

# IFC Tourism Training Network Market Research Report

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# 1 Executive Summary

## 1.1 Overview

The Global Business School Network's (GBSN) Tourism Training Network (TTN) project aims to address the shortage of human capital and management capacity in the tourism industry by strengthening African tourism management training. The TTN will build the capacity of local training institutions and better align tourism training to the needs of the private sector. The goal of this project is to increase the capacity of training institutions to create sustainable quality tourism management programs that offer locally-relevant courses. The three objectives of this project are to:

- 1) gain a greater understanding of current supply and demand of tourism training;
- 2) increase the quantity, relevance and quality of tourism training in Africa; and
- 3) increase the capacity of institutions to implement training.

A market research study was undertaken to examine the supply and demand of the tourism training in nine African countries: Ghana, Kenya, Madagascar, Mozambique, Rwanda, Senegal, South Africa, Tanzania, and Zambia. This report contains the key findings of that study.

## 1.2 Key training issues

Large and small private sector enterprises highlighted their motivation for training staff, and also the problems they face with existing training programs. The top three reasons for undertaking training were to increase efficiency; improve performance; and to become more professional. The most frequently cited problems with training were a scarcity of local trainers; no follow up on training; and scarce financial resources.

Through the TTN, the GBSN could assist large and small tourism enterprises in Africa by addressing some of their problems, and is perhaps best placed to address the following:

- “Scarcity of local trainers” – by training tourism management faculty
- “Poorly designed training” – by ensuring that new courses are well developed and tested
- “No training follow up” – by developing modules that incorporate follow-up programs
- “Trainers with poor communication skills” – by including good communication techniques in the training modules, or having a strict train the trainers program
- “No relevance of training to the bottom-line of business” – by developing practical courses
- “Inappropriate attendees at training” – by providing guidance to institutions about the type of course participants that would benefit most from particular training modules.

The private sector predominately desired face-to-face training (71%), but many also reported that CDs and DVDs (50%), and workbooks with independent study (40%) were of value. There was a relatively equal mix of companies desiring training on- and off- site, and also between those wanting courses during business hours and during evenings. In general, companies either wanted an internationally branded certificate from a recognized international institution, or simply a certificate provided by the course organizers.

### 1.3 Type of courses and students

Since the tourism industry is not a single distinct sector, but rather an amalgamation of sectors and industries it is useful to segment the markets into four distinct classifications, and to identify which segment the TTN would be most effective at addressing. The classifications applied are: *Vocational Skills*, *Public Sector Skills*, *SME Management Skills* and *Professional or Executive Skills*.

*Vocational skills* are those needed for basic entry-level positions in the tourism industry. One of the positive aspects of the tourism industry is that it is labor intensive and requires many low-skilled labor inputs to function properly. Some examples of vocational skills for the hospitality industry are front desk, reception, maintenance, housekeeping, food service, food preparation, bar keeping, etc. However, vocational skills development is probably not an appropriate TTN activity. Vocational skills development needs to be addressed at a basic education level (i.e. secondary school, technical colleges). Business schools are not the most appropriate training institution to deliver vocational skills training. One possibility lies in creating train-the-trainer courses, which effectively train people to become “vocational skills consultants” or allow them to set-up independent but quality vocational skills schools.

*Public sector skills* are those needed by employees who work for public entities, parastatal entities or non-governmental organizations (NGO) related to tourism. These entities are quite varied and include Ministries of Tourism, Tourism Boards, Conservation (i.e. environmental) and Preservation (i.e. historical & cultural) NGOs, Wildlife Reserves, National Parks and local and regional government offices. The types of skills that are required in this market fall into two categories: destination planning and destination management. The destination could be a nation, a region within a country, or an attraction (such as a national park or heritage site). If the TTN courses are designed to meet the needs of this market and include monitoring and evaluation, with multiple and repeated trainings and follow-up, then they could be very valuable to the public sector. If private sector management (and training) is to be effective, there needs to be an efficient government environment to support it.

*SME management skills* are those needed by owners and managers of any private sector tourism enterprise that is small in scale or in number of employees. The skills needed to run a small tourism business include financial management, operations management, human resources management and sales and marketing management. However, anecdotal evidence suggests that generic once-off courses for SME development are not effective. This approach has been tried in numerous locations and with many different approaches, but the result is typically the same: SMEs managers do not learn sufficient new skills to more effectively manage their business. Instead a more effective route is to deliver a systemized series of learning courses that are short in nature and broad in scope, and which are designed for owners and managers with a high school education. The IFC PEP Africa facility, through the SMART program, in conjunction with SME-EDI and other IFC facilities, is currently developing a tourism training program named the *Business Edge Hotel Management Training Program*. PEP Africa intends to roll this program out in a number of countries, many of which overlap with the GBSN TTN countries.<sup>1</sup> As SME-EDI is already mandated to assist with SME management skills and has already allocated resources to the same countries, it is not recommended that TTN focus in this direction.

*Management or executive skills* are those required by upper and middle management employees in large corporations or medium size enterprises. Due to the nature of the industry (and excluding

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<sup>1</sup> Harris, Adrienne. *IFC-PEP Africa*. Personal Interview, 28 May 2007.

public sector enterprises) these fall into two sectors of the industry: hospitality and transport. The emphasis for the purposes of this report was on the hospitality sector, because transport tends to see itself outside of the tourism industry. Therefore the skills that are necessary for management or executive skills in hospitality are areas such as hotel management, food and beverage management, hotel financial management, and human resources management. This market probably fits the GBSN profile and core competencies best, but it is also most likely to be the smallest market due to the make-up of the marketplace (too few large operators that are not already connected to chains and international support networks); in-house management training programs and competition from new hospitality specific schools.

In order to match the competencies of the GBSN and the needs of the market, as well as providing an adequate cost recovery mechanism for the schools that will deliver the modules, it is recommended that the TTN focus on creation and delivery of a mix of *Public Sector Skills* and *Management or Executive Skills* training programs.

#### **1.4 Tourism modules required**

A wide variety of stakeholders from a total of 205 strategic (56) and educational institutions (50), as well as large and small tourism enterprises (99) were consulted to understand the demand for new courses that would meet the needs of the industry. From a list of 28 tourism, hospitality and business courses suggested, they were asked to list courses that were (a) available, (b) available but needed improvement, (c) not available and not required, and also (d) not available but required. They were also asked to prioritize the top three most important and urgently required courses. The top ten prioritized courses and the proportion of interviewees who highlighted it are indicated below:

- Tourism business development (*including entrepreneurship and SME development*) – 11.36%
- Options for local communities (*including joint ventures, public-private partnerships, community based tourism*) – 7.10%
- Tourism business planning – 6.53%
- Business management – 5.97%
- Marketing and marketing management – 4.83%
- Protected areas and ecotourism management – 4.83%
- Responsible and sustainable tourism (*including conservation and poverty alleviation*) – 4.55%
- Hotel management – 4.55%
- Hospitality management – 4.26%
- Conference, exhibition and event management – 3.69%

#### **1.5 Cost recovery**

Small and large tourism enterprises were asked what they would be willing to pay for different lengths of courses. Interestingly, the range of prices that the small and large enterprises were willing to pay did not differ very greatly, and sometimes SMEs were actually prepared to pay more than large enterprises for the same type of course. There were no major differences observed between the numbers of enterprises desiring different lengths of courses (i.e. no particular preference for very short, or very long courses). On average, the 48 enterprises, which provided

information, were willing to pay between US\$26 for a half-day course, to US\$102 for a full six-week course.

Training institutions varied considerably in the prices that they charged students for courses. Course prices would also vary for residents, non-residents, the specific course, and whether the students were studying for diplomas, certificates, undergraduate or post-graduate courses. The general trend was that diplomas and certificates would be cheapest, followed by undergraduate courses, and post-graduate tuition would be most expensive. Charges also sometimes varied on an annual basis during specific degrees, with each subsequent year becoming more expensive. Across all nine countries, and 47 training institutions that reported their fees, the average fee charged per module was \$336, and \$2,656 per year. Average module fees were lowest in Madagascar, and highest in Tanzania, while the average annual fees were lowest in Madagascar and highest in South Africa.

The data reveals a major discrepancy between what the private sector enterprises are willing on average to pay for courses, and what the training institutions charge. However, the range of prices that small and large enterprises were willing to pay varied greatly, and therefore it is possible that some of the business would be willing to pay for courses at the prices currently charged.

## **1.6 Structure of this report**

This report includes the following information:

- Information about tourism sector in each country visited including government initiatives, attractions, major players and current development projects.
- Country by country lists of possible pilot institutions, clients, potential case studies and relevant skills and knowledge demanded by tourism sector.
- Detailed lists of existing tourism teaching materials.
- Information on cost recovery options and how much potential clients report being willing to pay for the program.
- Information on existing tourism education programs in Africa including a list of classes offered by institutions, faculty, number of enrolled students, and job placement of students.
- Information on other tourism training initiatives and programs, including:
  - PEP Africa and IFC tourism related projects and investments.
  - The IFC's SMART program and Worldhotel-link.com.
  - UNWTO resources and programs in Africa.
  - IFC's Business Edge materials.
- Recommendations of courses, materials and institutions.
- Reflections on the way the TTN would improve the quality and quantity of investment in Africa.
- A summary of all meetings.

## **1.7 Acknowledgements**

The authors would like to thank all of the stakeholders who provided information or details of contacts, and also to thank all the people who gave up their time to participate in this market research. Also thanks to Claudia Townsend who developed the French translation of the market research questionnaires, and to Dr Fernando Lichucha of the Universidade Eduardo Mondlane who

arranged Portuguese translations for use in Mozambique. Also thanks to Jennifer Aston and Andrew Rylance who assisted with background research and editing of the report.

## **2 Introduction**

### **2.1 Global Business Schools Network**

The mission of the Global Business Schools Network (GBSN) is to develop a global network in management, entrepreneurship and leadership knowledge to mentor local educators and strengthen emerging market business schools.

### **2.2 Tourism Training Network**

The GBSN's Tourism Training Network program aims to address the shortage of human capital and management capacity by strengthening African tourism management training through a Tourism Training Network (TTN). The TTN will build the capacity of local training institutions and better align tourism training to the needs of the private sector. This program will develop course modules in tourism management and train teachers from leading training institutions in Franco, Luso and Anglophone Africa to deliver the courses.

The goal of this program is to increase the capacity of training institutions to create sustainable quality tourism management programs that offer locally relevant courses. The three objectives of the program are to:

- 1) gain a greater understanding of current supply and demand of tourism training;
- 2) increase the quantity, relevance and quality of tourism training in Africa; and
- 3) increase the capacity of institutions to implement training.

This report constitutes an output of Phase 1 of the TTN: Market research undertaken to gain a greater understanding of current supply and demand of tourism training. The aim of the market research is to assess the current status of tourism education in Africa, identify clients and determine relevant skills and knowledge that are demanded in the tourism sector in nine countries: Ghana, Kenya, Madagascar, Mozambique, Rwanda, Senegal, South Africa, Tanzania, and Zambia.

The market research findings are to be used to select five pilot training institutions, design six tourism management courses and produce six locally relevant tourism case studies. The pilot training institutions are proposed to be selected based on their capacity to carry out the program's activities, their ability to reach the targeted market, and their institutional support demonstrated by their willingness to contribute travel expenses for faculty to Training of Trainers (ToT) workshops and faculty time to implement modules.

Following the market research, six tourism management course modules will be developed, and African teachers from the pilot institutions will be trained to deliver the courses. In addition, a ToT course will be designed and facilitated, with 2-5 instructors from each pilot training institution to receive the instruction. A ToT guide will also be developed to offer advice for delivering the modules and guidelines for their adaptation into the diverse institutional programs.

The course modules will then be implemented at the training institutions and the TTN will be further developed during Phase 2. Faculty from leading international tourism management programs will mentor the pilot institutions in how to integrate the course modules into their training programs and assist with the creation of a sustainability plan. Each training institution will work with one mentor who will make two visits to the school over the course of two years, and who will be available to the school throughout that period for assistance.

A network website will be developed to disseminate relevant information to the network of schools participating in the program. In addition, three annual meetings will be held in which the teachers from the pilot institutions will share best practices, lessons learned, and discuss new courses that are needed. This sharing of knowledge and lessons learned will be documented systematically on the network website, and will support the sustainability of the network after the program ends.

### **2.3 Relevant IFC tourism projects and investments<sup>2</sup>**

Specific tourism initiatives of the IFC country-offices are detailed within each country report, but an overview of activities by the IFC's Private Enterprise Partnership (PEP) for Africa, the IFC's SME Market Access Regional Tourism (SMART) program and the IFC supported initiative Worldhotel-link.com is provided below.

#### **2.3.1 Private Enterprise Partnership (PEP) for Africa**

The IFC's Private Enterprise Partnership (PEP) for Africa has adopted a sustainability business line to help more companies to engage in environmentally sustainable business practices. PEP Africa aims to assist the private sector in the introduction of innovative and cost effective methods of promoting sustainable energy, clean air, clean water, biodiversity, higher labor standards, and equal opportunities for women. PEP Africa aims to demonstrate the commercial value of environmentally sustainable business practices; nurture innovative business initiatives that deliver environmental and social benefits; and encourage the replication of successful models.

#### **2.3.2 IFC SMART program**

The SMART is a PEP Africa program that aims to strengthen the position of SMEs in the tourism sector across sub-Saharan Africa. The two principal objectives of the program are: to improve market access for SMEs, and to increase the competitiveness of SMEs in the selected African countries.

The program aims to facilitate market access for tourism SMEs using an e-market reservation platform, supplemented with focused technical assistance (TA), through a strategic partnership with Worldhotel-link.com (WHL). TA will be delivered to the local market place operators (MPOs), who are the intermediaries that manage the websites and process the bookings, as well as to the SMEs that will be hosted on the WHL platform. The TA to MPOs will be focused on capacity building, while TA to the SMEs will prioritize the strengthening of operational and marketing skills.

To address the overall competitiveness of SMEs, the programs will link into IFC and PEP Africa initiatives in the area of access to finance and SME development by working with the SME-EDI facilities in each of the key regions. SME-EDI intends to use the *Business Edge Hotel Management Training Program*. PEP Africa intends to work with WHL to roll out the program in fifteen African countries, covering at least twenty destinations, all of which overlap with the TTN market research countries.

##### *2.3.2.1 Worldhotel-link.com (WHL)*

WHL is a strategic partner in the SMART Program. WHL is an e-marketplace that facilitates direct bookings by independent travellers with locally owned SMEs in developing countries using local

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<sup>2</sup> Harris, Adrienne. *IFC-PEP Africa*. Personal Interview, 28 May 2007.

intermediaries, thereby retaining all earnings locally. WHL started in early 2002 as an IFC Mekong Private Sector Development Facility (MPDF) funded project to pilot a new way of assisting small travel service companies (particularly accommodation providers) in the developing world to use the Internet to market their properties and services online.

WHL uses a franchise model whereby WHL partners with a local person (generally a local tour company with an interest in sustainable tourism) and they manage the interface with the local accommodation providers (i.e. taking photos of their premises, loading content into the system, updating content and rates, managing bookings, collecting payments etc). WHL then provides the platform on which all these local operators work and provides the copyediting, web marketing, linkages with global distribution partners, and benchmarking etc.

WHL currently has a network of 33 live and trading country websites and 68 destination websites in Asia, the Pacific, Africa, Europe, the Caribbean, Central America and South America. On the African continent, WHL has established three portals in South Africa, three portals in Madagascar (with the support of the IFC) and one in Kenya. The first phase of the SMART program has assisted in the development of three portals in Tanzania, two portals in Senegal, one portal in the Gambia, one portal in Cape Verde and one portal in Swaziland. The next phase will look at establishing two more strategic clusters: one in East Africa and one in Southern Africa.

### 3 Methods

The IFC selected nine African countries for the market research: Ghana, Kenya, Madagascar, Mozambique, Rwanda, Senegal, South Africa, Tanzania, and Zambia. The countries were selected based on current IFC tourism investments and programs and World Bank tourism promotion projects that contain training components.

The market research was undertaken in the nine target countries through the following process:

#### **A. Stakeholders working in the countries were identified,** including those within:

- strategic institutions (i.e. government ministries, parastatals, tourism authorities, investment promotion agencies, tourism trade and industry associations, development agencies, non-governmental organizations, etc);
- training institutions (i.e. universities, business schools, technical colleges, hotel and hospitality schools, vocational training institutions);
- large tourism enterprises (i.e. with 101 or more employees)
- small and medium tourism enterprises (i.e. with 100 or fewer employees)

Where possible, meetings were scheduled by email prior to visiting the countries, and were confirmed on arrival. The majority of private sector contacts and interviews were arranged on arrival in the country.

#### **B. Market research questionnaires were developed and tested.**

Separate questionnaires were developed for each type of tourism stakeholder listed above. They were pilot tested in Cape Town, South Africa with two universities, one large tourism enterprise and one SME. The questionnaires were designed to establish the following:

- **Supply of tourism training courses**, by asking strategic institutions, training institutions and tourism businesses about:
  - General training supply and demand nationally
  - Specific courses that were available
  - Priority courses for development
  - The level and type of courses
  - Available teaching staff and resources
  - The number of students
  - Prior learning, origin of the student, and what students did after the courses
  - Course fees, and how they were paid for
  - The process of integrating new modules into existing courses
  - Short course and executive education delivery
  - Gaps and priority course development
- **Demand for tourism modules**, by asking stakeholders about:
  - Available courses, and their adequacy
  - Training needs
  - Preferred training methods
  - Willingness to pay for courses
  - Constraints and problems with training

Revisions were made to the survey tools to make them more reliable, valid, and simpler to implement. They were then translated into French and Portuguese. The final versions of the four questionnaires (in English) can be found in Appendix 1.

### **C. Field visits to interview stakeholders**

Field visits of two to five days in each of the nine countries were used to meet and interview stakeholders. Due to time constraints, the majority of interviews took place in capital cities, but where possible stakeholders in more rural areas were also interviewed. In each country at least two large and three small tourism enterprises were interviewed.

### **D. Review of literature and websites**

Reviews of documentation collected during the field visits, institutional websites, and also stakeholder interviews were also used to establish the status of the tourism industry in each country, and also information regarding complementary tourism training initiatives that were operating.

At this stage, it is useful to highlight that the difference between education and training is not distinct. In general, education can be seen as providing a general overview of the tourism industry, while training provides students with a more specific role<sup>3</sup>.

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<sup>3</sup> Kohler, K., and Naidoo, K. M. (2003) Tourism education and training in KwaZulu-Natal 2003: A Status Quo Report (5<sup>th</sup> Edition), KwaZulu-Natal Tourism Authority, September 2003.

## 4 Limitations

Limitations to the market research included the following:

- There was limited time available in each country to meet more stakeholders, and particular key stakeholders (i.e. Cape Coast University in Ghana), or to travel out of the capital cities into more rural areas where skills needs may have been different.
- Some stakeholders the researchers were requested to meet were not available (i.e. University of Pretoria) or unwilling to participate.
- Strategic stakeholders in South Africa were unwilling to contribute, due to a complementary national skills audit that was being undertaken at the same time, and therefore they felt they had already answered the questions. Unfortunately, the detailed results of the skills audit were not available at the time of this report.
- A limited number of interviews were undertaken with the private sector, and in order to be more demand-driven, and to be appropriately aligned to private sector needs, more investigation may be required. However, it was envisaged that interviews with private sector associations and strategic organizations would provide a wider perspective.
- There were mixed results in response rates per country (i.e. 31 SMEs interviewed in Tanzania and only 3 in Ghana, Mozambique, and South Africa), and therefore conclusions may be skewed towards the perspective of dominant countries.

## 5 Strategy proposed from the market research

### 5.1 Types of tourism training markets

The purpose of this market research was to examine the supply and demand of the tourism industry in nine sample African countries. Since the tourism industry is not a single distinct sector, but rather an amalgamation of sectors and industries, the researchers found it useful to segment the training markets into four distinct classifications: *Vocational Skills, Public Sector Skills, SME Management Skills and Professional or Executive Skills*. A description of each of the four segments follows; including a brief comment on where these skills are currently being serviced in the market and a description of the general needs and size of the market (including relative purchasing power).

Key training issues raised by the large and small private sector interviewees in Ghana, Kenya, Madagascar, Mozambique, Rwanda, Senegal, South Africa, Tanzania, and Zambia highlighted their motivation for training staff, and also the problems they face with existing training programs (see Table 1, and details for each country in Appendix 2 and Appendix 3). Responses show that the top three reasons for training are to increase efficiency; improve performance; and to become more professional. The most frequently cited problems with existing training were a scarcity of local trainers; no follow up on training; and scarce financial resources.

<b>Purpose and reasons for training</b>	<b>% N=86</b>	<b>Problems with existing training</b>	<b>% N=87</b>
Increase efficiency	<b>78%</b>	Scarcity of local trainers	<b>44%</b>
Performance improvement	<b>76%</b>	No training follow up	<b>42%</b>
Need for greater professionalism	<b>73%</b>	Scarce financial resources	<b>41%</b>
Acquire skills	<b>71%</b>	High turnover of employees	<b>32%</b>
Upgrading to international standards	<b>69%</b>	Trainers with poor communication skills	<b>30%</b>
Gain knowledge	<b>63%</b>	Poorly designed training	<b>30%</b>
Correction of repetitive mistakes	<b>52%</b>	Inexperienced trainers	<b>29%</b>
Changes in technology	<b>47%</b>	No relevance of training and bottom-line of business	<b>29%</b>
Launching new products or services	<b>46%</b>	Lack of awareness of availability of training	<b>27%</b>
To be better than my competitor	<b>45%</b>	Unqualified trainers	<b>24%</b>
Changes in systems	<b>39%</b>	Inappropriate attendees at training	<b>23%</b>
Obtain accreditation	<b>28%</b>		

Through the TTN, the GBSN could assist large and small enterprises in Africa by addressing some of their problems. It is perhaps best placed to address the following:

- “Scarcity of local trainers” – by implementing training tourism management faculty
- “Poorly designed training” – by ensuring that new courses are well developed and tested
- “No training follow up” – by developing modules that incorporate follow-up programs
- “Trainers with poor communication skills” – by including good communication techniques in the training module
- “No relevance of training and bottom-line of business” – by developing relevant courses
- “Inappropriate attendees at training” – by providing guidance to institutions about the type of course participants that would benefit most from particular training modules.

The private sector predominately wanted face-to-face training (71%), but many also reported that CDs and DVDs (50%), and workbooks with independent study (40%) were of value. There was a relatively equal mix of companies desiring training on and off site, and also between those wanting courses during business courses and during evenings. In the main, companies either wanted an

internationally branded certificate from a recognized international institution or simply a certificate provided by the course organizers (see Table 2 and full country details in Appendix 4.)

<b>Table 2: Type of training requested in all nine countries</b>	
<b>Issue</b>	<b>% N=91</b>
<b>Type of training</b>	
Face-to-face	<b>71%</b>
CDs and DVDs	<b>50%</b>
Workbook/independent study	<b>40%</b>
Distance education	<b>29%</b>
Internet	<b>27%</b>
Audio/video conf.	<b>26%</b>
Radio or TV broadcast	<b>23%</b>
<b>Preferred location for training</b>	
Off-site?	<b>51%</b>
Onsite	<b>48%</b>
<b>Timing of training</b>	
During business hours	<b>42%</b>
During evenings	<b>38%</b>
During weekends	<b>15%</b>
<b>Documentation desired at the end of training</b>	
An internationally branded certificate	<b>49%</b>
Other certificate	<b>47%</b>
Certificate from graduate school	<b>22%</b>
National certificate	<b>19%</b>

The majority of interviewees desired their training materials in English (86%), and businesses in Madagascar and Rwanda also requested materials in both French and English, while those in Mozambique desired materials in Portuguese and English. The dominance of English language use among international tourists has in part led to this demand for courses in English.

### **5.1.1 Vocational Skills**

#### *5.1.1.1 Description and necessary skills*

Vocational skills are those needed for basic entry-level positions in the tourism industry. One of the positive aspects of the tourism industry is that it is labor intensive and requires many low-skilled labor inputs to function properly. This aspect is especially beneficial for developing nations with a need for job creation. Regardless of the type of business in the tourism industry, for example a large hotel, a small guesthouse, an amusement park or a nature reserve, there is a great need for a wide variety of staff. However, in order to be a successful business in the tourism industry, these employees must be equipped to handle a wide variety of tasks, plus interact with clientele from a diverse background and with diverse needs.

Some examples of vocational skills for the hospitality industry are front desk, reception, maintenance, housekeeping, food service, food preparation, bar keeping, etc. Some examples of vocational skills that are required in other parts of the tourism industry are guiding, reception, travel agents and catering. There are some over-arching skills that were mentioned by respondents that cut across the entire spectrum of tourism training markets, but are most appropriately taught at a vocational level such as customer service and customer care, health and safety, and hygiene.

#### *5.1.1.2 Current training supply*

In general, vocational skills are most often learned *on-the-job* with no formal training. This phenomenon is especially true in SMEs in the accommodation sector, and in the travel services sector.

In most countries visited there are both private and public sector schools where these skills are taught, but for the most part these are woefully under-resourced and graduates are under-prepared for the marketplace. Additionally, these schools do not have capacity to teach large numbers of learners (they train between 60-150 people per annum). To fill the gap a number of private schools have appeared, but the market did not have favorable remarks about the quality of students from these private schools. In many cases there was no standard curriculum or minimum course work for completion (Ghana and Tanzania), or the curriculum was extremely out of date (Senegal's curriculum was designed in 1971 and Zambia's in 1990).

#### *5.1.1.3 Vocational training demand*

There is a huge need for an upgrade of vocational tourism training in each of the countries visited in the market survey. In nearly every interview with a strategic institution, the topic of vocational skills, customer service ethics or general life skills arose. The existing vocational training supply is inadequate.

There is a need for a quality control mechanism in each of the countries, which probably starts with creating a national curriculum or minimum vocational training standards that leads to a national training certificate. However, these need to be up to date with modern needs and in line with global best practices. Currently, this is not the case and many of the strategic and educational institutions have noted this, but there are not enough resources in order to adequately address the issue. Most of the countries are relying on donor projects to assist them with these issues, but the consultancies seem to end before the standards are set, the certificates are defined and before the coursework is in place.

#### *5.1.1.4 Market characteristic*

The vocational skills training market is a low value, high volume market. There are huge numbers of trained personnel needed to implement effective vocational skills training, and there is also a large pool of applicants that would be willing to pay for quality training. All of the current legitimate training institutions interviewed are stressed with an over demand of students and have to turn people away each year. Plus, many of the medium and large enterprises said they would be happy to pay for their staff to receive quality vocational skills training, provided that is in line with international standards.

### **5.1.2 Public Sector Skills**

#### *5.1.2.1 Description and necessary skills*

Public sector skills are those needed by employees who work for public entities, parastatal entities or non-governmental organizations (NGO) related to tourism. These entities are quite varied and include Ministries of Tourism, Tourism Boards, Conservation (environmental) and Preservation (historical & cultural) NGOs, Wildlife Reserves, National Parks and local and regional government offices.

The types of skills that are required in this market fall into two categories: destination planning and destination management. A destination could be equivalent to a nation, a region within a country, or an attraction (such as a national park or heritage site). Destination planning courses relate to the planning, product development and regulatory phases of tourism development. Destination management courses relate to marketing, fee structure and collection, and maintenance.

In many cases employees will have tangential skills, but not exact skills related to tourism. Examples of this include a nature reserve tourism manager having a background in conservation biology, or a director of a tourism board with a background in management. Neither of these examples have any direct experience or education in tourism.

#### *5.1.2.2 Current training supply*

Excluding Kenya and South Africa, the research showed that there are few programs, short courses or resources for employees in these institutions to acquire the necessary tourism skills. In the cases where employees do have these skills, they have generally acquired them abroad. For the most part these are not skills that can easily be learned on the job.

#### *5.1.2.3 Public sector training demand*

There are a wide variety of necessary skills that managers and employees in the public sector should have, but often do not.

For example, some public sector tourism bodies are tasked with setting up policies and zoning areas for development, but in most cases the individuals working in these positions have not taken any destination planning courses, tourism theory courses or tourism policy courses. Instead they rely upon outside experts and consultants to provide the necessary framework and strategies. In many cases the skill sets are such that the employees cannot even interpret the information provided to them by the consultants.

In addition, once the destination is developed there is a need for destination management, attraction management and destination marketing. These skills are critical for tourism boards and tourism attraction managers. Similarly, these skills are scarce and again the entities are dependent on hiring outside consultants.

Other courses that are particularly important are courses on sustainable tourism, responsible tourism, ecotourism, and conservation management. These courses are crucial when considering the main draw for tourists to Africa is either natural or cultural-resources based attractions, and the future of these attractions must be sustained.

#### *5.1.2.4 Market characteristic*

The type of learners that would fall into this category would range from managers in government departments looking for specialized skills to junior civil servants who are looking for a broad educational base to advance their careers. The time that the learners have to take courses varies, but in general public sector learners will have more time available than their private sector counterparts. Some suggested course types include short evening courses, weekend courses or extended courses (1-6 weeks).

If the course work is developed appropriately for the market, the potential market is huge. There is a strong desire by most of the strategic institutions to obtain these skills, but right now the costs far outweigh the benefits. This being said there were a number of instances where employees had been

sent to programs in the United States or Europe to take short courses. As mentioned earlier, large sums of money are being spent on outside expertise. They could reallocate some of this money for employees to undertake short courses in their home countries.

### **5.1.3 SME Management Skills**

#### *5.1.3.1 Description and necessary skills*

SME management skills are those needed by owners and managers of any private sector tourism enterprise that is small in scale or in number of employees.

As with SMEs in many other industries, there are generally limited executive or management positions in tourism. Often just one or two people fill these positions and they must possess a wide set of skills. The skills needed to run a small tourism business include:

- Financial management
- Operations management
- Human resources management
- Sales and marketing management

#### *5.1.3.2 Current training supply*

Most SME managers either have no formal training at all, are self-taught or learned *on-the-job*. Another peculiar aspect of the SME market is that the enterprise is often owned by an absent owner who places a family member or friend in a management position. In some cases the owner does not encourage any employee training, because of the fear that they will need to pay a higher salary.

In terms of training programs outside of South Africa and Rwanda, there are no ongoing tourism SME training programs that are set-up to specifically assist in the management of a tourism enterprise. The following is a description of some of the types of programs that were encountered to service the SME market:

- There are general SME courses or learning centres, but these are not tourism specific.
- There have been a number of donor-funded tourism workshops for SMEs. These are usually once off and generic in topic and content.
- NGOs and donors also often provide once-off courses or workshops on very specific topics such as ecotourism, marketing/market access, and customer service.

#### *5.1.3.3 SME Management training demand*

Unlike many other industries, tourism entities must put in considerable effort to reach potential clients, who are not often within the same regional market that the business resides in. In many cases potential clients are overseas and speak different languages to the business owner. These peculiarities create needs for particular skills that are specific to tourism SMEs, and which require specialized training. SMEs interviewed during the market research indicated a demand for training that would improve their performance and efficiency, and which would allow them to acquire skills. They also recognized the importance of becoming more professional and upgrading their standards to international levels.

#### 5.1.3.4 *Market characteristic*

The African tourism market is quite unique in the world in that the vast majority of enterprises are SMEs. Even in South Africa, which is by far the most developed market among the nine surveyed, the vast majority of enterprises are SMEs. Accurate data regarding the number of SMEs operating in the South African tourism economy is currently unavailable; however one study suggests that the proportion of SMEs could be as high as 97%.<sup>4</sup>

However, although this market appears to be huge and there is a real need for training, there is a problem in attracting SMEs to take training courses and pay for them. 39 of the 49 SME operators interviewed provided figures in the willingness to pay question, and these figures suggested they are willing to pay similar rates to larger operators as shown in section 5.4.

Again like SMEs in any industry, tourism SME managers or owners have highly limited time and financial resources, so the courses they take must be extremely short in length and extremely targeted and practical in content. The best delivery mechanism is numerous courses delivered at regular intervals for short periods of time, for example, 1-day courses that are run every 2<sup>nd</sup> Saturday for 3 months.

### **5.1.4 *Management or Executive Skills***

#### 5.1.4.1 *Description and necessary skills*

Management or executive skills are those required by upper and middle management employees in large corporations or medium size enterprises. Due to the nature of the industry (and excluding public sector enterprises) these fall into two sectors of the industry: hospitality and transport. The emphasis in this research was on the hospitality sector, because transport tends to see itself outside of the tourism industry. Therefore for the purposes of this study, the skills identified for management or executive positions are associated with hospitality (e.g. hotel management, food and beverage management, hotel financial management and human resources management).

#### 5.1.4.2 *Current training supply*

There tended to be many more courses teaching hotel and hospitality management than any other types of courses. In fact, outside of Kenya and South Africa hospitality training was synonymous with tourism training.

In general the quality of the training was not meeting the expectations or needs of the market. The students who were graduating with hospitality management degrees are not suitable for jobs as supervisors or mid-level managers. Therefore, extensive in-house training is taking place. Nearly all of the international hotel chains (e.g. Accor, Hilton, Southern Sun, Legacy, etc) have in-house<sup>5</sup> management training programs, and those that do not have developed their own management training institute (e.g. the Kilimanjaro Institute for the Kempinski properties in Tanzania). In addition, most of the emphasis by other donors, private individuals and by government is to establish new quality hospitality management schools:

- Ghana – GIMPA has built and a new hotel school on campus
- Mozambique – new hotel school in Inhambane
- Rwanda – recently completed Rwanda Tourism Institute

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<sup>4</sup> Rogerson, C (2002) *Tourism Sector Analysis*, The Presidency/ Conmark Sector Workshop

<sup>5</sup> In-house refers to within the company. Accor has the *Academie Accor* in Paris.

- Senegal – ISM is developing a school in Saly
- Tanzania – French donors are financing construction of new hotel school
- Zambia – a local hotel owner has started the Lusaka Hotel School

#### 5.1.4.3 *Management or Executive training demand*

The most frequently cited criteria or need for management or executive training is for *practical skills*. Both the private sector and the strategic institutions stressed that the current programs are too *theoretically based*, and the graduates cannot immediately begin work prepared for their job. For this reason the majority of new schools that are either being built or proposed (e.g. GIMPA and Lusaka Hotel School) are actually functioning hotels, where students must work in every position for one term as a part of their degree.

As for higher-level executives, such as Managing Directors, if in-house training is not available their preference for training is for strategic hospitality consultants to design tailor made programs to fit their specific needs. Often very specific courses for high-level management were sourced from overseas (i.e. either by bringing in an international trainer or sending staff overseas for specific training.)

#### 5.1.4.4 *Market characteristic*

As mentioned above in the SME section, the great majority of the marketplace is not large enterprises. For instance, in a small country like Zambia there are only four large hotels in the whole country. Representatives of the large hotel chains in Kenya reported that their existing training at this level was adequate. These facts automatically limit the market size of potential learners to take courses. Another factor to consider is that a great majority of these large properties are internationally owned and operated and already have existing in-house management training programs. The final factor is the propensity for other large operators (particularly those in international chains) to seek tailor made training programs to meet their training needs (e.g. in Kenya, Rwanda, and Senegal).

## 5.2 Demand for specific tourism modules

As describe in the methodology section of this report, a wide variety of stakeholders were consulted to understand the demand for new courses that would meet the needs of the industry. From a list of 28 tourism, hospitality and business courses suggested, they were asked to list courses that were available, available but needed improvement, not available and not required, and also not available but required. They were also asked to prioritize the top three most important and urgently required courses. The results of the prioritization are presented below, with results for strategic institutions, educational institutions, the private sector and a summary of all respondents.

### 5.2.1 *Strategic Institutions*

Thirty-two responses were garnered from the 56 strategic institutions interviewed, and the following are the top 15 courses requested (including those that were tied) and the percentage of institutions that prioritised specific modules were:

- Tourism business development (*including entrepreneurship and SME development*) – 13.08%
- Business management – 8.41%

- Options for local communities (*including joint ventures, public-private partnerships, community based tourism*) – 8.41%
- Tourism business planning – 7.48%
- Responsible and sustainable tourism (*including conservation and poverty alleviation*) – 6.54%
- Hotel management – 5.61%
- Hospitality management – 5.61%
- Customer service/customer care – 4.67%
- Field guiding (*cultural and natural*) – 3.74%
- Financial management – 2.80%
- Marketing and marketing management – 2.80%
- Protected areas and ecotourism management – 2.80%
- Tourism destination planning and development – 2.80%
- Tour organization management – 2.80%
- Impacts of tourism – economic, environmental, social and cultural – 2.80%

### **5.2.2 Educational Institutions**

Forty-five of the 50 training institutions interviewed also prioritized new modules. The eleven that were most commonly prioritized (including those tied) are listed below:

- Tourism business development (*including entrepreneurship and SME development*) – 11.49%
- Tourism business planning – 6.76%
- Hotel management – 6.08%
- Options for local communities (*including joint ventures, public-private partnerships, community based tourism*) – 5.41%
- Protected areas and ecotourism management – 5.41%
- Tourism attraction management – 4.73%
- Conference, exhibition and event management – 4.73%
- Business management – 4.05%
- Tourism theory – 4.05%
- Tourism destination planning and development – 4.05%
- Food and beverage management – 4.05%

### **5.2.3 Private Sector Enterprises**

Fifty-five large and small tourism enterprises of the 99 interviewed prioritized courses, and the list that follows includes the fourteen that were most frequently highlighted (including those that were tied):

- Tourism business development (*including entrepreneurship and SME development*) – 9.28%
- Marketing and marketing management – 9.28%
- Options for local communities (*including joint ventures, public-private partnerships, community based tourism*) – 8.25%
- Business management – 6.19%
- Protected areas and ecotourism management – 6.19%
- Tourism business planning – 5.15%
- Responsible and sustainable tourism (*including conservation and poverty alleviation*) – 5.15%

- Financial management – 4.12%
- Human resources management – 4.12%
- Hospitality management – 4.12%
- Conference, exhibition and event management – 4.12%
- Transportation for tourists – 4.12%
- Impacts of tourism – economic, environmental, social and cultural – 4.12%
- Tourism research methods – 4.12%

#### 5.2.4 Summary of prioritized courses

In all, 155 of the 204 strategic, educational and private sector institutions interviewed prioritized specific course modules for development. The lists for each stakeholder group show that the courses highlighted for development by different stakeholder groups vary, but Table 3 compares their priorities and illustrates the level of agreement.

<b>Tourism modules</b>	<b>Strategic Institutions</b> n = 32	<b>Educational Institutions</b> n = 45	<b>Private sector enterprises (large and small)</b> n= 55	<b>All institutions</b> n= 155
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	<b>13.08%</b>	<b>11.49%</b>	<b>9.28%</b>	<b>11.36% (1)</b>
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	<b>8.41%</b>	<b>5.41%</b>	<b>8.25%</b>	<b>7.10% (2)</b>
13. Tourism business planning	<b>7.48%</b>	<b>6.76%</b>	<b>5.15%</b>	<b>6.53% (3)</b>
1. Business management	<b>8.41%</b>	4.05%	<b>6.19%</b>	<b>5.97% (4)</b>
4. Marketing and marketing management	<b>2.80%</b>	3.38%	<b>9.28%</b>	<b>4.83% (5)</b>
22. Protected areas and ecotourism management	<b>2.80%</b>	<b>5.41%</b>	<b>6.19%</b>	<b>4.83% (6)</b>
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	<b>6.54%</b>	2.70%	<b>5.15%</b>	<b>4.55% (7)</b>
17. Hotel management	<b>5.61%</b>	<b>6.08%</b>	1.03%	<b>4.55% (8)</b>
18. Hospitality management	<b>5.61%</b>	3.38%	<b>4.12%</b>	<b>4.26% (9)</b>
21. Conference, Exhibition and Event management	1.87%	<b>4.73%</b>	<b>4.12%</b>	<b>3.69% (10)</b>
3. Financial management	<b>2.80%</b>	3.38%	<b>4.12%</b>	3.41%
12. Tourism destination planning and development	<b>2.80%</b>	<b>4.05%</b>	3.09%	3.41%
19. Tour organisation and management	<b>2.80%</b>	3.38%	3.09%	3.13%
23. Field guiding ( <i>cultural and natural</i> )	<b>3.74%</b>	3.38%	2.06%	3.13%
9. Tourism theory	1.87%	<b>4.05%</b>	2.06%	2.84%
10. Tourism policy and legislation	1.87%	2.70%	3.09%	2.56%
27. Impacts of tourism – economic, environmental, social and cultural	<b>2.80%</b>	1.35%	<b>4.12%</b>	2.56%
20. Tourism attraction management		<b>4.73%</b>	1.03%	2.27%
5. Human resources management	0.93%	1.35%	<b>4.12%</b>	1.99%
24. Food and beverage management		<b>4.05%</b>	1.03%	1.99%
28. Tourism research methods	0.93%	1.35%	<b>4.12%</b>	1.99%
6. HIV/AIDs in the workplace	1.87%	1.35%	2.06%	1.70%
26. Transportation for tourists		0.68%	<b>4.12%</b>	1.42%
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )		2.70%		1.14%
2. Business planning		1.35%	1.03%	0.85%
7. Computer literacy		0.68%	1.03%	0.57%
25. Retail travel	0.93%		1.03%	0.57%
8. Corporate social responsibility				

<b>Summary of prioritised course modules (Contd.)</b>				
<b>Tourism modules</b>	<b>Strategic Institutions</b> n = 32	<b>Educational Institutions</b> n = 45	<b>Private sector enterprises (large and small)</b> n= 55	<b>All institutions</b> n= 155
<b>Other Courses</b>				
Tourism Sensitization - Life/Soft/Communication Skills	1.87%	0.68%		0.85%
Customer Service/Customer Care	<b>4.67%</b>	0.68%		1.70%
Strategic planning and tourism	0.93%			0.28%
English Language Courses	0.93%	0.68%		0.57%
Vocational - Basic Staff Training	1.87%			0.57%
Change management in tourism	0.93%			0.28%
Changing trends in tourism	0.93%			0.28%
Behavioural changes	0.93%			0.28%
Destination Marketing	0.93%	0.68%		0.57%
Management and leadership in tourism		0.68%		0.28%
Business Economics and tourism		0.68%		0.28%
Strategic planning and tourism		0.68%		0.28%
Project Management		1.35%		0.57%
Note: Figures marked in bold are the ten most frequently prioritised courses				

The top three courses prioritized by all institutions were in the top five for each stakeholder group. In addition, there was agreement by at least two of the stakeholder groups of the importance of each of the top ten prioritized overall.

