategy for the delivery of training programs relevant to the tourism industry's needs.
- It is important that Swaziland develops new products that reinforce the strengths of its tourism image. It is expected that the potential areas includes adventure activity, sport tourism, eco-tourism, cultural tourism, festival tourism and water-based tourism at dams and rivers
- Skills training at all levels should be improved including communication skills and skills in the range of languages needed for tour guides and information officers.
- Need to broaden the ownership of the industry by having Swazi as managers

## **5.5 CONCLUSION**

Despite the continuing imbalances in world tourism, benefit distribution and the consistencies in the approaches to tourism development, tourism continues to be considered a miracle activity for most countries in particular, the less developed ones (Swaziland). It is called upon to improve their economies.

The most important challenge for Swaziland tourism delivery, education and training is to utilise limited resources and funding such that it can contribute to the development of the industry to its full potential. However, this requires co-operation and commitment from all parties concerned in tourism sector. A fresh look at tourism teaching and training within the current infrastructure has become necessary and we should indeed try to teach smarter and not work harder.



Much has been achieved in identifying the factors influencing the delivery of tourism industry's potential and in some cases training has already started. Milestones have been attained and a solid foundation laid on which to build Swaziland. It has a pool of education specialist and researchers who can pull together to streamline tourism delivery towards its potential. Most importantly, co-operation between industry, the government and the different educational institutions will have to improve. In the tourism industry, the goal must be well organised and be managed by qualified people that are capable of delivering what is expected from it.

There should be no doubt that in the near and foreseeable future, there will be a tourism demand, various needs and requirements. More tourists will be travelling for all purposes and want to be satisfied. Indeed, Swaziland is capable of fulfilling their expectations.

## BIBLIOGRAPHY

1. Benavides, D and Ducy, E (2001) *Tourism In The Least Developed Countries*, World Tourism Organisation, Madrid: Spain
2. Cooper, D and Schindler, P (2003) *Business Research Method 8<sup>th</sup> Edition*, MacGraw Hill: Singapore
3. Gilbert, D (1990) '*Conceptual Issues In The Meaning Of Tourism, In C. Cooper (ed) Progress In Tourism, Recreation And Hospitality Management*, volume 2, Press University: London
4. Hawkins and Tull (1988) *Essentials Of Marketing Research*, Macmillan: New York
5. Holder, J (1992) *The Need For Public-Private Sector Co-operation In Tourism*, Tourism Management
6. Hunter and Green(1995) *Tourism And The Environment* ,TJ Press Ltd: Great Britain
7. Jackson, I (1984) '*Enhancing The Positive Impact Of Tourism On The Built And Natural Environment*' in OAS volume 5 Reference Guidelines for Enhancing the positive Socio- cultural and environmental Impact of Tourism, Washington D.C
8. Keyser, H (2003) *Tourism Development*, Clyson Printers: Maitland
9. Krippendorf, J (1986) *Tourism In The System Of Industrial Society, Annals Of Tourism Research*, Heinemann: London
10. Lynch (1997) *Corporate Strategy*, Prentice Hall: New Jersey
11. Medlik, S (1991) *Managing Tourism*, Hartnolls Limited: Great Britain
12. Mowforth, M and Munt, I (1998) *Tourism And Sustainability, New Tourism In The Third World*, Biddles Ltd: Great Britain
13. Nash, D (1977) *Tourism As A Form Of Imperialism*, Basil Blackwell: London

14. Poon, A (1998) *Tourism, Technology And Competitive Strategies*, CABI Publishing: UK
15. Porter, M (1987) *From Competitive Advantage To Corporate Strategy*, Harvard Business Review, 43-59
16. Romeril, M (1985) '*Tourism And The Environment Towards A Symbiotic Relationship*' International Journal of Environmental Studies 25, 215-218
17. Sharpley, R and Telfer, J (2002) *Aspects Of Tourism*, Cambrian Printers Ltd: Great Britain
18. Smith, C and Jenner, P (1989) *Tourism And The Environment, Travel And Tourism*, Economist Intelligence Unit: London
19. Smith, S (1989): *Tourism Analysis, A Handbook*, Longman: Harlow Essex
20. Thompson et al (2002) *Crafting Executive Strategy*, MacGraw-Hall, London
21. Thomson and Learning (1994) *National And Regional Tourism Planning*, International: UK
22. Tse, E and Olsen (1991) *Relating Porter's Business Strategy To Organisational Structure*, Blacksburg Virginia: USA
23. Zethaml, A and Bitner, M (2003) *Services Marketing 3<sup>rd</sup> Edition*, McGraw-Hill Companies: New York

### **Personal Conversation**

Dladla, S., Board And Committee Co-ordinator at Tourism KwaZulu- Natal.  
June 2003, Personal conversation

Khoza, M., Chief Executive Officer at Swaziland Tourism Authority. July 2003,  
Personal conversation

Mahlalela, G., Chief Executive Officer at Swaziland Railway Station. April  
2003, Personal conversation

Nkosi, M., Operating Officer at Tourism KwaZulu- Natal. May 2003, Personal conversation

### **Anonymous Authors**

*Swaziland Review Of Industry, Commerce And Tourism* (2003)

*Swaziland Tourism Authority Strategic Plan* (2003)

*The Kingdom Of Swaziland, Leisure Activities* (2003)

*KwaZulu-Natal Tourism Strategy* (2001)

*White Paper On The Development And Promotion On Tourism* (1996)

### **Websites**

<http://www.welcometoswaziland.com>

<http://www.tourism-kzn.org>

<http://www.imc.org>

<http://www.environment.gov.za>

<http://www.zulu.org.za>

## **LIST OF FIGURES**

Figure 1: The Map of Swaziland

Figure 2: Umhlanga “Reed dance

Figure 3: The Brand key

## **LIST OF ABBREVIATIONS**

Swaziland Tourism Authority	STA
Swaziland Investment Promotion Authority	SIPA
Swaziland Environment Authority	SEA
Swaziland National Trust Commission	SNTC
Swaziland Water Services Corporation	SWSC
Swaziland College of Technology	SCOT

University Of Swaziland	UNISWA
Lubombo Spatial Development Initiatives	LSDI
Regional Tourism Organisation Of South Africa	RETOSA
Foreign Direct Investment	FDI
Inland Clearance Depot	IDC