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COUNTRY CASE:

SWAZILAND

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THE SWAZILAND TOURISM POLICY AND STRATEGY – A POLICY PERSPECTIVE

(A paper (case study) on Country experience in policy making, 19-20 November 2007 Geneva, Switzerland)

1. Background

Swaziland is a small land locked country located in the south-east of the African continent with a land area of 17 364 sq km, bordered on the south west and north by the Republic of South Africa and on the East by Mozambique. The capital and largest city is Mbabane.

Swaziland has a population of -1 million (*2007 census preliminary figures*) and a relatively youthful population with close to 40.6% of the population under the age of 15 years and only 3.8% of the population over 65 years old. The population growth rate for Swaziland is currently estimated at 2.9% (world growth rate at 2005 is 1.14%).

The National ICT policy therefore also addresses itself to this as the youthfulness of the population has social and economic implications. Whilst this presents a human resource base to be tapped from to facilitate socio-economic development efforts, this could also be a strain on the resources in terms of providing for education, health, social services, recreation and other amenities.

Description of indicator	Measurement
Total population	-1 Million
Growth rate	2.9%
Ratio men/women	53% women, 47% men
Population density/ sq km	225.94
City population	30%
Rural population	70%
Age Distribution of Population	
Under 15 years	40.6%
15 to 64	55.6%
65 years and over	3.8%
Literacy	81.3%

1.2 Tourism Situational Analysis

Growth in 2006 has been slower than expected and further characterized by redistribution of source market volumes with intense and unpredicted seasonality fluctuations. The stagnation was mainly contributed by a decline in growth from the country's main traditional markets these including RSA (Swaziland's main source market accounting for over 70% of international visitor arrivals), Germany, UK, the Netherlands and France. On the positive side the highlight of 2006 was the exceptionally remarkable performance of visitor arrivals from Portuguese speaking nations Mozambique – Swaziland's second source market- and Portugal. Portugal recorded a growth of 56.8% to 5,899 in 2006. Similarly Mozambican travelers to Swaziland grew by 29.8% 287,939 in 2006. Other notable emerging source markets that recorded impressive growth are Australia (14.5%), USA (5.0%), Belgium (7.9%), Italy (5.7%) and Switzerland (14.9%).

Swaziland's neighbouring countries remain the main source markets with RSA accounting for 70% of visitors. Overseas top drivers in terms of growth are Germany, UK, Netherlands, France and USA, respectively. An impressive 70% of visitors spent at least one night with average nights spent remaining constant at 2 nights. About 52% are repeat visitors, some repeating more than 2-3 times. They come generally, keen to enjoy the natural environment, on full-board or all-inclusive accommodation, with about 30% combining their holiday with another country. The highlight of most visitors is the friendliness of Swazi people, the scenery and heritage and culture of Swaziland. Although a lesser percentage of visitors indicate to have encountered problems most report to be very satisfied with their visit and would recommend Swaziland to others and plan to visit again. The general conclusion is that in the opinion of visitors, Swaziland remains a very desirable place that meets or exceeds expectations of the overwhelming majority.

2. Tourism Policy

The Tourism Policy is the guiding tool for the growth and development of tourism in the Kingdom of Swaziland. It details the shared vision and objectives of industry stakeholders and identifies strategies for the achievement of these goals.

The National Tourism Policy was formulated and adopted in 2001. There is a great need to review the policy to fit in with the current prevailing environment, including harmonizing it with other policies such as the ICT Policy and the Poverty Reduction Strategy and Action Plan (PRSAP).

In seeking to focus national attention on tourism development and management of the country's environment, this policy recognises the importance of the tourism industry as a leading contributor to the national economy.

A background analysis indicated the need to develop the overall national attractiveness of the Kingdom, rather than the attractiveness of a single feature. Therefore with a unifying vision, stakeholders have identified certain key guiding principles to underpin the formation of policy objectives.