- Tourism business development (*including entrepreneurship and SME development*) – 11.36%
- Options for local communities (*including joint ventures, public-private partnerships, community based tourism*) – 7.10%
- Tourism business planning – 6.53%
- Business management – 5.97%
- Marketing and marketing management – 4.83%
- Protected areas and ecotourism management – 4.83%
- Responsible and sustainable tourism (*including conservation and poverty alleviation*) – 4.55%
- Hotel management – 4.55%
- Hospitality management – 4.26%
- Conference, exhibition and event management – 3.69%

If these modules are developed by TTN, a number of institutions proposed local case studies to fit into the modules. Nearly all of the educational institutions suggested that they would be interested in developing case studies (see Table 4).

<b>Table 4: Proposed case studies that relate to prioritised courses</b>	
<b>Prioritised modules</b>	<b>Case studies proposed</b>
Tourism business development (including entrepreneurship and SME development)	<ul style="list-style-type: none"> <li>• Joint ventures inside and outside protected areas, particularly public-private partnerships with local communities</li> <li>• Franchising</li> <li>• Bush and Beach Tourism (combination safari and sun packages)</li> <li>• Package Tourism versus Independent Travel in the Circuits</li> <li>• SME training</li> </ul>
Options for local communities (including joint ventures, public-private partnerships, community based tourism)	<ul style="list-style-type: none"> <li>• Cultural tourism and cultural centres</li> <li>• Community based tourism project</li> <li>• Adventure, cultural and heritage tourism</li> </ul>
Tourism business planning	<ul style="list-style-type: none"> <li>• Business management of retail areas</li> <li>• Project management</li> <li>• Rejuvenation of urban areas for tourism</li> </ul>
Business management	<ul style="list-style-type: none"> <li>• Preparations for the 2010 FIFA World Cup</li> <li>• role of education in the development and promotion of tourism</li> <li>• New venture training</li> </ul>
Marketing and marketing management	<ul style="list-style-type: none"> <li>• Destination management and the outcomes from the market</li> <li>• Disaster and terrorism management</li> </ul>
Protected areas and ecotourism management	<ul style="list-style-type: none"> <li>• Ecotourism</li> <li>• Human/animal conflict issues</li> <li>• The Massai Mara in Kenya, regarding sustainable tourism and environmental impacts</li> <li>• Ecotourism and handicrafts</li> <li>• Environmental issues</li> </ul>
Responsible and sustainable tourism (including conservation and poverty alleviation)	<ul style="list-style-type: none"> <li>• Informal traders and tourism</li> <li>• Model of Inhambane and Cabo del Gado in Mozambique, (regarding the type of tourism construction, and contact between operators and local</li> <li>• Is culture a bottleneck to entrepreneurship in tourism?</li> </ul>
Hotel management	<ul style="list-style-type: none"> <li>• The Polana Hotel in Maputo, Mozambique: regarding service and changes in management.</li> </ul>
Hospitality management	None suggested
Conference, exhibition and event management	<ul style="list-style-type: none"> <li>• Events management</li> <li>• Events in cultural tourism and festivals</li> </ul>

### **5.3 How the existing supply of course modules relates to the demand**

This section discusses how the specified courses apply to each of the markets identified in the study. Additionally, the optimal institutional type to deliver these courses is briefly discussed. A subsequent section discusses how this relates to the strategy for the GBSN and the courses to be developed through the TTN.

#### **5.3.1 Vocational Skills**

##### *5.3.1.1 Relativity*

Vocational skills do not necessarily correlate to the courses described in the previous section, because the courses listed were not related to vocational skills but rather to management skills. However, in the strategic institutions 4.67% of the courses were customer service/customer care, which was not in the list, but was independently proposed as a course.

### 5.3.1.2 *Institutional Delivery Mechanism*

The optimal institution to deliver vocational skills is a specialized vocational school. Whether the school is public or private does not matter. Business schools are not appropriate for the delivery of vocational skills.

## 5.3.2 **Public Sector Skills**

### 5.3.2.1 *Relativity*

Public sector skills development is highly relevant to the courses prioritized by the interviewees. Among the list of prioritized modules, half of the top mentioned courses are directly related to the functions served by public sector entities:

- Options for local communities (*including joint ventures, public-private partnerships, community based tourism*)
- Marketing and marketing management
- Protected areas and ecotourism management
- Responsible and sustainable tourism (*including conservation and poverty alleviation*)
- Conference, exhibition and event management

In the modules prioritized by the educational institutions over half of the courses were related to functions served by these entities:

- Options for local communities (*including joint ventures, public-private partnerships, community based tourism*)
- Protected areas and ecotourism management
- Tourism attraction management
- Conference, exhibition and event management
- Tourism theory
- Tourism destination planning and development

### 5.3.2.2 *Institutional Delivery Mechanism*

Tertiary education schools would be the best mechanism for delivering these types of courses. Private institutions, NGOs and consultancies could deliver these types of programs, but would lack the support that a University or College would have. The modules could be delivered through short-courses, executive education or diploma/degree programs.

## 5.3.3 **SME management**

### 5.3.3.1 *Relativity*

SME management courses are highly relevant according to the prioritized courses by the interviewees. In the combined prioritization of courses most of top mentioned courses could function for SMEs:

- Tourism business planning
- Business management
- Marketing and marketing management
- Hotel management

- Hospitality management
- Conference, exhibition and event management

Each of the modules prioritized by the private sector would be valuable to SMEs.

#### 5.3.3.2 *Institutional Delivery Mechanism*

The optimal institution for delivery of SME courses would be a specialized SME or entrepreneurship centre, enterprise or consultancy. Due to the wide variety of courses needed, a degree of flexibility will be needed to suit the needs of the learners. Also, a low cost structure is recommended due to SMEs resource constraints and ability to pay for courses.

### **5.3.4 Management or Executive Skills**

#### 5.3.4.1 *Relativity*

Management and executive skills are highly relevant according to the prioritized courses by the interviewees. In the combined prioritization of courses most of top mentioned courses could function for management or executive skills:

- Tourism business development (*including entrepreneurship and SME development*)
- Tourism business planning
- Business management
- Marketing and marketing management
- Responsible and sustainable tourism (*including conservation and poverty alleviation*) –
- Hotel management
- Hospitality management
- Conference, exhibition and event management

In the modules prioritized by the educational institutions, half of them were related to management or executive skills:

- Tourism business planning
- Hotel management
- Conference, exhibition and event management
- Business management
- Food and beverage management

#### 5.3.4.2 *Institutional Delivery Mechanism*

Since the main market for this form of training is professionals and executives, short courses or an executive education format is best suited for this market. Specialist consultants or institutions, such as business schools with executive education programs or research and consulting centers, would best deliver these courses.

## **5.4 Payment mechanisms for courses**

Small and large tourism enterprises were asked what they would be willing to pay for different lengths of courses. A summary of data collected from all nine countries is provided below in Table 5 (with more country details in Appendix 5). Interestingly, the range of prices that the small and

large enterprises were willing to pay did not differ very greatly, and sometimes SMEs were actually prepared to pay more than large enterprises for the same type of course. Surprisingly, there were no major differences observed between the numbers of enterprises desiring different lengths of courses (i.e. no particular preference for very short or very long courses).

Type of course	Range of prices		Average N=48
	SMEs	Large Enterprises	
1 module: 1/2 day (or 50 page workbook)	\$6 to \$300	\$10 to \$286	\$26
1 module: 1 day (or 100 page workbook)	\$12 to \$550	\$47 to \$1344	\$81
1 module: 2 days (or 200 page workbook)	\$30 to \$320	\$30 to \$900	\$55
1 series of modules: 2 weeks (or ten x 100 page workbooks)	\$200 to \$850	\$54 to \$571	\$86
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)	\$17 to \$767	\$150 to \$800	\$102
N=48			

Training institutions varied considerably in the prices that they would charge for courses. Course prices would also vary for residents, non-residents, the specific course, and whether the students were studying for diplomas, certificates, undergraduate or post-graduate courses. The general trend was that diplomas and certificates would be cheapest, followed by undergraduate courses, and post-graduate tuition would be most expensive. Charges also sometimes varied on an annual basis during specific degrees, with each subsequent year becoming more expensive. A summary of the tuition fees reported by training institutions in the nine countries is provided in Table 6. Across all nine countries, and 47 training institutions that reported their fees, the average fee charged per module was \$336, and \$2656 would be charged per year. Average module fees were lowest in Madagascar, and highest in Tanzania, while the average annual fees were lowest in Madagascar and highest in South Africa.

Average course cost	Ghana (n=4)	Kenya (n=6)	Madag (n=5)	Mozamb. (n=7)	Rwanda (n=4)	Senegal (n=4)	South Africa (n=10)	Tanzania (n=4)	Zambia (n=3)	Ave. N=47
per module	\$683		\$39	\$82	\$160	\$288	\$346	\$794	\$300	<b>\$336</b>
per year	\$3,430	\$4,201	\$494	\$592	\$1,824	\$4,356	\$4,657	\$3,100	\$1,248	<b>\$2,656</b>
per semester				\$644					\$1,223	<b>\$933</b>

Comparing Table 5 and Table 6 reveals a major discrepancy between what the private sector are willing (on average) to pay for courses, and what the training institutions charge. However, the range of prices that small and large enterprises were willing to pay varied greatly, and therefore it is possible that some of the business would be willing to pay for courses at the prices currently charged.

Training institutions noted a mixture of payment mechanisms for courses, including that students would pay full fees, or if their employer sent them the student may be subsidized, or that grants might be available from government or other institutions. Therefore it may be necessary for GBSN to partner with local companies, trade associations, development agencies or government departments in order to maximize the number of course participants on the new modules.

## 5.5 Existing tourism teaching materials

During the course of the country-visits, a number of the institutions provided information, or examples of tourism training materials, particularly at an SME and vocational level (see Table 7).

<b>Table 7: Existing course materials</b>		
<b>Name of course</b>	<b>Institution</b>	<b>Materials available</b>
<b>Tertiary course materials</b>		
<ul style="list-style-type: none"> <li>• Bachelor of Tourism Management</li> <li>• Bachelor of Hotel and Restaurant management</li> </ul>	USIU, Kenya	Curriculum, list of modules & detailed module outlines
<ul style="list-style-type: none"> <li>• Masters in Management in Tourism</li> <li>• License Professionnel en Management du Tourism et du l'Hotellerie</li> <li>• DES in Tourism and Hotel Business</li> <li>• BEP in Hotel Business/Catering</li> </ul>	INTH, Madagascar	Curriculum
<ul style="list-style-type: none"> <li>• Bachelor of Science in Hospitality and tourism management</li> <li>• Masters in Hospitality and Tourism Management</li> </ul>	Kenyatta University, Kenya	Curriculum with list of modules
<ul style="list-style-type: none"> <li>• Diploma in Hospitality and Tourism</li> <li>• Bachelors in Hospitality and Tourism</li> </ul>	Strathmore University, Kenya	List of modules
<ul style="list-style-type: none"> <li>• Bachelors in Commerce, specialising in Tourism Management</li> <li>• Diploma in Tourism management</li> </ul>	UNISA, South Africa	List of modules
<ul style="list-style-type: none"> <li>• Bachelors in Hospitality and Tourism</li> </ul>	GIMPA, Ghana	List of modules
Executive courses: Various business and management modules	INSCAE, Madagascar	Module overview for each short course
Case studies	University of Cape Town, South Africa	Tourism case study book <sup>6</sup>
<b>SME course materials</b>		
Hotel management program	Business Edge	Training of trainer guides Course materials
<b>Vocational course materials</b>		
Catering and housekeeping	Hotel Andalucia, Mozambique / American Hotel and Lodge Educational Institute (START) materials	Detailed teaching materials, exercise and evaluation tools (can be used under license)
Restaurant, Reservations, Bar, Stock Control, Kitchen, Administration, Housekeeping, Management, Front Office, English for tourism	Hospitality matters & Mario's Place, Mozambique	Curriculum and module outlines
Certificate in Conference and Events management; food and beverage management; general travel; hospitality front office; professional Cookery; nature field-guiding; lodge operations and conservation studies. Diploma in Retail Travel, Travel processing	Damelin, South Africa	Curriculum and list of modules
Reception, housekeeping, restaurant and bar work, management	PIC, Madagascar	Curriculum for each module
Bartending and hygiene, Hotel management, kitchen organization, marketing	CAPMER, Rwanda	Course teaching materials
<b>Other training materials</b>		
Training and development for Tourism – a sustainable tourism course for the industry	Go To Madagascar / Pro Invest/ Mauritius Employers' Federation	Course materials and exercises in a booklet

<sup>6</sup> George, R. and Bennet, A. (2004) South Africa travel and tourism case studies, Van Schaik

Each institution will have tourism teaching materials that each teacher develops from the core curriculum, and therefore these materials are less accessible to the TTN as they are unpublished. There is potential for the TTN to enter into agreement with the authors of these materials, or the institutions that hold their copyright, but this could be a time-consuming and costly exercise. Understandably, some institutions were not prepared at this stage to share their curricula or course materials, to retain their intellectual copyright.

The majority of institutions have curricula and course outlines available, and there are a few examples of full teaching materials already available and easily accessible, such as:

- American Hotel and Lodge Educational Institute (START) materials
- Bartending and hygiene, Hotel management, kitchen organization, marketing materials from CAPMER
- Business Edge materials on Small and Medium Sized Hotel Management

However, the great majority materials are suitable for SMEs and vocational training, rather than public sector or management training. As mentioned before for executive or public sector education the module materials will need to be developed independently and then disseminated with the TTN pilot schools.

Sample program, course and module listings can be found at the end of this report in Annex A and Annex B.

## **5.6 Strategy for effective implementation of the Tourism Training Network**

The stated intention of the program is to increase the quality and ability of tourism training in Africa. This section outlines the potential fit of the TTN with the identified tourism training markets.

### **5.6.1 Vocational Skills Development**

Vocational skills development is probably not a GBSN activity. Vocational skills development needs to be addressed at a much lower level and business schools are not the likely entity to make a difference. One possibility lies in creating train-the-trainer courses, which effectively train people to become Vocational Skills consultants or allow them to set-up small quality vocational skills schools.

### **5.6.2 Public Sector Skills Development**

Tourism and tourism development are growing in each of the countries visited during the survey. In all cases including Kenya, Madagascar, and South Africa there is a deficiency in public sector skills. These entities all have budgets for training, and do send employees on training. The problems have been included: existing content has not been appropriate; courses have been once off; no monitoring and evaluation; no follow-up or feedback.

If the TTN courses were designed to meet the needs of this market and included monitoring and evaluation, multiple/repeated trainings and follow-up, then they could be very valuable to the public sector. This point also came up a number of times when asking if the TTN would increase investment in tourism in Africa. If private sector management (and training) is to be effective, there needs to be an efficient government environment to support it.

### **5.6.3 SME Management Skills Development**

As evidenced by the prioritization of courses in all segments, the most popular module *Tourism business development*. This makes sense since, as previously shown, the large majority of the tourism enterprises in Africa are SMEs. However, anecdotal evidence suggests that generic once-off courses for SME development are not effective. This approach has been tried in numerous locations and with many different approaches, but the result is typically the same: SME managers have not learned new skills to more effectively manage their businesses. Instead a more effective route is to deliver a systemized series of learning courses that are short in nature and broad in scope.

The most important aspect of working with SMEs is to make sure that the course work is pitched at the right level. Many of the owners/managers of SMEs may have only a high school education. The type of learning activities and the level of learning abilities is much lower than what is typically presented by business schools and management institutions.

Finally, as previously mentioned, the IFC PEP Africa facility through the SME-EDI program is developing a tourism training program named the *Business Edge Hotel Management Program*. The Business Edge is a successful SME management program developed in Southeast Asia to train managers across a wide range of skills. The success of the Business Edge and the huge market of tourism SMEs demanding training has prompted the development of an industry specific program. The Business Edge Hotel Management Program intends to focus on the hospitality industry, but provided it is successful will branch into other aspects of the tourism industry.<sup>7</sup> PEP Africa intends to roll this program out in a number of countries all of which overlap with the GBSN TTN countries.<sup>8</sup> The target profile of SMEs will be entities that have passed survival stage of development and are looking to grow the business. The actual size of the enterprises will vary, from the pilots conducted in Laos, Vietnam and Cambodia attendees ranged from guest houses with six rooms to hotels with 200 rooms. Since SME-EDI is going to focus on SME training it would be duplication if GBSN were to undertake this activity too.

### **5.6.4 Management or Executive Skills Development**

This market probably fits the GBSN profile and core competencies best, but it is also most likely to smallest market due to the issues previously mentioned: make-up of the marketplace (too few large operators); in-house management training programs and competition from new hospitality specific schools.

One question that is still left unanswered is whether large locally owned enterprises (i.e. with 100-250 employees) would be more suited to taking a Business Edge style course or if they would prefer to take executive education style courses at a business school.

## **5.7 Proposed strategy**

There is a good opportunity for tourism training in Africa, but at the same time there are real challenges that need to be overcome in the delivery. The research has shown that the market understands the needs for training and is interested, but in some instances there is either a fear of training (by SMEs) or distrust of local training (by large operators). Hopefully the TTN will address the challenges to sufficiently capitalize on the opportunities, through vetted, quality material and training processes.

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<sup>7</sup> McKenzie, John. *IFC-MPDF*. Personal Interview, 21 May 2007.

<sup>8</sup> Harris, Adrienne. *IFC-PEP Africa*. Personal Interview, 28 May 2007.

In order to match the competencies of the GBSN and the needs of the market, as well as to provide an adequate cost recovery mechanism for the schools that will deliver the modules, the optimal area to focus would be in the creation and delivery of a mix of *Public Sector Skills* and *Management or Executive Skills*. Focusing on these markets will provide excellent complimentary activities to the other PEP Africa programs in tourism, such as the Business Edge and SMART.

## 6 Country reports

Africa is a continent characterised by a relatively small, but growing tourism industry. The tourism industry in Africa is projected to grow by 5% per annum, with 1 billion arrivals by 2010 and 1.6 billion arrivals in 2020. Tourism growth has generally been driven by tourists from the African continent, followed by the Americas, Middle East and Europe<sup>9</sup>. Tourism is a major source of employment, and can be more labour intensive than manufacturing (although less labour intensive than agriculture) with a higher proportion of tourism benefits (such as jobs, and trade opportunities) reaching women, than other modern sectors<sup>10</sup>.

The following sections of the report provide full details of the research findings of each country that was collected using the questionnaires, interviews, and supplementary documentation. In addition, a summary is provided on the recommendations for TTN in each country.

The information collected and presented not only reflects the current status of tourism training supply and demand, but also provides information about the structure of courses and process of integrating new courses, which will facilitate the development of new courses that are locally relevant and appropriate. For easy reference and comparison, each country sections follows this structure:

### Overview of tourism

#### Strategic institutions:

- institutions interviewed
- tourism skills needs
- problems relating to capacity building
- tourism modules (available, needing improvement, not available or needed, not available but needed)
- cost recovery options
- accreditation
- other issues raised

#### Training institutions:

- Institutions identified and interviewed
- Tourism management and business courses offered
- Tourism modules available and needed
- Structure of courses
- Process of integrating new courses
- Case study options
- Students
- Cost recovery options

#### Large enterprises and SMEs:

- Enterprises interviewed
- Perception and purpose of training
- Problems with and relating to training
- Preferred method of training, and training requirements
- Willingness to pay for courses
- Tourism modules available and needed

Conclusions, including a summary of tourism modules prioritised in the country.

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<sup>9</sup> South African Tourism (2006) Indaba 2006 Factsheet: 2005 Tourism arrivals, May 2006, South African Tourism.

<sup>10</sup> Ashley, C., Roe, D., and Goodwin, H. (2001) Pro-poor tourism strategies: Making tourism work for the poor: A review of experience, Pro Poor tourism report No. 1, ODI/IIED/CRT.

The countries are discussed in alphabetical order: Ghana, Kenya, Madagascar, Mozambique, Rwanda, Senegal, South Africa, Tanzania, and Zambia. Additional detailed tables of information gathered in each country visit can be found in Appendix 6, which are cross referenced in the text.

## **6.1 Ghana**

### **6.1.1 Overview of tourism**

Since the late 1980s, Ghana's economic development strategy has placed significant attention on ensuring the growth of the tourism industry. Over the years, the number of tourist arrivals and amount of tourists' expenditure has steadily increased, while both public and private investment activity in the various tourism sub-sectors has also expanded.

In 1993 the Ghanaian government established a Ministry of Tourism with the aim of underscoring its commitment to the development of tourism in the country. With the assistance of the United Nations Development Program and the World Tourism Organization it prepared a development plan spanning 15 years and ending in 2010. So far the development plan has succeeded in positioning the Ghanaian tourism industry as one of the leading tourist markets in Africa. Not only has the plan boosted international tourism, but domestic tourism as well<sup>11</sup>.

Ghana can be considered as the model for economic growth in West Africa. Not only has inflation been kept down to 10% through good governance and the political stability that follows, but it has also experienced a general economic growth of between 4 and 6% in recent years. Foreign investment rose by a staggering 55% in 2005. The main sources of investment in Ghana are Germany, India, Lebanon, the UK and the United States; however investments from Nigeria and South Africa are now also starting to rise significantly. Tourism is currently the fourth largest foreign exchange earner in the country. To ensure that maximum benefit is gained from the industry, the government is developing a comprehensive travel and tourism policy, with a special emphasis on cultural tourism and eco-tourism. It is also implementing aggressive marketing campaigns to attract international travellers as well as encouraging Ghanaians to travel locally<sup>12</sup>.

Data from the World Travel and Tourism Council (WTTC) indicates that Personal Travel and Tourism generated US\$27.5 million in 2003, and is predicted to grow to US\$638.5 million by 2013 (see Table 8). The WTTC estimates that Ghana employs 117,900 people in the tourism industry, and that by 2013 this will nearly double to 205,500 (or 3.2% of employment).

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<sup>11</sup> [http://www.euromonitor.com/Travel\\_And\\_Tourism\\_in\\_Ghana#exec/](http://www.euromonitor.com/Travel_And_Tourism_in_Ghana#exec/) Downloaded 30 May 2007

<sup>12</sup> [http://www.euromonitor.com/Travel\\_And\\_Tourism\\_in\\_Ghana#exec/](http://www.euromonitor.com/Travel_And_Tourism_in_Ghana#exec/) Downloaded 30 May 2007

**Table 8: Financial, economic and employment estimates for Tourism in Ghana**

Description of figures	Status in 2003	Predicted growth to 2013
<b>Personal Travel &amp; Tourism</b> (or consumer expenditures) which captures spending on traditional travel and tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and non durable) used for travel and tourism activities.	US\$ 276.5 million (3.7% real growth)	US\$ 638.5 million (6.2% annualised real growth)
<b>Business Travel</b> by government and industry, in spending on goods and services (transportation, accommodation, meals, entertainment etc) and intermediate inputs used in the course of business or government work.	US\$ 88.1 million (-2.4% real growth)	US\$ 216.3 million (6.9% annualised real growth)
<b>Government expenditures</b> (Individual) by agencies and departments which provide visitor services such as cultural (art museums) recreational (national park) or clearance (immigration/customs) to individual visitors.	US\$ 14.6 million (2.3% of total government expenditure; 4.7% real growth)	US\$ 28.6 million (2.4% of total government expenditure; 4.4% annualised real growth)
<b>Travel &amp; Tourism Industry Employment</b> which includes those jobs with face to face contact with visitors (airlines, hotels, car rental, restaurant, retail, entertainment, etc)	117,900 employees (2.4% of total employment; -2.2 growth)	205,500 employees (3.2% of total employment; 5.8% annualised real growth)
<b>Travel &amp; Tourism Industry Gross Domestic Product (GDP)</b>	US\$ 178.7 million (3% of GDP; -1.7% real growth)	US\$ 439.4 million (3% of GDP; 7.0% annualised real growth)
Source: WTTC, 2003 <sup>13</sup>		

Despite the many promising features Ghanaian tourism, there are still significant challenges that need to be addressed. As in many other African countries, Ghana is plagued by poorly developed infrastructure and lacks the financial support to maintain existing infrastructure. Limited capital also affects the scale of marketing efforts and Ghana struggles to compete against destinations with greater capital reserves<sup>14</sup>. Despite the positive impact of tourism, Ghana still has to face the fact that it is one of the poorest countries in Africa with 35% of its 22 million people living on less than US\$1 a day<sup>15</sup>.

#### 6.1.1.1 Donor and development agency interventions

There has been some progress towards creating a national curriculum, firstly by a USAID project, which identified needs and drew up a sample curriculum. This project ended two years ago and currently there was mention by one of the Tourism Associations that the Japan International Cooperation Agency (JICA) was continuing with the project to actually implement the curriculum. However, this was not confirmed by the Ministry of Tourism.

IFC's strategy in Ghana includes supporting private provision of infrastructure, building and deepening the domestic financial sector, expanding financing and technical assistance support to MSMEs, promoting the development of non-traditional exports, and enhancing the business environment and investment climate. IFC's investment portfolio in Ghana amounts to approximately US\$155 million as of July 31, 2006. The IFC launched four new technical assistance programs through the Private Enterprise Partnership for Africa (PEP Africa) last year in Ghana, one of which is the SME Enterprise Development Initiative. In addition, the IFC-supported

<sup>13</sup> WTTC (2003) Country League Tables, The 2003 Travel & Tourism Economic Research, World Travel and Tourism Council

<sup>14</sup> Ghana Tourism Board (2007), Strategic Action Plan- Tourism 2007: Narrative

<sup>15</sup> [http://www.euromonitor.com/Travel\\_And\\_Tourism\\_in\\_Ghana#exec/](http://www.euromonitor.com/Travel_And_Tourism_in_Ghana#exec/) Downloaded 30 May 2007

African Management Services Company (AMSCO) continues to provide management expertise and capacity building to SMEs<sup>16</sup>.

#### **4.1.2 Strategic institutions**

##### *6.1.1.2 Institutions interviewed*

Meetings were held with representatives of the IFC in Ghana, Ghana Tourist Board, Ministry of Tourism, Ghana Association of Tourism and Travel Agents, and Tour Operators Union of Ghana.

##### *6.1.1.3 Tourism skills needs*

In Ghana there is a general consensus on a need for tourism skills development in general in all sectors and sub-sectors of the industry. A major identified need is management skills for SME accommodation providers, as many of the SME owners are unskilled. Another major deficiency lies in the public sector, both at an appointed managerial position and at civil servant level. Even at the Ghana Tourist Board there are few employees with prior experience or training the tourism industry.

##### *6.1.1.4 Problems relating to capacity building*

Three of the strategic institutions interviewed noted whether particular problems presented were relevant in Ghana (see Table 87 in Appendix 6). They concurred that problems included scarce financial resources; scarce local trainers, unqualified trainers, poorly designed training, no training follow up, no relevance of training to the bottom line of business, and the adequacy of vocational skills and hotel schools. A major issue raised by stakeholders was Customer Service and Customer Care. It was believed that the main issue is related to a lack of a service ethic in general.

##### *6.1.1.5 Tourism courses*

Two of the strategic institutions listed in their opinion which course modules were available, needed improvement, were not required, and were needed in Ghana (see Table 88). The most frequently prioritised modules for development were:

- 21. Conference, Exhibition and Event management
- 23. Field Guiding (*cultural and natural*)
- Other: Customer Care/Customer Service

##### *6.1.1.6 Cost recovery options*

In each of the institutions visited, the vast majority of students (or their parents) paid for their school fees. The exception is that in a few cases some students received sponsorships from their employer.

The Hotel Catering and Tourism Training Institute (HOTCATT) is a government funded institution, and all students who attend are subsidized by the government, which pays partial tuition for all students. Ghana Institute of Management and Public Administration (GIMPA) is also a public institution, but it does not provide government subsidies for its students.

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<sup>16</sup><http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/AFRICAEXT/GHANAEXTN/0,,menuPK:351962~pagePK:141132~piPK:141107~theSitePK:351952,00.html>

All institutions believed that there was extremely high demand for tourism courses and training, but there was some misunderstanding at which level students would want to enter.

#### 6.1.1.7 Accreditation

Currently there is no official accreditation body for tourism or hospitality courses.

### 6.1.2 Training institutions

#### 6.1.2.1 Institutions identified

A list of institutions identified that provide tourism courses is detailed below. Representatives from those marked with an asterisk were interviewed:

- Hotel Catering and Tourism Training Institute (HOTCATT)\*
- School of Hotel, Restaurant, and Tourism Management\*
- Career Development Institute (CDI) \*
- Hospitality Associates\*
- Ghana Institute of Management and Public Administration (GIMPA)\*
- University of Ghana-Department of Geography
- University of the Cape Coast
- Accra Polytechnic University (and some other polytechnics)

#### 6.1.2.2 Tourism management and business courses offered

Tourism courses offered, and in development, from the training institutions interviewed are outlined in Table 9 below. Additional business courses offered are listed in Appendix 6.

<b>Table 9: Tourism courses offered by training institutions in Ghana</b>		
<b>Tertiary level courses</b>		
<b>Institution</b>	<b>Diploma/Certificates</b>	<b>Bachelors</b>
HOTCATT	Introduction to management Diplomas in Travel and tourism and Hospitality Vocational courses in Food & Beverage, Food Preparation, Housekeeping and Front Desk	
CDI	IATA certification	
Hospitality Associates	Vocational Certificates in Food & Beverage, Housekeeping and Front Desk Supervisory Certificate from American Hotel and Motel Association	
GIMPA	<i>Next year plan to offer Supervisory and Skills Certificates</i>	<i>Entrepreneurship &amp; SME Management Hospitality Management</i>
University of Ghana	Certificate in Tourism	

Due to time constraints it was not possible to visit the University of Cape Coast. The University has a BSc in Tourism, an MSc/MPhil in Tourism and a PhD in Tourism and Geography within the Department of Geography and Tourism. The department has been in existence since 1962 and the tourism program has been in place since 1996.

Although also not visited, the University of Ghana runs tourism programs. Their certificate in tourism was launched in January 2006, as a result of collaboration between the Tour Operators of Ghana (TOUGHGA) and a number of departments of the University. TOUGHGA actually initiated

efforts to have such a program offered by the University to benefit its members and other practitioners in the industry. The objective of the program is to enhance the skills of practitioners in the highly competitive tourism industry<sup>17</sup>. Undergraduate Geography courses also include a module on tourism in the developing world.

#### *6.1.2.3 Tourism modules*

The training institutions identified course modules that were available, needed improvement, were not required, and were needed (see Table 89). The most frequently prioritised modules for development were:

- 1. Business management
- 17. Hotel management
- 19. Tour organization and management
- 24. Food and beverage management

#### *6.1.2.4 Structure of courses*

There is no common format for the development of vocational tourism skills or tourism management courses in Ghana. This was one of the areas of concern that someone Ministry of Education or Ministry of Tourism needs to establish a directive for course design and delivery, much as there is a need for a common curriculum.

All institutions agreed that it would be extremely valuable to see coursework developed outside the country, in order to get a better understanding of best practices. One institution was using the textbook and coursework from the American Hotel and Motel Association and believed that this was the best concept since there are no local guidelines.

All institutions interviewed used face-to-face training methods.

#### *6.1.2.5 Process of integrating new courses*

All of the institutions indicated that their preferred additional modules would fit within their existing course frameworks either as core courses or as elective modules. The process of integrating new courses varied greatly in the degree of formality, and length of time. Once the courses are accredited they do not go to any outside bodies for review.

#### *6.1.2.6 Case studies*

There are no local cases written about the Ghana tourism industry. GIMPA stressed that this is one of the big gaps in education. They were not aware of any cases, coursework or textbooks that have examples from West Africa. All of the institutions interviewed indicated that they would be interested in developing case studies.

#### *6.1.2.7 Students*

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning, and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 10).

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<sup>17</sup> <http://www.ug.edu.gh/announcementdetail.php?recordID=134> downloaded 2 July 2007

**Table 10: Overview of tourism students in Ghana**

Institution	Country of origin of students	No. of tourism students 2007 (2008 predicted)	Type of institution students drawn from	Organisational level the come from when coming from industry	Level of prior learning	Jobs students go on to do after the courses
HOTCATT	Ghana (95%), West Africa	300	60% from high school; 40% from industry	40% come from Mid management; 60% entry	High school degree minimum	Nearly all are entry level workers
School of Hotel, Restaurant and Tourism Management	Ghana (90%), West Africa	200	30% from industry; 50% from high school; 20% from other industries	95% come from mid-level or general staff	Incoming students must have a high school degree with a score of 24 or better	96% go onto work in the industry; 4% own an SME business
CDI/ Hospitality Associates	Ghana (98%), West Africa	80	99% from high school	99% are entry level	Incoming students must have a high school degree with a score of 24 or better – certificate have to take entrance	All work in industry
GIMPA	Ghana	18 in hospitality – only in 2nd cohort	All students have at least 3 years of experience	About 50/50 are from managerial and entry level	Have an entrance exam – very selective because they have such small cohorts	95% work in the industry at big operations – they would like more to start SMEs

#### 6.1.2.8 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 11). Courses are generally paid for per year, rather than per course or per module.

**Table 11: Course payment mechanisms in Ghana**

Institution	Students pay	Originating institutions pay	Subsidy or grant	Cost per course / module	Comments
HOTCATT	√		√	US \$440 per module	Students pay for half of the fees and a government subsidy pays the other half
School of Hotel, Restaurant and Tourism Management	√	√	√	Undergrad: US\$2250 p/a if resident \$3500 p/a if non resident Masters: \$2150 p/a resident; \$3250 p/a non res.	Majority of students pay; and minority of originating institutions pay. Kenyan students receive government subsidy
CDI/ Hospitality Associates	√			Management course: \$1500 Operational: \$300 IATA: \$500	Management course cost covers tuition, textbook materials and certificate. IATA cost covers certificate cost.
GIMPA	70%	30%		\$6,000 for the whole	Price only includes tuition; books and

				program	room & board are additional
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### **6.1.3 Large enterprises**

Labadi Beach Hotel reported the following:

- The Labadi Beach Hotel is owned by the Legacy Group of South Africa and they have an in-house management training program.
- Most of the managers at the Labadi Beach Hotel are ex-patriot South Africans.
- There is a plan to have more local managers onsite and they are working towards that goal through an internal management-training program.
- Vocational skills development should be a priority for Ghana to grow its tourism.
- There are some schools that are satisfactory, and some graduates are employed. Still much in-house training has to take place once they are hired.
- There was some concern that there is not being enough done to promote Ghana as a tourism destination, so it is hard for individual operators to be internationally competitive.

## 6.1.4 SMEs

### 6.1.4.1 Enterprises interviewed

The three small tourism enterprises were interviewed providing travel services and car hire: Westlink Travel, Apstar Tours Ltd. and Budget Travel and Tours (see Table 12).

Issue	Westlink Travel	Apstar Tours Ltd.	Budget Travel and Tours
Type of enterprise	Travel Agency and Tour Operator	Tour operator	Tours and Car Hire
No. visitors (per mo.):			
High season	20	10	120
Low season	10	5	80
Average length of stay	5 days	10 days	7 days
Price from / to	\$100-240 per night	-	\$50-150 per package
Type of guests	65% business 25% leisure 10% other	30% business 70% leisure	70% business 20% leisure 10% other
Country of origin of guests	South Africa and Nigeria	Europe	USA, Asia, Europe, Africa
No. full time employees	6	4	22
No. part time employees	-	2	-

### 6.1.4.2 Perception and purpose of training

The SMEs recognised the importance of training, and indicated it was necessary to improve the quality of services and standards in the industry. They recognised the need for languages skills, and that they would like to hire people with better skills. The purpose and reasons for training given by the SMEs are summarised in Table 90, and shows that they concurred that it was used to increase performance, efficiency, acquire skills, and gain knowledge. They also agreed that it was useful when upgrading to international standards and to become more professional.

### 6.1.4.3 Problems with and relating to training

The SMEs generally reported that training was satisfactory, but for the most part they had not undertaken their training in Ghana. *Internal problems* that related to training included shortage of time and releasing staff. Other problems they identified are indicated in Table 91, which in particular focussed on high turnover of employees, and the lack of training follow up.

### 6.1.4.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the three SMEs are indicated in Table 92. They noted that face-to-face training in a classroom setting was preferred, and that it should be presented in English.

#### 6.1.4.5 Willingness to pay

Westlink Travel indicated their willingness to pay for courses, and stated that they would be interested if the courses were accredited by an international body like the UK's City & Guild (see Table 13).

Type of course	Westlink Travel
1 module: 1/2 day (or 50 page workbook)	\$150
1 module: 1 day (or 100 page workbook)	\$200
1 module: 2 days (or 200 page workbook)	\$250
1 series of modules: 2 weeks (or ten x 100 page workbooks)	\$200
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)	\$250

#### 6.1.4.6 Tourism modules

The small enterprises listed course modules that were available, needed improvement, were not required, and were needed in Ghana by the SMEs, and prioritised modules for development (see Table 93). Only Westlink Travel prioritized courses for development:

- 1. Business Management
- 3. Financial Management
- 14. Tourism business development (*including entrepreneurship and SME development*)

#### 6.1.5 Conclusions

Ghana is an interesting tourism destination and should be a market leader in West Africa, however there is little to no marketing of Ghana as a tourism destination on the international scale. Both public and private sector complained of not have a presence in the market and that Ghana is restrained due to negative publicity of its neighbours. Without adequate resources to combat the bad press about the region Ghana is affiliated by association with the neighboring negativities. However, Ghana has been independent for 50 years, and has experienced peace and stability for most of this time. The infrastructure is a fair standard, and the people are extremely friendly and welcoming. Perceived problems in Ghana are human resource and capital resource constraints.

The individual operators find it difficult to sell their product when the overall perception of Ghana is negative and therefore there are few extra resources available for training. As highlighted by the strategic institutions, there is a general fear of training in the industry, both at an SME and large enterprise level, as trained staff demand higher wages, and may be poached by other companies. Although, the few operators (5) that were interviewed found that training is important and necessary, they believe that their counterparts in the industry do not find it as important. This apathy to training will need to be overcome to be successful in Ghana.

The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 14.

<b>Table 14: Summary of tourism modules prioritised in Ghana</b>					
	<b>Strategic institution (n=2)</b>	<b>Training institutions (n=4)</b>	<b>Large operators (n/a)</b>	<b>SMEs (n=1)</b>	<b>Totals</b>
<b>General business modules</b>					
1. Business management		**		*	3
2. Business planning					
3. Financial management	*	*		*	3
4. Marketing and marketing management					
5. Human resources management	*				1
6. HIV/AIDs in the workplace					
7. Computer literacy		*			1
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory					
10. Tourism policy and legislation					
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )					
12. Tourism destination planning and development	*	*			2
13. Tourism business planning					
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )				*	1
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )					
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )					
17. Hotel management		**			2
18. Hospitality management					
19. Tour organisation and management		**			2
20. Tourism attraction management					
21. Conference, Exhibition and Event management	**	*			3
22. Protected areas and ecotourism management					
23. Field guiding ( <i>cultural and natural</i> )	**				2
24. Food and beverage management		**			2
25. Retail travel					
26. Transportation for tourists					
27. Impacts of tourism – economic, environmental, social and cultural					
28. Tourism research methods					
<b>Other courses</b>					
Customer Care/Customer Service	*				1
Destination Marketing	*				1
Practical skill for managers		*			1

Overall, the three most frequently prioritised courses by the Ghana institutions and businesses were:

- 1. Business management
- 3. Financial management
- 21. Conference, Exhibition and Event management

## 6.2 Kenya

### 6.2.1 Overview of tourism

Tourism in Kenya has grown steadily in numbers and revenue since independence in 1963, and is now one of the most important economic sectors in the country. The coastal region is the main tourist destination, with most tourists (63.5%) coming from Europe on holiday. In 2003 tourism earnings increased from Ksh 21,734 million in 2002 (~US\$ 276 million) to Ksh 25,768 million in 2003 (~US\$ 353 million). International visitor arrivals increased by 14.5% from 1 million in 2002 to 1.12 million in 2003. The visitors on business more than doubled, while those on holiday declined by 6.4% in 2003. Between 1990 and 1993, 3.23 million foreign visitors came to Kenya, representing about 5% of the tourist trade in Africa and about 28% of that of Eastern Africa<sup>18</sup>. Key tourism attractions in Kenya are its world-class wildlife parks, beaches and coral reefs of the Indian Ocean, mountains and Swahili cities.

Tourism Satellite Account estimates from the World Travel and Tourism Council for Kenya are described in Table 15. This indicates that Personal Travel and Tourism generated US\$443.7 million in 2003, and is predicted to grow to US\$999.8 million by 2013. The WTTC estimates that Kenya employs 218,700 people in the tourism industry, and that by 2013 this will increase to 335,600 (or 3.7% of total employment).

The Catering and Tourism Development Levy Trustees (CTDLT) collect, control, and administer the catering, training and tourism development levy fund for training, marketing, promotion, development and provision of high quality services for the tourism industry. The Trustees establishes and equip tourism training institutions which have been approved by the Ministry of Tourism and Wildlife. They also use the fund to enable the Kenya Tourist Board to market Kenya as preferred tourist destination. Another of their core functions is to establish and develop national standards for testing skills required in the tourism industry. One of their key beneficiaries is the Kenya Utalii College<sup>19</sup>.

Government standardised tourism guide training in 2006. Previously there were many training institutions, although only 20 were licensed. Now there are tour guide courses and a national curriculum. They are in the process of accrediting schools that can give the course, which is evaluated with a national exam, and a standard certificate is provided<sup>20</sup>

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<sup>18</sup> Carolyn, G. (2004) National status report submitted to NEPAD-COSMAR secretariat, sustainable coastal tourism, Ministry of Environment and Natural Resources & Ministry of Tourism and Wildlife, UNIDO /UNEP/GEF PDF-B Project

<sup>19</sup> Carolyn, G. (2004)

<sup>20</sup> Pers. com. F. Kaigua, KATO, 2007

<b>Table 15: Financial, economic and employment estimates for tourism in Kenya</b>		
<b>Description of figures</b>	<b>Status in 2003</b>	<b>Predicted growth to 2013</b>
<b>Personal Travel &amp; Tourism</b> (or consumer expenditures) which captures spending on traditional travel and tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and non durable) used for travel and tourism activities.	US\$ 443.7 million (3% real growth)	US\$ 999.8 million (5.9% annualised real growth)
<b>Business Travel</b> by government and industry, in spending on goods and services (transportation, accommodation, meals, entertainment etc) and intermediate inputs used in the course of business or government work.	US\$ 102.9 million (-3.2% real growth)	US\$ 281.6 million (8.1% annualised real growth)
<b>Government expenditures</b> (Individual) by agencies and departments which provide visitor services such as cultural (art museums) recreational (national park) or clearance (immigration/customs) to individual visitors.	US\$ 135.2 million (6.7% of total government expenditure; 3.3% real growth)	US\$ 265.0 million (7.0% of total government expenditure; 4.5% annualised real growth)
<b>Travel &amp; Tourism Industry Employment</b> which includes those jobs with face to face contact with visitors (airlines, hotels, car rental, restaurant, retail, entertainment, etc)	218,700 employees (3.1% of total employment; 2.9% growth)	335,600 employees (3.7% of total employment; 5.0% annualised real growth)
<b>Travel &amp; Tourism Industry Gross Domestic Product (GDP)</b>	US\$ 438.0 million (3.8% of GDP ; 2.9% real growth)	US\$ 996.3 million (4.6% of GDP; 6.1% annualised real growth)
Source: WTTC, 2003 <sup>21</sup>		

### 6.2.1.1 Donor and development agency interventions

Tourism Trust Fund (TTF) is a joint initiative of the European Union (EU) and the Government of Kenya. Their objective is to alleviate poverty and assist community development and conservation of natural and cultural resources through direct assistance to the tourism industry. The Tourism Trust Fund manages two joint programs - the Tourism Diversification and Sustainable Development Program (TDSDP) and the Tourism Institutional Strengthening and Market Promotion Program (TISMPP). The success of any tourism project depends on the availability of resources combined with the human capital to utilize these resources. The TTF supports capacity building through training, human resource development, technology and consultancy. The TTF supports the National Network of Kenya's community based tourism projects (KECOBAT), whose major aim is to raise the visibility of Kenya's community based tourism projects and increase the number of tourists to these projects<sup>22</sup>.

The IFC office in Nairobi did not indicate activities in any tourism-related programs. However, the IFC is offering support through several technical assistance programs including the following: the Small and Medium-Size Enterprise (SME) Solutions Center; SME Development Initiatives; a program to facilitate women entrepreneurs' access to finance through local banks; a program to develop credit bureaus; and a program to facilitate better access to finance for private schools in Kenya. As part of joint World Bank/IFC outreach and dialogue with the private sector, IFC will explore additional opportunities for company-level programs, especially among MSMEs, to provide training and build awareness, address problems in particular companies, and help create governance reform champions. Specific to tourism, the IFC has signed an agreement to provide \$15 million

<sup>21</sup> WTTC (2003) Country League Tables, The 2003 Travel & Tourism Economic Research, World Travel and Tourism Council

<sup>22</sup> <http://www.ttfkenya.org/> downloaded 9 May 2007

financing to Kenya Airways. By providing \$15 million of the total pre-delivery financing of \$54 million, IFC is assisting the airline in modernizing its fleet in order to become a world-class carrier<sup>23</sup>.

## **6.2.2 Strategic institutions**

### *6.2.2.1 Institutions interviewed*

Meetings were held with representatives of the Kenya Association of Tour Operators (KATO), the Kenya Association of Hotel Keepers and Caterers (KAHKC), and the GBSN's Micro, Small, and Medium enterprise (MSME) Competitiveness Project and the IFC in Kenya.

### *6.2.2.2 Tourism skills needs*

Reports indicated that there is a lack of quality and consistency in tour operators and guides, partially because there are no training pre-requisites to entering the industry. Also, a range of SME skills are needed, including basic management, financial management, Human Resources (HR), and marketing, and general business management skills. Skills in community tourism, craft and conservation of cultural heritage were also highlighted.

### *6.2.2.3 Problems relating to capacity building*

Three of the strategic institutions listed whether particular problems presented were relevant in Kenya (see Table 94). They agreed that scarce financial resources and a scarcity of local trainers were problems, as were the high turnover of employees and a lack of follow-up training.

### *6.2.2.4 Tourism courses*

Three of the strategic institutions listed which course modules were available, needed improvement, were not required, and were needed in Kenya (see Table 95). The most frequently prioritised modules for development were:

- 14. Tourism business development (*including entrepreneurship and SME development*)
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)

### *6.2.2.5 Cost recovery options*

The strategic institutions believed that students generally did, and should, pay for courses. Courses at Utalii College are subsidised. Levies on the tourism industry are used to fund tourism courses. Companies can be reimbursed portions of the levy for training. The IFC estimated that there were about 100,000 potential students for modules on protected areas and ecotourism; tourism business management; and options for local communities. KAHKC estimated 100 students for courses on behavioural changes, changing trends in tourism and change management.

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<sup>23</sup><http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/AFRICAEXT/KENYAEXTN/0,,menuPK:356520~pagePK:141132~piPK:141107~theSitePK:356509,00.html>

### 6.2.2.6 Accreditation

There were mixed reports on whether courses would need to be accredited or registered: The Ministry of Tourism and the Kenya National Education Council were both mentioned to approve them.

## 6.2.3 Training institutions

### 6.2.3.1 Institutions identified

A list of institutions identified that provide tourism courses is detailed below. Representatives from those marked with an asterisk were interviewed:

- Kenyatta University, Department of Hospitality and Tourism Management\*
- Kenya Utalii College\*
- Jomo Kenyatta University of Agriculture and Technology\*
- Strathmore Business School, Strathmore University\*
- United States International University (USIU)\*
- Greta University
- Moi University
- Maseno University
- University of Nairobi
- Eldoret University
- Egerton University
- Kenya Polytechnic
- Mombassa Polytechnic
- Private colleges
- Career Training Centre, Westlands
- National Youth Service
- Catering and Tourism Development Levy Trustees
- Ecotourism Society of Kenya working with communities and SMEs on ecotourism\*
- Large hotel chains: Serena, InterContinental; Sarova etc
- Price Waterhouse Coopers was working with CBTEs funded by USAID
- Koyaki Training School – guiding training for illiterate Massai

### 6.2.3.2 Tourism management and business courses offered

Tourism courses offered, and in development, from the training institutions interviewed are outlined in Table 16. Other business courses offered are listed in Appendix 6.

<b>Table 16: Courses offered by training institutions in Kenya</b>			
<b>Tertiary level courses</b>			
<b>Institution</b>	<b>Diploma/Certificates</b>	<b>Bachelors</b>	<b>Postgraduate</b>
Kenya Utalii College	4 year diplomas: - Hotel management - Travel and tourism management 2 year certificates: - Travel operations - Tour guiding & administration - Front office operations - Housekeeping and laundry - Food production 1 year courses: - F&B services and sales Also: - Refresher courses - Short courses - Customer made courses		
Kenyatta University		Hospitality & Tourism (4 yr)	Hospitality & Tourism (2 yr)
Strathmore Business School	2 year diploma: - <i>Hospitality and Tourism (To start 2007)</i>	4 year course: - <i>Hospitality and Tourism (BHT) (to start 2007)</i>	
USIU		Hotel and Restaurant Management (4 yr) Tourism Management (4 yr)	
<b>SME level courses</b>			
Ecotourism Society of Kenya	Community based tourism planning (3 days) Sustainable tourism outreach course (1 day)		

### 6.2.3.3 Tourism modules

The six training institutions identified course modules that were available, needed improvement, were not required, and were needed (see Table 95). The most frequently prioritised modules for development were:

- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 13. Tourism business planning
- 14. Tourism business development (*including entrepreneurship and SME development*)

Both Kenya Utalii College and USIU undertook curriculum reviews in 2006. The review by Utalii College (which is a UNWTO ‘Centre of Excellence’) incorporated a survey of 114 hotels, lodges, tour operators, restaurants, travel agents, and transportation companies. The survey asked the private sector their opinion of the strengths and weaknesses of each of their courses, and established that (KUC, 2006: ppiii<sup>24</sup>):

- 85% of respondents were satisfied with the technical competence of the college graduates
- 85% requested a need to enhance foreign languages and computer skills
- They were unhappy with a short course on F&B service (3 month course)
- 80% supported the idea of parallel programs.
- 89% supported the idea of multi-skilling

<sup>24</sup> Kenya Utalii College (KUC) (2006) Summary of Curriculum review survey report, Research and Corporate Planning Department

#### 6.2.3.4 *Structure of courses*

Training institutions noted the structure of their courses, with regard to the number of taught and self-study hours per module, the method of evaluation, whether work was conducted in groups or individually, and if field visits were conducted (see **Error! Reference source not found.**). Modules ranged between 24-42 hours in length, and tended to be taught in 1 and 2- hour lecture slots, with three hours taught per week for a semester. Semester length ranged between 13-16 weeks, and there would be four semesters each year.

Institutions indicated that the development of lecture notes within the IFC program would be of value, but they would want to integrate local materials and context.

Delivery methods for courses were very similar, with all institutions using face-to-face classroom training and one (Strathmore) using workbooks and independent study. At Kenya Utalii College the format for IATA and TedQual exams would be set externally.

#### 6.2.3.5 *Process of integrating new courses*

All of the institutions indicated that their preferred additional modules would fit within their existing course frameworks either as core courses or as elective modules. The process of integrating new courses varied greatly in the degree of formality, and length of time.

In general the university department proposes a new course, and this is passed through various academic committees for approval. The timeframe for integrating new courses varies from immediate to 8 months, with formal courses reviews by CHE every 3 years.

None of the universities need to have new courses externally reviewed or audited, as this is not required of public training institutions that are already accredited.

#### 6.2.3.6 *Case studies*

Case studies suggested included the following:

- Cultural tourism and cultural centres
- Community participation in tourism
- Tourism product development proposals
- Joint ventures inside and outside protected areas, particularly public-private partnerships with local communities
- The Massai Mara, regarding sustainable tourism and environmental impacts
- Franchising
- Business management of retail areas
- Human/animal conflict issues
- Project management
- Environmental issues
- Disaster and terrorism management

All of the institutions interviewed indicated that they would be happy to develop case studies.

#### 6.2.3.7 *Students*

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning,

and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 17.

<b>Institution</b>	<b>Country of origin of students</b>	<b>No. of tourism students 2007 (2008 predicted)</b>	<b>Type of institution students drawn from</b>	<b>Organisational level the come from</b>	<b>Level of prior learning</b>	<b>Jobs students go on to do after the courses</b>
Ecotourism Society of Kenya	Kenya	200 (200)	Volunteers tourism and conservation. Retired civil servants	Potential SME owners	Not always literate/numerate.	Develop SMEs, and CBOs, but financial constraints
Jomo Kenyatta University of Agriculture and Technology	Kenya (95%), Uganda Ethiopia Tanzania Sudan Rwanda	0* (100)	Undergraduates straight from school; Masters students from private sector and government	Masters students – executive and mid-level managers. SME owners	Masters need undergraduate (2:2). Undergraduates need pass in high school or a diploma	Hope they will develop SMEs, managers in private sector, ecotourism etc.
Kenya Utalii College	Kenya, East Africa, rest of Africa	540 (?)	Private sector – airlines, cruise ships; Government in education; students	Management for MDPs; Mid level, general and entry level staff for regular courses	University courses and apprentice based courses, and high school	Develop SMEs, Employee in tourism; work in PA, government, Outside tourism.
Kenyatta University	Kenya	550 (715)	50% private sector; 50% high school students; Government for masters level	General managers for executive courses. Some managers and mid-level managers. Mostly general staff	High school. 'B' and above in O'levels. Undergraduate needed for masters level	Those who had jobs in private sector go back to them. Those without become entry level. Others go direct to mid-level management
Strathmore Business School**	Kenya	40	Private sector, Government, SMEs, students, Industries outside tourism	All levels	High school graduates, with 3-4 years of diploma courses from specified colleges	Probably – develop SMEs, employee in tourism sector, work in national park, or government
USIU	Kenya (80%), Uganda (10%), Tanzania (10%)	175 (240)	Private sector tour operators, travel agencies, hotels (20%); students (80%)	Mid level managers and school leavers.	High school certificates. 10% have university education	90% employees in tourism sector. Others work in protected area or government

\* Jomo Kenyatta has 100 Business masters and 900 Business undergraduate students  
 \*\* The Tourism courses are due to start in September 2007, therefore this information is predicted.

### 6.2.3.8 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 18). Courses are generally paid for per year, rather than per course or per module.

Institution	Students pay	Originating institutions pay	Subsidy or grant	Cost per course / module* in US\$	Comments
Ecotourism Society of Kenya				Free	Courses cost about ~US\$3608 to run for 3 days for 20 people in destinations. Funded by donors
Jomo Kenyatta University of Agriculture and Technology	√	√	√	Undergrad: US\$2250 p/a if resident \$3500 p/a if non res. Masters: \$2150 p/a resident; \$3250 p/a non res.	Majority of students pay; and minority of originating institutions pay. Kenyan students receive government subsidy
Kenya Utalii College	√		√	US\$7,792 p/a	Tourism training levy subsidises courses
Kenyatta University	10%	50%	40%	Undergrad: \$1732 p/a Masters: \$3607 p/a	¾ of students coming directly from high school have a government bursary
Strathmore Business School**	√		√	MCom (2 yrs): ~\$6631 MScIT (2 yrs): ~\$7323 BBIT: ~\$3757 p/a BCom: ~\$2993 p/a BHT: \$3501 p/a	Tourism course will cost \$260 per module
USIU	√		√	\$4,400 p/a East African students \$5928 p/a foreign students	Some grants from government / USIU.

\* US\$1 = Ksh 69.3

## 6.2.4 Large enterprises

### 6.2.4.1 Enterprises interviewed

Three large hotel operators in Nairobi were interviewed regarding their tourism training needs: the Hilton and Serena, and also the Mutaiga Country Club. Both the Hilton and Serena are part of major hotel chains (see Table 19).

Issue	Hilton Hotel	Nairobi Serena Hotel	Mutaiga Country Club
No. visitors: High season	6500	6500	2100
Low season	5000	-	1500
Average length of stay	2 nights	2 nights	4 nights
Price from / to	\$99 – 200	\$160-650	High end
Type of guests	45% business 30% leisure 25% other	70% business 29% leisure 1% other	20% business 70% leisure 10% other
Country of origin of guests	Africa (most), UK, France,	Europe, UK	Kenya, UK, USA

	Germany, Italy, USA, Canada		
No. full time employees	400	455	204
No. part time employees	50	30	25

#### 6.2.4.2 Perception and purpose of training

The operators believed that they “couldn’t do enough” training. The Hilton had a full time training manager and facility, in addition to a regional trainer. They also had an online university and an Interactive Training Hotel School. Serena indicated that training was a tool to improve individual skills, and give staff competencies that allowed them to tackle more complex challenges. Mutaiga Country Club noted that it helped to increase skills and productivity. The purpose and reasons for training given are summarised in Table 96. The three enterprises agreed that training was used to increase performance, and undertaken in relation to changes in technology, systems, upgrading to international standards, launching new products or services, to become more professional, improve performance and correct repetitive mistakes.

#### 6.2.4.3 Problems with and relating to training

Annually the Hilton undertakes a survey among its staff to see how satisfied they are on a variety of issues. In the last survey 81% indicated that they were completely satisfied with training (and all employees returned the questionnaire). Serena stated that they were very satisfied with training, because it was relevant to the issues faced in the workplace.

*Internal problems* identified by the hotels that are linked to training included customer satisfaction, complaints, service quality and consistency, and resistance to change due to traditions. *External problems* linked to training included competition, and a perception of that the tourism industry is not a ‘professional’ sector (i.e. when compared to medicine, accounting, teaching etc.) – a factor that is compounded by low wage levels. Other problems are indicated in Table 97, and they agreed on the problems of scarce trainers and no training follow-up.

#### 6.2.4.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the three enterprises are indicated in Table 98, and revealed that they agreed on the need for traditional classroom delivery, or a distance learning approach, with courses undertaken off site and in English.

At the Hilton Hotel, 25% of training was developed in-house; 50% was provided in-house and 25% was externally provided.

#### 6.2.4.5 Willingness to pay

The Hilton indicated that they would be willing to pay US\$100-200 for a 1 day module (or a 100 page workbook). They indicated that the price would depend on the quality and calibre of the teacher, and whether the training was essential. They preferred a structure of 1-4 weeks training, with a 1 week of follow-up every quarter. Trainers would ideally return 2-3 times to evaluate performance. Mutaiga Country Club stated they would pay US\$800 for a full course (i.e. a three, 2-week series of modules). Serena did not respond to this question.

#### 6.2.4.6 Tourism modules

The hotels listed course modules that were available, needed improvement, were not required, and were needed in Kenya, and prioritise modules for development (see Table 99). Although the hotels did not prioritise courses that they wished to see developed most urgently, the new courses they indicated that were needed were:

- 3. Financial management
- 12. Tourism destination planning and development
- 13. Tourism business planning
- 14. Tourism business development (*including entrepreneurship and SME development*)
- 15. Responsible and sustainable tourism (*including conservation and poverty alleviation*)
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 20. Tourism attraction management
- 21. Conference, Exhibition and Event management
- 28. Tourism research methods

## 6.2.5 SMEs

### 6.2.5.1 Enterprises interviewed

Training information was obtained from six SMEs in Kenya. These enterprises included a community wildlife conservancy, a boat tour company, a tour operator, a hotel and craft vendors. A summary of five of these enterprises is provided in Table 20, and the sixth, the Hindu Women's Group did not provide this information.

Issue	Lake Baringo Boat Tours and Excursions	Ruko Community wildlife conservancy	Elsamere Field Study Centre	Coast Beaches Curio Operators Association	Acacia Holidays
No. visitors: - High season	100		150		Groups of 12. Max 300 pple
- Low season	0				
Av. length of stay	2 nights		2 nights		8 days
Price from / to	Mid range		US \$ 37.9		US \$ 24.2 – 48.9
Type of guests	50% leisure 50% other		35% business 5% leisure 60% students	30% business 40% leisure 10% other	10% business 80% leisure 10% other
Country of origin of guests	Netherlands, Germany, UK, Belgium			England, Germany, France, Italy, Holland, Sweden, Poland	Turkey, China, Canada, USA, Australia, Hong Kong, Malaysia
No. full time employees	5	10	16		4
No. part time employees	2				4
* US\$1 = Ksh 69.3					
** Note that information is incomplete for some of the SMEs					

### 6.2.5.2 Perception and purpose of training

The SMEs noted the purpose and reasons for training (see Table 100). Reasons that they agreed on were to acquire skills, to improve performance, and to gain stability and to network.

### 6.2.5.3 *Problems with and relating to training*

*Internal problems* that related to training included management, capacity building, lack of skills, and a lack of qualified staff. Other problems noted by five of the SMEs are indicated in Table 101, and the majority cited scarce financial resources and no training follow up as key problems.

#### 6.2.5.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the SMEs are indicated in Table 102, indicating that all preferred the use of face-to-face teaching in a classroom.

#### 6.2.5.5 Willingness to pay

Three of the SMEs indicated their willingness to pay for different types of courses (see Table 21).

Type of course	Ruko Community wildlife conservancy	Hindu Women Group	Acacia Holidays
1 module: 1/2 day (or 50 page workbook)?		US \$ 72	
1 module: 1 day (or 100 page workbook)?			
1 module: 2 days (or 200 page workbook)			US\$200
1 series of modules: 2 weeks (or ten x 100 page workbooks)?			
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?	US\$144		US\$600

#### 6.2.5.6 Tourism modules

One of the SMEs indicated the availability of specific course modules (see Table 103), and prioritised general business options (business management, planning, financial management, marketing) and specific tourism courses (tourism business planning, and development, options for local communities, conference management and research methods).

### 6.2.6 Conclusions

In general, the standard of tourism training for mid-level managers in Kenya is good. Kenya Utalii College stands out as being one of the most respected institutions in the country (and the region) providing vocational tourism training. There is little tourism training being implemented for SMEs, although ESOK is providing short courses focussed at people with low educational levels in rural areas across the country.

The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 22.

<b>Table 22: Summary of tourism modules prioritised in Kenya</b>					
	<b>Strategic institution (n=3)</b>	<b>Training institutions (n=6)</b>	<b>Large operators (n=3)*</b>	<b>SMEs (n=1)*</b>	<b>Totals</b>
<b>General business modules</b>					
1. Business management					
2. Business planning					
3. Financial management	*	*	*	*	4
4. Marketing and marketing management	*	*		*	3
5. Human resources management				*	1
6. HIV/AIDs in the workplace	*	*		*	3
7. Computer literacy					
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory					
10. Tourism policy and legislation		*			1
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )		*			1
12. Tourism destination planning and development			*		1
13. Tourism business planning	*	**	*	*	5
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	**	**	*	*	6
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )			*		1
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	**	***	*	*	7
17. Hotel management					
18. Hospitality management					
19. Tour organisation and management					
20. Tourism attraction management		*	*		2
21. Conference, Exhibition and Event management		*	*	*	3
22. Protected areas and ecotourism management		*	*		2
23. Field guiding ( <i>cultural and natural</i> )		*			1
24. Food and beverage management					
25. Retail travel					
26. Transportation for tourists					
27. Impacts of tourism – economic, environmental, social and cultural		*			1
28. Tourism research methods		*	*	*	3
<b>Other courses</b>					
Behavioural changes	*				1
Changing trends in tourism	*				1
Change management in tourism	*				1
Strategic management	*				1
NB: The large operators and SME did not prioritise courses, but courses that were requested are indicate here					

The three most frequently prioritised courses by the Kenyan institutions and businesses were:

- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 14. Tourism business development (*including entrepreneurship and SME development*)
- 13. Tourism business planning

## 6.3 Madagascar

### 6.3.1 Overview of tourism

Estimates of financial and economic impacts of tourism in Madagascar from Tourism Satellite Accounts of the World Travel and Tourism Council (WTTC) are indicated in Table 23. The WTTC indicates that Personal Travel and Tourism generated US\$213.1 million in 2003, and is predicted to grow to US\$547.8 million by 2013. The WTTC also estimates that Madagascar employs 82,800 people in the tourism industry, and that by 2013 this will nearly double to 136,100 (or 2.9% of employment). However, the figures are different from those released by the Ministry of Culture and Tourism. Their report of January 2007 states that in 2006 there were 311,730 foreign tourists (growth of 14%) and that there were 22,409 people directly employed in the sector<sup>25</sup>. The majority of tourists are from France (51.4%) followed by Italy (11.2%). In 2006 there were 1015 hotels and 755 B&Bs providing 11872 rooms that had an average of 57% occupancy<sup>26</sup>.

Description of figures	Status in 2003	Predicted growth to 2013
<b>Personal Travel &amp; Tourism</b> (or consumer expenditures) which captures spending on traditional travel and tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and non durable) used for travel and tourism activities.	US\$ 213.1 million (5.2% real growth)	US\$ 547.8 million (7.4% annualised real growth)
<b>Business Travel</b> by government and industry, in spending on goods and services (transportation, accommodation, meals, entertainment etc) and intermediate inputs used in the course of business or government work.	US\$ 28.8 million (3.3% real growth)	US\$ 77.7 million (8.0% annualised real growth)
<b>Government expenditures</b> (Individual) by agencies and departments which provide visitor services such as cultural (art museums) recreational (national park) or clearance (immigration/customs) to individual visitors.	US\$ 19.0 million (4.9% of total government expenditure; 10.8% real growth)	US\$ 38.7 million (5.2% of total government expenditure; 4.9% annualised real growth)
<b>Travel &amp; Tourism Industry Employment</b> which includes those jobs with face to face contact with visitors (airlines, hotels, car rental, restaurant, retail, entertainment, etc)	82,800 employees (2.4% of total employment; 1.0% growth)	136,100 employees (2.9% of total employment; 5.1% annualised real growth)
<b>Travel &amp; Tourism Industry Gross Domestic Product (GDP)</b>	US\$ 140.5 million (3% of GDP ; 7.8% real growth)	US\$ 331.4 million (3.6% of GDP; 6.5% annualised real growth)

Source: WTTC, 2003<sup>27</sup>

Major tourism attractions in Madagascar are based on the natural and cultural heritage. The Malagasy people are descended from Malay-Polynesian mariners, and there are 17 officially recognised tribes in the country. The country is famous for its biodiversity, and protected areas that are inhabited unique and endangered species of plant and animal, including lemurs and chameleons. Sandy beaches and warm waters are popular among cruise ship and package tours, where coral reefs

<sup>25</sup> Ministère de la Culture et du Tourisme (2007) Données Statistiques du Tourisme, Repoblikan'i Madagasikara, 17 January 2007

<sup>26</sup> Ministère de la Culture et du Tourisme (2007) Données Statistiques du Tourisme, Repoblikan'i Madagasikara, 17 January 2007

<sup>27</sup> WTTC (2003) Country League Tables, The 2003 Travel & Tourism Economic Research, World Travel and Tourism Council

attract divers and snorkellers. Activities undertaken by tourists included ecotourism (55%), sun and beach (19%), cultural activities (15%), sport and adventure (8%) and others (3%)<sup>28</sup>.

The Tourism Masterplan for Madagascar highlights the importance of developing human resources for the tourism industry. Strengths include a positive attitude and friendliness towards tourists, and wide use of French as a language; but weaknesses include a low awareness of service, only one, insufficient public training facility (INTH); a lack of guidelines and regulations for training; a shortage of qualified personnel in the tourism sector; little English skills; and insufficient quality standards. Also emphasised is the need for pro-poor tourism (that generates net-benefits for the poor) through employment, ownership and the delivery of products and services in the industry. The Masterplan suggests raising awareness of tourism across the country in schools, and setting up Colleges Professionnels du Tourism to run apprenticeship programs in hotel, restaurant, tour operator, guiding and kitchen sectors across the country. The plan also suggests setting up Tourism Management Schools to train hospitality supervisory personnel, and a Centre for Tourism Studies at university level. These establishments, the plan suggests, would be certified. The role of the Office National de Tourisme de Madagascar (ONTM) would be to gather information on international standards; identify training needs; define training schedules; promote apprenticeship programs; promote cooperation with other international schools; and check the quality of training programs.

Federation des Hoteliers et Restaurateurs de Madagascar (FHORM), is a national federation with 226 members. Members pay a fee to join, and need to have at least 6 rooms for hotels or space for 20 people in a restaurant. They must also be licensed by the Ministry of Tourism. FHORM provides their members with training opportunities, within three main areas of activity:

- i) a professional association that defends the interests of its members;
- ii) capacity building and promotion to make the industry more professional (i.e. organising competitions of chefs to raise the quality and standard of skills, and to make hotel jobs more attractive); and
- iii) destination promotion and marketing their members. These activities do not overlap with the Office Nationale du Tourisme: they create directory of members and promote the hotels.

#### *6.3.1.1 Donor and development agency interventions*

IFC's has a committed portfolio in Madagascar of \$26.6 million. The SME Solutions Center (SSC) has screened over 900 SMEs, and there is a \$10 million SME Fund, managed by Business Partners (a South Africa based company). Specific to tourism, the IFC has two advisory mandates with the Government of Madagascar for the concessioning of 12 airports, while PEP Africa is implementing programs in Entrepreneurship Development Initiative (EDI), Leasing and Export Promotion. PEP Africa is also currently developing proposals covering Tourism, and Rural Electrification.<sup>29</sup> For the past three years the Federation des Hoteliers et Restaurateurs de Madagascar (FHORM) has worked in cooperation with the IFC and a school in Reunion to provide training in catering, housekeeping, waitressing and tourism management.

A Government project funded by the World Bank called the Pôles Intégrés de Croissance (PIC) is working to promote socioeconomic development in three destinations or 'poles' (Nosy Be, Fort Dauphin, and Antananarivo & Antsirabe). The project's strategic priorities include to improve the capacity of local people, training, and to stimulate private sector investment in tourism. In 2005 the

<sup>28</sup> Ministère de la Culture et du Tourisme (2007) Données Statistiques du Tourisme, Repoblikan'î Madagasikara, 17 January 2007

<sup>29</sup> <http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/AFRICAEXT/MADAGASCAREXTN/0,,menuPK:356362~pagePK:141132~piPK:141107~theSitePK:356352,00.html>

project reported that in Nosy Be and Fort Dauphin, 70% of employees in the tourism sector needed better professional training (CHL Consulting, 2005<sup>30</sup>). Also, the initiative reported that there was no sustainable mechanism for financing training, with a lack of government financing for training, and a basic level of tourism education is required across the country<sup>31</sup>.

Since the creation of tourism schools depends on many factors, they pilot training in partnership with Malagasy and private institutions, and the INTH, and companies on Reunion. In 2006 the project sent Malagasy people in Mauritius to a train the trainers session, who returned to provide basic training for staff in hotels in Madagascar. The training focussed on room service, reception, waitering, restaurant, bar work, and also on the roles of supervisors of these positions. Subsequently more people receive training in the three poles. In all, 300 people were trained, during 2 training sessions in each pole in 2006 and 2007. They propose additional training to assess the impacts of the training. They will also consider the needs of the operators after the training.

First aid training was provided by the PIC for tour guides, using teachers from the Malagasy Red Cross. In 2006 around 50 guides were trained, and the process will continue in 2007. They also propose to collect information on training needs of the tour guides. The guides are mostly independent (i.e. not within tour operator companies). The PIC obtains information about training needs through regional tourism offices.

In 2006 USAID provided support to the Association Nationale pour la Gestion Aires Protégé (ANGAP), targeting their staff to create circuits within the parks, and provide signage to guides and tourists. Spatial management of the parks was also improved, and they provided guiding training. These were standard courses for guides in guiding techniques, English, flora and fauna and interpretation.

The World Wide Fund for Nature (WWF) also ran a program funded by USAID on ecotourism and protected area management. The WWF sent ANGAP staff for training in South Africa and Canada on interpretation and park management, and how to create circuits. They visited 6 parks in South Africa and learned how to manage circuits, how to welcome visitors and so on. Most of the people do not have a high enough educational level, and are limited to basic and menial jobs, and therefore it is difficult to train professional guides.

Go To Madagascar, a group of tourism operators in the country, undertook a tourism training program between September 2005 and May 2006, which was part-financed by the European Commission under the ProInvest Program. The program introduced participants to concepts of sustainable tourism in order to encourage discussion about how to make their tourism products more responsible and to take market advantage of those changes<sup>32</sup>. That the private sector is mobilising training resources to address sustainability issues is very encouraging. The IFC office in Madagascar did not report any tourism training initiatives at this time.

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<sup>30</sup> CHL Consulting (2005) Appui à la formation professionnelle dans le secteur Tourisme et les secteurs Liés au Tourisme, Project Poles Integres de Croissance (PIC), Rapport final, 10 Juin 2005.

<sup>31</sup> CHL Consulting (2005) Appui à la formation professionnelle dans le secteur Tourisme et les secteurs Liés au Tourisme, Project Poles Integres de Croissance (PIC), Rapport final, 10 Juin 2005.

<sup>32</sup> Townsend, C. (2006) Training and development for Tourism: Training initiative to catalyse interest in sustainable tourism in the tourism industry in Madagascar and Mauritius, Go To Madagascar; ProInvest; Mauriuis Employers' Federation

## **6.3.2 Strategic institutions**

### *6.3.2.1 Institutions interviewed*

Meetings were held with representatives of the Office National de Tourisme de Madagascar (ONTM), the Federation des Hoteliers et Restaurateurs de Madagascar (FHORM), Association Nationale pour la Gestion Aires Protégé (ANGAP), an association of tour operators, travel agents and transportation companies called Go To Madagascar, IFC Madagascar, USAID and a World Bank project called the Pôles Intégrés de Croissance (PIC).

### *6.3.2.2 Tourism skills needs*

A wide range of tourism skills are required in Madagascar, at all levels. In particular, language skills are required in English, French, Italian, German and Japanese. Guest relations and reception in all sectors is required (i.e. travel agents, hoteliers, guides), in addition to guiding skills and business management. It was reported that most people in the hospitality sector are opportunists, rather than people trained in hospitality. Hotel management training for SMEs and mid-level managers is required, although some of the people in these positions do not think they need it. Often there are family enterprises that do not have a vision of quality service, or of real professionalism within the business. Therefore there are generally low levels of service across the country, and no national standards for the quality of service.

Sustainable tourism training is required in architecture, planning environmental impact assessment, waste management, water use etc. Stakeholders noted that Madagascar is noted for its biodiversity, culture and ecotourism, and therefore tourism needed to be developed sustainably.

### *6.3.2.3 Problems relating to capacity building*

Three of the strategic institutions listed whether particular problems presented were relevant in Madagascar (see Table 104), and they agreed that there was a scarcity of local trainers. Part of reason identified for the limited number of public sector trainers was their low salaries, which are irregularly paid by government, and as a result the profession is not valued (e.g. teachers were on strike for four months in 2006). There is also a lack of training facilities. Although there are centres in the capital, there is nothing in the provinces where the majority of the tourism attractions are located.

The skills and educational level of hotel staff are very low. Most have simply received primary education, or the first part of secondary education. Also supervisors do not have necessary skills to fulfil their leadership roles. In general, hotel and restaurants do not see sufficient reason to send their employees for training (even when training is free). For example, they may only have one chef, so the chef does not have time to attend training because they are working. Alternatively, others fear that if their employees become trained, they will leave to get another job, or start their own enterprise and provide them with competition. The result of these constraints and fears is the tendency to persist with a lower quality of tourism product than enhance it through skills development.

Institutions noted that local communities should be the primary beneficiaries of training and tourism. A problem with local guides now is that they do not want to improve their skills: they think that they are established and that they 'own' the parks.

#### 6.3.2.4 *Tourism courses*

The strategic institutions listed which course modules were available, needed improvement, were not required, and were needed in Madagascar (see Table 105). The most frequently prioritised modules for development were:

- 14. Tourism business development (*including entrepreneurship and SME development*)
- 13. Tourism business planning
- 15. Responsible and sustainable tourism (*including conservation and poverty alleviation*)
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)

A report from the PIC project noted that in Nosy Be and Fort Dauphin the main tourism training needs were<sup>33</sup>:

- Languages (French)
- Management (for managers)
- Catering
- Hygiene and security
- Training
- Tourism guiding (general and specific)
- Waiter and restaurant service
- Information technology
- Reception
- Supervision, for mid-level managers.

The report noted that there was no organisation to validate diplomas delivered by training institutions. There is also a lack of expertise in the industry, and the number of lecturers in the sector was insufficient<sup>34</sup>.

#### 6.3.2.5 *Cost recovery options*

Some institutions indicated that students should pay for the courses, if they could (or at least 5-10%), because it would help to motivate them. They also thought that the companies they work for should pay a contribution if it was necessary for their job. Subsidies and grants could be made available, from donors and government (i.e. they thought that university should be free). One option suggested was to develop a fund for tourism training, and donors and the private sector could pay half each. The donor community has agreed to become more streamlined and avoid overlapping initiatives, so this could be an efficient mechanism.

Estimates of the number of students that would want to do the sources ranged from 150 to 1000's. (i.e. FHORM has 226 members would might want to receive training; PIC trains 150 people per year, between the three poles; and perhaps 500 people already working in the tourism sector who are to be mid-level managers may want additional training.

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<sup>33</sup> CHL Consulting (2005) Appui à la formation professionnelle dans le secteur Tourisme et les secteurs Liés au Tourisme, Project Poles Integres de Croissance (PIC), Rapport final, 10 Juin 2005.

<sup>34</sup> CHL Consulting (2005) Appui à la formation professionnelle dans le secteur Tourisme et les secteurs Liés au Tourisme, Project Poles Integres de Croissance (PIC), Rapport final, 10 Juin 2005.

The stakeholders noted that it was essential to raise awareness about tourism training programs, using newspapers and other media. The reason that people study abroad so frequently is the lack of availability of courses in Madagascar.

#### *6.3.2.6 Accreditation*

The Ministry of Education should accredit courses, in partnership with private sector associations such as FHORM and Go To Madagascar. However, the need for this depends on the type and length of course and a review process would be of value. The PIC program contracts individual training institutions, and evaluates the company with the best training materials.

### **6.3.3 Training institutions**

#### *6.3.3.1 Institutions identified*

A list of institutions identified that provide tourism and business courses are detailed below. Representatives from those marked with an asterisk were interviewed:

- Institut National de Tourisme et d'Hotellerie (INTH)\*, managed by the private sector and government
- Universite d'Antananarivo\*
- Institut Superieur de al Communication, des Affaires et du Management (ISCAM)\*
- Institut Catholique de Madagascar\*
- Institute Superior Polytechnic of Madagascar have a masters course in tourism
- Institut National des Sciences Comptables et de l'Administration d'Enterprises (INSCAE)\*
- University of Antsiranana – in the north of Madagascar are interested in developing tourism courses.
- ATOUT
- Ecole Tourism Hotelierie (EMTH) in Majanja, linked with INTH
- ESSVA in Antsirable has a tourism and hotel school, with funds from a hotel school in Lausanne, and their alumni teaching at ESSVA. Trainers come for 6 months at a time, on rotation. They have started a catering and restaurant school.
- ASFOR is a training centre in the capital sponsored by the French Development Agency
- Chamber of Commerce (CCEAAA) operates courses for chefs, guides and tour operators.
- InfoTour have long term training offered over 2-3 years.
- The Centre Nationale de Tourism Hotelierie et Restauration in Reunion are building a centre in Madagascar that should be open by September 2007.
- USAID provide training guiding training for ANGAP, park management and tourism management (i.e. routes and circuits in parks); interpretation and managing interpretations centres\*
- FHORM provides training with support from the French Cooperation Agency and the IFC (who paid for 50% of hotel management capacity building in 2006)\*
- ProInvest from the UE paid for training in sustainable tourism
- ANGAP train guides to people around the 46 protected areas and 18 national parks. They work with the INTH to provide the training, and train about 300 people each year (60-70 of which are new guides)\*
- InfoTour
- Knowledge Institute
- Institute for Management and Administration (IGAM) – a business school
- Conservation International have some training when they implement ecotourism initiatives

- Wildlife Conservation Society have an ecotourism project funded by USAID, and had a training program for private sector and guides.
- PIC project \*

### 6.3.3.2 Tourism management and business courses offered

Tourism courses offered, and in development, from the training institutions interviewed are outlined in Table 24 below. Additional business courses are listed in Appendix 6.

<b>Table 24: Courses offered by training institutions in Madagascar</b>			
<b>Tertiary level courses</b>			
<b>Institution</b>	<b>Diploma/Certificates</b>	<b>Bachelors</b>	<b>Postgraduate</b>
INTH	BEP in Hotel business/catering (2 yr) (with various options) DES in Tourism and Hotel Business (2 year) Certificate in tourist and ecotourist guiding (1 year)	Tourism management and Hotellery (3 year)	Management in Tourism
ISCAM	<i>Was a 2 year tourism diploma – stopped four years ago</i>		
Universite d’Antananarivo		License in Language and communication for tourism (1 year)	
<b>Vocational courses</b>			
EMTH	<ul style="list-style-type: none"> <li>• Catering/bar</li> <li>• Culinary production</li> <li>• Accommodation</li> </ul>	<ul style="list-style-type: none"> <li>• Welcome service</li> <li>• Tourism guiding</li> </ul>	
INTH	<ul style="list-style-type: none"> <li>• Welcome service (16 hours)</li> <li>• Improve floor services (8 hours)</li> <li>• Drink service (20 hours)</li> </ul>	<ul style="list-style-type: none"> <li>• Innovation in cooking and pastry</li> <li>• Accompanying and guiding techniques</li> <li>• Training of trainers</li> </ul>	
BEP = Brevet d’Etudes Professionnelles (degree after completion of 2 year training after 9 <sup>th</sup> grade or the ‘Brevet d’etudes du Premier Cycle’ (BEPC) BTS = Brevet de Technicien Supérieur (undertaken after High School Diploma). 2 year duration Licence = Three year bachelors degree DES = Diplôme d’Etudes Supérieures			

Apparently there is no categorical difference between diplomas and degrees, because in the French system there is no difference. Students who get their Baccalaurate (Bac) +3 or 4 mostly do not work in the tourism sector.

### 6.3.3.3 Tourism modules

The five training institutions identified course modules that were available, needed improvement, were not required, and were needed (see Table 106). Although there were very diverse views on courses that should be prioritised, the most frequently prioritised modules for development were:

- 9. Tourism theory
- 12. Tourism destination planning and development
- 22. Protected areas and ecotourism management

### 6.3.3.4 Structure of courses

Delivery methods for courses were very similar, with all institutions using face-to-face classroom training and one (Institut Catholique de Madagascar) also using workbooks and independent study. Institut Catholique de Madagascar and INSCAE proposed distance learning in the future.

### 6.3.3.5 Process of integrating new courses

All of the institutions indicated that their preferred additional modules would fit within their existing course frameworks either as core courses or as elective modules. Part of the ease of doing so would depend on whether the teachers could teach the courses, and whether there was demand from students to take them. The process of integrating new courses varied though.

### 6.3.3.6 Case studies

Case studies suggested included the following:

- Is culture a bottleneck to entrepreneurship in tourism?
- Destination management and the outcomes from the market
- Ecotourism and handicrafts
- Regional case studies

Four institutions interviewed indicated that they would be happy to develop case studies.

### 6.3.3.7 Students

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning, and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 25.

<b>Institution</b>	<b>Country of origin of students</b>	<b>No. of tourism students 2007 (2008 predicted)</b>	<b>Type of institution students drawn from</b>	<b>Organisational level the come from</b>	<b>Level of prior learning</b>	<b>Jobs students go on to do after the courses</b>
Institut Catholique de Madagascar	Madagascar, Comores, Congo-Brazzaville	?	Students	n/a	National diploma (Bac)	Employee in tourism, government (not tourism)
INSCAE	Madagascar Cameroon Comores DRC	200 (200)	Private sector, government, SMEs, students, industries outside tourism	All levels. Masters: lots of mid-level managers who get promoted quickly after/during the course	Vocational: must speak French (pref. mid-level manager) Academic: completed 2ndry education Masters: Graduate or Engineer	Develop SMEs, employees in tourism sector, government, not tourism sector, leave country.
INTH	Madagascar Cameroon, Comores	320 (420)	Private sector tourism, government, SMEs, students	All levels	Vocational: some 2ndry education. Academic: completed 2ndry education	Develop SMEs, employees in tourism sector, government, work in national parks, not tourism sector,

ISCAM*	Madagascar, Cameroon, Comores, Rwanda, Djibouti, Gabon, Indonesia, France	620 (30)	Private sector and non-tourism (masters level); government, students	Executive and mid-level management	For masters, need to have completed 4 years university study. If not, need experience. Entrance exam and interview	leave country Return to company that employed them (masters level); undergraduates go to private sector. Some start businesses.
Universite d'Antananarivo	Madagascar	14 (85)	Students, private institutions	SME owners	Applied tourism courses; formal education (2 years); apprentice-based, and entrance exam	Develop SMEs, employees in tourism sector, government
* No students in tourism currently. 30 expected if course re-started, depending on availability of teachers.						

INSCAE noted that the bachelors course is either full or part-time, and therefore students can work while doing the courses. 70% of masters students are working, and attend evening classes. The institute encourages students to work while studying the course.

### 6.3.3.8 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 26).

Institution	Students pay	Originating institutions pay	Subsidy or grant	Cost per course / module (US\$)	Comments
Institut Catholique de Madagascar	√		X	Year 1: \$335 Year 2&3: \$363 Year 4: \$391 Yr 5: \$670	
INSCAE	√	√	√	Bachelors \$391 p/a full time; \$39 per subject and need 42 subjects to graduate. Masters year 1: \$614 Year 2: \$948	If student had Bac at A-grade, INSCAE pays tuition fully. If student gets top semester mark, they are refunded semester fees.
INTH	√			Academic: \$335 Vocational: \$223 for 3 months full time	
ISCAM	√		√	Undergraduate: \$558 Masters: \$948	Scholarship. Best students granted lump sum by ISCAM.
Universite d'Antananarivo	√			\$150 p/a	

### 6.3.4 Large enterprises

#### 6.3.4.1 Enterprises interviewed

Three large enterprises from Madagascar participated in the market research; two hotels, a travel agency and guiding company. Although they did not fully complete the questionnaires, some information about these businesses is indicated in Table 27.