These key principles are:

- Tourism development will be private sector driven
- Tourism development will be managed to ensure sustainability and the conservation of the country's environment and natural resources
- Tourism development will promote active Swazi participation in the sector
- Tourism development will aim to maximise the opportunities afforded by strategic regional opportunities
- Swaziland will build on its existing strengths
- The Swaziland tourism industry will aim to develop a marketable identity

2.1 Tourism Policy Objectives

- To develop an effective marketing strategy linked with regional initiatives through a collaborative process to project a positive identity for Swaziland to the international tourism markets as a unique and desirable country to visit. The marketing strategy will provide the logic that will guide and direct marketing efforts thereby bringing about increased visitor numbers and visitor spending. The goal will be to create a unique image for Swaziland as a distinctive, fascinating, peaceful, safe and desirable country to visit and re-visit, both as a destination in its own right and in combination with visits to neighbouring destinations, and with a range of attractions available within a compact area. For international tourism, Swaziland will fully capitalise on its role as a place to be visited as part of a multi-destination trip to Southern Africa. For the regional market, Swaziland will be re-positioned as a stand-alone destination. Critical to the success of this approach will be an inventory of existing sites of historic, cultural and natural interest and the preparation of plans for their upgrading and promotion, together with the identification and development of new diversified eco-tourism attractions.
- To deliver high quality service at all levels in the tourism industry through the establishment of minimum standards and participatory regulation, and by supporting training and human resource development. Strategies will include a review of licensing and other regulations that impact on the tourism industry, as well as actions to ensure upgrading of the physical quality of tourism infrastructure and related services.

- To make the tourism industry in Swaziland a leader in responsible environmental practices, through adherence to environmental legislation and to encourage the conservation and sustainable usage of natural resources. A strategy will be detailed to form a National Committee for Conservation, which will be responsible for developing and maintaining a prioritised list of the main natural sites and biodiversity areas to be considered for future conservation and tourism development.

3. Tourism Strategy

The overall tourism strategy is to complement the efforts of the National Tourism Policy and also develop Swaziland as a unique and distinctive destination in its own right, fully capitalizing on its natural resources (people + environment + culture) and its favourable location as well as regional initiatives, to produce new, upgraded and different products, services and experiences.

Tourism is linked to many other sectors. It is important that the development of the tourism sector supports and reinforces developments in other sectors of the economy and vice versa. Of particular importance is the linkage between tourism and the rest of the services sector.

The Swaziland tourism sector has faced many challenges/constraints and has therefore had difficulty in realizing its full potential. Notable issues include the following amongst others:

- i)** There is an urgent need to review the Tourism Policy. Current Policy was adopted in 2001, and has since been overtaken by other events and technological advances within the sector.
- ii)** Border posts hours need to extended to cater for the ever increasing traffic, both leisure and business alike.
- iii)** Lack of tourism awareness amongst the frontline staff dealing with tourists at entry points is a hindrance to the promotion and competitiveness of this sector
- iv)** Product development and diversification should be undertaken beyond wildlife, culture and scenery. The spreading of the tourism product base out of urban areas should be considered as this is also one way of developing community based tourism
- v)** The limited number of days that tourists spend in the country contribute to the not so impressive bed nights sold and thus impacting on the revenue
- vi)** The budget allocated to tourism marketing should be increased in order for the country to gain a competitive edge in tourism.

- vii) Entry visa requirements for selected countries should be reviewed. Issuing of visas at entry points should also be considered.
- viii) The efficient collection and analysis of tourism statistics should be developed so that the sector's potential is fully realized.

4. ICT

Swaziland as a developing country is also faced with the opportunities and challenges brought by ICTs. In realizing the need for an integrated approach in managing ICT, an ICT Policy was formulated by Government and adopted in 2006. Generally, the implementation of the Policy is still new.

Swaziland's development process can be accelerated through the development, deployment and exploitation of Information and Communications Technologies (ICT's) within the economy and society. ICT is one of the most significant driving forces for development and its application contributes to promoting reforms, modernising the economy and enforcing the competitiveness of enterprises. ICT remain at the helm of economic growth and human development and the potential offers numerous options to assist the realisation of the Millennium Development Goals (MDG's).