<b>Table 27: Large Madagascan tourism enterprises interviewed</b>			
<b>Issue</b>	<b>Hotel du Louvre</b>	<b>Arotel/Fiaro Tourisme</b>	<b>Mad Cameleon</b>
No. visitors: High season	-	18	-
Low season	-	16	-
Average length of stay	-	1.5 nights	-
Price from / to	-	\$ 54	Mid range
Type of guests	-	25% business 60% leisure 15% other	80% business 20% leisure
Country of origin of guests	Europe	Italy, Germany	-

#### 6.3.4.2 Perception and purpose of training

The enterprises indicated that training helped their staff to complete their daily tasks, and fulfil their job descriptions. However, it was also noted that there were only a few institutions providing training, and that these were not located across the whole country. The purpose and reasons for training given are summarised in Table 107. They agreed that it was useful for the acquisition of skills and also to develop greater professionalism. Half of the training at the Arotel is developed in-house, and the enterprises were largely satisfied with training because it met their needs.

#### 6.3.4.3 Problems with and relating to training

Internal problems identified that related to training including staff skill level, the problem of satisfying clients, and staff mobility. Other problems are indicated in Table 108, and enterprises agreed that the lack of training follow up was an issue.

#### 6.3.4.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the three enterprises are indicated in Table 109, and reveal that there was little consensus on the method of training, although a majority preferred training using CDs and DVDs.

#### 6.3.4.5 Willingness to pay

Two of the enterprises indicated their willingness to pay for different types of courses (see Table 28). Hotel du Louvre indicated that they would be willing to do a ½ day module, but did not indicate a fee that they would be willing to pay.

Type of course	Arotel /Fiaro Tourisme	Mad Cameleon
1 module: 1/2 day (or 50 page workbook)?		\$14
1 module: 1 day (or 100 page workbook)?	\$20	\$27
1 module: 2 days (or 200 page workbook)		\$40
1 series of modules: 2 weeks (or ten x 100 page workbooks)?		\$54
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?		

#### 6.3.4.6 Tourism modules

The hotels listed course modules that were available, needed improvement, were not required, and were needed in Madagascar, and one prioritised modules for development (see Table 110). One of the enterprises prioritised courses, and indicated that the most important to develop were:

- 10. Tourism policy and legislation
- 22. Protected areas and ecotourism management
- 27. Impacts of tourism – economic, environmental, social and cultural

### 6.3.5 SMEs

#### 6.3.5.1 Enterprises interviewed

Five SMEs in Madagascar were interviewed regarding tourism training. These enterprises were hotels with restaurants, a self-catering apartment company, a hotel and tour operator, and a travel agent/tour operator. A summary of these enterprises is provided in Table 29.

<b>Issue</b>	<b>Aparthotel</b>	<b>Radama Hotel</b>	<b>Relais des Plateau</b>	<b>Somacarn</b>	<b>Island Continent Hotel and Tours</b>
No. visitors: - High season	-	288	70% occupancy	125	40
- Low season	-	192	30% occupancy	25	19
Av. length of stay	15 nights	1.5 nights	2 nights	10 nights	15 night (tour) 2 night (hotel)
Price from / to	\$40-\$47	\$34-\$47	\$81-\$108	\$134-\$269	\$27-\$134
Type of guests	60% business 10% leisure 30% other	60% business 40% leisure	15% business 80% leisure 5% other	5% business 80% leisure 15% other	90% leisure 10% other
Country of origin of guests	France, Madagascar, USA	France, UK, Italy, South Africa, USA	Europe, South Africa	France, Japan	Belgium, South Africa
No. full time employees	25	26	54	17	17
No. part time employees	-	-	0	Depends on demand in high season	-

#### *6.3.5.2 Perception and purpose of training*

The SMEs said that training was important in order to be up to date with technology; to professionalise personnel, and develop excellence. They also noted that training should be sustained and should give tangible results. The purpose and reasons for training given are summarised in Table 111. The enterprises agreed that it was necessary to increase performance and efficiency, to acquire skills and to upgrade to international standards.

#### *6.3.5.3 Problems with and relating to training*

*Internal problems* that related to training included staff mobility (i.e. rotation) and the qualifications that personnel had. External problems linked to training included the weakness of service quality, in the face of additional competition. Other problems noted by three of the SMEs are indicated in Table 112. The table shows that they agreed that local trainers were scarce.

#### *6.3.5.4 Preferred method of training and training requirements*

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the SMEs are indicated in Table 113, and show that they preferred face-to-face training.

#### *6.3.5.5 Willingness to pay*

Four of the SMEs indicated their willingness to pay for different types of courses (see Table 30).

Type of course	Radama Hotel	Relais des Plateau	Somacram	Island Continent Hotel and Tours
1 module: 1/2 day (or 50 page workbook)?			\$10	\$2
1 module: 1 day (or 100 page workbook)?		\$14	\$20	\$4
1 module: 2 days (or 200 page workbook)		\$27	\$40	
1 series of modules: 2 weeks (or ten x 100 page workbooks)?				
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?	\$14			\$20

### 6.3.5.6 Tourism modules

Three of the SMEs indicated the availability of specific course modules (see Table 114). Two of the SMEs prioritised the most urgently needed courses, which were:

- 27. Impacts of tourism – economic, environmental, social and cultural
- 4. Marketing and marketing management
- 14. Tourism business development (*including entrepreneurship and SME development*)
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 28. Tourism research methods

### 6.3.6 Conclusions

There is an overriding need across the tourism industry for skills development at all levels, and particularly at a basic level (i.e. housekeeping, reception, waitering, catering). Despite the fact that SMEs reporting that they recognized the value and importance of training, strategic institutions were concerned about a general reluctance within the industry to send employees for training. They reported that SME managers feared employees would leave and take other jobs, or even set up their own businesses in competition with those who trained them.

New courses are accredited by the Ministry of Education, in partnership with private sector associations.

The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 31.

**Table 31: Summary of tourism modules prioritised in Madagascar**

	Strategic institution (n=6)	Training institutions (n=5)	Large operators (n=1)	SMEs (n=4)	Totals
<b>General business modules</b>					
1. Business management	*				1
2. Business planning		*			1
3. Financial management	*				1
4. Marketing and marketing management	*			*	2
5. Human resources management					
6. HIV/AIDs in the workplace					
7. Computer literacy					
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory		**			2
10. Tourism policy and legislation			*		1
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )		*			1
12. Tourism destination planning and development		**			2
13. Tourism business planning	***	*			4
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	****	*		*	6
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	**	*			3
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	**	*		*	4
17. Hotel management	*	*			2
18. Hospitality management	*				1
19. Tour organisation and management		*			1
20. Tourism attraction management					
21. Conference, Exhibition and Event management					
22. Protected areas and ecotourism management		**	*		3
23. Field guiding ( <i>cultural and natural</i> )	*	*			2
24. Food and beverage management					
25. Retail travel					
26. Transportation for tourists					
27. Impacts of tourism – economic, environmental, social and cultural			*	**	3
28. Tourism research methods				*	1
<b>Other courses</b>					
Basic level staff training	*				1
Management and leadership in tourism		*			1
Management and marketing of ecotourism		*			1
NB: the large operators did not prioritise courses, but the three indicated were the only new courses that were requested					

Overall, the three most frequently prioritised courses by the Malagasy institutions and businesses were:

- 14. Tourism business development (*including entrepreneurship and SME development*)
- 13. Tourism business planning
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)

## 6.4 Mozambique

### 6.4.1 Overview of tourism

Historically the country was once of the top tourism destinations in Africa, and in 1973 had 400,000 tourists from southern Africa and Portugal. Tourism was developed around beaches, wildlife and urban areas of Maputo and Bierá. The change in security after 1973 resulted in a dramatic decline in tourism, with infrastructure destroyed, and wildlife virtually decimated. After the signing of the peace accord in 1992, the industry began to be revitalised. There has been development of beach-based leisure tourism in destinations such as Ponto do Ouro, Inhambane, Xai Xai, and Vilanculos, and more recently in the north of the country in Pemba, Quirimbas and Nacala. In 2001 the number of tourists attracted to the country was 400,000 (the same as in 1973). There were 12,000 beds, of which less than 5000 were of 3-star or above, and tourism contributed 1.2% to national GDP<sup>35</sup>.

The Minister of Tourism reported that tourism visitation was 711,000 in 2004<sup>36</sup>, and the average occupancy of hotels in 2003 was just 13.9%. In 2004 the average length of stay was 2.19 nights, and it was estimated that they spent \$70 per night while in the country<sup>37</sup>. However, there is little economic data currently available on tourism in Mozambique. In 2007 the first departure surveys were undertaken by the Ministry of Tourism, and domestic tourism surveys will begin in 2008. Data will then be collected to develop Tourism Satellite Accounts. Tourism attractions in Mozambique include beautiful sand beaches and coral reefs; islands; cultural heritage in historic towns and islands, such as the Ilha de Mozambique and Inhambane; natural forests and wetlands. In Inhambane an investor is proposing to develop a 5\* hotel of \$50-100 million, conference centre, enhance the airport, and develop a hotel school as a donation to the University in Inhambane.

The Government Of Mozambique has taken a series of actions to promote the tourism sector, including creating a separate Ministry of Tourism in 2001, adopting a Tourism Policy and Implementation Strategy (2003), producing a National Biodiversity Strategy and Action Plan (NBSAP),<sup>38</sup> and by preparing a Strategic Plan for Tourism Development in Mozambique (SPTDM) (2004-20013). The Tourism Policy defines the high-level tourism objectives, identifies the focal points for government intervention and provides tactical guidelines on how to optimize and operationalize its competitive edge. Key strategic directions indicated in the Tourism Policy relevant to SEATIP, include enhancing tourism development opportunities in synergy with opportunities offered by regional development initiatives, and also realizing strategic bush-beach linkages<sup>39</sup>.

The Ministry of Tourism developed a human resources plan for the sector in 2006, and undertook a survey to identify the gaps in capacity in the tourism sector. The review included interviews with tourism employers, training institutions (public and private) and strategic organisations (GFA

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<sup>35</sup> GFA Management (2003) Tourism and hospitality training in Mozambique, Sector Study Maputo/Inhambane. Final draft report, 8 September 2003.

<sup>36</sup> MITUR data

<sup>37</sup> Spenceley, A. and Spenceley, J. (2006) Cost benefit analysis of the South East African Investment Program (SEATIP) and potential for the 2010 World Cup, Report to the International Finance Corporation, January 2006; McEwan, D. (2004) Study of Economic Potential of Tourism in Mozambique, Transfrontier Conservation Areas (TFCA) and Tourism Development Project (TFCATDP); Ministério do Turismo (2004) Strategic Plan for the Development of Tourism in Moçambique (2004 – 2013), Volume I, February, 2004, Republic of Mozambique

<sup>38</sup> Which highlights the participation of local communities and other stakeholders and sustainable use of the natural resources by communities, particularly through sustainable tourism.

<sup>39</sup> Republic of Mozambique (2003) Tourism policy and implementation strategy, Resolution No 14 of the 4<sup>th</sup> April 2003, Ministry of Tourism

management, 2003<sup>40</sup>). The review highlighted the need for training in the private sector and in government, and to introduce tourism at primary school level. The review stated that training at a high level is not problematic in Mozambique, but basic and mid-level training is (i.e. supervisors need training on how to lead their teams).

#### *6.4.1.1 Donor and development agency interventions*

In Mozambique the IFC provides investment and technical assistance support to SMEs through the Mozambique SME Initiative Program. IFC's focus in Mozambique is on three industries: tourism, mining and energy, and financial services. This support encompasses the cross-cutting issues of: Mobilization of both local and foreign direct investment to key sectors of the economy; Strengthening of private sector access to finance; Developing infrastructure; Improving the investment climate; Increasing linkages between large investments and the local economy; and Increasing private sector awareness of HIV/AIDS issues. During 2007 the IFC will seek to<sup>41</sup>:

- Create dedicated lines of credit to local financial institutions to increase their trade finance and SME-lending functions;
- Assist the Government in creating a privately-managed credit bureau;
- Assist the Government in its efforts to improve the investment climate;
- Provide direct investments and technical assistance to local financial institutions;
- Expand its Mozlink Program, to further increase the linkage of large investments to local SMEs;
- Expand the SME Enterprise Development Initiative that provides support for feasibility studies to increase potential access to finance and to strengthen local business associations;
- Continue support to large corporate investments, especially early on in order to promote greater development impact; to SMEs; and to programs that increase corporate sector awareness of HIV/AIDS issues

The IFC's PEP Africa's Tourism Anchor Investment Program is a collaborative initiative with the Ministry of Tourism that aims to identify, develop and promote three Anchor Investment Sites, and to mobilize funds for infrastructure development, both to improve the country's image as a tourism and investment destination. Within the program the IFC intends to identify areas and prepare investment packages to propose to investors, and currently they are working on the Maputo Special Reserve. There is no training component under the program, but the IFC representative recognised that they needed to work on linkages with the communities, and in particular training staff and producers of goods and services.

The World Bank has been working since 1998 on Transfrontier Conservation Areas (TFCAs) in the country. During the Phase 1 GEF-financed Transfrontier Conservation Areas Pilot and Institutional Strengthening project (1998-2003) (TFCAPISP), which helped to establish two southern TFCAs, developed policy and institutions, and made modest investments to strengthen the management of protected areas within the TFCAs. Starting in 2005, Phase 2 is continuing to support the TFCAs through the<sup>42</sup>:

- (1) legal designation of TFCAs, including establishment of regulations, criteria, procedures and institutional structures for planning, management and development);

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<sup>40</sup> GFA Management (2003) Tourism and hospitality training in Mozambique, Sector Study Maputo/Inhambane. Final draft report, 8 September 2003.

<sup>41</sup> <http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/AFRICAEXT/MOZAMBIQUEEXTN/0,,menuPK:382142~pagePK:141132~piPK:141107~theSitePK:382131,00.html>

<sup>42</sup> World Bank, 2005

- (2) the preparation and implementation of a IDDPs in each TFCA, to provide an environmentally sustainable framework for land use planning, natural resource management and development investment within the TFCAs;
- (3) the development of environmentally sound and socially inclusive nature tourism (emphasizing community/private sector partnership), and directly related economic activities, in areas with high tourism potential as identified in the IDDPs; and
- (4) improving the effectiveness of the PA networks within the TFCAs by:
  - (a) improving the management capacity of the National Directorate for Conservation Areas (DNAC),
  - (b) expanding or creating new formal PAs, and rehabilitating/constructing key protected area infrastructure, and
  - (c) supporting the establishment of community reserves and conservation areas (“informal PAs”) in key areas outside the formal PAs (i.e. corridors, dispersal areas, cultural sites, etc.)

The Programa Integrado da Reforma da Educacao Proissional (PIREP) is a pilot program funded by the World Bank that aims to restructure all vocational courses in Mozambique, through a demand led, stakeholder driven process to develop and financially sustainable courses. This is a US\$37.5 million government program that started in July 2007 and will be implemented over 5 years. PIREP is targeting 4-5 tourism sectors, which will probably be in bar and restaurant; catering; housekeeping; and front of house. The courses will be developed for technical schools (equivalent to secondary schools) that are administered by DINET. The program includes a stakeholder body (including private sector and government representatives) that will be able to set standards and accredit courses (an activity currently undertaken by the Ministry of Education). The format will be similar to the South African SAQA unit standards format (TIVA), and will be ready by August 2007. PIREP intends to deliver three courses at three pilot institutions in 2008. By 2009 PIREP will be registering, accrediting courses and training providers. PIREP stated that there were ‘too many generals, and not enough soldiers’ in the tourism industry, reflecting a demand for more people to be trained with basic hospitality skills, rather than management capacity. PIREP noted that they also required modules instructing teachers in how to train people in tourism.

The Netherlands development agency SNV is working with MITUR to help implement pro-poor tourism. They will be providing guides in Vilanculos with training in local history, areas of interest and how to deal with tourists. SNV is initiating a partnership with the United Nations World Tourism Organisations’ Sustainable Tourism Eliminating Poverty program (UNWTO ST-EP), to raise capacity of 3 community-based tourism enterprises based in Mozambique. The African Safari Lodges program at Technoserve will be developing training programs with the Professional Training Consulting on tourism and conservancy issues for lodge staff and community members, and implementing them around Quirimbas.

## **6.4.2 Strategic institutions**

### *6.4.2.1 Institutions interviewed*

Meetings were held with representatives of the Ministry of Tourism, Fundo Nacional do Turismo (FUTUR) (the Ministry of Tourism’s agency responsible for marketing Mozambique), the Programa Integrado da Reforma da Educação Profissional (PIREP), an ex- consultant for the Ministry of Education’s Higher Education program, the Associação de Hoteis do Sul de Moçambique, Inhambane provincial government, the African Safari Lodges program of Technoserve, SNV, and the IFC’s PEP Africa Anchor program.

#### 6.4.2.2 *Tourism skills needs*

The institutions indicated that all tourism skills are needed across all disciplines, and for a diverse range of stakeholders - from government through to community level. Capacity in tourism needs to be increased in government departments and organisations, and it was noted that there was very little national experience in tourism management of operations. Investors, it was noted, want to do business in Mozambique, but there are insufficient skills available, and they resort to importing labour. A general increased awareness was required in tourism and conservation. Also language skills are required by members of rural communities working in lodges. Training would not necessarily need to be delivered in Portuguese, but could also be provided in local languages, like Shangaan. Training for community members is also required to address the discipline of being an employee; how to relate to tourists; and how to interpret cultural and natural heritage.

A private sector representative highlighted the need for basic skills training for waiters, in kitchens, and in housekeeping. In general, the students are unable to pay for courses, and so it was indicated that basic training should be free. It appears that many employees in the tourism sector have had little personal experience of hospitality (i.e. had not stayed in hotels themselves) and often had entered the tourism industry because they had not succeeded in other fields. Work in hospitality entails long hours, low pay, stress, high and low seasons, and work was required on weekends and holidays. Rather than mid-level management skills, the private sector representative stated that basic skills were required. This perspective contrasts with the Ministry of Tourism's human resources plan for tourism mentioned earlier. Although there are degrees available in tourism in Mozambique, it was reported that they do not really teach practical skills that can be used in hotels.

In a training-needs assessment undertaken in Inhambane among 34 lodges, a third of employees were illiterate, and only 50% had primary school education. Only 8% employees had professional training, and most of these were foreigners rather than Mozambicans. They estimated that 661 training weeks were required in English (which was the most highly prioritised training need). 28 of the lodges were willing to pay the equivalent of €30 per person, per week for language training (~US\$40). The second most important form of training required was in hygiene<sup>43</sup>.

Standardisation of courses was recommended, so that courses undertaken in Mozambique were comparable with other countries (particularly private vocational courses).

#### 6.4.2.3 *Problems relating to capacity building*

Five of the strategic institutions listed whether particular problems presented were relevant in Mozambique (see Table 115). There was agreement on the problems of scarce financial resources and local trainers, and that vocational skills and hotel schools were inadequate. One respondent indicated that there was a complete lack of basic skills, and vocational skills, and no national policy on this.

#### 6.4.2.4 *Tourism courses*

Three of the strategic institutions listed which course modules were available, needed improvement, were not required, and were needed in Mozambique (see Table 116). They prioritised three modules for development, which are marked with an asterisk below. The most frequently prioritised modules for development were:

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<sup>43</sup> Muatxiwa, M. A. and Eberherr, T. (2006) Situação de emprego e as necessidades de formação profissional no sector turístico - Caso Município de Inhambane e Distrito de Jangamo, Inhambane December 2006

- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 17. Hotel management
- 1. Business management

#### 6.4.2.5 Cost recovery options

The institutions concurred that students should pay for courses, if they could, and also originating institutions should contribute. Some courses should be subsidised, and grants should be made available for basic skills and poor people. They considered that there could be between 20 and 500 students per year for particular courses in the country.

#### 6.4.2.6 Accreditation

There was agreement that courses should be accredited and peer reviewed. The Ministry of Education and Culture, and FUTUR, and the DNFFB should be involved in this process.

### 6.4.3 Training institutions

#### 6.4.3.1 Institutions identified

A list of institutions identified that provide tourism courses is detailed below. Representatives from those marked with an asterisk were interviewed:

- Instituto Superior Politecnico e Universitario (ISPU)\*
- Escoal Superior de Hotelaria e Turismo de Inhambane (Eduardo Mondlane University)\*
- Eduardo Mondlane University\*
- Catholic University, Pemba
- Hotel School Andalucia\*
- Centro de Formaco Hoteleira ‘Mario’s Place’\*
- Hospitality matters\*
- Inhassoro (damaged by a cyclone in February 2007)
- Development Aid People to People (ADPP)\*
- SNV\*
- Helvetas\*
- Politechnico Manica
- Technoserve and the Africa Safari Lodges program\*

#### 6.4.3.2 Tourism management and business courses offered

Courses offered, and in development, from the training institutions interviewed are outlined in Table 32 below. Additional business courses offered are listed in Appendix 6.

Tertiary level courses		
Institution	Diploma/Certificates	Bachelors
ADPP	<u>School level:</u> Basic level course 8-10 <sup>th</sup> grade (2 years, from age 13 upwards). Tourism, restaurant, bar, housekeeping, reception.	
Escola Superior de Hotelaria e Turismo de Inhambane		Tourism management (4 yr) Hotel management (4 yr)

Hotel School Andalucia	<u>Certificate:</u> START program - Room & food & beverage positions (8 months) Lodge management (15 months) <u>Diploma:</u> Professional cookery (3 yrs) Hospitality management (3 yrs)	
ISPU		Tourism management (4 yr)
<b>SME level courses / short courses</b>		
Escola Superior de Hotelaria e Turismo de Inhambane	Short courses in hotel and tourism; catering; reception; watering – partnering with Hospitality matters and Mario’s place	
Hospitality matters	Housekeeping (5 days) Restaurant service (5 days) Bar service (5 days)	English for waiters (5 days) Reception (5 days) Guest relations (5 days)
Hotel School Andalucia	Hospitality business English and communication English for hospitality (6 weeks) School holiday English revision program (12 hours)	
Mario’s place	Waitering (2 months), catering (6 months) Hygiene in food preparation (5 days) Food preparation (10 days)	

#### 6.4.3.3 Tourism modules

The training institutions identified course modules that were available, needed improvement, were not required, and were needed (see Table 117). The most frequently prioritised modules for development were:

- 24. Food and beverage management
- 21. Conference, Exhibition and Event management
- 14. Tourism business development (*including entrepreneurship and SME development*)
- 18. Hospitality management
- 17. Hotel management
- 13. Tourism business planning
- 11. Tourism resources (*including natural, cultural, infrastructure, human and financial, macro-environment*)
- English for hospitality industry

#### 6.4.3.4 Structure of courses

Delivery methods for courses were very similar, with all institutions using face-to-face classroom training and three (Escola Superior de Hotelaria e Turismo de Inhambane, Hotel School Andalucia, and Universidade Eduardo Mondlane) using workbooks and independent study.

#### 6.4.3.5 Process of integrating new courses

All of the institutions indicated that their preferred additional modules would fit within their existing course frameworks. The process of integrating new courses varied greatly in the degree of formality, and length of time.

Courses at ADPP and Hotel School Andalucia need to be accredited by the Ministry of Education. Courses at the ISPU, Escola Superior de Hotelaria e Turismo de Inhambane, Universidade Eduardo Mondlane are autonomous, so once the institution is approved by the Ministry of Education they can teach what they see fit.

### 6.4.3.6 Case studies

Case studies suggested included the following:

- Events in cultural tourism and festivals
- Model of Inhambane and Cabo del Gado (regarding the type of tourism construction, and contact between operators and local communities)
- The Polana Hotel in Maputo: regarding service and changes in management.
- Ihla de Mocambique

Four institutions interviewed indicated that they would be happy to develop case studies.

### 6.4.3.7 Students

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning, and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 33.

<b>Institution</b>	<b>Country of origin of students</b>	<b>No. of tourism students 2007 (2008 predicted)</b>	<b>Type of institution students drawn from</b>	<b>Organisational level the come from</b>	<b>Level of prior learning</b>	<b>Jobs students go on to do after the courses</b>
ADPP	Mozambique	32 (100)	Students	-	7 <sup>th</sup> grade (13 yrs old)	Started in 2005, 2 year course. Will find out next year
Escola Superior de Hotelaria e Turismo de Inhambane	Mozambique, Sao Tome	238 (250)	Government, Students	-	Secondary school required. Entrance exam	Start SME (but hard to find capital); Most are employees in tourism sector
Hospitality matters	Mozambique, Zimbabwe	100 (200)	Private sector; house-workers	Entry level	Understand hearing Portuguese. Kitchen: 10 <sup>th</sup> grade. If bright – literate and numerate.	Private sector – go back to their jobs (less likely to loose their jobs)
Hotel School Andalucia	Mozambique	70 (120)	Private sector tourism (50%); SMEs (50%)	Entry level, SME owners	START: Literate and numerate in English. Reception – grade 11; Other courses - grade 10 with passes.	Some start SMEs, 95% employees in tourism sector
ISPU	Mozambique, Portugal, Pakistan, India	60 (100)	Students	-	Secondary school required. Entrance exam	Employee in tourism sector. Government
Mario's place	Mozambique	50 (150)	Private sector, students	General and entry level	10 <sup>th</sup> grade	Employee in hotel or

Universidade Eduardo Mondlane*	Mozambique, Sao Tome, Portugal	1500 (1200)	Private sector (evening courses); students (daytime courses)	All levels	Secondary school required. Entrance exam	restaurant Not known
* Reducing numbers of students due to space capacity						

#### 6.4.3.8 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 34).

**Table 34: Course payment mechanisms in Mozambique**

Institution	Students pay	Originating institutions pay	Subsidy or grant	Cost per course / module	Comments
ADPP	√		√	\$536 (2 years)	Real cost is \$1000 per year, but subsidised
Escola Superior de Hotelaria e Turismo de Inhambane	√		√	\$95 per year (\$48 per semester)	Also pay 750 MTN per month lodging; 1350 MTN per month food
Hospitality matters		√		Catering: \$170 (2 weeks). English \$34 (1/2 day). Housekeeping, Reception, Guest reln: \$61 (5 days); Kitchen \$69 (5 days)	Students have no money. Very underpriced. Would need to charge more to break even.
Hotel School Andalucia	√	√	√	START: \$1200 p/a. EHC - \$230 (kitchen is \$250). 3 year traineeships (not priced yet). English: \$65 for 6 weeks. Others: \$100	
ISPU	√	√		\$220 per month (for 5 months each year). If do 6 subjects, pay \$225)	No grants available for tourism. Ministry of Tourism pays for students it sends.
Mario's place	√	√		\$115 (6 months) \$57 Restaurant management (2 months)	First courses were subsidised by Mario's Place
Universidade Eduardo Mondlane	√		√	\$1000 p/a (evening courses)	Government pays for daytime students (undergraduate and graduate)
NB: US\$1 = 26.1 MTN and 26,120 Metacais (The currency has been devalued)					

### 6.4.4 Large enterprises

#### 6.4.4.1 Enterprises interviewed

Two large tourism enterprises in Maputo and Inhambane were interviewed: the VIP hotel and Casa Barry (see Table 35).

<b>Issue</b>	<b>VIP hotel</b>	<b>Casa Barry</b>
No. visitors: High season	3900	100% occupancy
Low season	3900	50% occupancy (86 beds; 27 Units)
Average length of stay	4 nights	7 nights
Price from / to	US\$106-180	US\$54– \$557
Type of guests	85% business 10% leisure 5% other	5% business 95% leisure
Country of origin of guests	Mozambique, South Africa	South Africa, Europe
No. full time employees	151	70
No. part time employees	-	-
Note: US\$1 = Rand 6.91496		

#### 6.4.4.2 Perception and purpose of training

The operators stated that training is needed to improve the level of service, but it is difficult to find experience and trained staff. Also there are only a few training facilities available. The purpose and reasons for training given by the hotels are summarised in Table 118. They agreed that it was important to increase performance and when upgrading to international standards. Neither hotel developed its training in-house, although the VIP has a link with a hotel school in Portugal.

#### 6.4.4.3 Problems with and relating to training

Internal problems identified that relate to training included hygiene, respect for management, attendance and communication (at Casa Barry), staff rotation and difficulties with English (at VIP). Other problems are indicated in Table 119, and although there was no agreement, a scarcity of local trainers and poorly designed training materials were raised as issues.

#### 6.4.4.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the two hotels are indicated in Table 120, and reveal that they desired face-to-face training, either onsite or within 20 km.

#### 6.4.4.5 Willingness to pay

The hotels indicated their willingness to pay for particular courses (see Table 36). The VIP hotel was interested in a range of different lengths of courses while Casa Barry were interested in the longer options.

<b>Type of course</b>	<b>VIP hotel</b>	<b>Casa Barry</b>
1 module: 1/2 day (or 50 page workbook)?	\$10	
1 module: 1 day (or 100 page workbook)?	\$15	
1 module: 2 days (or 200 page workbook)	\$30	
1 series of modules: 2 weeks (or ten x 100 page workbooks)?	\$150	
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?	\$250	\$50

#### 6.4.4.6 *Tourism modules*

The hotels listed course modules that were available, needed improvement, were not required, and were needed in Mozambique, and prioritise modules for development (see Table 121). Only one of the hotels prioritised courses for development, which were:

- 6. HIV/AIDs in the workplace
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 26. Transportation for tourists

#### **6.4.5 SMEs**

##### 6.4.5.1 *Enterprises interviewed*

Three tourism SMEs were interviewed in Mozambique: Hotel Tofu Mar in Inhambane, a travel agent called Novo Mundo in Maputo, and Covane Community Lodge in Massingir (see Table 37).

Issue	Hotel Tofu Mar	Novo Mundo	Covane Community Lodge
No. visitors: High season	240	500	25
Low season	90	200	15
Average length of stay	4 nights	-	3 nights
Price from / to	\$37 – \$10	(tours vary in price)	\$20
Type of guests	30% business 50% leisure 20% other	50% business 40% leisure 10% other	90% leisure 10% other
Country of origin of guests	Mozambique, South Africa	Europe	South Africa, Spain, Switzerland, Mozambique, USA
No. full time employees	23	15	
No. part time employees	-	-	-

#### 6.4.5.2 Perception and purpose of training

Although one SME indicated that training was fundamental to deliver adequate service, another noted that tour operators often do not see the importance of training. The purpose and reasons for training given are summarised in Table 122. They agreed that training was undertaken to increase performance and efficiency, and to acquire skills. The enterprises also indicated it was used to upgrade to international standards, and to correct repetitive mistakes.

#### 6.4.5.3 Problems with and relating to training

One SME indicated that training was satisfactory, but not sufficient. Another indicated that training should be improved with more guidance needed for waiters (rather than managers). It was also noted that hotels are able, but not willing, to pay for training. *Internal problems* identified that related to training were human resources, stock management, satisfaction of tourists, and the need for training. Two of the enterprises developed their own training in house. Other problems are indicated in Table 123.

#### 6.4.5.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the SMEs are indicated in Table 124, and they agreed that training should ideally be in a traditional classroom setting, and located within 15 km of the enterprise.

#### 6.4.5.5 Willingness to pay

The SMEs indicated their willingness to pay for particular courses (see Table 38). All three were interested in full courses, while Novo Mundo was also keen to undertake 2 day courses; and Tofu Mar was interested in 2-week sessions.

Type of course	Hotel Tofu Mar	Novo Mundo	Covane Lodge
1 module: 1/2 day (or 50 page workbook)?			
1 module: 1 day (or 100 page workbook)?			
1 module: 2 days (or 200 page workbook)		\$60	
1 series of modules: 2 weeks (or ten x 100 page workbooks)?	√ (1 week would pay \$40)		
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?	√	\$250	√

#### 6.4.5.6 Tourism modules

The SMEs reported what course modules were available, and were required (see Table 125). Two of the SMEs prioritised courses, but there was no consensus. The courses they prioritised were:

- 1. Business management
- 15. Responsible and sustainable tourism (*including conservation and poverty alleviation*)
- 19. Tour organisation and management
- 23. Field guiding (*cultural and natural*)
- 25. Retail travel
- 26. Transportation for tourists

#### 6.4.6 Conclusions

Similarly to Madagascar, there is a great demand for skills development at all levels, but particularly at a basic level (i.e. housekeeping, reception, waitering, catering). The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 39.

<b>Table 39: Summary of tourism modules prioritised in Mozambique</b>					
	<b>Strategic institution (n=5)</b>	<b>Training institutions (n=7)</b>	<b>Large operators (n=1)</b>	<b>SMEs (n=2)</b>	<b>Totals</b>
<b>General business modules</b>					
1. Business management	**			*	3
2. Business planning					
3. Financial management					
4. Marketing and marketing management					
5. Human resources management		*			1
6. HIV/AIDs in the workplace	*	*	*		3
7. Computer literacy					
8. Corporate social responsibility					
<b>Tourism specific modules</b>					
9. Tourism theory					
10. Tourism policy and legislation					
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )		**			2
12. Tourism destination planning and development					
13. Tourism business planning	*	**			3
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )		***			3
<b>Summary of tourism modules prioritised in Mozambique (Contd.)</b>					
	<b>Strategic institution (n=5)</b>	<b>Training institutions (n=7)</b>	<b>Large operators (n=1)</b>	<b>SMEs (n=2)</b>	<b>Totals</b>
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	*			*	1
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	****	*	*		6
17. Hotel management	**	**			4

18. Hospitality management	*	***			4
19. Tour organisation and management	*			*	2
20. Tourism attraction management		*			1
21. Conference, Exhibition and Event management		***			3
22. Protected areas and ecotourism management	*				1
23. Field guiding ( <i>cultural and natural</i> )	*			*	1
24. Food and beverage management		****			4
25. Retail travel	*			*	2
26. Transportation for tourists			*	*	2
27. Impacts of tourism – economic, environmental, social and cultural	*				1
28. Tourism research methods	*				1
<b>Other courses</b>					
Tourism sensitisation (how to deal with tourists)	*				1
English for hospitality industry		*			1
Nutrition		*			1
NB: the large operators did not prioritise courses, but the three indicated were the only new courses that were requested					

Overall, the four most frequently prioritised courses by the Mozambique institutions and businesses were:

- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 17. Hotel management
- 18. Hospitality management
- 24. Food and beverage management

## 6.5 Rwanda

### 6.5.1 Overview of tourism

The security situation has been re-established in Rwanda since the end of the war in 2002, and an international campaign launched tourism again in 2003. Rwanda is now booming, and is ahead of its targets in terms of both tourism arrivals and foreign exchange earnings<sup>44</sup> with 26 000 visitors in 2005. The country has surpassed the 24 000 visitors recorded in 1989, but has not recovered to an earlier peak of 39,000 in 1984. The government aims to attract 70 000 international tourists by 2010 and has launched a series of marketing and distribution measures aimed at attracting nationals and foreigners to invest in the tourism sector<sup>45</sup>. International tourism receipts accounted for 8.9% of exports of goods and services in 2005<sup>46</sup>. Also in 2005, international arrivals to Rwanda registered a 16% growth above the average 13% for Sub Sahara Africa<sup>47</sup>. Tourism to Rwanda is still highly

<sup>44</sup> On The Frontier Rwanda 2006 cited in Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>45</sup> WTO Tourism market trends Africa Figures 2004

<sup>46</sup> Data collected during 2006 by World Tourism Organisation (UNWTO), cited in Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>47</sup> UNWTO (2006) Africa is this year again the world's leader in terms of growth in international tourist arrivals. Between January and August 2006, international tourist arrivals to the region increased by 9.8%. Sub-Saharan Africa (+12.6%) leads the performance so far. cited in Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

[www.world-tourism.org/newsroom/Releases/2006/november/barometer06.htm](http://www.world-tourism.org/newsroom/Releases/2006/november/barometer06.htm)

focussed upon short visits<sup>48</sup>, predominately to visit the mountain gorillas, but the tourism potential of the country is not fully exploited. There are over 140 hotels (around 1,400 rooms), including a few international hotels and many private Rwandan ones<sup>49</sup>.

Data from the World Travel and Tourism Council (WTTC) indicates that Personal Travel and Tourism generated US\$51.1 million in 2003, and is predicted to grow to US\$109.8 million by 2013 (see Table 40). The WTTC estimates that Rwanda employs 23,900 people in the tourism industry, and that by 2013 this will rise to 41,100 (or 1.9% of employment).

<b>Description of figures</b>	<b>Status in 2003</b>	<b>Predicted growth to 2013</b>
<b>Personal Travel &amp; Tourism</b> (or consumer expenditures) which captures spending on traditional travel and tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and non durable) used for travel and tourism activities.	US\$ 51.1 million (6% real growth)	US\$ 109.8 million (5.4% annualised real growth)
<b>Business Travel</b> by government and industry, in spending on goods and services (transportation, accommodation, meals, entertainment etc) and intermediate inputs used in the course of business or government work.	US\$ 20.6 million (0% real growth)	US\$ 50.4 million (6.9% annualised real growth)
<b>Government expenditures</b> (Individual) by agencies and departments which provide visitor services such as cultural (art museums) recreational (national park) or clearance (immigration/customs) to individual visitors.	US\$ 3.2 million (1.4% of total government expenditure; 6.7% real growth)	US\$ 5.8 million (1.4% of total government expenditure; 3.5% annualised real growth)
<b>Travel &amp; Tourism Industry Employment</b> which includes those jobs with face to face contact with visitors (airlines, hotels, car rental, restaurant, retail, entertainment, etc)	23,900 employees (1.4% of total employment; 1% growth)	41,100 employees (1.9% of total employment; 5.6% annualised real growth)
<b>Travel &amp; Tourism Industry Gross Domestic Product (GDP)</b>	US\$ 36.6 million (1.8% of GDP; 4.7% real growth)	US\$ 86.1 million (2.5% of GDP; 6.4% annualised real growth)

Source: WTTC, 2003<sup>50</sup>

The government is actively involved in tourism development, in part due to the infancy of the tourism sector, and also due to the weakness of the private sector. Stakeholders suggest that the government needs to show the private sector that business is possible by developing infrastructure, which can then be leased to the private sector. For example, the government built the Intercontinental Hotel in Kigali, which has now been leased to the Serena group for 30 years. However some stakeholders thought that the government should be responsible for developing basic infrastructure (i.e. airports, roads) while the private sector should be responsible for developing hotels.

The national government's Vision 2020 (2002) is a framework for Rwanda's development, presenting the key priorities and providing Rwandans with a guiding tool for the future. The goal is to transform the economy from its 90% dependence on subsistence agriculture into a modern, broadly based economic engine, welcoming to investors, creating employment and new

<sup>48</sup> Length of stay went from 4 days in 2004 to 4.5 days early 2006 (ORTPN 2006) cited in Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>49</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>50</sup> WTTC (2003) Country League Tables, The 2003 Travel & Tourism Economic Research, World Travel and Tourism Council

opportunities<sup>51</sup>. A Rwanda Tourism Strategy has been adopted, and tourism was designated as a priority sector in October 2002<sup>52</sup>.

As part of the Rwanda National Innovation and Competitiveness Program, a national Tourism Working Group (TWG) with the support of a consultancy firm On The Frontier (OTF) developed the Rwanda Tourism Strategy in 2002. They articulated this vision for the Rwanda's Tourism Industry: '*Generate \$100 million in tourism receipts in 2010 by focusing on creating high value and low environmental impact experiences for Eco-travellers, Explorers and Individual Business Travellers.*' The strategy focuses on tourism growth at national level and on country's receipts' increase. To meet the above targets, the strategy advocates increasing the level of visitors' spending per day and length of stay. The goal is to reach 70,000 visitors staying one week and spending an average of US\$ 1,400, by 2010<sup>53</sup>.

The Rwanda Private Sector Federation has nine chapters, and the Tourism Chapter comprises a Hotel and restaurant association; a Tour operator association; a Schools association; and a Taxi association. Although they require additional capacity and training, they report having a good program to develop tourism training, and have discussed this with SNV and IFC<sup>54</sup>.

Crafters, vendors, artists, music groups obtain business support through existing cooperatives and *Projet pour la Promotion des Petites et Micro Entreprises Rurales (PPMER)*. PPMER provides financial support through loan at extremely low interest rate, and is a unit of MINICOM (the Ministry of Commerce, Industry, Investment Promotion, Tourism and Cooperatives). In 2006 PPMER was operating in two Districts involved in tourism development, Musanze (Northern Province) and Nyagatare (Eastern Province). They target value added micro projects, such as carpentry, beekeeping, and basketry. Local crafters have to group themselves into associations to benefit from PPMER funding<sup>55</sup>. PPMER believes in the effectiveness of low interest loans, and that 'free' money does not serve sustainable development<sup>56</sup>.

Rwanda Investment and Export Promotion Agency (RIEPA) has set up craft training centres at District level. They also fund exports sectors, especially handicrafts, with business missions, fairs, and training. Small producers as cooperative members benefit from this initiative. RIEPA encourages small producers participating in export quality products with an incentive of 4000 RWF (±US\$ 7) each per week. These small crafters are producing both for tourism and for export. There is marketing assistance provided by GoR to craft small enterprises or cooperatives. This scheme was not designed with micro enterprises in mind and as a result is not accessible by them<sup>57</sup>.

#### *6.5.1.1 Donor and development agency interventions*

In June 2007 the IFC announce that it would invest \$2.5 million to refurbish the Hotel des Mille Collines, in order to help increase the number of high-quality hotel rooms in Kigali, Rwanda's capital, promote further investments, and attract more tourists. The IFC's loan to Compagnie

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<sup>51</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>52</sup> WTO Tourism market trends Africa Figures 2004

<sup>53</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>54</sup> Pers. Com. Emmanuel Ndamutsa Rusera, Chair, 2007 cited in Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>55</sup> <http://www.ifad.org/english/operations/pt/rwa/index.htm>

<sup>56</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>57</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

Rwandaise d'Hôtellerie et de Tourisme, parent company of Hotel des Mille Collines, will allow the company to upgrade the four-star, 112-room hotel to match current international hotel standards. Dimitris Tsitsiragos, IFC Director for Global Manufacturing and Services stated that "In addition to promoting tourism, improving operations at the hotel will help create jobs and increase demand for local goods and services."<sup>58</sup>

USAID-Rwanda is working in three main fields: Health/HIV; Democracy and good governance; and Economic growth (increasing economic opportunities in rural areas). In the Economic Growth field there is a private sector competitiveness project (mainly dealing with coffee); a rural finance initiative; and an ecotourism program. In the ecotourism program USAID wants to create Nyungwe National Park with ORTPN as a new tourism destination. A training centre is proposed at Kitabe, the entrance of Nyungwe National Park. USAID aims to increase the capacity of ORTPN; attract more tourists; stimulate private sector business; and improve local health conditions. Currently there are 3,000 tourists annually, and they aim to receive 15,000 by 2010. They intend to train tour operators, ORTPN and entrepreneurs<sup>59</sup>.

SNV in close collaboration with ORTPN participated in completing the tourism indicators and key activities draft ensuring support to micro enterprises, providing incentives for hotels to source locally and partner with communities, training small businesses, and diversifying tourism into products that are particularly accessible to the poor<sup>60</sup>.

## **6.5.2 Strategic institutions**

### *6.5.2.1 Institutions interviewed*

Meetings were held with representatives of the Office Rwandais Du Tourisme Et Des Parcs Nationaux (ORTPN), the Parents Association for Education and Promotion of Hospitality and Tourism in Rwanda (APEHOTOUR), the Rwanda Private Sector Federation and its Tourism Chapter, USAID-Rwanda, the Dutch development agency SNV, and the IFC in Rwanda.

### *6.5.2.2 Tourism skills needs*

Tourism skills at all levels are required in Rwanda. Basic service training was identified by nearly all of the institutions as a major gap. This training is required in all aspects of hospitality, including in hotels, restaurants and guiding. There are no qualified hotel management and hospitality training institutes, and so no formal basic tourism training available. Training linking tourism with conservation and community enterprises was also prioritised, because more revenue from tourism needs to be channelled to local people. Language skills, particularly in English, were noted as a major gap. Due to the low level of tourism skills, it was noted that there were many expatriates working in the country. There is a need to increase the number of tourism professionals in the country, and also improve the quality of service of those already working in the industry.

SNV reports that tourism industry faces a major challenge as there is no training available in essential hospitality skills and appropriate languages (i.e. English, French and Swahili). There is only basic training in hospitality skills and even more basic training in languages. In June 2006, there are four official small scale private institutions offering training in hospitality and tourism in Rwanda. *Centre de Formations des Jeunes* offers students from secondary school level basic

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<sup>58</sup> <http://ifc.org/ifcext/media.nsf/content/SelectedPressRelease?OpenDocument&UNID=06E2FFCA68BA25E0852572FA0058FF6A>

<sup>59</sup> Pers. com. T. Karera, USAID-Rwanda, 2007

<sup>60</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

training in hospitality. Some hotels also provide in-house training for candidates from the lower end particularly focusing on apprenticeships in cleaning and security, more rarely in cooking. One hotel manager considers that 2/3 of their staff are roughly from the lower end. For some establishments, communication skills and languages are a barrier for recruitment<sup>61</sup>.

A new national tourism school should be built in 2007 with GoR funds<sup>62</sup>. SNV note that it will be important for the new school to provide training across the skill levels so that un-skilled and semi-skilled entrants to tourism can benefit and progress. Under a World Bank fund, the new Tourism Chamber organises seminars on training on a regular basis. There is no training tax in place on business or on hotels, nor requirement for tourism businesses to invest in training. However, a hotel investing in training benefits from a 100% tax rebate on the money spent as long as there is prior approval for the training plan which has to be audited with certificates of training<sup>63</sup>.

SNV report that demand is booming for tourism guides and this is an area where government action is needed. At present the only officially recognised guides by GoR are the ones working for ORTPN within National parks and for the Kigali City Tour. The guides employed by Tour Operators received in house training and are accepted as guides by ORTPN but there is no documentation on their duties and tasks. Thus there is presently no category of 'local guide' which is more accessible to the poor, despite the demand. Standards, definitions and regulations covering guides will be needed. In this process, the opportunity to consider a 'local guide' category, which is accessible to someone with less formal education, should be explored<sup>64</sup>.

#### 6.5.2.3 *Problems relating to capacity building*

The strategic institutions listed whether particular problems presented were relevant in Rwanda (see Table 126). This indicates that the most commonly reported problems are a scarcity of local trainers, poorly designed training, training that is not relevant to the bottom-line of business, and inadequate vocational skills and hotel schools.

#### 6.5.2.4 *Tourism courses*

The strategic institutions listed which course modules were available, needed improvement, were not required, and were needed in Rwanda (see Table 127). The most frequently prioritised modules for development with three institutions prioritising them were:

- 14. Tourism business development (*including entrepreneurship and SME development*)
- 15. Responsible and sustainable tourism (*including conservation and poverty alleviation*)

#### 6.5.2.5 *Cost recovery options*

Estimates of the number of students for the courses varied between 50-1000 per year, with the most frequently cited estimate of 200 students.

Some institutions indicated that a tax rebate is available for tourism training, but only large operators (not SMEs) are able to access it. Institutions considered that government and donors

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<sup>61</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>62</sup> RPSF Tourism Chamber (November 2006)

<sup>63</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

<sup>64</sup> Verdugo, D. (2007) An analysis of Government incentives for increasing the local economic impacts of tourism in Rwanda, SNV, March, 2007

should provide grants and subsidies for half of the students, particularly since tourism was a priority for development in the country. Half of the students themselves should also pay for courses, if they are able to do so. It was indicated that people would only be willing to pay for training if they could see an advantage. Therefore it was suggested that there could be a declining contribution over time. Institutions suggested that companies students originated from should also contribute part of the costs – and up to 50% of the fees were suggested.

At the Rwanda Tourism Institute, the government has reportedly agreed to pay for all the students tuition (up to 200 students) even though it is a private institution.

#### *6.5.2.6 Accreditation*

It was indicated that A-level courses are currently used (based on the UK system), and courses are reviewed and approved by the Ministry of Education. APEHOTOUR has developed the Rwanda Tourism Institute, based on the demand for tourism training.

### **6.5.3 Training institutions**

#### *6.5.3.1 Institutions identified*

A list of institutions identified that provide tourism courses is detailed below. Representatives from those marked with an asterisk were interviewed:

- School of Finance and Banking\*
- Rwanda Tourism Institute (APEHOTOUR)\*
- Centre for Support to Small and Medium-Sized Enterprises in Rwanda (CAPMER)\*
- Papyrus Restaurant\*
- College APEHOT, for school leavers for training as waiters and junior hospitality staff.
- Office Rwandais Du Tourisme Et Des Parcs Nationaux (ORTPN)\*

#### *6.5.3.2 Tourism management and business courses offered*

Tourism courses offered, and in development, from the training institutions interviewed are outlined in Table 41 below (additional business courses are indicated in Appendix 6). Currently there are no higher-level tourism courses available in Rwanda, hence the initiative of APEHOTOUR to develop the Rwanda Tourism Institute (RTI). The RTI course materials are currently in development, and they are working on the curriculum with Kenya's Utalii College. Tourism courses only exist at high school level, which are suitable for junior staff in hotels. There is a lack of trainers and training institutions specialising in hotel management.

<b>Table 41: Tourism courses offered by training institutions in Rwanda</b>	
<b>Tertiary level courses</b>	
<b>Institution</b>	<b>Diploma/Certificates</b>
Rwanda Tourism Institute (APEHOTOUR)	3 year diplomas in development: - Hotel Management (BBA) - Travel and Tourism management - Restaurant management
Papyrus Restaurant	1 year certificate in catering (including bread and pizza)
<b>SME level courses</b>	
CAPMER	Introduction to tourism and hotels Reception F&B Room management Restaurant management Security and Hygiene

CAPMER works with PUM, which is an association of retired professionals in the Netherlands, and members come to supervise their informal courses. CAPMER sponsors them to stay in 20 hotels and identify their weaknesses. They then use a SWOT analysis then develop a training program to help the hotels. During 2006 they assisted 20 small and medium hotels that had asked for help (they estimate there are 150 hotels in total). There is no curriculum, and they simply give the professionals guidelines on different areas.

#### 6.5.3.3 *Tourism modules*

The six training institutions identified course modules that were available, needed improvement, were not required, and were needed (see Table 128). Most of the courses identified either were not available, and were needed, or were available but required improvement. The most frequently prioritised modules for development were:

- 13. Tourism business planning
- 14. Tourism business development (*including entrepreneurship and SME development*)
- 17. Hotel management
- 24. Food and beverage management

#### 6.5.3.4 *Process of integrating new courses*

All of the institutions indicated that their preferred additional modules would fit within their existing course frameworks or into proposed courses. The process of integrating new courses varied greatly in the degree of formality, and length of time. The Ministry of Education is responsible for accrediting and approving formal courses.

#### 6.5.3.5 *Case studies*

Case studies suggested included information about ORTPN and the role of education in the development and promotion of tourism in Rwanda. CAPMER, the RTI, and the School of Finance and Banking indicated that they could develop case studies.

#### 6.5.3.6 *Students*

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning, and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 42.

**Table 42: Overview of tourism students in Rwanda**

Institution	Country of origin of students	No. of tourism students 2007 (2008 predicted)	Type of institution students drawn from	Organisational level the come from	Level of prior learning	Jobs students go on to do after the courses
CAPMER	Rwanda	25 <sup>1</sup> (500)	Private sector (short courses); SMEs	Executive managers and managers, general staff, SME owners	Secondary education	They go back to what they did before (SME, work in tourism private sector)
Papyrus Restaurant	Rwanda	40 (100)	Street children (orphans)	n/a	Majority completed primary school (5 years education)	58% get jobs afterwards in restaurants; or cooking in private houses
Rwanda Tourism Institute (APEHOTOUR)	Rwanda, Burundi, Uganda, Djibouti <sup>2</sup>	30 (600)	Private sector tourism, government, students, outside tourism	All levels of management, SME owners, general staff	Applied courses, university education, apprentice-based learning, secondary school	Develop SME, employee in tourism sector, work in protected areas, government (tourism), other industry sector
School of Finance and Banking	Rwanda	1800 (2000)	Private sector, government, students, industries outside tourism	MBA: Executive and management level, SME owners. Evening classes: general staff Undergraduate: Entry level.	Varies for each course. MBA need undergraduate in Economics/finance +5 years experience. Undergraduate need a minimum level of marks from secondary school. Council selects.	Government (not tourism role), industry (not tourism).

1. Number of people that were being trained at time of assessment. Three year target of 1500 students.

2. Where they will be drawn from, origin, levels of prior learning, and alumni information was predicted, as tourism courses have not yet started.

### 6.5.3.7 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 43).

**Table 43: Course payment mechanisms in Rwanda**

Institution	Students pay	Originating institutions pay	Subsidy or grant	Cost per course / module	Comments
CAPMER	√	√	√	Free courses.	Students pay their accommodation,

					and partners pay for courses/lecturer fees
Papyrus Restaurant			√	Free. Students are orphans	Could be course fees later when there are additional courses (i.e. not for orphans though)
Rwanda Tourism Institute (APEHOTOUR)	√	√	√	10,000 Fr admission fee (~US\$ 19). 30,000 Fr tuition fees per month (~US\$ 56).	Courses will become more expensive with foreign lecturers. They intend to follow course prices of other universities.
School of Finance and Banking	√	√	√	Certificate: \$300 per paper Undergraduate: \$800 p/a Masters: \$4000 p/a	For certificate courses 13-15 papers are required.

## 6.5.4 Large enterprises

### 6.5.4.1 Enterprises interviewed

Representatives of two large hotels in Kigali were interviewed regarding their tourism training needs: Hotel des Milles Collines and Novotel (see Table 44).

Issue	Hotel des Milles Collines	Novotel
No. visitors: High season	2700	2238
Low season	1800	-
Average length of stay	7 nights	5 nights
Price from / to	\$90-150	\$155-195
Type of guests	85% business 15% leisure	95% business 5% leisure
Country of origin of guests	Europe, Kenya, South Africa	Europe, USA

### 6.5.4.2 Perception and purpose of training

The operators believed that training was indispensable in Rwanda. There are many hotels open with poor service and unqualified personnel. The purpose and reasons for training given are summarised in Table 129. The hotels agreed that training was used to increase efficiency and acquire skills, and also to increase the level of professionalism.

### 6.5.4.3 Problems with and relating to training

The two hotels indicated that they were satisfied or very satisfied with the training available. However, *internal problems* noted by the Hotel des Milles Collines included finding qualified staff, and *external weaknesses* included competition. The Novotel did not perceive any problems with training. Other problems noted by one of the hotels are indicated in Table 130, which shows that all of the issues suggested were encountered: Scarce financial resources; Scarcity of local resource people; Unqualified trainers; Inexperienced trainers; Trainers with poor communication skills; Poorly designed training; Inappropriate attendees at the training; High turnover of employees; No training follow-up; No link or relevance between training and bottom-line of business; Lack of awareness of availability of training.

### 6.5.4.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing

courses. The results from Hotel des Milles Collines and Novotel are indicated in Table 131. The hotels agreed that face-to-face training was preferred, during business hours.

Both hotels developed internal training, and the Novotel had an e-learning system through the ACCOR University. There are a variety of courses including restaurant, catering, recruitment and CD-Roms on different issues. The online courses provide feedback to the manager on their progress and performance on courses. This information is part of the performance evaluation used to calculate staff bonuses, which can be considerable at up to 2.4 months salary.

Once a year each Head of Department at the Novotel sends a member of staff to another ACCOR hotel, for between 1 and 3 weeks as an exchange. This is another form of training.

#### *6.5.4.5 Willingness to pay*

The Hotel des Milles Collines stated that the price would depend on the type of course, but they already send 40 staff for 3-4 weeks at a time to a hotel in Belgium they are linked with. The Novotel would be willing to pay ~US\$1344 for a 1 day module. They had paid for a train the trainers course which cost ~US\$4032, and those employees then trained other staff at the hotel.

#### *6.5.4.6 Tourism modules*

The hotels listed course modules that were available, needed improvement, were not required, and were needed in Rwanda, and prioritise modules for development (see Table 132). The Novotel indicated that they did not need new training materials, but rather repeated training. Modules prioritised were:

- 4. Marketing and marketing management
- 17. Hotel management
- 24. Food and beverage management

## 6.5.5 SMEs

### 6.5.5.1 Enterprises interviewed

Five small tourism enterprises were interviewed providing accommodation, bookings and tours: Iris Guest House; Hotel Gorillas, Rwanda Safaris Ltd; the Rwanda Multi-Service Agency; and an independent guide (see Table 45).

Issue	Iris Guest House	Hotel Gorillas	Rwanda Safaris	Rwanda Multi-Service Agency	Independent guide
Type of enterprise	Hotel	Hotel	Tour operator	Travel agency, Tour operator, car hire	Guide
No. visitors:					
High season	420 (78%)	720	4	20	20-25
Low season	180 (35%)	450	4	12	10
Average length of stay	-	3 nights	6 days	4 days	10 days
Price from / to	\$45 per night	\$55-75 per night	\$1613-5050 per tour	\$600 per tour	\$50-300 per tour
Type of guests	90% business 7% leisure 3% other	60% business 35% leisure 5% other	2% business 98% leisure	30% business 70% leisure	10% business, 90% leisure
Country of origin of guests	USA, Canada, Europe, Africa	East Africa, Europe	USA, UK, Australia, Germany	USA	USA, Europe (England, Germany, France, Italy)
No. full time employees	25	34	5	3	1
No. part time employees	-	8	-	+10	-

### 6.5.5.2 Perception and purpose of training

The SMEs recognised the importance of training, and indicated it was necessary to improve the quality of services and standards in the industry. They recognised the need for languages skills, and that they would like to hire people with better skills. The purpose and reasons for training given by the SMEs are summarised in Table 133, and there was consensus that training was needed to improve the level of professionalism.

### 6.5.5.3 Problems with and relating to training

The SMEs thought that training was satisfactory or very satisfactory. They commented that some training schemes consisted of very short ‘crash’ courses. *Internal problems* that related to training included the lack of trained safari guides, the quality of staff, and unskilled workers. Other problems they identified are indicated in Table 134, and the majority of enterprises were concerned with a lack of local trainers, no training follow-up, and a lack of awareness of available training.

### 6.5.5.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the five SMEs are indicated in Table 135, and show they agreed on the need for CDs and DVDs for training materials, and that it should ideally be conducted onsite.

#### 6.5.5.5 Willingness to pay

The SMEs indicated their willingness to pay for different types of courses (see Table 46). Iris Guest house and the independent guide were interested in a range of different courses, while the others had more specific needs and budgets.

Type of course	Iris Guest House	Hotel Gorillas	Rwanda Safaris	Rwanda Multi-Service Agency	Independent guide
1 module: 1/2 day (or 50 page workbook)?	\$20				\$20
1 module: 1 day (or 100 page workbook)?	\$40		\$100		\$40
1 module: 2 days (or 200 page workbook)	\$60	\$200 equivalent (i.e. in accommodation etc)			\$60
1 series of modules: 2 weeks (or ten x 100 page workbooks)?	\$400	Yes			\$100
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?				\$500	Yes (not sure what price)

#### 6.5.5.6 Tourism modules

The hotels listed course modules that were available, needed improvement, were not required, and were needed in Rwanda by the SMEs, and prioritised modules for development (see Table 136). Although the hotels did not prioritise courses that they wished to see developed most urgently, the new courses that at least three of the five enterprises indicated that were needed were:

- 4. Marketing and marketing management
- 9. Tourism theory
- 10. Tourism policy and legislation
- 12. Tourism destination planning and development
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 18. Hospitality management
- 19. Tour organisation and management
- 21. Conference, Exhibition and Event management
- 22. Protected areas and ecotourism management

#### 6.5.6 Conclusions

The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 47.

	Strategic institution (n=7)	Training institutions (n=4)	Large operators (n=1)	SMEs (n=5)	Totals
<b>General business modules</b>					
1. Business management					
2. Business planning		*			1
3. Financial management					

4. Marketing and marketing management	*		*	Majority	3
5. Human resources management					
6. HIV/AIDs in the workplace					
7. Computer literacy					
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory		*		Majority	2
10. Tourism policy and legislation	**			Majority	3
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )					
12. Tourism destination planning and development				Majority	1
13. Tourism business planning	**	**			4
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	***	**			5
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	***				3
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	*			Majority	2
17. Hotel management	**	**	*		5
18. Hospitality management	**			Majority	3
19. Tour organisation and management	*			Majority	2
20. Tourism attraction management					
21. Conference, Exhibition and Event management		*		Majority	2
22. Protected areas and ecotourism management	**			Majority	3
23. Field guiding ( <i>cultural and natural</i> )					
24. Food and beverage management		**	*		3
25. Retail travel					
26. Transportation for tourists				Majority	1
27. Impacts of tourism – economic, environmental, social and cultural	**	*			2
28. Tourism research methods					1
NB: The SMEs did not prioritise courses, but ones that the majority indicated as required are indicated.					

Overall, the three most frequently prioritised courses by the Rwandan institutions and businesses were:

- 14. Tourism business development (*including entrepreneurship and SME development*)
- 17. Hotel management
- 13. Tourism business planning

## 6.6 Senegal

### 6.6.1.1 Overview of tourism

Senegal is a popular tourism destination in West Africa. The comfortable climate, variety of cultural attractions, attractive physical features and the relative proximity to Europe has combined

to make Senegal an increasingly popular vacation area. Tourism within the country contributes significantly to both the Balance of Payments and towards employment levels<sup>65</sup>.

Data from the World Travel and Tourism Council (WTTC) indicates that Personal Travel and Tourism generated US\$226.5 million in 2003, and is predicted to grow to US\$725.4 million by 2013 (see Table 48). The WTTC estimates that Senegal employs 47,400 people in the tourism industry, and that by 2013 this will increase to 83,200 (or 2.3% of employment).

Description of figures	Status in 2003	Predicted growth to 2013
<b>Personal Travel &amp; Tourism</b> (or consumer expenditures) which captures spending on traditional travel and tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and non durable) used for travel and tourism activities.	US\$ 226.5 million (4.6% real growth)	US\$ 725.4 million (5.4% annualised real growth)
<b>Business Travel</b> by government and industry, in spending on goods and services (transportation, accommodation, meals, entertainment etc) and intermediate inputs used in the course of business or government work.	US\$ 64 million (-1.4% real growth)	US\$ 180.1million (8.3% annualised real growth)
<b>Government expenditures</b> (Individual) by agencies and departments which provide visitor services such as cultural (art museums) recreational (national park) or clearance (immigration/customs) to individual visitors.	US\$ 27.1 million (4.1% of total government expenditure; 5.9% real growth)	US\$ 57.4 million (4.3% of total government expenditure; 5.1% annualised real growth)
<b>Travel &amp; Tourism Industry Employment</b> which includes those jobs with face to face contact with visitors (airlines, hotels, car rental, restaurant, retail, entertainment, etc)	47,400 employees (1.9% of total employment; -0.4 growth)	83,200 employees (2.3% of total employment; 5.8% annualised real growth)
<b>Travel &amp; Tourism Industry Gross Domestic Product (GDP)</b>	US\$ 136.7 million (2.3% of GDP; 1% real growth)	US\$ 339.6 million (2.8% of GDP; 6.9% annualised real growth)
Source: WTTC, 2003 <sup>66</sup>		

The accelerated growth in tourist arrivals from 1996 to 2000 can be largely attributed to demand from the French market. French tourists constitute 50% of all of Senegal's visitors and have increased at an average annual rate of 7% during the 1996 to 2000 period compared to the overall decade rate of 2.7%. African visitors constitute 25% of Senegal's arrivals, but they tend to be mostly business travelers who visit briefly and often do not leave Dakar. There was a 10% growth in arrivals of African visitors for the decade, which slowed to 7.6% for the five years ending in 2000.

There are many weaknesses in demand which are preventing the industry from reaching its potential. The average length of stay is currently 3.4 nights. Senegal is also very dependant on France as a source market. Other issues include a low rate of repeat tourism (tentatively estimated at 5%), seasonality and low occupancy rates (on average around 35%)<sup>67</sup>.

Travel accommodation in Senegal is generally characterised by low levels of investment and a huge inequality of standards. After a few years of limited private investment, crumbling hotel and road

<sup>65</sup> <http://www.nationsencyclopedia.com/Africa/Senegal-TOURISM-TRAVEL-AND-RECREATION.html/> Downloaded on 2 June 2007

<sup>66</sup> WTTC (2003) Country League Tables, The 2003 Travel & Tourism Economic Research, World Travel and Tourism Council

<sup>67</sup> Crompton, E and Iain, C. (2003) Africa Region Working Paper Series No. 46, Senegal Tourism Study

infrastructure and some competition from other African countries, the government of Senegal is trying to boost the industry by addressing issues around poor professional standards and lengthy and costly investment procedures. New legislation has been put into place, giving the tourism industry the legal framework that it previously lacked<sup>68</sup>.

With most of the travel industry run by foreigners, one objective is to seek ways for easing bank lending facilities to enable the Senegalese themselves to play a greater role in developing the industry<sup>69</sup>.

One of the most significant challenges directly impeding growth within the industry is the lack of reliable public transport facilities. Aided by international funding agencies, the government is undertaking renovation and expansion projects on its road infrastructure as currently, most roads are inaccessible during the rainy seasons and many parts of the country as well as neighboring countries are not reachable by road.

Expensive air ticket prices and a lack of air services are also of concern for the government and the creation of a new international airport outside Dakar with an increased passengers flow capacity and better services should encourage airlines to increase flights to the destination. Also Air Senegal International, created in 2001 and partly owned by the Senegalese Government is proving to be a successful venture and contributes to the widening of Senegal as an accessible destination<sup>70</sup>.

Another major problem facing Senegal as it attempts position itself within the global market is the growing movement towards sustainable and “green tourism”. For Senegal to be considered sustainable, any expansion of tourism within the sensitive ecological areas would require a review of current land-use planning practices and the establishment of environmental regulations. There is little awareness in Senegal of the growing demand for this new type of travel and very few instances where it is being actively practiced<sup>71</sup>.

#### *6.6.1.2 Donor and development agency interventions*

Within the context of the Strategic Initiative for Africa, the IFC’s activities in Senegal are focused on pro-active project development especially in financial markets, SME development, technical assistance, tourism, agribusiness, Information and Communication Technology (ICT), mining, infrastructure and housing. Through PEP Africa, the IFC is focusing on investment climate, tourism initiatives, and access to Finance for Micro, Small and Medium size Enterprises. In February 28, 2007, IFC’s outstanding portfolio in Senegal was US\$47.94 million<sup>72</sup>.

The IFC office in Dakar discussed some potential investments that have implications in tourism. Firstly, there is a potential investment to be made in a tourism specific school in Saly with the Institut Superior de Management (ISM). Secondly, a possible client has interest in building hotel properties in Mali, Burkina Faso and Mauritania. Thirdly, a proposal was presented for a water taxi to ferry tourists from the international airport in Dakar to the main tourist resort area in Saly.

The SMART program within PEP Africa recently began the development of the first online booking portals for Senegal. The initial focus will be on Dakar/Saint Louis and Saly/Petit Cote.

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<sup>68</sup> [http://www.euromonitor.com/Travel\\_And\\_Tourism\\_in\\_Senegal/](http://www.euromonitor.com/Travel_And_Tourism_in_Senegal/) Downloaded on 2 June 2007

<sup>69</sup> [http://www.africa-ata.org/txt\\_wto\\_news.htm/](http://www.africa-ata.org/txt_wto_news.htm/) Downloaded on 2 June 2007

<sup>70</sup> [http://www.euromonitor.com/Travel\\_And\\_Tourism\\_in\\_Senegal/](http://www.euromonitor.com/Travel_And_Tourism_in_Senegal/) Downloaded on the 2 June 2007

<sup>71</sup> Crompton, E and Iain, C. (2003) Africa Region Working Paper Series No. 46, Senegal Tourism Study

<sup>72</sup> <http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/AFRICAEXT/SENEGALEXTN/0,,menuPK:296312~pagePK:141132~piPK:141107~theSitePK:296303,00.html>

## **6.6.2 Strategic institutions**

### *6.6.2.1 Institutions interviewed*

Meetings were held with representatives from the IFC Dakar office, APIX, SAPCO, EU/CDE Proinvest, The Ministry of Tourism, Senegal Tourism and Hotel Association, ONITS, and the PPIP (World Bank).

### *6.6.2.2 Tourism skills needs*

Senegal is in need of skills development at all levels, vocational and managerial. There is an immediate vocational skills need in all hospitality areas: food preparation, bar tending, housekeeping, front desk operations, etc. This is mainly due to the rapid development of new large-scale hotel properties in and around Dakar and the Petit Cote. There are also a number of other investment intensive tourism development projects in other parts of the country such as Saint Louis. One other non-hospitality immediate need that was identified is a qualified guide program.

The respondent from the Ministry of Tourism stated that there is a real need for professional training within the Ministry. None of the employees working in the ministry have a tourism background and many of them require generic management training.

### *6.6.2.3 Problems relating to capacity building*

Three of the strategic institutions underwent formal interviews and listed whether particular problems presented were relevant in Senegal (see Table 137). They agreed that a lack of financial resources and local trainers were problems, as were the high turnover of employees and the inadequacy of vocational skills and hotel schools.

### *6.6.2.4 Tourism courses*

Three of the strategic institutions listed in their opinion which course modules were available, needed improvement, were not required, and were needed in Senegal (see Table 138). The most frequently prioritised modules for development were:

- 1. Business management
- 9. Tourism theory
- 14. Tourism Business Development (*including entrepreneurship and SME development*)

### *6.6.2.5 Cost recovery options*

Most of the institutions interviewed agreed that students should most often pay for their fees for taking the courses. In discussion with the hotel association members it was apparent that if quality training was available the big hotels would pay for their staff to receive vocational skills training.

Most interviewed that government needed to contribute something to the industry; maybe through scholarships or subsidies. There has been considerable political emphasis on the tourism industry by the government but very little in concrete support.

### *6.6.2.6 Accreditation*

There is no accreditation body set up to monitor tourism training in Senegal. The national hotel school has had the same curriculum and facilities since 1971. The Ministry of Tourism has not taken an action to improve or update the curriculum.

If management training is developed it must come with a degree not a certificate. There was a consensus that students will not be interested in paying for something that is not internationally recognized.

#### *6.6.2.7 Other issues raised*

Many of the private training schools are not offering quality education. There was some discussion that vocational training institutions were more of a burden on the industry than serving a good. The schools will collect tuition for a year, but the students are only in class for one month and serve out the rest of their term in internships or attachments.

The hotel association felt strongly that if anything was to be developed that they must be involved in the process because they are the end clients of the training. Thus far they feel as if they have not been consulted in any process fear that what is developed will not suit their needs.

### **6.6.3 Training institutions**

#### *6.6.3.1 Institutions identified*

A list of institutions identified that provide tourism or business management courses is detailed below. Representatives from those marked with an asterisk were interviewed:

- L'Ecole Nationale de Formation Hoteliere et Touristique (ENFHT)\*
- Centre Africain D'Etudes Superieures en Gestion (CESAG)\*
- Institut Africain de Management (IAM)\*
- Institut Superior de Management (ISM)\*
- University of Dakar – ESP
- Sainte Marthe
- Institut Tourisme et Hoteliere (IHT)
- EMETO
- ETSHOS
- ILEA

#### *6.6.3.2 Tourism management and business courses offered*

Tourism courses offered, and in development, from the training institutions interviewed are outlined in Table 49 below. Other business courses are detailed in Appendix 6.

<b>Table 49: Courses offered by training institutions in Senegal</b>	
<b>Tertiary level courses</b>	
<b>Institution</b>	<b>Diploma/Certificates*</b>
ENFHT	Diploma and Certificates in Tourism, Catering & Hospitality
ISM	Tourism is new course

\*Senegal is on the LMD system, Diploma = Bachelor's in English system

### 6.6.3.3 Tourism modules

The training institutions identified course modules that were available, needed improvement, were not required, and were needed (see Table 139). The most frequently prioritised modules for development were:

- 9. Tourism theory
- 10. Tourism policy and legislation
- 14. Tourism business development (*Including entrepreneurship and SME development*)

### 6.6.3.4 Process of integrating new courses

In each of the three business schools no formal process is needed for short courses or executive education.

### 6.6.3.5 Case studies

CESAG, IAM and ISM wished to participate in the case study process. All three mentioned that they have staff trained in case study methodology and preparation. All three expressed that they have interesting cases in tourism to write about.

### 6.6.3.6 Students

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning, and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 50.

<b>Table 50: Overview of tourism students in Senegal</b>						
<b>Institution</b>	<b>Country of origin of students</b>	<b>No. of tourism students 2007 (2008 predicted)</b>	<b>Type of institution students drawn from</b>	<b>Organisational level the come from when coming from industry</b>	<b>Level of prior learning</b>	<b>Jobs students go on to do after the courses</b>
ENFHT	Mostly Senegal; West Africa	120-150 capacity	Almost all students	Entry level	Must have a Junior School certificate, but prefer high school	100% work in the tourism industry
CESAG	Mostly from the 8 EMUWA;	620 in undergrad; 50-100 in	Undergrad: high school (80%); PS	Undergrad: Students – MBA: 90%	No prior learning is necessary for vocational	100% work in tourism industry-

	SSA countries	MBA	(20%) – MBA: PS 60%, NGO 20%, Gov 20%	management experience	courses, must be literate/numerate	private sector
IAM	26 African countries	1,500 undergrad 150 MBA	Undergrad: high school (95%); MBA - 90% PS	3 years of experience for MBA (80% from mgt.)	High school completion – entrance exam	Most stay in West Africa in the Private Sector
ISM	27+ Africa countries	27 tourism students; 3,000 undergrad	Undergrad is students; MBA is usually PS	MBA mostly from management	They have a strict entrance exam	Program too new for tourism

### 6.6.3.7 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 51). Courses are generally paid for per year, rather than per course or per module.

**Table 51: Course payment mechanisms in Senegal**

Institution	Students pay	Originating institutions pay	Subsidy or grant	Cost per course / module	Comments
ENFHT	√		√	Hotel – US\$349; Catering – US\$267; Tourism –US\$247	Government gives 15 scholarships per year.
CESAG	√	√	√	Undergrad: US\$2,568 per annum – MBA: US\$7,498	There are a variety of scholarships available
IAM	√	√		Undergrad: US\$5,238	Sometimes companies will pay for MBAs
ISM	√	√	√	Undergrad: US\$2,054 per annum	About half of MBAs are sponsored by company

### 6.6.3.8 Short Course Delivery

Information was gathered on the history and ability of delivering short courses or executive/professional education courses. Table 52 shows the outcome in Senegal.

**Table 52: Short Courses in Senegal**

Institution	Offer Short Courses	Duration	Cost	What types of courses	Comments
CESAG	√	1-3 week & longer	1 week = US\$1,027-1,438; 3 weeks = US\$ 2,979	They have a training engineering department that creates many different types of courses for government and private sector	Have some experience with delivering tourism training courses to the public and private sector.
IAM	√	2 weeks	US\$1,150	Mostly management courses, can be developed on demand	Offered that the TTN should be started out as a executive education program and that they would prefer this and adapt to existing courses if applicable
ISM	√	Various	US\$5,135.3	Usually executive courses	Deliver courses in a variety of formats, but prefer long weekend style

#### **6.6.4 Large enterprises**

Three large enterprises were interviewed, but did not fill out formal questionnaires. Instead a roundtable discussion was convened at the IFC offices in Dakar. In attendance was the managing director of the Sofitel and Novotel Dakar and the President of SenegalTours, Senegal's largest tour operator and owner of a number of leisure hotels in the Petit Cote.

Management training for the Sofitel and Novotel was not a priority, because they are a part of the Accor hotel group. The Accor group has the *Academie Accor* in Paris, where all the middle and upper management are trained to the group's standards. The concern that these entities had is that there are a number of other competing hotels in Dakar that do not have high standards and do not reach to achieve high standards.

The enterprises felt management education could be interesting to the marketplace in Senegal, but it is not a priority. The major priority is vocational skills and training of front-line workers. The schools that exist in Senegal are not producing students that can immediately walk into a position in a hotel and start working immediately. The same is true for tour operators. In most cases the two hotels felt is better to hire a "green" employee with no prior training and do all of the training in-house, rather than break bad habits learned at the schools.

In addition to vocational programs there was a general agreement that the tourism industry in Senegal needed to improve its English speaking ability. The French speaking market is shrinking and in order to compete with neighbours like Ghana and the Gambia there must be an emphasis on learning English. The technical courses that are developed should be taught in French, but each course should include English classes.

The consensus from the three companies that the best investment that the TTN could provide would be a program for training of trainers that would establish high quality human resource specialists that could come in-house to hotels and provide crash courses on items such as food handling, catering, and front desk operation..

## 6.6.5 SMEs

### 6.6.5.1 Enterprises interviewed

A focus group was held and representatives from twelve small enterprises attended. Seven of the SMEs filled out surveys. The enterprises interviewed were providing accommodation and one was a nature reserve: Hotel le Relais des Mamelle, SEHM-Laguna Beach, SEHM-Sarene Beach, Sarong, Le Warang, Giendaaly, and Reserve de Bandia (see Table 53).

Issue	Hotel le Relais des Mamelle	Laguna Beach	Sarene Beach	Sarong	Le Warang	Giendaaly	Reserve de Bandia
Type of enterprise	Guest house	Hotel	Hotel	Guest house	Hotel	Guest house	Nature Reserve
No. visitors:							
High season	60	833	80	40	100	50	-
Low season	60	833	60	25	10	25	-
Average length of stay	4 days	3 nights	2 days	3 days	7 days	3 days	-
Price from / to	\$31-40 per night	\$61 per night	\$40 per night	\$26-57 per night	\$35 per night	\$31 per night	-
Type of guests	90% business 9% leisure 1% other	49% business 12% leisure 39% other	20% business 10% leisure 70% other	9% business 90% leisure 1% other	2% business, 98% leisure	75% leisure 25% other	-
Country of origin of guests	France, Senegal, Others	France, Senegal	Senegal	France, Senegal, Holland	France, Belgium, Italy	France, Spain, Italy	USA, France, Belgium, Italy, Germany
No. full time employees	10	88	25	18	9	3	36
No. part time employees	-	120	35	-	7	3	20

### 6.6.5.2 Perception and purpose of training

The SMEs recognised the importance of training, and indicated it was necessary to improve the quality of services and standards in the industry. They recognised the need for languages skills, and that they would like to hire people with better skills. The purpose and reasons for training given by the SMEs are summarised in Table 140, and there was agreement on the use of training to improve performance.

### 6.6.5.3 Problems with and relating to training

The SMEs thought that training was unsatisfactory. *External problems* they faced were tough regulatory environment (taxes, licensing, etc.) and poor service delivery (water, electricity, etc.) by government. *Internal problems* that related to training included the lack of trained safari guides, the quality of staff, and unskilled workers. Other problems they identified are indicated in Table 141.

### 6.6.5.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing

courses. The results from the five SMEs are indicated in Table 142, and they agreed in the need for training to be delivered in French, and a majority requested delivery through CDs or DVDs.

#### 6.6.5.5 Willingness to pay

The SMEs indicated their willingness to pay for different types of courses (see Table 54). Only Hotel le Relais des Mamelles and Sarong indicated an amount they are willing to pay.

**Table 54: Senegal SME's willingness to pay for courses**

Type of course	Hotel le Relais des Mamelles	Laguna Beach	Sarene Beach	Sarong	Le Warang	Le Warang	Le Warang
1 module: 1/2 day (or 50 page workbook)?		Y	Y		N	Y	Y
1 module: 1 day (or 100 page workbook)?		Y	Y		N	Y	
1 module: 2 days (or 200 page workbook)		Y	Y		N	Y	
1 series of modules: 2 weeks (or ten x 100 page workbooks)?	US\$400	Y	Y	US\$400	N	Y	
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?		Y	Y		N	Y	

#### 6.6.5.6 Tourism modules

The hotels listed course modules that were available, needed improvement, were not required, and were needed in Senegal by the SMEs, and prioritised modules for development (see Table 143). Although the enterprises did not prioritize courses as such, but gave preference for which courses they wanted to take most urgently:

- 1. Business management
- 4. Marketing and marketing management
- 14. Tourism business development (*including entrepreneurship and SME development*)

### 6.6.6 Conclusions

The tourism industry in Dakar specifically is due for a major shock that will lead to even lower service standards at the hotels, because of the huge push and investment in new hotel properties. With just the hotels that are currently under construction—not including ones in plans—the annual forecasted deficiency of skilled workers is 400-600 over the next 2-4 years. Due to this fact, and coupled with the discussion with the Hotel Association and large enterprises, vocational skill development seems to be the priority in Senegal. There was much discussion around the need for managers to lead any staff.

In discussions held with the Tourism and Hotel Association a concept arose that there might be a need for a whole new approach to tourism training in Senegal and Africa as a whole. Instead of putting resources in place to continually train vocational skills to brand new staff members, that effort should be put in place to train trainers or consultants. These tourism training consultants could then go in-house to hotels and train staff on a regular basis, but not be fully employed, and then they could have multiple contracts with multiple hotels. Currently there are no companies in Senegal offering these services and no institutions providing a skill base to establish such a business.

The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 55.

<b>Table 55: Summary of tourism modules prioritised in Senegal</b>					
	<b>Strategic institution (n=3)</b>	<b>Training institutions (n=4)</b>	<b>Large operators (n/a)</b>	<b>SMEs (n=7)</b>	<b>Totals</b>
<b>General business modules</b>					
1. Business management	**	*		***	6
2. Business planning					
3. Financial management					
4. Marketing and marketing management				***	3
5. Human resources management				**	2
6. HIV/AIDs in the workplace					
7. Computer literacy					
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory	**	**			4
10. Tourism policy and legislation		**			2
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )					
12. Tourism destination planning and development					
13. Tourism business planning		*		**	3
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	**	**		***	7
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	*			*	2
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )				*	1
17. Hotel management					
18. Hospitality management					
19. Tour organisation and management		*			1
20. Tourism attraction management		*			1
21. Conference, Exhibition and Event management					
22. Protected areas and ecotourism management				**	2
<b>Summary of tourism modules prioritised in Senegal (Contd.)</b>					
	<b>Strategic institution (n=3)</b>	<b>Training institutions (n=4)</b>	<b>Large operators (n/a)</b>	<b>SMEs (n=7)</b>	<b>Totals</b>
23. Field guiding ( <i>cultural and natural</i> )				*	1
24. Food and beverage management					
25. Retail travel					

26. Transportation for tourists					
27. Impacts of tourism – economic, environmental, social and cultural					
28. Tourism research methods		*			1
<b>Other courses</b>					
English Language Courses	*				1
Customer Service	*				1
Vocational	*				1
NB: The SMEs did not prioritise courses, but ones that the majority indicated as required are indicated.					

Overall, the three most frequently prioritised courses by the Senegal institutions and businesses were:

- Business management
- 9. Tourism theory
- 14. Tourism business development (including entrepreneurship and SME development)

## 6.7 South Africa

### 6.7.1 Overview of tourism

Between 2004 and 2005 tourism's total contribution to the South African economy grew by 13% to 8.15% of GDP. In 2005 foreign tourist arrivals to South Africa reached 1.6 million, with an increase of 15% over the previous year, with a direct spend of R8.3 billion (~US\$1.2 bn). South African residents made 36 million domestic trips in 2005 – about five times the number of trips made by foreign tourists – and the majority of these trips were made to visit friends and relatives<sup>73</sup>.

Data from the World Travel and Tourism Council (WTTC) indicates that Personal Travel and Tourism generated US\$4.6 billion in 2003, and is predicted to grow to US\$12.7 billion by 2013 (see Table 56). The WTTC estimates that South Africa employed 491,700 people in the tourism industry in 2003, and that by 2013 this will nearly double to 751,100 (or 3.7% of employment). 72% of employees are service workers, casuals or unskilled labourers. South Africa creates one job for every twelve foreign arrivals, which is less than the global standard of one job for every eight foreign arrivals<sup>74</sup>. Employment in the sector grew by 7.2% in 2004 and 14.3% in 2005<sup>75</sup>. Between 2004 and 2005 the total number of people employed in tourism in South Africa rose by 3.5% to 1.06 million<sup>76</sup>. There are estimated to be 40,000 tourism enterprises, of which about 90% are SMES and employ less than 50 people<sup>77</sup>.

South Africa boasts a diverse array of tourist attractions. Protected areas such as Kruger NP and Hluhluwe-Umfolozi provide bountiful wildlife for game viewing. Table Mountain NP the historic Robben Island are icons of the country, while the wine lands and Garden Route in the Cape are popular attractions. The sandy beaches with warm waters in KwaZulu-Natal are ideal for surfing, and have stunning coral reefs. Inland there are lowveld savannas with rich wildlife, historic battlefields, dramatic mountain ranges of the Drakensberg, and rich traditional culture. There are also ample opportunities for shopping and facilities for business travellers and conferences.

<sup>73</sup> South African Tourism (2006) Indaba 2006 Factsheet: 2005 Tourism arrivals, May 2006, South African Tourism.