There is therefore a need for an ICT-led socio-economic development process with the potential of transforming the country into an information-rich, knowledge-based and technology driven economy and society. The rapid developments which have emerged in the ICT sector avail huge opportunities for elevating the usage of information as a resource for development and the creation of an environment that will enable Swazi citizens to participate fully in the global information economy.

The ICT Policy has also come up with pillars for the support of its development, ie: Education, Health, Banking services, infrastructure and others. However, there is no Tourism pillar, though there is the mentioning of the tourism potential to promote ICT and vice versa.

The implementation of the Tourism Strategy is being hampered by the non visible support of the ICT Policy in general. In an effort to address this issue, is promoting ICT initiatives within the implementation of the Tourism Strategy and will also advocate for the development of the tourism pillar once ICT policy is due for review.

4. ICT Policy Objective

Swaziland's development process, and tourism in particular, can be accelerated through the development, deployment and exploitation of ICTs within the economy and society. There is therefore a need for an ICT-led socio-economic development process with the

potential of transforming the country into an information-rich, knowledge-based and technology driven economy and society. The crosscutting nature of ICT's demands for a national policy framework harnessed by political will and business-sector leadership which will enable the integration and use of ICT's. The Policy addresses the following issues amongst others:

- Increase national consciousness about the role and potential of ICTs for the sustainable development of Swaziland;
- Chart a roadmap for ICT development in the country and define the roles and responsibilities of different players in the development of the ICT sector;
- Facilitate the development and implementation of the necessary legal, institutional and regulatory framework and structures to support the deployment, utilization and development of ICTs;
- Create a conducive/enabling environment for co-operation and partnerships in ICTs, between the public and private sectors, and all interested stakeholders at the national, regional and international levels and create a favourable climate for investment in the ICT sector and to identify innovative financing mechanisms that address specific needs for ICT development.

5. ICT in Tourism

In Swaziland, there remains an untapped potential in the tourism sector currently facing competition from the neighbouring countries. The importance of ICT for the travel and the tourism industry has increased enormously over the past few years. ICT's present a perfect platform for the industry to avail information about its products to the customers all over the world, in a direct, cost and time effective way. It is important that efforts are accelerated to develop this sector and therefore increase its contribution to the Gross Domestic Product (GDP). Tourism is an information-intensive sector and therefore can significantly benefit

from ICTs. The use of ICT for tourism development is expected to produce economic benefits by generating increased revenue for the local economy and contributing to local development. The distribution of tourism information and products over the Internet will have an impact on tourism enterprises such as suppliers and distributors. ICT will enable tourism businesses to make tourism products and services directly available to target consumers at a relatively low cost. ICT's therefore present an opportunity for Swaziland

Michael Porter's *Model of Competitive Advantage* (Porter, 1985; Porter, 2001) contends that ICT affect competition in three major ways:

- ICT can change the structure of an industry, and alter rules of competition;
- ICT can be used to create sustainable competitive advantage and provide companies with new competitive instruments;
- As a result of ICT, new business can be developed within a company's existing activities.

to organize and develop the tourism sector and improve competitiveness in tourism markets.

This sector has also been identified in the PRSAP as having the potential to create jobs for the unskilled, semi-skilled and SME's.

6. Observations

Achieving more sustainability in tourism requires the support of government. Barriers include a lack of understanding of and commitment to sustainability among the various sectors and levels of government that relate to tourism. The impact on tourism of peace and stability versus lack of commitment to Policy formulation is considerable, with the former promoting and the latter inhibiting the development of the sector.

Challenges include gaining more political support, increasing transparency and expanding knowledge. There is a need to integrate tourism into national development plans and to strengthen both the tools available to Governments to influence action on the ground and the skills and resources needed to apply them effectively.

The establishment of a Unit responsible for policy co-ordination by the Swaziland Government, the Public Policy Coordination Unit (PPCU) has been hailed as a milestone by all stakeholders as the formulation and implementation monitoring of all Government policies is now done in a well concerted manner and creating synergies with other existing policies.

The review of the Tourism Policy in collaboration with PPCU will indeed consider ICT and other policies in a broad manner as well as scrutinizing the impacts of tourism services in trade.