<sup>74</sup> South African Tourism (2006) Indaba 2006 Factsheet: 2005 Tourism arrivals, May 2006, South African Tourism.

<sup>75</sup> Tourism, Hospitality and Sport Education and Training Authority (THETA) (2006) Sector Skills Plan, 30 November 2006

<sup>76</sup> South African Tourism (2006) Indaba 2006 Factsheet: 2005 Tourism arrivals, May 2006, South African Tourism.

<sup>77</sup> Tourism, Hospitality and Sport Education and Training Authority (THETA) (2006) Sector Skills Plan, 30 November 2006

<b>Table 56: Financial, economic and employment estimates for tourism in South Africa</b>		
<b>Description of figures</b>	<b>Status in 2003</b>	<b>Predicted growth to 2013</b>
<b>Personal Travel &amp; Tourism</b> (or consumer expenditures) which captures spending on traditional travel and tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and non durable) used for travel and tourism activities.	US\$ 4,561.7 million (5.8% real growth)	US\$ 12,654.0 million (5.6% annualised real growth)
<b>Business Travel</b> by government and industry, in spending on goods and services (transportation, accommodation, meals, entertainment etc) and intermediate inputs used in the course of business or government work.	US\$ 1060.5 million (-3.1% real growth)	US\$ 3,308.6 million (7.0% annualised real growth)
<b>Government expenditures</b> (Individual) by agencies and departments which provide visitor services such as cultural (art museums) recreational (national park) or clearance (immigration/customs) to individual visitors.	US\$ 113.8 million (0.6% of total government expenditure; 3.1% real growth)	US\$ 208.2 million (0.6% of total government expenditure; 1.3% annualised real growth)
<b>Travel &amp; Tourism Industry Employment</b> which includes those jobs with face to face contact with visitors (airlines, hotels, car rental, restaurant, retail, entertainment, etc)	491,700 employees (2.9% of total employment; -5.6% growth)	751,100 employees (3.7% of total employment; 4.3% annualised real growth)
<b>Travel &amp; Tourism Industry Gross Domestic Product (GDP)</b>	US\$ 3,563.9 million (2.9% of GDP ; -3.9% real growth)	US\$ 10,231.1 million (3.6% of GDP; 6.0% annualised real growth)
Source: WTTC, 2003 <sup>78</sup>		

The Tourism, Hospitality and Sport Education and Training Authority (THETA) is an education training and quality assurance body, that is responsible for accrediting tourism courses that are not at the level or duration of those at university or technikons. THETA is one of a series of Sector Education and Training Authorities (SETA's). THETA's activities also include accrediting education and training providers; monitoring training provision; and registration of assessors<sup>79</sup>.

For different types of education and training, there are eight National Qualifications Framework levels<sup>80</sup>:

- Levels 2-4: further education and training that deal with schools (grade 12), colleges and NGO certificates. They include regional training centres, private colleges, private companies, industry training centres and community colleges;
- Levels 5-8: higher education and training, which is non-compulsory
  - Level 5: diplomas and occupational certificates
  - Level 6: first degrees and higher diplomas
  - Level 7: higher degrees
  - Level 8: doctorates and further research degrees.

A survey was carried out by THETA and DEAT in 2006/7 to evaluate tourism skills in South Africa. They interviewed 1200 employers and 55 training providers, in addition to 50 high-level key

<sup>78</sup> WTTC (2003) Country League Tables, The 2003 Travel & Tourism Economic Research, World Travel and Tourism Council

<sup>79</sup> Kohler, K., and Naidoo, K. M. (2003) Tourism education and training in KwaZulu-Natal 2003: A Status Quo Report (5<sup>th</sup> Edition), KwaZulu-Natal Tourism Authority, September 2003.

<sup>80</sup> Kohler, K., and Naidoo, K. M. (2003) Tourism education and training in KwaZulu-Natal 2003: A Status Quo Report (5<sup>th</sup> Edition), KwaZulu-Natal Tourism Authority, September 2003.

stakeholders and had 9 focus group discussions around the country. Although the full report was being finalised at the time of the TTN market research, initial findings indicated the following<sup>81</sup>:

- In 2006 there were some 200,000 high school learners studying tourism in 1,200 schools;
- There is a limited availability of qualified and experienced black management
- Limited non-African language abilities
- The private sector emphasized creating a service ethos and affording tourists a wonderful experience, and training personnel in airports, tour operators and front-line staff
- The public sector emphasized the need for better communication in non-African languages.
- Geographical and curriculum coverage is incomplete and information management at institutional levels is poor.
- Training service providers focus on identifying and accessing funding, as there is insufficient funding for learners who need training.
- There is a shortage of skilled, qualified and experienced facilitators
- Training delivery does not address the needs of the second economy (i.e. developing entrepreneurial opportunities), many SMEs and large organizations.
- Training content is often irrelevant and ineffective.
- Marginalised communities, in real need of tourism benefits have been left behind.

The THETA/DEAT report also indicated that most of the firms in tourism are SMEs (97%) and see growth in demand as very positive, while HIV/AIDS as very negative influences on the sector. Poor availability of scarce and critical skills was viewed as an important negative influence, compounded by more than 50% all employees in hospitality being unskilled. 70% of employees in tourism are black, and there are slightly more women than men employed. The most important occupations in the hospitality sector are waiters and waitresses (17%), cooks and restaurant workers (13%), cleaners (9%), clerical and supervision (8%) and cashiers (5%). Major skills gaps are related to ICT, communications, operations and guest relations. The most important occupations in travel and tourism are travel consultants (14%), sales coordinators (9%), accountants (5%), general secretarial (5%) and sales and marketing directors (5%). In the conservation and tour guiding sector, the most important occupations are travel guides (13%), cleaners (16%), game rangers (6%), guides (travel and safari) (5%). They find it difficult to fill positions for managers and supervisor. All firms prefer courses that are short and/or part time, which occur outside working hours or where employees can work and learn simultaneously<sup>82</sup>.

The Tourism Enterprise Program (TEP) facilitates the growth and expansion of small and medium-sized enterprises in the Tourism Economy, resulting in job creation and income generating opportunities. TEP is a public-private partnership between the Department of Environmental Affairs and Tourism and the Business Trust and implemented by Imbumba Tourism Services. The primary thrust of the program was to facilitate the growth and expansion of small, medium and micro enterprises (SMEs) in the tourism economy and thereby creating job opportunities. TEP has worked with large numbers of SMEs and has identified the following as the most common constraints faced by them, including lack of access to information; lack of understanding of market requirements and, lack of credibility and reputation in the market. TEP's primary beneficiaries are its SME clients. The buyers can be large tourism corporates purchasing goods and services (such as furniture or maintenance services) from non-tourism SMEs, or tourists and tour operators purchasing tourism services (such as accommodation or tours) from tourism SMEs. TEP's success lies in its demand-driven approach, whereby SMEs are assisted to respond to proven demand for

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<sup>81</sup> Tourism, Hospitality and Sport Education and Training Authority (THETA) and Department of Environmental Affairs and Tourism (DEAT) (2007) Skills in Tourism and Sport: Emerging Themes: 2007.

<sup>82</sup> Tourism, Hospitality and Sport Education and Training Authority (THETA) and Department of Environmental Affairs and Tourism (DEAT) (2007) Skills in Tourism and Sport: Emerging Themes: 2007.

their services. This sets TEP apart from many other development programs which are often supply-side driven and where the output of an intervention is often a more skilled SME rather than an SME generating new business<sup>83</sup>.

In 2003 the KwaZulu-Natal Tourism Authority (KZNTA) undertook a Tourism Education and Training status review<sup>84</sup>. The review indicated that “*the field of education and training for the tourism industry is one which is still largely characterised by confusion, duplication, over-supply in certain areas and under-supply in others*”<sup>85</sup>. KZNTA noted that the high rate of unemployment in the country, coupled with expectations that a growth in tourism will lead to increased employment, has encouraged people to register for tourism courses. Not all of the courses, however, are established by scrupulous educators.

There has also been some concern that courses run by tertiary institutions are too long and lack practical application<sup>86</sup>.

#### 6.7.1.1 Donor and development agency interventions

The International Finance Corporation's (IFC) committed portfolio in South Africa has grown steadily to about \$200 million in 23 projects). The IFC strategy for South Africa supports the Government's objectives in terms of black economic empowerment, the development of the SME sector, as well as developing the financial markets<sup>87</sup>. In South Africa PEP Africa helped the Pro-Poor Tourism Consortium develop four sets of guidelines: partnerships with communities, boosting local input in the tourism supply chain, stimulating local tourism products, and encouraging small and medium enterprises. These “*How to...?*” guides were developed to provide concrete examples and suggestions that the private sector could implement.

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<sup>83</sup> <http://www.tep.co.za/tepoverview.php> downloaded 9 May 2007

<sup>84</sup> Kohler, K., and Naidoo, K. M. (2003) Tourism education and training in KwaZulu-Natal 2003: A Status Quo Report (5<sup>th</sup> Edition), KwaZulu-Natal Tourism Authority, September 2003.

<sup>85</sup> Kohler, K., and Naidoo, K. M. (2003) Tourism education and training in KwaZulu-Natal 2003: A Status Quo Report (5<sup>th</sup> Edition), KwaZulu-Natal Tourism Authority, September 2003: pp4

<sup>86</sup> Tourism, Hospitality and Sport Education and Training Authority (THETA) (2006) Sector Skills Plan, 30 November 2006

<sup>87</sup> <http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/AFRICAEXT/SOUTHAFRICAEXTN/0,,menuPK:368086~pagePK:141132~piPK:141107~theSitePK:368057,00.html>

## **6.7.2 Strategic institutions**

### *6.7.2.1 Institutions interviewed*

Information was obtained from the Federated Hospitality Association of South Africa (FEDHASA) and the KwaZulu-Natal Tourism Authority. Unfortunately, due to the timing of the work information was not made available by other stakeholders from whom it was requested (i.e. the Department of Environmental Affairs and Tourism; Department of Trade and Industry, the Tourism, Hospitality and Sport Education and Training Authority, Fair Trade in Tourism South Africa), as THETA and DEAT had just completed a skills audit for the country (although full results were not available at the time of this report). An overview of summarised survey findings are provided in the previous section.

### *6.7.2.2 Tourism skills needs*

Key training needs identified included foreign language skills (particularly for tourist guides and other front-line personnel. Also catering and senior management skills are required.

### *6.7.2.3 Problems relating to capacity building*

The strategic institutions listed whether particular problems presented were relevant in South Africa (see Table 144). The institutions agreed on the scarcity of financial resources.

### *6.7.2.4 Tourism courses*

Neither of the strategic institutions listed which course modules were available, needed improvement, were not required, and were needed in South Africa.

### *6.7.2.5 Cost recovery options*

The strategic institutions indicated that students should pay for their courses, but also that originating institutions should pay for courses, and that there should be subsidies or grants available for those who could not afford to pay.

### *6.7.2.6 Accreditation*

Degrees offered by universities need to be accredited by the South African Qualifications Authority (SAQA). Technikons emphasis more practical aspects of subjects, and are career-oriented institutes. All diplomas and degrees they offer are accredited by the Certification Council for Technikon Education (SERTEC) and short courses are covered by associated relevant bodies (i.e. Galileo for ticketing). Private institutions offer a range of qualifications, not all of which are accredited, nor are the in all the institutions themselves. They need to be registered with the Department of Education<sup>88</sup>.

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<sup>88</sup> Kohler, K., and Naidoo, K. M. (2003) Tourism education and training in KwaZulu-Natal 2003: A Status Quo Report (5<sup>th</sup> Edition), KwaZulu-Natal Tourism Authority, September 2003.

### 6.7.3 Training institutions

#### 6.7.3.1 Institutions identified

A list of institutions identified that provide tourism courses is detailed below. Representatives from those marked with an asterisk were interviewed:

- University of KwaZulu-Natal (KZN)\*
- University of Johannesburg\*
- UNISA\*
- Hospitality Industry Training and Consultants (HITC)\*
- University of the Witwatersrand\*
- University of Cape Town\*
- University of Stellenbosh\*
- University of the Western Cape\*
- Cape Peninsular University of Technology (CPUT)\*
- Damelin College\*
- Intec\*
- South Africa Tourism College\*
- Varsity College\*
- Boston College\*
- Northlink College
- Durban Institute of Technology
- University of Zululand
- University of Pretoria
- MANCOSA
- Technikon South Africa

#### 6.7.3.2 Tourism management and business courses offered

Courses offered, and in development, from the training institutions interviewed are outlined in Table 57 below.

<b>Table 57: Tourism courses offered by training institutions in South Africa</b>			
<b>Tertiary level courses</b>			
<b>Institution</b>	<b>Diploma/Certificates</b>	<b>Bachelors</b>	<b>Postgraduate</b>
Cape Peninsular University of Technology*	BTECs in: <ul style="list-style-type: none"> <li>• F&amp;B management</li> <li>• Hospitality management</li> <li>• Tourism management</li> </ul> National Diplomas in: <ul style="list-style-type: none"> <li>• Tourism Management</li> <li>• Hospitality management with a) accommodation services; b) F&amp;B; or c) Professional cookery</li> </ul> Tourist guide short course		MTech in Tourism and hospitality management
HITC*	1 year certificates (THETA endorsed): <ul style="list-style-type: none"> <li>• Accommodation</li> <li>• Fast food services</li> <li>• Hospitality reception</li> <li>• Professional cookery</li> <li>• Tourism guiding</li> </ul> Skills programs (1-3 months)		

<b>Tourism courses offered by training institutions in South Africa (Contd.)</b>			
<b>Tertiary level courses</b>			
<b>Institution</b>	<b>Diploma/Certificates</b>	<b>Bachelors</b>	<b>Postgraduate</b>
Nelson Mandela Metropolitan University	BTEC in Tourism Management National Diploma in Tourism Management	BCom Honours Tourism (Tourism management or Tourism Research)	
Technikon South Africa	National Diploma Tourism Management BTEC Tourism management		
UNISA*	National Diploma Tourism management Baccalaureus Technologia Tourism management Advanced program in tourism, travel and hospitality	Commerce with Tourism Management	Commerce in tourism management Doctor of Administration in tourism management
University of Cape Town*			Postgraduate diplomas in Tourism management and in Marketing management
University of Johannesburg*	Diploma Tourism Management	Tourism Development	
University of KZN*		Tourism (including marketing; policy and law; economic development; research methods)	Postgraduate diploma in Tourism
University of Pretoria	Certificate in tourism Certificate in Advanced Tourism	Commerce with Tourism Management	MPhil in Tourism management Commerce in Tourism Management Doctor of commerce in Tourism Management PhD in Tourism Management
University of the Free State		BCom Tourism Management	
University of the Western Cape*		Honours in Sociology with a Culture and Tourism option	Masters in Sociology with a Culture and Tourism option
University of the Witwatersrand*		Tourism and development Tourism and policy	Tourism and development
Varsity College*	Tourism & Tour operation Diploma		
Damelin*	Certificate in Travel Diploma in Retail Travel		
Intec*	Certificate and Diploma in Hospitality Management		
Boston College*	National Certificate in Travel & Tourism		
Northlink College	National Certificate in Tourism Advanced Diploma in Tourism		
<b>SME level courses / short courses / vocational</b>			
UNISA*	Short tourism courses B&B management Meetings, incentives, conferences and exhibitions Tour operators management Tourism awareness		
University of Pretoria	Fares and ticketing Community-based tourism and rural development Strategic tourism destination marketing Galileo Computer Program		
South Africa Tourism College*	9-month Certificate of small accommodation establishment operations (Vocational training only)		
Intec*	Vocational Studies: 20 choices – wide variety from tourism to barkeeping		
* Institutions that were interviewed. Other course information obtained from institutional websites.			

### 6.7.3.3 *Tourism modules*

The seven training institutions interviewed identified course modules that were available, needed improvement, were not required, and were needed (see Table 145). The most frequently prioritised modules for development were:

- 14. Tourism business development (*including entrepreneurship and SME development*)
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 20. Tourism attraction management
- 15. Responsible and sustainable tourism (*including conservation and poverty alleviation*)
- 22. Protected areas and ecotourism management

### 6.7.3.4 *Process of integrating new courses*

All of the institutions indicated that their preferred additional modules would fit within their existing course frameworks, or as new courses. The process of integrating new courses varied greatly in the degree of formality, and length of time.

### 6.7.3.5 *Case studies*

Richard George of UCT has co-written a book of South African case studies, which would provide existing materials for courses<sup>89</sup>. New case studies suggested included:

- Events management
- Informal traders and tourism
- SME training
- New venture training
- Community based tourism project
- Adventure, cultural and heritage tourism
- Rejuvenation of urban areas for tourism
- Preparations for the 2010 FIFA World Cup

Institutions interviewed indicating that they would be happy to develop case studies included UCT, Witwatersrand, KZN, HITC, and UNISA.

### 6.7.3.6 *Students*

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning, and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 58.

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<sup>89</sup> George, R. and Bennet, A. (2004) South Africa travel and tourism case studies, Van Schaik

**Table 58: Overview of tourism students in South Africa**

<b>Institution</b>	<b>Country of origin of students</b>	<b>No. of tourism students 2007 (2008 predicted)</b>	<b>Type of institution students drawn from</b>	<b>Organisational level the come from</b>	<b>Level of prior learning</b>	<b>Jobs students go on to do after the courses</b>
HITC	South Africa	200 (1000)	Hotels mostly, government	Mid-Level managers, general and entry staff, SME owners	Literate and numerate; apprentice based learning	Develop SMEs, work in tourism, work in protected area
UNISA	South Africa, Zimbabwe, UK, Italy, USA, Canada, Europe	1400 (+10%)	Private sector, government, SMEs, Unemployed, Industries outside tourism	Managers and entry level	Recognition of prior learning. Matric exemption	Develop SMEs, work in tourism, work in protected area, government, other industries
University of Cape Town	South Africa, Africa	25 (to 30)	Most students, 5% private sector	Entry and mid-level management	Formal education (university courses)	Develop SMEs, work in tourism, work in protected area, government, other industries
University of Johannesburg	South Africa and Africa	312	Students	Entry level	School leavers – literate and numerate	Develop SMEs, work in tourism, work in protected area, government, other industries
University of KZN	South Africa, SADC	543 (250-300)	Students (majority), government	Entry level (majority)	Undergrads need matric exemption. Postgrads need undergraduate with 60% pass rate	Most are employees in tourism, some develop SMEs or go outside tourism. Others in government or protected areas.
University of the Witwatersrand	South Africa, Rwanda, Eritrea, Swaziland, Zimbabwe, Zambia, Cameroon	7 (7)	Consultants, Government, Students	Executive management, management, mid-level management	Undergraduate honours for masters, or sufficient work experience. They must be able to write.	Employee in tourism sector or government
UWC/CPUT	South Africa, Africa, foreign	350 (350)	Most private sector (>50%). 40% students	Mid level management – of those in tourism	Formal education	Develop SMEs, work in tourism, work in protected area, government, other industries

<b>Overview of tourism students in South Africa (Contd.)</b>						
<b>Institution</b>	<b>Country of origin of students</b>	<b>No. of tourism students 2007 (2008 predicted)</b>	<b>Type of institution students drawn from</b>	<b>Organisational level the come from</b>	<b>Level of prior learning</b>	<b>Jobs students go on to do after the courses</b>
Varsity College	South Africa, Other African	50	90% students 10% PS	Entry level	Matric	Entry level PS mostly
Damelin	South Africa	30	99% Students	Entry level	Matric	Entry level PS mostly
Intec	South Africa	-	-	-	Matric	All types and level of jobs

### 6.7.3.7 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 59).

<b>Table 59: Course payment mechanisms in South Africa</b>					
<b>Institution</b>	<b>Students pay</b>	<b>Originating institutions pay</b>	<b>Subsidy or grant</b>	<b>Cost per course / module*</b>	<b>Comments</b>
HITC			√	US\$1575 p/a or \$141 per module	
UNISA	√		√	US\$82 Certificates US\$579 p/a	Not many grants available.
University of Cape Town	√		√	US\$2130-\$2839 p/a	
University of Johannesburg	√		√	US\$7031 per year, tuition	
University of KZN	√		√	US\$225 per module. On average 4 modules per semester. \$992 p/a	Accommodation, subsistence, transport, books and notes cost extra
University of the Witwatersrand	√	√	√	Module prices vary between \$431 and \$1117	
UWC/CPUT	√	√	√	US\$ 12,776 to \$17,035 p/a. US\$284 to \$426 per module	
Varsity College	√			US\$3,548 per year	
Damelin	√			US\$3,407 total	
Intec	√			Full Qual = US\$1,690; 4 modules = US\$643	
* \$US 1 = R 7.0445 and = € 0.742721					

## 6.7.4 Large enterprises

### 6.7.4.1 Enterprises interviewed

Two large South African tourism enterprises were interviewed regarding tourism training: South African National Parks (which has a network of accommodation throughout national parks in the country) and Grootbos Nature Reserve: a luxury lodge. An overview of these enterprises is provided in Table 60.

Issue	South African National Parks	Grootbos Nature Reserve
No. visitors: High season	100% occupancy of 13,079 bednights	300
Low season	54% occupancy	160
Average length of stay	2.5 nights	3 nights
Price from / to	\$5– \$100 per night	\$357 per night
Type of guests	2% business 98% leisure	80% business 20% leisure
Country of origin of guests	South Africa (75%) and foreign (25%)	Germany, UK, USA
No. full time employees	>2200	104
No. part time employees	-	30

### 6.7.4.2 Perception and purpose of training

The operators were generally satisfied with training (little of which was developed in-house). However, SAN Parks indicated that there was no fundamental training in tourism, and people do not generally want to stay in menial level jobs, such as housekeeping. Grootbos noted that some training is not directly relevant to the workplace, so new skills cannot always be implemented. The purpose and reasons for training given are summarised in Table 146. They agreed on the use of training to increase performance and efficiency; to acquire skills and knowledge; to adapt to changes in systems; when launching new products or services, to become more professional, correct repetitive mistakes and to be more competitive.

### 6.7.4.3 Problems with and relating to training

*Internal problems* identified that related to training included proactiveness of staff, and their sense of urgency. *External problems* included the BEE tourism charter (which was considered onerous and a bottleneck). Other problems are indicated in Table 147, and indicate that they agreed on the scarcity of local trainers, and the lack of training follow-up.

### 6.7.4.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from SANParks and Grootbos are indicated in Table 148, indicating that both preferred training to take place onsite, and during business hours.

### 6.7.4.5 Willingness to pay

The enterprises reported their willingness to pay for different types of courses (see Table 61).

Type of course	South African National	Groobos
----------------	------------------------	---------

	<b>Parks</b>	
1 module: 1/2 day (or 50 page workbook)?		\$285
1 module: 1 day (or 100 page workbook)?		
1 module: 2 days (or 200 page workbook)	\$1000 - \$14,300 for senior management	\$400
1 series of modules: 2 weeks (or ten x 100 page workbooks)?		\$570
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?		

#### 6.7.4.6 *Tourism modules*

Grootbos identified course modules that were available, needed improvement, were not available and not needed, and those that were not available but required (see Table 149). Although the enterprises did not prioritise courses that they wished to see developed most urgently, the new courses indicated that were needed by Grootbos were:

- 8. Corporate social responsibility
- 13. Tourism business planning
- 17. Hotel management
- 18. Hospitality management

## 6.7.5 SMEs

### 6.7.5.1 Enterprises interviewed

Three small tourism enterprises were interviewed in South Africa. All three enterprises were guest houses in Cape Town: Mnandi Lodge, Blue Tangerine and The Copper Kettle Guest House (see Table 62).

Issue	Mnandi Lodge	Blue Tangerine	The Copper Kettle Guest House
Type of enterprise	Guest house	Guest house	Guest house
No. visitors (per mo.): High season	20	10	60
Low season	8	10	30
Average length of stay	2 nights	3 nights	2 nights
Price from / to	\$60-110 per night	\$70-500 per night	\$30-50 per night
Type of guests	30% business 70% leisure	65% business 35% leisure	10% business 90% leisure
Country of origin of guests	Europe	UK, Germany	South Africa, UK, Germany
No. full time employees	3	4	5
No. part time employees	-	-	1

### 6.7.5.2 Perception and purpose of training

The SMEs recognised the importance of training, and indicated it was necessary to improve the quality of services and standards in the industry. The purpose and reasons for training given by the SMEs are summarised in Table 150, and they agreed on its value in increasing performance and efficiency.

### 6.7.5.3 Problems with and relating to training

The SMEs thought that training was very satisfactory. The main *Internal problems* were identified as marketing and market access. *External problems* identified was competition and seasonality. Other problems they identified are indicated in Table 151, and a majority reported a problem with a high turnover of employees.

### 6.7.5.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the three SMEs are indicated in Table 152, and reveal that they preferred classroom delivery, offsite.

### 6.7.5.5 Willingness to pay

Only The Copper Kettle Guest House indicated what they were willing to pay for courses (see Table 63).

Type of course	The Copper Ketel
1 module: 1/2 day (or 50 page workbook)?	\$55
1 module: 1 day (or 100 page workbook)?	\$85
1 module: 2 days (or 200 page workbook)	\$85
1 series of modules: 2 weeks (or ten x 100 page workbooks)?	\$850
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?	-

#### 6.7.5.6 Tourism modules

The small enterprises listed course modules that were available, needed improvement, were not required, and were needed in South Africa by the SMEs, and prioritised modules for development (see Table 153). Only Mnandi Lodge prioritized courses:

- 4. Marketing and marketing management
- 7. Computer literacy
- 18. Hospitality management

#### 6.7.6 Conclusions

In general, the level and standard of tourism courses in South Africa is well established, and there are a wide range of public and private training institutions providing tertiary level and SME level courses. THETA provides standardisation of course modules throughout the country from basic to postgraduate curricula.

The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 64.

	Strategic institution (n/a)	Training institutions (n=10)	Large operators (n=1)	SMEs (n=2)	Totals
<b>General business modules</b>					
1. Business management					
2. Business planning		**			2
3. Financial management		*			1
4. Marketing and marketing management		*		*	2
5. Human resources management					
6. HIV/AIDs in the workplace					
7. Computer literacy				*	1
8. Corporate social responsibility			*		1
<b>Specific tourism modules</b>					
9. Tourism theory		*			1
10. Tourism policy and legislation					
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)					
<b>Summary of tourism modules prioritised in South Africa (Contd.)</b>					
	Strategic	Training	Large	SMEs	Totals

	<b>institution</b>	<b>institutions</b>	<b>operators</b>		
12. Tourism destination planning and development		**			2
13. Tourism business planning		*	*		2
14. Tourism business development (including entrepreneurship and SME development)		****			4
15. Responsible and sustainable tourism (including conservation and poverty alleviation)		***			3
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)		***			3
17. Hotel management		*	*		2
18. Hospitality management		*	*	*	3
19. Tour organisation and management		*			1
20. Tourism attraction management		***			3
21. Conference, Exhibition and Event management		**			2
22. Protected areas and ecotourism management		***			3
23. Field guiding (cultural and natural)					
24. Food and beverage management					
25. Retail travel					
26. Transportation for tourists		*			1
27. Impacts of tourism – economic, environmental, social and cultural		*			1
28. Tourism research methods		**			2
<b>Other courses</b>					
Project management		**			2
Strategic planning and tourism		*			1
NB: The strategic enterprises did not provide this information; large enterprises listed those needed.					

Overall, the six most frequently prioritised courses by the South African institutions and business were:

- 14. Tourism business development (including entrepreneurship and SME development)
- 15. Responsible and sustainable tourism (including conservation and poverty alleviation)
- 16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)
- 18. Hospitality management
- 20. Tourism attraction management
- 22. Protected areas and ecotourism management

The THETA/DEAT skills audit carried out in 2006/7 identified the following scarce and critical skills (see Table 65).

Scarce skills	All sectors	Travel and tourism	Hospitality	Conservation and guiding
Management	*			
Public sector management and provincial public sector stakeholders	*			
Black experienced and/or qualified middle managers		*	*	*
Supervisors and team leaders			*	*
Capacitating of unions and federations			*	*
Understanding of tourism, the world, the reasons why it is important		*	*	
Tour operators		*		
Site guides: located at specific tourism sites		*		
Adventure guiding: especially black guides				*
Adventure instructors				*
Environmentalists				*
Chefs: executive to griller			*	
Travel software		*		
Communication (manner and content: interaction with the client)	*			
Spoken English and understanding (coherency)	*			
Ability to conduct research and develop travel plans		*		
Multi-lingual foreign language: French, Chinese/Mandarin/Spanish				*
Knowing South Africa	*			
Service culture	*			
Frontline skills	*			
Conflict management		*	*	*
Customer service	*			
Professionalism from a global perspective	*			
Following instruction	*			
Accuracy and attention to detail	*			
Problem solving	*			
Teamwork		*	*	
Ability to work independently				*
IT skills	*			
Numeracy		*	*	

## 6.8 Tanzania

### 6.8.1 Overview of tourism

Tanzania's greatest attraction for international travellers lies in the richness of the country's natural assets. Tanzania has abundant wildlife resources, which are spread across a large number of national parks, game reserves and game controlled areas. The conservation areas and marine parks in the country are considered to be among some of the most attractive in the world. As happens with most developing tourist destinations, Tanzania is making policy moves aimed at establishing its position as a viable travel destination through marketing campaigns in European, Asian and American source markets as a means of expanding the tourist base of potential travellers to this diverse country.<sup>91</sup>

<sup>90</sup> Tourism, Hospitality and Sport Education and Training Authority (THETA) and Department of Environmental Affairs and Tourism (DEAT) (2007) Skills in Tourism and Sport: Emerging Themes: 2007.

<sup>91</sup> [http://www.euromonitor.com/Travel\\_And\\_Tourism\\_in\\_Tanzania/](http://www.euromonitor.com/Travel_And_Tourism_in_Tanzania/) Downloaded on 4 June 2007

Currently, the majority of tourism sector investment is concentrated in the northern part of the country. In this region there are a number of internationally acclaimed hotels providing various services to tourists from around the world. Numerous government initiatives have however sought to increase investment in the Southern Circuit as well. Though service facilities and infrastructure in this area are still poor, the area's diverse wildlife renders it an ideal location for further tourist development. To aid this initiative the international donor community has helped to finance the rehabilitation of infrastructure in the Southern Circuit. The government recently established the Tanzanian Tourism Board (TTB) which serves to oversee the development of tourism within the country.<sup>92</sup>

Data from the World Travel and Tourism Council (WTTC) indicates that Personal Travel and Tourism generated US\$210.8 million in 2003, and is predicted to grow to US\$562.5 million by 2013 (see Table 66). The WTTC estimates that Tanzania employed 293,200 people in the tourism industry in 2003, and that by 2013 this will increase to 549,000 (or 4.6% of employment).

<b>Description of figures</b>	<b>Status in 2003</b>	<b>Predicted growth to 2013</b>
<b>Personal Travel &amp; Tourism</b> (or consumer expenditures) which captures spending on traditional travel and tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and non durable) used for travel and tourism activities.	US\$ 210.8 million (5.4% real growth)	US\$ 562.5 million (7.8% annualised real growth)
<b>Business Travel</b> by government and industry, in spending on goods and services (transportation, accommodation, meals, entertainment etc) and intermediate inputs used in the course of business or government work.	US\$ 93.7 million (-0.5% real growth)	US\$ 257.6 million (8.2% annualised real growth)
<b>Government expenditures</b> (Individual) by agencies and departments which provide visitor services such as cultural (art museums) recreational (national park) or clearance (immigration/customs) to individual visitors.	US\$ 36 million (5.2% of total government expenditure; 6.5% real growth)	US\$ 75.2 million (5.4% of total government expenditure; 5.1% annualised real growth)
<b>Travel &amp; Tourism Industry Employment</b> which includes those jobs with face to face contact with visitors (airlines, hotels, car rental, restaurant, retail, entertainment, etc)	293,200 employees (3.5% of total employment; 1.9% growth)	549,000 employees (4.6% of total employment; 6.5% annualised real growth)
<b>Travel &amp; Tourism Industry Gross Domestic Product (GDP)</b>	US\$ 474.4 million (4.5% of GDP; 4.4% real growth)	US\$ 1260.3 million (6.0% of GDP; 7.7% annualised real growth)
Source: WTTC, 2003 <sup>93</sup>		

Tanzania is operating in a competitive atmosphere in terms of the provision of quality tourism products and services. For the industry to continue to grow, there are issues that need to be addressed. Poor quality access roads and limited air transport are restricting the ability of the country to attract foreign tourists. There is also a need to for more support services such as hotels/restaurant facilities. Service quality levels need to be dealt with and more focused marketing efforts need to be carried both domestically and internationally<sup>94</sup>.

<sup>92</sup> <http://www.nationsencyclopedia.com/economies/Africa/Tanzania.html/> Downloaded on 4 June 2007

<sup>93</sup> WTTC (2003) Country League Tables, The 2003 Travel & Tourism Economic Research, World Travel and Tourism Council

<sup>94</sup> <http://www.tanemb.se/TourismPolicy/> Downloaded on 4 June 2007

Between 1995 and 2001, about 59% of the visitors came to Tanzania for leisure, recreation and holidays compared to those who came for conferences, professionals and others (i.e. 41%). While tourism is now fast developing in traditional destinations, such as the Serengeti, Ngorongoro, Kilimanjaro mountain and Zanzibar, efforts to promote community based tourism have thus far only had limited success. Overall, the contribution of tourism to poverty reduction in local communities in Tanzania has remained marginal and isolated. Most of the skilled jobs are still being given to foreigners, while local people are left to take up unskilled and low paying jobs such as watchmen, room attendants and gardeners<sup>95</sup>.

#### *6.8.1.1 Donor and development agency interventions*

The IFC is involved in tourism investment in Tanzania, and has approved loans and equity investments of \$9 million for Tourism Promotion Services (Tanzania) Limited, to help finance the construction of three lodges and a tented camp in the Northern Safari Circuit of Tanzania. The IFC will provide a senior loan of US\$7 million, a subordinated loan of US\$1 million, and an equity investment of US\$1 million equivalent. The US\$32.5 million project will be managed by Serena Tourism Promotion Services of Switzerland, a wholly owned subsidiary of the Aga Khan Fund for Economic Development, the project sponsor. Additional loan and equity financing is being provided by Britain's Commonwealth Development Corporation and the Tanzania National Provident Fund. Foreign shareholders will raise Tanzanian shillings for their equity investments through Tanzania's debt conversion program. This is expected to reduce the foreign exchange cost of these investments by about 50 percent. The lodges and camp, which will be of four- to five-star quality, will be located outside Lake Manyara National Park, on the rim of the Ngorongoro Crater, and in the Serengeti National Park. The project is expected to benefit Tanzania's conservation efforts, as it will provide revenues to Park and Conservation Area authorities, reduce poaching, and promote the welfare of local communities. In Tanzania, IFC invested with the Aga Khan Fund for Economic Development (AKFED) to develop four safari lodges or tented camps oriented toward wildlife viewing.<sup>96</sup>

### **6.8.2 Strategic institutions**

#### *6.8.2.1 Institutions interviewed*

Meetings were held with representatives of the World Bank Private Sector Competitiveness Project, Ministry of Planning, Economy and Empowerment, EU-Tourism Training Project, Tanzania Confederation of Tourism, Tanzania Association of Tour Operators, Tanzania Tourism Board, Hotel Association of Tanzania and Ministry of Tourism.

#### *6.8.2.2 Tourism skills needs*

Tanzania needs skills development at all levels, vocational and managerial. The skills development also need to reach beyond the mainstream tourism industry and filter into the communities that share the land with the amazing natural game parks scattered throughout Tanzania. It is recognized that most managers of large hotel properties are not Tanzanian and that there is no place for a Tanzanian to go locally to gain the requisite skills.

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<sup>95</sup> Sosovele, H. (2004) "Tourism Development and Poverty Reduction Initiatives from Tanzania: Lessons for practice", Institute of Resource Assessment

<sup>96</sup><http://ifc.org/ifcext/media.nsf/content/SelectedPressRelease?OpenDocument&UNID=352D959389F1E6BE8525697D004C090F>

### *6.8.2.3 Problems relating to capacity building*

Three of the strategic institutions underwent formal interviews and listed whether particular problems presented were relevant in Tanzania (see Table 154). They agreed that there were scarce financial resources, unqualified and inexperienced trainers, poorly designed training and inadequate vocational skills and hotel schools.

### *6.8.2.4 Tourism courses*

Three of the strategic institutions listed in their opinion which course modules were available, needed improvement, were not required, and were needed in Tanzania (see Table 155). The most frequently prioritised modules for development were:

- 12. Tourism destination planning and development
- 18. Hospitality Management

### *6.8.2.5 Cost recovery options*

Most of the institutions interviewed agreed that students should most often pay for their fees for taking the courses, however there were a number of people interviewed that felt government also had a responsibility to subsidize training for vocational skills development.

### *6.8.2.6 Accreditation*

There is no accreditation body set up to monitor tourism training in Tanzania. Currently there is a consultancy within the Ministry of Tourism funded by the EU to create and install a national skills framework that will hopefully lead to a national tourism training curriculum and accreditation process. The consultant engaged on the project is GOPA and they have been consulted regarding the TTN. The skills framework consultancy has just begun and will run for two years.

### *6.8.2.7 Other issues raised*

Tourism has played an important role of the economy of Tanzania for a number of years now, and with the intense need for trained and qualified staff a number of private tourism training schools have opened in Arusha and Dar es Salaam. These schools are completely unmonitored and from a number of sources interviewed are in fact scamming most of the students that take the courses. The consultants from GOPA had completed interviews at three of these schools and made note that it is not even worth considering them as a part of the training supply in Tanzania because the quality of the coursework and training is poor. The consultants will be making this a part of their first report, which is due to come out later in 2007.

### 6.8.3 Training institutions

#### 6.8.3.1 Institutions identified

A list of institutions identified that provide tourism or business management courses is detailed below. Representatives from those marked with an asterisk were interviewed:

- University of Dar es Salaam\*
- Management Training Institute\*
- National Tourism College\*
- Eastern and Southern Africa Management Institute (ESAMI)\*
- Open University (Morogoro)
- Njuweni
- Masoka Hotel and Tourism Institute
- Arusha Hotel Training Institute
- Kilimanjaro Institute (private for Kempinski Hotels)
- Wildlife Training Management Center
- Hotel Tourism Training Institute
- Tumaini University (Iringa)

#### 6.8.3.2 Tourism management and business courses offered

Courses offered, and in development, from the training institutions interviewed are outlined in Table 67 below. Other business courses are detailed in Appendix 6.

<b>Table 67: Tourism courses offered by training institutions in Tanzania</b>	
<b>Tertiary level courses</b>	
<b>Institution</b>	<b>Diploma/Certificates</b>
University of Dar es Salaam*	Taylor made courses Entrepreneurship Centre
Management Training Institute	Individualized modules
National Tourism College	Diploma in travel and tourism Vocational certificates
ESAMI**	Various short courses
*Want offer a focus in tourism starting next year. ** The main campus building is in Arusha and ESAMI has facilities in 11 African Nations in Eastern and Southern Africa.	

#### 6.8.3.3 Tourism modules

The training institutions identified course modules that were available, needed improvement, were not required, and were needed (see Table 156). Only one of the courses was mentioned more than once, and prioritised for development:

- 14. Tourism business development (*Including entrepreneurship and SME development*)

Ten courses were mentioned only once:

- 1. Business management
- 4. Marketing and marketing management

- 10. Tourism theory
- 12. Tourism resources (*including natural, cultural, infrastructure, human and financial, macro-environment*)
- 17. Hotel management
- 18. Hospitality management
- 22. Protected areas and ecotourism management
- 23. Field Guiding (*cultural and natural*)
- Other: Customer service / Customer care
- Other: Life skills / soft skills

#### 6.8.3.4 Process of integrating new courses

The only institution visited that had a formal process for integration was the University of Dar es Salaam.

#### 6.8.3.5 Case studies

The University of Dar es Salaam expressed great interest in writing or reviewing case studies. They seemed to have a strong staff with experience in writing cases. The following were suggested topics:

- Bush and Beach Tourism (combination safari and sun packages)
- Package Tourism versus Independent Travel in the Northern Circuit
- The Impact of the Kilimanjaro Kempinski
- Ecotourism in the Islands

The other interviewee that might have the requisite skills for the cases would be ESAMI.

#### 6.8.3.6 Students

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning, and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 68.

<b>Institution</b>	<b>Country of origin of students</b>	<b>No. of tourism students 2007 (2008 predicted)</b>	<b>Type of institution students drawn from</b>	<b>Organisational level the come from when coming from industry</b>	<b>Level of prior learning</b>	<b>Jobs students go on to do after the courses</b>
University of Dar es Salaam	Mostly Tanzania – All over East Africa	2,000 undergrad; 1,000 postgrad	Undergrad – 95% highschool; Postgrad 50/50 public/private	75% from mid to upper management 25% other	Huge demand for MBAs now, so they are very selective and min 2 years experience	30% public; 35% private; 35% abroad
Management Training Institute	Tanzania, Zimbabwe, Zambia,	60-75 management; 200-300	100% private sector: 35% SMEs; 30%	Non-vocational: 50% upper	No prior learning is necessary for vocational	100% work in tourism industry-

	South Africa, Kenya	vocational	start-ups; 35% big business	management; 50% line management	courses, must be literate/numerate	private sector
National Tourism College	Tanzania	150	95% high school	Entry level	High school completion	90% work in tourism industry – private sector
ESAMI	Within the 10 member states	1,000 in executive MBA; thousands in short courses	All have work Experience	10% upper management; 70% middle management; 20% general staff	All have at least undergrad degree and 2 years experience	All students work in their chosen area of study; short courses are for professionals

### 6.8.3.7 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 69). Courses are generally paid for per year, rather than per course or per module.

**Table 69: Course payment mechanisms in Tanzania**

Institution	Students pay	Originating institutions pay	Subsidy or grant	Cost per course / module	Comments
University of Dar es Salaam	√	√	√	FT/PT MBA \$2,800 for 2 years; Exec \$4,800	Did not obtain pricing for undergrad program
Management Training Institute	√	√		\$200 per module; \$800 to \$1,600 per course; soft skills \$1,000	Courses range between 4-8 modules
National Tourism College	√			\$650 per semester for 2 semesters	
ESAMI	√	√	√	Short programs generally cost \$600 per week	

### 6.8.3.8 Short Course Delivery

Information was gathered on the history and ability of delivering short courses or executive/professional education courses. Table 70 shows the outcome in Tanzania.

**Table 70: Short Courses in Tanzania**

Institution	Offer Short Courses	Duration	Cost	What types of courses	Comments
University of Dar es Salaam	√	2-4 days; 1-2 weeks	Day: \$250-300 Week: ~\$1,500	Taylor made short courses	They have an entrepreneurship center that does SME short courses
Management Training Institute	√	1-7 days per module	\$200 per module		Develop short courses on a demand basis with industry representatives
ESAMI	√	1-4 weeks	\$600 per week	All types of courses on demand	Have acquired a strong capacity to deliver multiple types of management courses; have worked with World Bank, EU, USAID, etc

#### 6.8.4 Large enterprises

Meetings were held with management at the Kilimanjaro Kempinski Hotel and the Movenpick Dar es Salaam; neither manager filled out a formal questionnaire. The Kempinski has a sister leisure property on Zanzibar and is looking to add a complimentary property in the Northern Circuit in Arusha. Until the Kempinski was renovated the Movenpick was the quality standard in Dar es Salaam. Both properties insisted that they must maintain their high level of quality by training staff in-house. The Kempinski went as far as starting the Kilimanjaro Institute, which each employee must attend before being able to work at any of the properties. The Kilimanjaro Institute is widely regarded as the best tourism training program in Tanzania and the Movenpick is considering signing an agreement with them to train some of their management.

Some of the common issues mentioned by both parties facing tourism training in Tanzania:

- A general lack of customer service ethic
- Constant need for retraining of staff on simply items such as customer care and health and safety
- An absence of quality training service providers in the market
- Staff loyalty did not seem to be as big of concern as in other markets
- Good managers came from within the organization rather than recruiting from outside
- Poaching will be a bigger problem going into the future with more properties planned or under development

#### 6.8.5 SMEs

##### 6.8.5.1 Enterprises interviewed

Three workshops were held in Dar es Salaam, Zanzibar and Arusha where small tourism enterprises were interviewed. In total 31 individuals were interviewed (24 of which provided general

information) who were from accommodation enterprises (n=11) and travel service providers (n=13). Averages for each of these segments is summarized below (see Table 71).

<b>Issue</b>	<b>Accommodation</b>	<b>Travel Service Providers</b>
Type of enterprise	Hotels, B&Bs, Guest houses, Lodges	Tour operator, transport and guides
No. visitors (per mo.):		
High season	381.5	90
Low season	337.4	33.6
Average length of stay	3.9 days	7.8 days
Price from / to	\$65.8-87.3 per night	500 – 828.9 per package
Type of guests	21.5% business 61% leisure 18.5% other	19.7% business 61.1% leisure 19.2% other
Country of origin of guests (most frequently given)	United States, United Kingdom, France, South Africa and Germany	United States, United Kingdom, Germany, Italy
No. full time employees (average)	30.9	14.9
No. part time employees (average)	6.8	6.9

#### 6.8.5.2 Perception and purpose of training

The SMEs recognised the importance of training, and indicated it was necessary to improve the quality of services and standards in the industry. They recognised the need for improving their business skills, and that they would like to hire people with better skills. The purpose and reasons for training given by the SMEs are summarised in Table 157. There were a wide range of opinions, but a majority agreed that training was used to increase efficiency, upgrade to international standards and increase performance.

#### 6.8.5.3 Problems with and relating to training

There was mixed views by the SMEs on their satisfaction of existing or past training. *External problems* widely ranged; some offered were competition cutting prices, gaining consistent customers, service delivery, etc. *Internal problems* that related to training included high costs, and a shortage of time. Other problems they identified are indicated in Table 158, and reveal that the most frequently reported problem was no training follow up.

#### 6.8.5.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing courses. The results from the three SMEs are indicated in Table 159, and indicate that most preferred face-to-face training during business hours that was offsite.

#### 6.8.5.5 Willingness to pay

Few SMEs answered this question and the range offered by the SMEs is listed below (see Table 72). Some SMEs just indicated that they were interested, but did not specify a price, and these responses were not included in the range or average.

Type of course	Number	Range	Average
1 module: 1/2 day (or 50 page workbook)?	7	\$50-100	\$62.50
1 module: 1 day (or 100 page workbook)?	4	\$100-1000	\$550
1 module: 2 days (or 200 page workbook)	3	\$150	\$150
1 series of modules: 2 weeks (or ten x 100 page workbooks)?	6	\$80-500	\$260
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?	11	\$80-2000	\$458.89

#### 6.8.5.6 Tourism modules

The small enterprises listed course modules that were available, needed improvement, were not required, and were needed in Tanzania by the SMEs, and prioritised modules for development (see Table 160). Although the hotels did not prioritise courses that they wished to see developed most urgently, the new courses that more than half of the enterprises indicated that were needed were:

- 1. Business management
- 2. Business planning
- 3. Financial management
- 4. Marketing and marketing management
- 5. Human resources management
- 14. Tourism business development (*including entrepreneurship and SME development*)
- 15. Responsible and sustainable tourism (*including conservation and poverty alleviation*)
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 18. Hospitality management
- 21. Conference, Exhibition and Event management
- 22. Protected areas and ecotourism management

#### 6.8.6 Conclusions

Even though vocational skills gaps were greatest it does not make sense to focus on vocational training in Tanzania as the European Union project is at the beginning and aims to create a national curriculum for tourism training. The plan is for the Ministry of Tourism to accept this plan and for all other schools to abide by the national curriculum. In Tanzania it probably does not make sense to focus on providing executive education to the large enterprises because they have created their own programs. The real need lies at the SME level, because of the size of the market and from the need from the operators.

The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 73.

	Strategic institution (n=3)	Training institutions (n=3)	Large operators (n/a)	SMEs (n=14)	Totals
<b>General business modules</b>					
1. Business management	*	*		Majority	3
2. Business planning				Majority	1
3. Financial management				Majority	1
4. Marketing and marketing management		*		Majority	2
5. Human resources management				Majority	1
6. HIV/AIDs in the workplace					

7. Computer literacy					
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory					
10. Tourism policy and legislation		*			1
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )					
12. Tourism destination planning and development	**	*			3
13. Tourism business planning		*			1
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	*	***		Majority	5
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )				Majority	1
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )				Majority	1
17. Hotel management	*	*			2
18. Hospitality management	**	*		Majority	4
19. Tour organisation and management	*				1
20. Tourism attraction management					
21. Conference, Exhibition and Event management				Majority	1
22. Protected areas and ecotourism management		*		Majority	2
23. Field guiding ( <i>cultural and natural</i> )		*			1
24. Food and beverage management					
25. Retail travel					
26. Transportation for tourists					
27. Impacts of tourism – economic, environmental, social and cultural					
28. Tourism research methods					
<b>Other courses</b>					
Customer Care/Customer Service	*	*			2
Life Skills/Soft Skills		*			1
NB: The SMEs did not prioritise courses, but ones that the majority indicated as required are indicated.					

Overall, the three most frequently prioritised courses by the Tanzania institutions and businesses were:

- 1. Business management
- 12. Tourism destination planning and development
- 14. Tourism business development (*including entrepreneurship and SME development*)
- 18. Hospitality management

## 6.9 Zambia

### 6.9.1 Overview of tourism

Zambia has a peculiar recent history that has led to the interesting tourism industry that exists today. The industry is very young as a whole, with most enterprises five years old or younger. Recently tourism has boomed, both from a supply (i.e. number of new properties) and from the demand (i.e. number of tourists arriving). There is a phenomenon of many new guesthouses developing throughout the country, and these are not only concentrated in the main tourist destination of Livingstone, but are widespread throughout the country. There are a number in Lusaka and the road connecting the two cities is lined with signboards for guesthouses. This is partly explained by the economic history of Zambia, which used to have a nationalistic monopoly economy. Major industry cartels were established and no goods could be imported from abroad. Once liberalization occurred none of the national businesses were competitive and one by one they all closed, leaving the economy completely shattered. Many Zambians lost their jobs and with no other economic alternative people have heard about this “tourism business” and have either turned their house into a guesthouse or have quickly erected a lodge. Therefore there has been a proliferation of guesthouses that have no business plans, have had no market research, and which have no market access strategy. Unfortunately, the owners are now starting to complain that they are not getting a piece of the “tourism business” and that the large enterprises such as Sun Properties are taking it all. With the Protea and Legacy properties under development this fear among SMEs is increasing.<sup>97</sup>

In Zambia, the tourism sector has until recently remained relatively marginal in its contribution towards the GDP, employment and the foreign exchange earnings of the country. This has a lot to do with the fact that was only recently reclassified as part of the economic sector in 1997, before that it was thought of in terms of the social sector. Government approved the first tourism policy in 1997 and quickly followed it up with a strategic action plan, which was released in 1999. This plan translated the government policies into a program of action for the period 2000-2005. The strategies focused on three areas: management and marketing, product planning, and infrastructure development<sup>98</sup>.

Evidence of the success of the action plan can be seen throughout the industry. The GDP from the major components of the tourism industry rose from 2.0% in 1994 to 2.7% in 2001 and to 3.0% in 2002. The hotel and restaurant industry accelerated in terms of real value added, growing at an average rate of 5% for the 1991-1998 and 18% for the 1999-2001 periods compared to just 0.8% for the 1985-1990 period.

Bed occupancy has also begun to improve. The average bed occupancy rate grew from 49% in 1997 to 51% in 2001. The growth was reinforced by the opening of two major hotels in Livingstone, by Zambia’s hosting of the Organization for African Unity (OAU) Summit in 2001 and the by occurrence of a solar eclipse in 2002, which boosted tourist arrivals and bed occupancy.

The number of visitors to Zambia coming for tourism purposes is estimated to have grown at an average rate of 12% per annum between 1990 and 2001. The trends of tourism arrivals and expenditure have steadily increased in recent years. International tourist arrivals increased from 341,000 in 1997 to 556,000 in 2002<sup>99</sup>. Tourism Satellite Account estimates from the World Travel and Tourism Council for Zambia are described in Table 74. The WTTC data indicates that Personal Travel and Tourism generated US\$89.8 million in 2003, and is predicted to grow to US\$2005.4 million by 2013. The WTTC estimates that Zambia employs 23,900 people in the tourism industry, and that by 2013 this will nearly double to 44,900 (or 2.6% of employment).

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<sup>97</sup> Mwendapole, Fred. *Livingstone Tourism Association*, Personal Interview. 14 April 2007

<sup>98</sup> <http://www.iran-daily.com/1383/2077/html/panorama.htm#4260> / downloaded 30 May 2007

<sup>99</sup> The Ministry of Tourism, Environment and Natural Resources (2005) *Innovations in export strategy building the tourism mega-cluster: What works and what doesn't, Zambia*.

**Table 74: Financial, economic and employment estimates for Tourism in Zambia**

Description of figures	Status in 2003	Predicted growth to 2013
<b>Personal Travel &amp; Tourism</b> (or consumer expenditures) which captures spending on traditional travel and tourism services (lodging, transportation, entertainment, meals, financial services, etc) and goods (durable and non durable) used for travel and tourism activities.	US\$ 89.8 million (3.8% real growth)	US\$ 205.4 million (6.1% annualised real growth)
<b>Business Travel</b> by government and industry, in spending on goods and services (transportation, accommodation, meals, entertainment etc) and intermediate inputs used in the course of business or government work.	US\$ 28.6 million (-2.2% real growth)	US\$ 73.2 million (7.4% annualised real growth)
<b>Government expenditures</b> (Individual) by agencies and departments which provide visitor services such as cultural (art museums) recreational (national park) or clearance (immigration/customs) to individual visitors.	US\$ 9.1 million (2.7% of total government expenditure; 4.4% real growth)	US\$ 17.4 million (2.8% of total government expenditure; 4.2% annualised real growth)
<b>Travel &amp; Tourism Industry Employment</b> which includes those jobs with face to face contact with visitors (airlines, hotels, car rental, restaurant, retail, entertainment, etc)	23,900 employees (1.7% of total employment; 3.9 growth)	44,900 employees (2.6% of total employment; 6.6% annualised real growth)
<b>Travel &amp; Tourism Industry Gross Domestic Product (GDP)</b>	US\$ 71.3 million (2% of GDP; 6.1% real growth)	US\$ 205.6 million (3.2% of GDP; 8.7% annualised real growth)
Source: WTTC, 2003 <sup>100</sup>		

There are some important factors restricting the growth of the Zambian tourism industry. There is a limited international air network covering the country, and the local airlines are often unreliable. Poor infrastructure includes poor quality roads, insufficient public health services including a lack of adequate health facilities near main tourism sites. This is particularly problematic as Zambia is often perceived as a malaria-prone area and visitors want to be ensured of good medical healthcare in the case of illness. Hotel accommodation and restaurants often fail to meet the high standards of international travellers. There is a high cost of capital and there are heavy administrative barriers in place which makes starting a business in Zambia more costly than it ought to be<sup>101</sup>.

Zambia does however have many assets that support development. Not only does it boast an array of breathtaking sites across the country but it also possesses rare flora and fauna that in many cases exists nowhere else in the world. Zambia has 19 National Parks, access to Victoria Falls, Lake Kariba and Lochinvar. It is clear that the tourism development potential lies in the country's abundant tourism resources in form of wildlife resources, wilderness experiences and cultural heritage<sup>102</sup>.

#### 6.9.1.1 Donor interventions

The government of Zambia has a World Bank program called the Support to Economic Expansion and Diversification (SEED) and the project objectives are to support the Government of the Republic of Zambia's efforts to stimulate diversified economic growth and private sector investment in the country, and using tourism as one entry point. The plan calls for growth of public/private partnerships for creating a strengthened enabling environment to allow for stronger private sector

<sup>100</sup> WTTC (2003) Country League Tables, The 2003 Travel & Tourism Economic Research, World Travel and Tourism Council

<sup>101</sup><sup>101</sup> <http://www.iran-daily.com/1383/2077/html/panorama.htm#4260> / downloaded 30 May 2007.

<sup>102</sup> <http://www.zambiaembassy.org/business.html/>, downloaded 30 May 2007.

growth. The end goal is to support community-based development, and to allow Zambians to benefit from the extensive cultural, natural and wildlife assets.<sup>103</sup>

## **6.9.2 Strategic institutions**

### *6.9.2.1 Institutions interviewed*

Meetings were held with representatives of the Zambia Hotel Keeper's Association, Livingstone Tourism Authority, Ministry of Tourism, Environment and Natural Resources, Tourism Council of Zambia, Zambia National Tourist Board, and World Bank SEED Project.

### *6.9.2.2 Tourism skills needs*

In Zambia the immediate concern is the proliferation of small guesthouses and lodges all across the country and specifically in Livingstone. It appears that anyone with either land or a house has turned the property into a guesthouse or is planning to in the near future. Close to none of these entrepreneurs have any idea of what business they are getting into, nor have they had any business or tourism training.

One comment that was echoed by many interviewed is that there is too much emphasis on front desk managers in the current training offering, that the students coming out are "half-baked" for a supervisory position, that there are incumbents in the positions and that the students expect too much in relation to their experience.

### *6.9.2.3 Problems relating to capacity building*

Three of the strategic institutions underwent formal interviews and listed whether particular problems presented were relevant in Zambia (see Table 161). They agreed that scarce financial resources and local trainers were problem, and that training was poorly designed, there was a high turnover of employees, that training was not relevant to the commercial nature of businesses, and that vocational skills and hotel schools were inadequate.

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<sup>103</sup> [http://www.wds.worldbank.org/.../WDSP/IB/2001/07/14/000094946\\_01062204005492/Rendered/PDF/multi0page.pdf](http://www.wds.worldbank.org/.../WDSP/IB/2001/07/14/000094946_01062204005492/Rendered/PDF/multi0page.pdf), downloaded 13 July 2007.

#### 6.9.2.4 *Tourism courses*

Three of the strategic institutions listed in their opinion which course modules were available, needed improvement, were not required, and were needed in Zambia (see Table 162). The most frequently prioritised modules for development were:

- 1. Business management (which would include operational management)
- 14. Tourism business development (*including entrepreneurship and SME development*)
- Other: Life Skills / Soft Skills

#### 6.9.2.5 *Cost recovery options*

All of the institutions believed that students need to pay their fees, however there was also a consensus that the SMEs do not understand the value of training and also have a fairly low willingness to pay. Therefore some sort of incentive program (governmental or otherwise) needs to be set-up to get the initial interest.

The only exception to this was the LTA who believed that if provided quality training that the SMEs would be more than willing to pay for training. HKAS was the only entity that believed the international hotel chains would send their staff to training sessions, while all others felt that they would continue to do their training in-house.

#### 6.9.2.6 *Accreditation*

Technical, Entrepreneurial, and Vocational Education and Training Authority (TEVETA) is the official entity set up to accredit and monitor skills development in Zambia. As there is no University with tourism training this is the only body that deals with training in tourism.

Tourism is a relatively new industry in Zambia and quite a few changes are being made at a policy and regulatory level. One of the issues the government is pondering is tourism training and a national curriculum.

#### 6.9.2.7 *Other issues raised*

One of the biggest issues facing the Zambia tourism industry is a lack of standards and quality control. There are very few regulatory measures that are in place to prevent someone from opening a guesthouse or lodge. A number of interviewees made the point that it might be futile to start training SMEs without having some minimum quality and service standards in place.

### **6.9.3 *Training institutions***

#### 6.9.3.1 *Institutions identified*

A list of institutions identified that provide tourism or business management courses is detailed below. Representatives from those marked with an asterisk were interviewed:

- Fairview Hotel – Hotel and Tourism Training Institute (HTTI)\*
- Sylva Catering, Hospitality and Tourism Training\*
- University of Zambia\*
- Zambia Centre for Accountancy Studies (ZCAS)\*
- Lusaka Hotel and Hotel School (*opening April/May 2007*)

Institutions consulted during the Livingstone workshop, but not yet offering tourism courses at this time:

- Livingstone Institute of Business and Engineering Services
- Luumuno Training Centre
- Catholic Church Training Centre

A number of interviewees spoke of a number of “fly by night” private hotel or tourism schools in Lusaka, which offered some courses, but when questioned about which ones were operational or giving courses now, no names were able to be produced that were currently operational. Any entity that wants offer tourism training is able to simply by applying to TEVETA, and TEVETA will provide the curriculum for the training institution to provide training. So there is some concern that it is unknown who is actually giving tourism training throughout the country.

### 6.9.3.2 Tourism management and business courses offered

Courses offered, and in development, from the training institutions interviewed are outlined in Table 75 below. Other business courses are listed in Appendix 6.

<b>Table 75: Tourism courses offered by training institutions in Zambia</b>	
<b>Tertiary level courses</b>	
<b>Institution</b>	<b>Diploma/Certificates</b>
HTTI	Certificates: Food Production, Tourism & Travel Management, Housekeeping, Food & Beverage Services, Front Office Operations, General Hospitality, IATA Certification Diploma: Hotel Management
Sylva Catering, Hospitality and Tourism Training	Certificate: Food & Beverage, Food Production, Tourism & Travel Diploma: Hotel Management

The University of Zambia does not currently offer a degree or diploma specifically for tourism, but has a course in the geography department about tourism. Currently the University does not have a business school and does not run business courses, but demand for this subject is high and the University is looking to make a formal request to begin a business school. If tourism courses were to be delivered they would currently fall into the Geography department, but the University would like to see them in a new business school if they were to be able to develop one. The process seems very lengthy for this to happen and it is unlikely they will be able to complete it during the life of the TTN project. There is one other national University in Zambia that is offering business at Copper Belt University, but it would be inappropriate for tourism courses.

### 6.9.3.3 Tourism modules

The training institutions identified course modules that were available, needed improvement, were not required, and were needed (see Table 163). The most frequently prioritised modules for development were:

- 1. Business management
- 4. Marketing and marketing management
- 3. Financial Management
- Other: Communication Skills

#### *6.9.3.4 Process of integrating new courses*

Any new curriculum development must now go through the Ministry of Education or the Ministry of Science and Technology, TEVETA and the Examination Council of Zambia.

#### *6.9.3.5 Students*

Training institutions were asked about where their students came from, how many they taught, what type of institution (and level of management) they were drawn from, their level of prior learning, and also the type of jobs they went on to do after the courses. An overview of this information is provided in Table 76.

#### *6.9.3.6 Case studies*

None of the institutions interviewed would be able to write businesses case studies, however it was noted that the phenomenon of rapid explosion of the tourism industry and proliferation of guesthouses would make a highly interesting and important case study or journal article.

**Table 76: Overview of tourism students in Zambia**

Institution	Country of origin of students	No. of tourism students 2007 (2008 predicted)	Type of institution students drawn from	Organisational level the come from when coming from industry	Level of prior learning	Jobs students go on to do after the courses
HTTI	Zambia	63	75% from high school; 10% from gov.; 15% from industry	33% come from managerial; 67% from general staff	Entrance exam and must have merits in Maths and English	4% start an SME; 66% enter industry; 5% work for gov. 25% leave the country (SA, Kenya, EU, UK, USA)
Sylva Catering, Hospitality and Tourism Training	Zambia	350	80% from high school; 15% from industry; 5% from other industries	85% are from managerial; 15% is general staff	Most students pass the TEVETA minimum criteria; if not then they use time in service	Nearly 100% work in industry
ZCAS	Zambia (85%), Tanzania, Malawi, Zimbabwe	400	90% from high school; 10% from private sector	50/50 of managerial and general staff	ZCAS is very selective and has a strict admission screening process	Nearly all students work in their chosen field; many go abroad at some point

### 6.9.3.7 Cost recovery options

Information was gathered on how existing courses were paid for: by the students, their originating institution, a subsidy or grant, or other mechanism (see Table 77). Courses are generally paid for per year, rather than per course or per module.

**Table 77: Course payment mechanisms in Zambia**

Institution	Students pay	Originating institutions pay	Subsidy or grant	Cost per course / module	Comments
HTTI	√	√		Diploma is US\$2,560 Certificates are between US\$938 and \$551	
Sylva Catering, Hospitality and Tourism Training	√	√	√	Certificate is \$1,200 and Diploma is \$1,300	Diploma is 2 years
ZCAS	√			Programs range from US\$832 and \$1,819 per semester	6 semesters for a diploma

### 6.9.3.8 Short Course Delivery

Information was gathered on the history and ability of delivering short courses or executive/professional education courses. Table 78 shows the outcome in Zambia. ZCAS has a mechanism that would suit the delivery of short courses, however they do not have any staff with expertise in tourism.

<b>Institution</b>	<b>Offer Short Courses</b>	<b>Duration</b>	<b>Cost</b>	<b>What types of courses</b>	<b>Comments</b>
HTTI	√	2 weeks;	\$100 USD	Intensive Vocational programs	They have also tried to do Mobile trainings in the field, but won't try again unless much more support is in place
Sylva Catering, Hospitality and Tourism Training	√	3-6 months; 2 weeks to 1 month	\$500 USD per month; on request	Intensive certificate courses; "Taylor Made" programs	Have worked with donors to create short programs (i.e. USAID)
ZCAS	√	1 day to 3 weeks	On demand/quote	Seminars: banking, accountancy; Professional/Exec Ed: Supervisory Refreshers Once off programs	They have a research and consultancy department that focuses solely on short course creation and delivery. Will branch into any field there is demand. All courses are developed and priced individually

### 6.9.4 Large enterprises

Interviews were conducted with Managing Directors of the twin properties owned by Sun International on the banks of the Zambezi River: The Zambezi Sun (3-4 Star) and the Royal Livingstone (5 Star). The properties are located inside the national park that surrounds the Victoria Falls and are very successful, running almost year round above 90% occupancy. At the time of interview these were the only two international properties operating in Livingstone, but will soon be joined by a new Legacy Hotel Group property and a Protea Hotel (already under construction).

The Zambezi Sun and the Royal Livingstone properties were developed 5 years ago and when they arrived there was zero capacity in Livingstone for any tourism skills from construction all the way through to manning the hotel, so the Sun properties had to setup their own training institute. They have been very successful and have very little staff turnover in all aspects of running the property (maintenance, housekeeping, grounds, operations, etc.). They are slowly phasing out expatriate workers in positions they can, but it is taking a longer time than expected. There is still a legacy in Zambia of hiring for relations versus skills and that needs to be eliminated before complete local management can be in place.

In terms of the other players in the industry the properties see a definite need to contribute to the local tourism economy. After 5 years of extreme success and little spill over to the locally-owned

small accommodation providers, there are some complaints of unfair business practice taking place. Both of the MDs see a role for the Sun properties to assist with the local development. The following points were offered:

- There is a definite need for a tourism school in Livingstone.
- The school needs to be able to turn out vocational skills and management skills.
- Special certificate programs associated should be created such as
  - Guiding: Eco and Adventure Sports
  - Game Lodge Management
  - Guest House Management

The MD at the Zambezi Sun would be personally interested in helping to build and guide the development of the school as he has experience working with government and industry towards the same goals in Botswana.

<b>Table 79: Interest in participating in the TTN in Zambia</b>						
<b>Institution</b>	<b>Review of curriculum</b>	<b>Review of teaching materials</b>	<b>Attend training the trainers</b>	<b>Want to be a pilot institution?</b>	<b>Deliver courses after pilot phase complete?</b>	<b>General comments</b>
HTTI	√	√		√	√	Inappropriate for working with TTN
Sylva Catering, Hospitality and Tourism Training						Inappropriate for working with TTN
ZCAS						Could be good for SME training through the consultancy and research department, but has not worked in tourism to date. They are also interested in the GBSN in general.

## **6.9.5 SMEs**

### *6.9.5.1 Enterprises interviewed*

One SME workshop was held in Livingstone where small tourism enterprises were interviewed. In total 28 individuals attended and 16 small enterprises were interviewed from accommodation providers (n=9) and travel service providers (n=5). Eight of the enterprises provided adequate information (see Table 80).

Issue	Elite Apartment	Zambezi Ultima Search	The Stone Guest House	Jollyboys	Lubamutu Guest House	Guestmate Inn	Livingstone Holiday House	Chapa Classic Lodge
Type of enterprise	Guest house	Lodge	Guest house	Guest house	Guest house	Lodge	Lodge	Lodge
No. visitors: High season	-	180	14	600	-	65	350	46
Low season	-	140	8	300	-	40	150	27
Average length of stay	3 days	2 nights	2 nights	3 nights	2 nights	2 nights	2 nights	2 nights
Price from / to	\$55-70 per night	\$45-65 per night	\$40-80 per night	\$5-35 per night	\$40 per night	\$40-60 per night	\$20-50 per night	\$25-30 per night
Type of guests	50% business 25% leisure 25% other	80% business 15% leisure 5% other	20% business 70% leisure 10% other	2% business 98% leisure	40% leisure 60% other	50% business 30% leisure 20% other	10% business 65% leisure 25% other	65% business 25% leisure 15% other
Country of origin of guests	Norway, Sweden, US, Zimbabwe, Botswana	Zambia, South Africa, Zimbabwe, Namibia	Zambia, South Africa, Zimbabwe, Namibia	UK, US, Holland, German, Australia	Zambia	Zambia, South Africa, US, UK	Zambia	USA, France, Belgium, Italy, Germany
No. full time employees	5	18	9	20	1	7	8	36
No. part time employees	-	-	3	-	2	2	-	20

#### 6.9.5.2 Perception and purpose of training

The SMEs recognised the importance of training, and indicated it was necessary to improve the quality of services and standards in the industry. They recognised the need for languages skills, and that they would like to hire people with better skills. The purpose and reasons for training given by the SMEs are summarised in Table 164, and although there were a wide range of opinions, most indicated that training was used to increase performance and efficiency, acquire skills, upgrade standards, and enhance professionalism.

#### 6.9.5.3 Problems with and relating to training

The SMEs thought that training was unsatisfactory. *External problems* they faced were access to training, unfair competition (big enterprises), limited market access, quality control, etc. *Internal problems* that related to training included the lack of high turnover of employees, low resource base, etc. Other problems they identified are indicated in Table 165, and most enterprises stated that there were scarce financial resources for training.

#### 6.9.5.4 Preferred method of training and training requirements

Enterprises were asked what format they would like training to be presented in; what language; where it would be located; the timing; and what they wanted to receive in return for completing

courses. The results from the five SMEs are indicated in Table 166, and reveal that most would prefer face-to-face training.

#### 6.9.5.5 Willingness to pay

Very few SMEs answered this question. The number of SMEs that answered and the price they specified is listed below (see Table 81). Some enterprises did not specify a price.

Type of course	Number	Prices
1 module: 1/2 day (or 50 page workbook)?	3	\$100, \$500
1 module: 1 day (or 100 page workbook)?	1	\$200
1 module: 2 days (or 200 page workbook)	1	\$30
1 series of modules: 2 weeks (or ten x 100 page workbooks)?	0	
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?	5	\$150, \$150, \$2000

#### 6.9.5.6 Tourism modules

The hotels listed course modules that were available, needed improvement, were not required, and were needed in Zambia by the SMEs, and prioritised modules for development (see Table 167). Although the hotels did not prioritise courses that they wished to see developed most urgently, the new courses that more than half of the enterprises indicated that were needed were:

- 9. Tourism theory
- 10. Tourism policy and legislation
- 12. Tourism destination planning and development
- 13. Tourism business planning
- 14. Tourism business development (*including entrepreneurship and SME development*)
- 15. Responsible and sustainable tourism (*including conservation and poverty alleviation*)
- 16. Options for local communities in tourism (*including joint ventures, public-private partnerships, community based tourism*)
- 18. Hospitality management
- 19. Tour organisation and management
- 21. Conference, Exhibition and Event management
- 26. Transportation for tourists
- 27. Impacts of tourism – economic, environmental, social and cultural
- 28. Tourism research methods

### 6.9.6 Conclusions

There is a major need for vocational training, tertiary education, specialized certificates (guiding, lodge management, tour operations, etc.) and management training for existing operators in Zambia. However, it might not be the role of the GBSN or TTN at this moment, due to an insufficient University or training structure for providing the courses.

A consensus from nearly all stakeholders interviewed was reached that there is an entry point from the World Bank’s SEED program at the SME training level and that the Ministry (maybe working with SEED) should intervene at the vocational level. These programs could come to a head in the form of a “*Tourism Training Institute*” and the facility should be located in Livingstone. Currently, most leisure tourism takes place in Livingstone, however most training is delivered in Lusaka.

The types of courses prioritised by strategic level institutions, training establishments, large operators and SMEs are indicated in Table 82.

<b>Table 82: Summary of tourism modules prioritised in Zambia</b>					
	<b>Strategic institution (n=3)</b>	<b>Training institutions (n=2)</b>	<b>Large operators (n/a)</b>	<b>SMEs (n=14)</b>	<b>Totals</b>
<b>General business modules</b>					
1. Business management	***	**			5
2. Business planning					
3. Financial management		*			1
4. Marketing and marketing management		**			2
5. Human resources management					
6. HIV/AIDs in the workplace					
7. Computer literacy					
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory				Majority	1
10. Tourism policy and legislation				Majority	1
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )					
12. Tourism destination planning and development				Majority	1
13. Tourism business planning	*			Majority	2
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	**			Majority	3
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )				Majority	1
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )				Majority	1
17. Hotel management					
18. Hospitality management				Majority	1
19. Tour organisation and management				Majority	1
20. Tourism attraction management					
21. Conference, Exhibition and Event management					
22. Protected areas and ecotourism management					
23. Field guiding ( <i>cultural and natural</i> )					
24. Food and beverage management					
25. Retail travel					
26. Transportation for tourists				Majority	1
27. Impacts of tourism – economic, environmental, social and cultural				Majority	1
28. Tourism research methods				Majority	1
<b>Other courses</b>					
Life/Soft/Communication Skills	*	*			2
Customer Service/Customer Care	**				2
NB: The SMEs did not prioritise courses, but ones that the majority indicated as required are indicated.					

Overall, the most frequently prioritised courses by the Zambia institutions and businesses were:

- 1. Business management
- 14. Tourism business development (*including entrepreneurship and SME development*)

Other courses that received more than one mention were:

- 4. Marketing and marketing management
- 13. Tourism business planning
- Other: Life/Soft/Communication Skills
- Other: Customer Service/Customer Care

## **Appendices and Annexes**

Appendix 1: Market research questionnaires

Appendix 2: Purpose of training according to the private sector in all countries

Appendix 3: Summary of training problems highlighted by the private sector in all countries

Appendix 4: Preferred method of training and requirements according to the private sector in all countries

Appendix 5: Average amount the private sector in all countries is willing to pay for training

Appendix 6: Detailed country tables

Annex A: University of Pretoria tourism program course information

Annex B: United States International University tourism program course information

## **Briefing note for strategic level institutions**

### **TOURISM TRAINING NETWORK**

This programme will address the shortage of human capital and management capacity by strengthening African tourism management training through a Tourism Training Network (TTN). The TTN will build the capacity of local training institutions and better align tourism training to the needs of the private sector. This program will develop course modules in tourism management and train teachers from leading training institutions in Franco, Luso and Anglophone Africa to deliver the courses. The programme will run for 3 years and include 10 African training institutions starting with 5 in the first year.

The goal of this programme is to increase the capacity of training institutions to create sustainable quality tourism management programmes that offer locally-relevant courses. The programme's three objectives are to:

- 1) gain a greater understanding of current supply and demand of tourism training;
- 2) increase the quantity, relevance and quality of tourism training in Africa; and
- 3) increase the capacity of institutions to implement training.

Phase one will include a market survey to gain a greater understanding of current supply and demand of tourism training. Market research will be undertaken in South Africa, Kenya, Tanzania, Rwanda, Mozambique, Madagascar, Nigeria, Ghana, and Senegal to interview tourism related SMEs and managers, training institutions and tourism development project actors. Current tourism education programmes will be evaluated and teaching materials identified.

The market survey will be used to select five pilot training institutions, design six tourism management courses and produce six locally relevant tourism case studies.

Pilot training institutions will be chosen based on their capacity to carry out the programme's activities, their ability to reach the targeted market, and their institutional support demonstrated by their willingness to contribute travel expenses for faculty to Training of Trainers (TOT) workshops and TTN annual meetings and faculty time to implement modules.

Name of institution	Date of interview
Contact person	Address
Position	
Phone	Fax
Email	Website
Language preference	English / French / Portuguese

Question	Description
1. What tourism-related skills and knowledge are needed in this country?	
2. What are the problems relating to developing these skills / knowledge?	<ul style="list-style-type: none"> <li>a. Scarce financial resources</li> <li>b. Scarcity of local resource people (trainers)</li> <li>c. Unqualified trainers</li> <li>d. Inexperienced trainers</li> <li>e. Trainers with poor communication skills</li> <li>f. Poorly designed training (e.g. lecture-heavy, poor handouts)</li> <li>g. Inappropriate attendees at the training (e.g. too sophisticated or too unsophisticated for the topic taught)</li> <li>h. High turnover of employees (implying constant need for training and retraining)</li> <li>i. No training follow-up</li> <li>j. No link or relevance between training and bottom-line of business</li> <li>k. Lack of awareness of availability of training</li> <li>l. Adequacy of vocational skills and hotel schools (national or private)</li> </ul> Other:
3. Do you know of any other organizations that are working on tourism training programs in the country?	<i>For example: USAID, MCC, EU, NGOs, etc. List and contact details</i>
4. Which institutions offer tourism or business management training programs in this country?	<i>List – those that would be capable of delivering courses and contact details</i>
5. What tourism or business management courses do they offer in	<i>List – name, level and duration – contact details</i>

the country?	
6. What teaching modules are available?	<i>(refer to module list – include)</i>
7. Please can you prioritise the additional tourism-related modules that you need  <i>(Use module list as trigger for module options if necessary)</i>	Top three additional modules needed 1. _____ 2. _____ 3. _____ Others:
8. Do new courses need to be accredited by a local training institution?	Accredited / Peer reviewed / Registered / Moderated / Up to institution / Not required <i>If yes b) Who?</i>
9. Estimated annual demand for these new modules nationally?	<i>Number of students p/a – say from 2008</i>
10. Interested in working with this program to help develop materials address these gaps?	a) Yes / No <i>If yes b) Review of course outline? Yes / No</i> c) Review of full modules? Yes / No
11. Who should pay to take the courses?	Students who do the course:  Students' originating institution:  Subsidy or grant (indicate from whom):  Other:
12. General opinion	This course development for a network of countries – South Africa, Mozambique, Kenya, Tanzania, Rwanda, Madagascar, Senegal, Ghana, and Nigeria  How do you think this could improve the quality and quantity of tourism investment in Africa?

Many thanks for your participation.

	1	2	3	4
<b>Tourism-related modules</b>	<b>Offered already</b>	<b>Offered – but module needs improvement</b>	<b>Not offered – not needed</b>	<b>Not offered - Need this module</b>
<b>General business modules</b>				
1. Business management				
2. Business planning				
3. Financial management				
4. Marketing and marketing management				
5. Human resources management				
6. HIV/AIDs in the workplace				
7. Computer literacy				
8. Corporate social responsibility				
9. Other:				
<b>Specific tourism modules</b>				
10. Tourism theory				
11. Tourism policy and legislation				
12. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )				
13. Tourism destination planning and development				
14. Tourism business planning				
15. Tourism business development ( <i>including entrepreneurship and SMME development</i> )				
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )				
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )				
17. Hotel management				
18. Hospitality management				
19. Tour organisation and management				
20. Tourism attraction management				
21. Conference, Exhibition and Event management				
22. Protected areas and ecotourism management				
23. Field guiding ( <i>cultural and natural</i> )				
24. Food and beverage management				
25. Retail travel				
26. Transportation for tourists				
27. Impacts of tourism – economic, environmental, social and cultural				
28. Tourism research methods				
29. Other:				

## **Briefing note for Training and Education Institutions**

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The market survey will be used to select five pilot training institutions, design six tourism management courses and produce six locally relevant tourism case studies.

Pilot training institutions will be chosen based on their capacity to carry out the programme's activities, their ability to reach the targeted market, and their institutional support demonstrated by their willingness to contribute travel expenses for faculty to Training of Trainers (TOT) workshops and TTN annual meetings and faculty time to implement modules.

Name of institution	Date of interview
Contact person	Address
Position	
Phone	Fax
Email	Website
Language preference for materials	English / French / Portuguese

Question	Description		
<b>A. Existing and required courses</b>			
1. What tourism management and business courses do you currently offer?	<i>List – name, level and duration, get brochures. Executive education courses? Short SME courses?</i>		
2. What modules are included?	<i>(refer to module list at back of questionnaire)</i>		
3. Please can you prioritise the additional tourism-related modules that you need  <i>(Use module list as trigger)</i>	Top three additional modules needed 1. _____ 2. _____ 3. _____ Others:		
4. What tourism management training materials and resources are available to you?	<b>Available</b>	<b>Need improvement</b>	<b>Don't have, but do need</b>
	Lecturers in tourism	n=	
	Lecturers from other fields who could / already teach tourism courses	n=	
	Teaching assistants	n=	
	Classrooms		
	Text books		
	Journals		
	Teaching materials		
	Computers		
	Internet access		
	Communications		
	Financial resources		
	Training follow-up for students		
Comments:			

## Tourism Training Network Industry Questionnaire

<b>B. Structure of courses &amp; process of integrating new courses</b>	
<p>5. Existing module teaching structure</p> <p><i>(include short courses)</i></p>	<p>Normal total indicative hours for a module:</p> <p>* Number of teacher-contact hours: * Self study hours:</p> <p>Method of evaluation: exam / essay / assignment / research / internship</p> <p>Group work: Independent work: Field visits:</p> <p>Other:</p>
<p>6. What format do your modules use?</p>	<p><i>Obtain example if possible / SAQA / NQF or equivalent format</i></p>
<p>7. Preferred way of delivering courses</p>	<ul style="list-style-type: none"> <li>• Face-to-face (traditional classroom) training delivery:</li> <li>• Workbook independent study:</li> <li>• Distance education approach with tutor support by mail, fax, email or telephone:</li> <li>• Other:</li> </ul>
<p>8. Which existing courses could the new modules you indicated in (3) fit within?</p>	<p><i>Including what year – e.g. 1<sup>st</sup> year undergraduate</i> <i>Refer to the list in Question 1</i></p>
<p>9. What is the process of integrating new modules within existing courses?</p>	<p><i>Include administration / timeframe / departments must be submitted to / who needs to be consulted in the institution</i></p>
<p>10. Do they need to be accredited/ peer reviewed / registered with a local institution?</p>	<p>Accredited / Peer reviewed / Registered / Moderated / Not required</p> <p><i>If yes b) By who?</i></p>
<b>C. About your students</b>	
<p>11. Where are your students currently drawn from?</p> <p><i>(and %'s)</i></p>	<p>Countries:</p> <p>Private sector tourism (what types/level):</p> <p>Government (what sector):</p> <p>SMMEs:</p> <p>Students (starting careers):</p> <p>Industries outside tourism (indicate which industry)</p> <p>Other:</p>

Please, complete all questions.

## Tourism Training Network Industry Questionnaire

12. What organisational level do they come from?	Executive management: Manager: Mid-level manager: General staff: Entry level: SMME owner:  Other:	
13. What level of prior learning do they have?	Literate & numerate:  Formal education (university courses):  Applied tourism courses:  Apprentice based learning:  Other:	
14. What jobs do they go on to do after your existing courses?	Develop a tourism businesses (SME): Employee in the tourism sector (e.g. Tourist guide, Tour operator, Travel agent, Hotel, Restaurant, Tourism attraction): Tourism work in a national park or protected area: Government (tourism role): Not tourism industry: Leave the country: Other:	
15. Number of students	a) How many students do you currently have? <i>(breakdown of number of students for different tourism courses – esp Exec Mgt and SME)</i>	b) Estimated annual demand for the new modules from your institution <i>Number of students p/a – say from 2008</i>
<b>D. Capacity and interest to participate in the IFC Tourism Training Network module development program</b>		
16. Interested in working with this program to help develop materials address these gaps?	a) Yes / No  If yes b) Review of course outline? Yes / No  c) Review of full modules? Yes / No	
17. Would your institution be interested in delivering the tourism modules developed?	a) Attending a training-the-trainers session? (Self financed travel/attendance)	Yes / No
	b) Pilot institution for the modules (1 of 5)	Yes / No
	c) Subsequently delivering them if piloting successful	Yes / No
18. Do you know of any interesting local issues that would make good tourism case studies?	a) Yes / No: <i>(Description)</i>  If Yes, b) would you be interested in developing them for the courses? Yes / No:	

Please, complete all questions.

## Tourism Training Network Industry Questionnaire

<b>E. Cost recovery options</b>	
19. How are your courses paid for?	Paid by students:  Paid by originating institution:  Subsidy or grant:  Other
20. How much do they cost?  \$ or Euro	Cost per module / per course:  Cost per year / month / per day / per half day:
<b>F. Other courses in the country &amp; general comments</b>	
21. Which other institutions offer tourism management training programs in this country?	<i>(list – those that would be capable of delivering courses)</i>
22. General opinion	This course development is for a network of countries – South Africa, Mozambique, Kenya, Tanzania, Rwanda, Madagascar, Senegal, Ghana, and Nigeria  How do you think this could improve the quality and quantity of tourism investment in Africa?

Many thanks for your participation.

Please, complete all questions.

## Tourism Training Network Industry Questionnaire

	1	2	3	4
<b>Tourism-related modules</b>	<b>Offered already</b>	<b>Offered – but module needs improvement</b>	<b>Not offered – not needed</b>	<b>Not offered - Need this module</b>
<b>General business modules</b>				
1. Business management				
2. Business planning				
3. Financial management				
4. Marketing and marketing management				
5. Human resources management				
6. HIV/AIDs in the workplace				
7. Computer literacy				
8. Corporate social responsibility				
9. Other:				
<b>Specific tourism modules</b>				
10. Tourism theory				
11. Tourism policy and legislation				
12. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )				
13. Tourism destination planning and development				
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15. Tourism business development ( <i>including entrepreneurship and SMME development</i> )				
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24. Food and beverage management				
25. Retail travel				
26. Transportation for tourists				
27. Impacts of tourism – economic, environmental, social and cultural				
28. Tourism research methods				
29. Other:				

Please, complete all questions.

## **Tourism Training Network Industry Questionnaire**

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The market survey will be used to select five pilot training institutions, design six tourism management courses and produce six locally relevant tourism case studies.

Please, complete all questions.

# TOURISM TRAINING NETWORK INDUSTRY QUESTIONNAIRE

## Section A: General Information

1. Name of Establishment: \_\_\_\_\_
2. Establishment Address: \_\_\_\_\_
3. Business Phone: \_\_\_\_\_ / \_\_\_\_\_ (mobile) / \_\_\_\_\_ (fax)
4. Website: \_\_\_\_\_ 5. Email: \_\_\_\_\_
6. Your Name and Position \_\_\_\_\_ / \_\_\_\_\_ (position)
7. Your Age: \_\_\_\_\_ 8. Your Gender: M / F (please circle)
9. Year Business opened \_\_\_\_\_
10. Number of employees: Full time \_\_\_\_\_ Part time \_\_\_\_\_
11. Business Type \_\_\_\_\_
12. Average number of overnight visitors received per month? \_\_\_\_\_ (high season) \_\_\_\_\_ (low season)
13. Average length of stay? \_\_\_\_\_ days/nights (circle one)
14. Where do most of your visitors come from (which countries .)? \_\_\_\_\_  
\_\_\_\_\_
15. Which category does your establishment/operation best fit in terms of your rates compared to other similar tourism products in your destination? (please circle your response)      **Budget**      **Mid-Range**      **High-End**  
Price Range: in \$ or □ \_\_\_\_\_ to in \$ or □ \_\_\_\_\_ (per person per night or per package – circle one)
16. What percentage of your guests are **Business & conference** \_\_\_\_% **Leisure travelers** \_\_\_\_% **Other** \_\_\_\_\_%

## Section B: Opportunities and Challenges

1. List the three most difficult internal problems (challenges, drawbacks, weaknesses) for the business (e.g., customer satisfaction, staff turnover, quality, waste, complaints, etc)? Indicate whether it is serious problem or just a weakness

Most difficult internal problems	Serious problem	Just a Weakness
i.		
ii.		
iii.		

2. List the three most difficult external problems (challenges, drawbacks, weaknesses) for the business (e.g., competition, market changes, government regulations, etc)? Indicate if it is a serious problem or just a weakness

Most difficult external problems	Serious problem	Just a weakness
i.		
ii.		
iii.		

3. What are the growth opportunities for your business (e.g., new markets or new products)?  
\_\_\_\_\_

## Section C: Training Perception and Needs

- ii. Based on prior experience what is your perception of training and its usefulness? Please Describe: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please, complete all questions.

## Tourism Training Network Industry Questionnaire

iii. In your opinion, what is the overall purpose of training in your opinion? (Please circle all that are appropriate)

- |                         |                         |
|-------------------------|-------------------------|
| a. Increase performance | d. Obtain accreditation |
| b. Increase efficiency  | e. Gain knowledge       |
| c. Acquire skills       | f. Other: _____         |

iv. For what reason(s) do you undertake training? (Please circle all that are appropriate)

- |   |                                      |
|---|--------------------------------------|
| a. Changes in technology                | f. Performance improvement           |
| b. Changes in systems                   | g. Correction of repetitive mistakes |
| c. Upgrading to international standards | h. Gaining accreditation             |
| d. Launching new products or services   | i. To be better than my competitor   |
| e. Need for greater professionalism     | j. Other: _____                      |

v. What is your history of management training? What kinds of management training courses have you taken in the past, duration of course(s) and from whom?

Past Training	Duration	Whom

vi. How much of your management training material is developed in-house? \_\_\_\_\_

vii. How satisfied have you been with the training received? **Very / OK / Not Very**

viii. Why? \_\_\_\_\_

ix. What kinds of problems have you faced when undertaking training? How important is each factor (indicate the 3 *most important* factors)?

Factor	Tick if Problem	Important Factor	Factor	Tick if Problem	Important Factor
Scarce financial resources			Inappropriate attendees at the training (e.g. too sophisticated or too unsophisticated for the topic taught)		
Scarcity of local resource people (trainers)			High turnover of employees (implying constant need for training and retraining)		
Unqualified trainers			No training follow-up		
Inexperienced trainers			No link or relevance between training and bottom-line of business		
Trainers with poor communication skills			Lack of awareness of availability of training		
Poorly designed training (e.g. lecture-heavy, poor handouts)			Other ( <i>Specify</i> )		

Please, complete all questions.

## Tourism Training Network Industry Questionnaire

- x. What method(s) of training do you prefer? Rank preferences from most to least preferred (indicate the 3 *most important* methods).

Method	Tick if Preferred	Important Method	Factor	Tick if Preferred	Important Method
Face-to-face (traditional classroom) training delivery			Radio or television broadcast		
Workbook independent study			Audioconference or videoconference		
CDs and DVDs			Distance education approach with tutor support by mail, fax, email or telephone		
Internet			Other ( <i>Specify</i> )		

- xi. What requirements do you have for training?

a. Language preference: English / French / Portuguese

b. Location preferences

i. On-site (at your place of business) or off-site?

ii. If off-site, how far are you willing to travel for training? \_\_\_\_\_ kms

c. Schedule preferences

i. During business hours?

ii. Evenings?

iii. Weekends?

iv. Other? \_\_\_\_\_

Please, complete all questions.

- xii. What do you want to receive to show that you have completed the course work?
- a. An internationally branded certificate. If so accredited by what body: \_\_\_\_\_
  - b. A national certificate. If so accredited by what body: \_\_\_\_\_
  - c. A certificate/diploma from the Graduate School. \_\_\_\_\_
  - d. Other: \_\_\_\_\_

- xiii. How much are you willing to pay for a one-day equivalent of training in a management topic?

Type of course	Yes / No	Price willing to pay: \$ or €
1 module: 1/2 day (or 50 page workbook)?		
1 module: 1 day (or 100 page workbook)?		
1 module: 2 days (or 200 page workbook)		
1 series of modules: 2 weeks (or ten x 100 page workbooks)?		
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?		

If you are interested in receiving more information about this program at a later date, please tick here:

## **TOURISM TRAINING NETWORK**

This programme will address the shortage of human capital and management capacity by strengthening African tourism management training through a Tourism Training Network (TTN). The TTN will build the capacity of local training institutions and better align tourism training to the needs of the private sector. This program will develop course modules in tourism management and train teachers from leading training institutions in Franco, Luso and Anglophone Africa to deliver the courses. The programme will run for 3 years and aims to ultimately include 10 African training institutions starting with 5 in the first year.

The goal of this programme is to increase the capacity of training institutions to create sustainable quality tourism management programmes that offer locally-relevant courses. The programme's three objectives are to:

- 1) gain a greater understanding of current supply and demand of tourism training;
- 2) increase the quantity, relevance and quality of tourism training in Africa; and
- 3) increase the capacity of institutions to implement training.

Phase one will include a market survey to gain a greater understanding of current supply and demand of tourism training. Market research will be undertaken in South Africa, Kenya, Tanzania, Rwanda, Mozambique, Madagascar, Nigeria, Ghana, and Senegal to interview tourism related SMEs and managers, training institutions and tourism development project actors. Current tourism education programmes will be evaluated and teaching materials identified.

The market survey will be used to select five pilot training institutions, design six tourism management courses and produce six locally relevant tourism case studies.

## Tourism Training Network SME Questionnaire

### Section A: General Information

5. Name of Establishment: \_\_\_\_\_
6. Establishment Address: \_\_\_\_\_
7. Business Phone: \_\_\_\_\_ / \_\_\_\_\_ (mobile) / \_\_\_\_\_ (fax)
8. Website: \_\_\_\_\_ 5. Email: \_\_\_\_\_
8. Your Name and Position \_\_\_\_\_ / \_\_\_\_\_ (position)
9. Your Age: \_\_\_\_\_ 8. Your Gender: M / F (please circle)
17. Year Business opened \_\_\_\_\_
18. Business Type \_\_\_\_\_

For Accommodations	For Tour Operators / guides
Type of Accommodation – Please Describe: <i>(Hotel, B&amp;B, Backpacker, Lodge, etc.)</i>	Type of Tour Operator / guide – Please Describe: <i>(Adventure/sport, ecotourism, cultural, business, Etc)</i>
Number of rooms _____	Average size of group _____
Number of beds _____	Max number of simultaneous groups _____

19. Number of employees: Full time \_\_\_\_\_ Part time \_\_\_\_\_
20. Average number of overnight visitors received per month? \_\_\_\_\_ (high season) \_\_\_\_\_ (low season)
21. Average length of stay? \_\_\_\_\_ days/nights (*circle one*)
22. Where do most of your visitors come from (which countries .)? \_\_\_\_\_
- 
23. Which category does your establishment/operation best fit in terms of your rates compared to other similar tourism products in your destination? (please circle your response)      **Budget**      **Mid-Range**      **High-End**
- Price Range: in \$ or € \_\_\_\_\_ to in \$ or € \_\_\_\_\_ per person per night / per package (*circle one*)
24. What percentage of your guests are **Business & conference** \_\_\_\_% **Leisure travelers** \_\_\_\_% **Other** \_\_\_\_%
25. Do you have a computer at your place of business? **Yes / No** Internet? **Yes / No** Do you check your email daily? **Yes / No**
26. Do you pay commissions to any agents or tour operators currently? **Yes / No / Don't know**
27. Please tick how you currently receive *most* of your bookings/clients:
- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Emails through my own website/brochures<br><input type="checkbox"/> Emails from another website/e-marketplace | <input type="checkbox"/> Message from another accommodation establishment/ tour operator<br><input type="checkbox"/> Message from a Travel Agent<br><input type="checkbox"/> Fax<br><input type="checkbox"/> Mobile / Cellphone | <input type="checkbox"/> Land Telephone<br><input type="checkbox"/> They just arrive (Walk in customers)<br><input type="checkbox"/> Other: _____ |
|--|---|---|

## Tourism Training Network SME Questionnaire

### Section B: Opportunities and Challenges

4. Please name three of your business' Unique Selling Points compared to other similar operators (tourism businesses or accommodations) in the area:

i. \_\_\_\_\_ ii. \_\_\_\_\_ iii. \_\_\_\_\_

5. List the three most difficult internal problems (challenges, drawbacks, weaknesses) for the business (e.g., customer satisfaction, staff turnover, quality, waste, complaints, etc)? Indicate whether it is serious problem or just a weakness

Most difficult internal problems	Serious problem	Just a Weakness
i.		
ii.		
iii.		

6. List the three most difficult external problems (challenges, drawbacks, weaknesses) for the business (e.g., competition, market changes, government regulations, etc)? Indicate if it is a serious problem or just a weakness

Most difficult external problems	Serious problem	Just a weakness
i.		
ii.		
iii.		

7. What are the growth opportunities for your business (e.g., new markets or new products)?

\_\_\_\_\_

### Section C: Training Perception and Needs

xiv. Based on prior experience what is your perception of training and its usefulness? Please describe: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

xv. In your opinion, what is the overall purpose of training in your opinion? (Please circle all that are appropriate)

- |                         |                         |
|-------------------------|-------------------------|
| a. Increase performance | d. Obtain accreditation |
| b. Increase efficiency  | e. Gain knowledge       |
| c. Acquire skills       | f. Other: _____         |

xvi. For what reason(s) do you undertake training? (Please circle all that are appropriate)

- |   |                                      |
|---|--------------------------------------|
| a. Changes in technology                | f. Performance improvement           |
| b. Changes in systems                   | g. Correction of repetitive mistakes |
| c. Upgrading to international standards | h. Gaining accreditation             |
| d. Launching new products or services   | i. To be better than my competitor   |
| e. Need for greater professionalism     | j. Other: _____                      |

xvii. What is your history of training? What kinds of courses have you taken in the past, duration of course(s) and from whom?

Past Training	Duration	Whom

## Tourism Training Network SME Questionnaire

xviii. How satisfied have you been with the training received? **Very / OK / Not Very**

xix. Why? \_\_\_\_\_  
\_\_\_\_\_

xx. What kinds of problems have you faced when undertaking training? How important is each factor (indicate the 3 *most important* factors)?

Factor	Tick if Problem	Important Factor	Factor	Tick if Problem	Important Factor
Scarce financial resources			Inappropriate attendees at the training (e.g. too sophisticated or too unsophisticated for the topic taught)		
Scarcity of local resource people (trainers)			High turnover of employees (implying constant need for training and retraining)		
Unqualified trainers			No training follow-up		
Inexperienced trainers			No link or relevance between training and bottom-line of business		
Trainers with poor communication skills			Lack of awareness of availability of training		
Poorly designed training (e.g. lecture-heavy, poor handouts)			Other ( <i>Specify</i> )		

xxi. What method(s) of training do you prefer? Rank preferences from most to least preferred (indicate the 3 *most important* methods).

Method	Tick if Preferred	Important Method	Factor	Tick if Preferred	Important Method
Face-to-face (traditional classroom) training delivery			Radio or television broadcast		
Workbook independent study			Audioconference or videoconference		
CDs and DVDs			Distance education approach with tutor support by mail, fax, email or telephone		
Internet			Other ( <i>Specify</i> )		

xxii. What requirements do you have for training?

a. Language preference: English / French / Portuguese

b. Location preferences

i. On-site (at your place of business) or off-site?

ii. If off-site, how far are you willing to travel for training? \_\_\_\_\_ kms

c. Schedule preferences

i. During business hours?

iv. Other? \_\_\_\_\_

ii. Evenings?

iii. Weekends?

Please complete all questions

xxiii. What communication channels serve you best to find out about training opportunities? (e.g., local newspaper ads, newsletters, web ads, etc.)? \_\_\_\_\_  
\_\_\_\_\_

xxiv. What do you want to receive to show that you have completed the course work?

a. An internationally branded certificate. If so accredited by what body: \_\_\_\_\_  
\_\_\_\_\_

b. A national certificate. If so accredited by what body: \_\_\_\_\_  
\_\_\_\_\_

c. A certificate/diploma from the Graduate School. \_\_\_\_\_  
\_\_\_\_\_

d. Other: \_\_\_\_\_  
\_\_\_\_\_

xxv. How much are you willing to pay for training in a management topic?

Type of course	Yes / No	Price willing to pay: \$ or €
1 module: 1/2 day (or 50 page workbook)?		
1 module: 1 day (or 100 page workbook)?		
1 module: 2 days (or 200 page workbook)		
1 series of modules: 2 weeks (or ten x 100 page workbooks)?		
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?		

If you are interested in receiving more information about this program at a later date, please tick here:

## Appendix 7: Purpose of training according to the private sector in all countries

Large enterprises did not complete the questionnaire in Ghana, Senegal, Tanzania or Zambia. Averages have been calculated from the number of Small (S) and Large (L) institutions that commented on each issue, rather than the total sample of 86 contributors. Note that an average is given, although in some cases there may have been one or more responses to each of the categories presented (see Table 83).

<b>Table 83: Purpose of training highlighted by the private sector</b>																			
<b>Type of training</b>	<b>Ghana</b>		<b>Kenya</b>		<b>Madag.</b>		<b>Mozamb.</b>		<b>Rwanda</b>		<b>Senegal</b>		<b>South Afr</b>		<b>Tanzania</b>		<b>Zambia</b>		<b>Tot</b>
	S n=3	L n=0	S n=6	L n=3	S n=5	L n=3	S n=3	L n=2	S n=5	L n=2	S n=7	L n=0	S n=3	L n=2	S n=31	L n=0	S n=16	L n=0	% N=86
<b>Purpose of training</b>																			
Increase performance	3		5	3		2	3	2	4	1	6		3	2	17		14		<b>71%</b>
Increase efficiency	3		5	2	5	2	3	1	4	2	6		3	2	20		13		<b>78%</b>
Acquire skills	3		6	2	5	3	3	1	3	2	6		2	2	14		13		<b>71%</b>
Obtain accreditation			2	1	1	1	1	1	1						10		3		<b>28%</b>
Gain knowledge	3		5	2	2	1	2	1	3	1	3			2	18		12		<b>63%</b>
<b>Reasons for training</b>																			
Changes in technology	2		3	3	3		1			1	3		2	1	10		9		<b>47%</b>
Changes in systems	1		4	3			1		1	1	2			2	9		8		<b>39%</b>
Upgrading to international standards	3		4	3	5	2	3	2	3	1	4		1	1	18		13		<b>69%</b>
Launching new products or services	2		3	3	1		1			1	3			2	12		8		<b>46%</b>
Need for greater professionalism	3		5	3	4	3	2	1	5	2	6		1	2	16		13		<b>73%</b>
Performance improvement	1		6	3	4	2	3	2	4	1	7		3	2	16		15		<b>76%</b>
Correction of repetitive mistakes	1		4	3	3	2	3	1	2	1	5			2	10		9		<b>52%</b>
Gaining accreditation	1		3	1		1	1							1	7		5		<b>28%</b>
To be better than my competitor	1		2	2	3	2	1		2	1	4			2	12		7		<b>45%</b>

## Appendix 8: Summary of training problems highlighted by the private sector in all countries

Large enterprises did not complete the questionnaire in Ghana, Senegal, Tanzania or Zambia. Averages have been calculated from the number of Small (S) and Large (L) institutions that commented on each issue, rather than the total sample of 87 contributors. Note that an average is given, although in some cases there may have been one or more responses to each of the categories presented (see Table 84).

Problem noted	Ghana		Kenya		Madag.		Mozamb.		Rwanda		Senegal		South Afr.		Tanzania		Zambia		Tot
	S n=3	L n=0	S n=5	L n=3	S n=3	L n=3	S n=3	L n=2	S n=5	L n=1	S n=7	L n=0	S n=3	L n=2	S n=31	L n=0	S n=16	L n=0	% N=87
Scarce financial resources	1		4	2	2	2	1		2	1	1				6		11		<b>41%</b>
Scarcity of local trainers	1		3	3	3	2	2	1	3	1	4			2	6		6		<b>44%</b>
Unqualified trainers			2	1	2	1			1	1	2				5		3		<b>24%</b>
Inexperienced trainers	1		2	1	1	2	1		1	1	2				6		5		<b>29%</b>
Trainers with poor communication skills	1		2		1	2			2	1	3			1	6		4		<b>30%</b>
Poorly designed training			2		2	1	1	1			2			1	6		6		<b>30%</b>
Inappropriate attendees at training			2		1	2				1				1	3		4		<b>23%</b>
High turnover of employees	2		2	1	1	2	1		2	1				3	1	4		5	<b>32%</b>
No training follow up	2		4	3	2	3	1		3	1	1			1	2	7		6	<b>42%</b>
No relevance of training and bottom-line of business			3		2	2	1							1	1	4		5	<b>29%</b>
Lack of awareness of availability of training			3			2	1		3	1					4		3		<b>27%</b>

## Appendix 9: Preferred method of training and requirements according to the private sector in all countries

Large enterprises did not complete the questionnaire in Ghana, Senegal, Tanzania or Zambia. Averages have been calculated from the number of Small (S) and Large (L) institutions that commented on each issue, rather than the total sample of 91 contributors. Note that an average is given, although in some cases there may have been one or more responses to each of the categories presented (see Table 85).

Type of training	Ghana		Kenya		Madag.		Mozamb.		Rwanda		Senegal		South Af		Tanzania		Zambia		Total % N=91
	S n=3	L n=0	S n=6	L n=3	S n=5	L n=3	S n=3	L n=2	S n=5	L n=2	S n=7	L n=0	S n=3	L n=2	S n=31	L n=0	S n=16	L n=0	
Face-to-face	3		6	3	5	1	3	2	3	2	4		3	2	14		14		<b>71%</b>
Workbook/independent			4	1	4	1	1	1	2	1	5				6		7		<b>40%</b>
CDs and DVDs	2		2	2	4	2	2		5	1	6			1	10		6		<b>50%</b>
Internet	1		1	1	2		1		2	1	2		1		7		4		<b>27%</b>
Radio or TV broadcast	1		3		2	1			1					1	5		2		<b>23%</b>
Audio/video conf.	1			1	1	1	1	1	1					1	9		2		<b>26%</b>
Distance education	2			3	1	1	2		2	1	2		1		5		4		<b>29%</b>
Language - English	3		6	3	2	1	3	1	4				2	2	31		15		<b>89%</b>
- French	1				5	3			2	2	7				1		1		<b>31%</b>
- Portuguese							2	2											<b>80%</b>
Location - onsite			3	2	3	2	1	2	4	2	6			2	9		6		<b>48%</b>
- off-site?	3		3	3	4	1	3	2	3	2	1		3		10		7		<b>51%</b>
During - business hours	1		2	2	3	3	3	1	1	2	2			2	9		6		<b>42%</b>
- evenings	2		2	1	4	1	1	1	3		4		2		6		5		<b>38%</b>
- weekends			2				1		3		2				2		1		<b>15%</b>
Obtain - an internationally branded certificate	2				4	2	3	1	3		4			1	9		7		<b>49%</b>
- national certificate					1						1		1		5		4		<b>19%</b>
- certificate from graduate school			2	1	1		1						2		4		3		<b>22%</b>
- other certificate			2	1					2	1				1					<b>47%</b>

## Appendix 10: Average amount the private sector in all countries is willing to pay for training

Large enterprises did not complete the questionnaire in Ghana, Senegal, Tanzania or Zambia. Averages have been calculated from the number of Small (S) and Large (L) institutions that commented on each issue, rather than the total sample of 87 contributors. Note that an average is given, although in some cases there may have been one or more responses to each of the categories presented (see Table 86).

<b>Table 86: Average amount the private sector is willing to pay for training</b>																			
Type of course	Ghana		Kenya		Madag.		Mozamb.		Rwanda		Senegal		South Afr.		Tanzania		Zambia		Total
	S n=3	L n=0	S n=3	L n=2	S n=4	L n=2	S n=3	L n=2	S n=4	L n=1	S n=7	L n=0	S n=1	L n=2	S n=11	L n=0	S n=3	L n=0	Ave. N=48
1 module: ½ day (or 50 page workbook)?	\$150		\$72		\$6	\$13	\$20	\$10	\$20				\$55	\$286	\$63		\$30		<b>\$26</b>
1 module: 1 day (or 100 page workbook)?	\$200			\$150	\$12	\$47		\$15	\$60	\$1344			\$85		\$550		\$200		<b>\$81</b>
1 module: 2 days (or 200 page workbook)	\$250		\$200		\$33	\$40	\$60	\$30	\$320				\$85	\$900	\$150		\$30		<b>\$55</b>
1 series of modules: 2 weeks (or ten x 100 page workbooks)?	\$200					\$54		\$150	\$250		\$403		\$850	\$571	\$260				<b>\$86</b>
Full course: three 2-week series of modules (or for thirty x 100 page workbooks)?	\$250		\$372	\$800	\$17		\$250	\$150	\$500						\$459		\$767		<b>\$102</b>

## Appendix 11: Detailed country tables

The tables in this appendix are cross referenced and described in the text of the ‘Country reports’ sections of the main report.

### GHANA

Additional courses offered by training institutions in Ghana:

- HOTCATT- Life skills (short-course)
- School of Hotel, Restaurant and Tourism Management - Introduction to Operations Certificate, Management Program
- GIMPA - Public Administration, Business Administration, Economics, Marketing, Accounting, Banking and Finance, Accounting and Finance, Information & Communication Technology

Problem noted	% agreement	Comments
Scarce financial resources	100%	
Scarcity of local trainers	100%	Only a few institutions offering training and a much greater need
Unqualified trainers	100%	
Inexperienced trainers	66%	
Trainers with poor communication skills	33%	
Poorly designed training	100%	Courses are very old and not geared to the needs of the market
Inappropriate attendees at training	0%	
High turnover of employees	33%	
No training follow up	100%	
No relevance of training and bottom-line of business	100%	For management courses
Lack of awareness of availability of training	0%	Didn't think was a problem because such limited training
Adequacy of vocational skills and hotel schools (national or private)	100%	Just doesn't suit the markets needs
<i>No. respondents =3 (With Formal Surveys)</i>		

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management		1		1	
2. Business planning				2	
3. Financial management		2			*
4. Marketing and marketing management		1		1	
5. Human resources management		1		1	*
6. HIV/AIDs in the workplace		1		1	
7. Computer literacy	1	1			
8. Corporate social responsibility		1		1	
<b>Specific tourism modules</b>					
9. Tourism theory		2			
10. Tourism policy and legislation				2	
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)		1		1	
12. Tourism destination planning and development		1		1	*
13. Tourism business planning		1		1	
14. Tourism business development				2	

<i>(including entrepreneurship and SME development)</i>					
15. Responsible and sustainable tourism <i>(including conservation and poverty alleviation)</i>				2	
16. Options for local communities in tourism <i>(including joint ventures, public-private partnerships, community based tourism)</i>				2	
17. Hotel management	1	1			
18. Hospitality management	1	1			
19. Tour organisation and management		2			
20. Tourism attraction management				2	
21. Conference, Exhibition and Event management				2	**
22. Protected areas and ecotourism management				2	
23. Field guiding <i>(cultural and natural)</i>				2	**
24. Food and beverage management		2			
25. Retail travel	2				
26. Transportation for tourists				2	
27. Impacts of tourism – economic, environmental, social and cultural		1		1	
28. Tourism research methods		1		1	
<b>Other courses</b>					
Customer Care/Customer Service				2	**
Destination Marketing				1	*
NB: Number of institutions = 2					

<b>Table 89: Number of Ghana training institutions reporting specific tourism module needs</b>					
<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management	2			2	**
2. Business planning	2			2	
3. Financial management	1	1		2	*
4. Marketing and marketing management	3			1	
5. Human resources management	1	1		2	
6. HIV/AIDs in the workplace	1	1		2	
7. Computer literacy	2	2			*
8. Corporate social responsibility		2		2	
<b>Specific tourism modules</b>					
9. Tourism theory	1	2	1		
10. Tourism policy and legislation	1	2	1		
11. Tourism resources <i>(including natural, cultural, infrastructure, human and financial, macro-environment)</i>	1	2		1	
12. Tourism destination planning and development	1	1	1	1	*
13. Tourism business planning		1	1	2	
14. Tourism business development <i>(including entrepreneurship and SME development)</i>		1	1	2	
15. Responsible and sustainable tourism <i>(including conservation and poverty alleviation)</i>		2	1	1	
16. Options for local communities in tourism <i>(including joint ventures, public-private partnerships, community based)</i>		1	1	2	

<i>tourism)</i>					
17. Hotel management	2	2			**
18. Hospitality management	2	2			
19. Tour organisation and management		3		1	**
20. Tourism attraction management		2	1	1	
21. Conference, Exhibition and Event management			1	3	*
22. Protected areas and ecotourism management			1	3	
23. Field guiding ( <i>cultural and natural</i> )		2		2	
24. Food and beverage management	2	2			**
25. Retail travel	1		2	1	
26. Transportation for tourists	1	1		2	
27. Impacts of tourism – economic, environmental, social and cultural	1	1	1	1	
28. Tourism research methods	1			3	
<b>Other courses</b>					
Practical Skills for managers (Vocational)		1			*
Customer Service		2			
Soft Skills		1			
Basic Workplace Skills		1			*
Risk & Safety Management				1	*
NB: Number of institutions = 4					

<b>Table 90: Purpose and reasons for training in Ghana for SMEs</b>	
<b>Reasons for training</b>	<b>Level of agreement (n=3)</b>
<b>Purpose of training</b>	
Increase performance	100%
Increase efficiency	100%
Acquire skills	100%
Obtain accreditation	0%
Gain knowledge	100%
<b>Reasons to undertake training</b>	
Changes in technology	66%
Changes in systems	33%
Upgrading to international standards	100%
Launching new products or services	66%
Need for greater professionalism	100%
Performance improvement	33%
Correction of repetitive mistakes	33%
Gaining accreditation	33%
To be better than my competitor	33%

<b>Table 91: Problems with training identified by Ghana SMEs</b>	
<b>Problems</b>	<b>Level of agreement (n=3)</b>
Scarce financial resources	33%
Scarcity of local resource people (trainers)	33%*
Unqualified trainers	-
Inexperienced trainers	33%
Trainers with poor communication skills	33%
Poorly designed training (i.e. lecture-heavy, poor handouts)	-
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	-
High turnover of employees (implying constant need for training and retraining)	66%*
No training follow-up	66%
No link or relevance between training and bottom-line of business	-
Lack of awareness of availability of training	-
* If at least one interviewee thought the problem was serious	

Type of training	Level of agreement (n=3)
Face-to-face (traditional classroom) training delivery	100%*
Workbook independent study	-
CDs and DVDs	66%
Internet	33%
Radio or television broadcast	33%
Audio-conference or videoconference	33%
Distance education approach with tutor support by mail, fax, email or telephone	66%
Language - English, French, Portuguese	French (33%), English (100%)
Location: onsite or off-site?	Offsite (within Ghana)
Timing preferences: business hours, evenings, weekends?	Business hours (33%); Evenings (66%)
Type of certificate required to show training completed	Internationally branded certificate (66%)

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (not done)
<b>General business modules</b>					
1. Business management	2			1	*
2. Business planning	2			1	
3. Financial management	2			1	*
4. Marketing and marketing management	2				
5. Human resources management	1				
6. HIV/AIDs in the workplace		1			
7. Computer literacy	1	1			
8. Corporate social responsibility	1				
<b>Specific tourism modules</b>					
9. Tourism theory		2			
10. Tourism policy and legislation		1			
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )					
12. Tourism destination planning and development					
13. Tourism business planning		2			
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )				1	*
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )				1	
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )			1		
17. Hotel management		1			
18. Hospitality management		1			
19. Tour organisation and management	1	2			
20. Tourism attraction management					
21. Conference, Exhibition and Event management		1			
22. Protected areas and ecotourism management					
23. Field guiding ( <i>cultural and natural</i> )		1			
24. Food and beverage management		1			

25. Retail travel		1			
26. Transportation for tourists	1	1			
27. Impacts of tourism – economic, environmental, social and cultural		1			
28. Tourism research methods		1			
<b>Other courses</b>					
NB: Number of institutions = 3 – but not all answered all					

## KENYA

Additional courses offered by training institutions in Kenya:

- Jomo Kenyatta University of Agriculture & Technology - Diplomas in, Microfinance, Business, Enterprises, HR management; Bachelors in Business and IT, Commerce, Purchasing and supplies; Postgraduate courses in Entrepreneurship, MBA, Human Resource Management, Procurement and logistics.
- Strathmore Business School – Diplomas in Business IT (1 yr), Leadership and management (1 yr); Bachelors in Commerce (4 yrs), Business IT (4 yrs); postgraduate courses in Commerce (2 yrs), Science in IT (2 yrs), Business Administration (MBA), Information systems

<b>Problem noted</b>	<b>% agreement</b>	<b>Comments</b>
Scarce financial resources	100%	
Scarcity of local trainers	100%	
Unqualified trainers	66%	
Inexperienced trainers	66%	
Trainers with poor communication skills	66%	
Poorly designed training	33%	Very theoretical. Training for SMEs difficult
Inappropriate attendees at training	33%	
High turnover of employees	100%	Once trained, they are mobile
No training follow up	100%	
No relevance of training and bottom-line of business	0%	Very little for SMEs.
Lack of awareness of availability of training	66%	Problem for SMEs
Adequacy of vocational skills and hotel schools (national or private)	66%	
<i>No. respondents =3</i>		

<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management	2	1			*
2. Business planning		3			
3. Financial management		3			
4. Marketing and marketing management	1	2			*
5. Human resources management	1	2			
6. HIV/AIDS in the workplace		2		1	
7. Computer literacy		2		1	
8. Corporate social responsibility					

<b>Specific tourism modules</b>					
9. Tourism theory	3				
10. Tourism policy and legislation		1		2	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )	1	2			
12. Tourism destination planning and development		2		1	
13. Tourism business planning	1	1		1	*
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )				3	**
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	1	1		1	
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	1			2	**
17. Hotel management	3				
18. Hospitality management	3				
19. Tour organisation and management	2	1			
20. Tourism attraction management		1		2	
21. Conference, Exhibition and Event management		1		2	
22. Protected areas and ecotourism management		3			*
23. Field guiding ( <i>cultural and natural</i> )	2	1			
24. Food and beverage management	2		1		
25. Retail travel	1	1	1		
26. Transportation for tourists	2	1			
27. Impacts of tourism – economic, environmental, social and cultural	1	1		1	
28. Tourism research methods	2			1	
<b>Other courses</b>					
Corporate governance		1			
Behavioural changes					*
Changing trends in tourism					*
Change management in tourism					*
NB: Number of institutions = 3					

<b>Table 96: Purpose and reasons for training: Large enterprises in Kenya</b>	
<b>Reasons for training</b>	<b>Level of agreement (n=3)</b>
<b>Purpose of training</b>	
Increase performance	100%
Increase efficiency	66%
Acquire skills	66%
Obtain accreditation	33%
Gain knowledge	66%
<b>Reasons to undertake training</b>	
Changes in technology	100%
Changes in systems	100%
Upgrading to international standards	100%
Launching new products or services	100%
Need for greater professionalism	100%
Performance improvement	100%
Correction of repetitive mistakes	100%

Gaining accreditation	33%
To be better than my competitor	66%
<b>Table 97: Problems with training for large enterprises in Kenya</b>	
<b>Problems</b>	<b>Level of agreement (n=3)</b>
Scarce financial resources	66% *
Scarcity of local resource people (trainers)	100% *
Unqualified trainers	33%*
Inexperienced trainers	33%
Trainers with poor communication skills	-
Poorly designed training (i.e. lecture-heavy, poor handouts)	-
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	-
High turnover of employees (implying constant need for training and retraining)	33%
No training follow-up	100% *
No link or relevance between training and bottom-line of business	-
Lack of awareness of availability of training	-
* If at least one interviewee thought the problem was serious	

<b>Table 98: Preferred method of training and requirements</b>	
<b>Type of training</b>	<b>Level of agreement (n=3)</b>
Face-to-face (traditional classroom) training delivery	100%
Workbook independent study	33%
CDs and DVDs	66%
Internet	33%
Radio or television broadcast	-
Audio-conference or videoconference	33%
Distance education approach with tutor support by mail, fax, email or telephone	100%
Language - English, French, Portuguese	English (100%)
Location: onsite or off-site?	Onsite (66%) Offsite (within Kenya) (100%)
Timing preferences: business hours, evenings, weekends?	Business hours (66%), Evenings (33%)
Type of certificate required to show training completed	Any certificate (33%); Certificate from graduate school (33%)

<b>Table 99: Kenyan large tourism enterprises reporting specific tourism module needs</b>					
<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules (not done)</b>
<b>General business modules</b>					
1. Business management	3				
2. Business planning	2	1			
3. Financial management	2			1	
4. Marketing and marketing management	2		1		
5. Human resources management	3				
6. HIV/AIDs in the workplace	1	1			
7. Computer literacy	1	2			
8. Corporate social responsibility			1		
<b>Specific tourism modules</b>					
9. Tourism theory	1	2			
10. Tourism policy and legislation	1	2			
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)	1		2		

12. Tourism destination planning and development	1		1	1	
13. Tourism business planning	1		1	1	
14. Tourism business development (including entrepreneurship and SME development)	1		1	1	
15. Responsible and sustainable tourism (including conservation and poverty alleviation)	1		1	1	
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)			1	1	
17. Hotel management	1	2			
18. Hospitality management	1	2			
19. Tour organisation and management	1	2			
20. Tourism attraction management	1	2		1	
21. Conference, Exhibition and Event management	1	1		1	
22. Protected areas and ecotourism management	1	1		1	
23. Field guiding (cultural and natural)	1	2			
24. Food and beverage management	1	2			
25. Retail travel	1	1	1		
26. Transportation for tourists	1	2			
27. Impacts of tourism – economic, environmental, social and cultural	1	2			
28. Tourism research methods	1	1		1	
<b>Other courses</b>					
Health and safety (rather than HIV only)		1			
Leadership		1			
NB: Number of institutions = 3					

Reasons for training	Level of agreement (n=6)
<b>Purpose of training</b>	
Increase performance	83%
Increase efficiency	83%
Acquire skills	100%
Obtain accreditation	33%
Gain knowledge	83%
<b>Reasons to undertake training</b>	
Changes in technology	50%
Changes in systems	66%
Upgrading to international standards	66%
Launching new products or services	50%
Need for greater professionalism	83%
Performance improvement	100%
Correction of repetitive mistakes	66%
Gaining accreditation	50%
To be better than my competitor	33%

Problems	Level of agreement (n=5)
Scarce financial resources	80%
Scarcity of local resource people (trainers)	60%*
Unqualified trainers	40%*
Inexperienced trainers	40%
Trainers with poor communication skills	40%*

Poorly designed training (i.e. lecture-heavy, poor handouts)	40%*
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	40%*
High turnover of employees (implying constant need for training and retraining)	40%
No training follow-up	80%*
No link or relevance between training and bottom-line of business	60%*
Lack of awareness of availability of training	60%
* If at least one interviewee thought the problem was serious	

Type of training	Level of agreement (n=6)
Face-to-face (traditional classroom) training delivery	100%
Workbook independent study	66%
CDs and DVDs	33%
Internet	17%
Radio or television broadcast	50%
Audio-conference or videoconference	-
Distance education approach with tutor support by mail, fax, email or telephone	-
Language - English, French, Portuguese	English and Kiswahili
Location: onsite or off-site?	Onsite (50%); within 20 km (33%); within 150 km (17%)
Timing preferences: business hours, evenings, weekends?	Business hours (33%); evenings (33%); weekends (33%)
Type of certificate required to show training completed	Graduate school certificate (33%); certificate from course organisers (33%)

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (not done)
<b>General business modules</b>					
1. Business management				1	
2. Business planning				1	
3. Financial management				1	
4. Marketing and marketing management				1	
5. Human resources management		1			
6. HIV/AIDs in the workplace	1				
7. Computer literacy	1				
8. Corporate social responsibility		1			
<b>Specific tourism modules</b>					
9. Tourism theory	1				
10. Tourism policy and legislation		1			
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)		1			
12. Tourism destination planning and development		1			
13. Tourism business planning				1	
14. Tourism business development (including entrepreneurship and SME development)				1	
15. Responsible and sustainable tourism (including conservation and poverty alleviation)		1			
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)				1	
17. Hotel management	1				

18. Hospitality management	1				
19. Tour organisation and management		1			
20. Tourism attraction management		1			
21. Conference, Exhibition and Event management				1	
22. Protected areas and ecotourism management		1			
23. Field guiding ( <i>cultural and natural</i> )	1				
24. Food and beverage management	1				
25. Retail travel	1				
26. Transportation for tourists	1				
27. Impacts of tourism – economic, environmental, social and cultural		1			
28. Tourism research methods				1	
NB: Number of institutions = 1					

## MADAGASCAR

Additional courses offered by training institutions in Madagascar:

- Institut Catholique de Madagascar – Bachelors and postgraduate courses in Economics and management
- INSCAE – Bachelors in Finance and Business Administration; postgraduate courses in Accountancy control audit, Marketing and strategy, International commerce, Research, Management control and operational audit, Finance and banking, Business Administration; 1-60 day vocational courses in Management, Marketing, Finance, Computing, Languages (French, English)
- ISCAM – Bachelors and postgraduate courses in Marketing and communication, Management, Foreign international trade, Accounting, Human resources management, Financial management, Company strategy and development

<b>Problem noted</b>	<b>% agreement</b>	<b>Comments</b>
Scarce financial resources	83%	This is a major problem, to find money to pay for training.
Scarcity of local trainers	100%	There are no real trainers available
Unqualified trainers	83%	
Inexperienced trainers	50%	There is training in flora and fauna, but not for guiding tourists.
Trainers with poor communication skills	17%	
Poorly designed training	67%	
Inappropriate attendees at training	33%	
High turnover of employees	50%	
No training follow up	67%	
No relevance of training and bottom-line of business	17%	
Lack of awareness of availability of training	33%	There is a lack of communication
Adequacy of vocational skills and hotel schools (national or private)	83%	There is only the INTH, but they offer general basic, not specific training.
<i>No. respondents = 6</i>		

<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management	4	2			*
2. Business planning	1	4		1	

3. Financial management	3	2		1	*
4. Marketing and marketing management	3	1		2	*
5. Human resources management	2	3	1		
6. HIV/AIDs in the workplace		3	1		
7. Computer literacy	4	1		1	
8. Corporate social responsibility	2	1		3	
<b>Specific tourism modules</b>					
9. Tourism theory	1	2	1	2	
10. Tourism policy and legislation	1		1	4	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )	1	1		3	
12. Tourism destination planning and development	1	1		3	
13. Tourism business planning		1		5	***
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )		2		4	****
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )		1	1	3	**
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )				5	**
17. Hotel management	3	1	1	1	*
18. Hospitality management	3	2		1	*
19. Tour organisation and management	2	1		3	
20. Tourism attraction management	1		1	4	
21. Conference, Exhibition and Event management	1	2		3	
22. Protected areas and ecotourism management	1	2		3	
23. Field guiding ( <i>cultural and natural</i> )	1	5			*
24. Food and beverage management	2	3		1	
25. Retail travel	1	2		3	
26. Transportation for tourists		2		4	
27. Impacts of tourism – economic, environmental, social and cultural		1		5	
28. Tourism research methods				6	
<b>Other courses</b>					
Credit application (accounting)				1	
Basic level staff training				1	*
Success stories from other countries				1	
Statistics for tourism				1	
Languages		1			
NB: Number of institutions = 6					

<b>Table 106: Number of Madagascar training institutions reporting specific tourism module needs</b>					
<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management	2	2		1	
2. Business planning	2	2		1	*
3. Financial management	3	2			
4. Marketing and marketing management	4	1			
5. Human resources management	2	3			
6. HIV/AIDs in the workplace			3	2	

7. Computer literacy	4	1			
8. Corporate social responsibility		1	2	1	
<b>Specific tourism modules</b>					
9. Tourism theory	1	1		2	**
10. Tourism policy and legislation	3	1		1	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )	1	3		1	*
12. Tourism destination planning and development	1			4	**
13. Tourism business planning	1	2		2	*
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )		2		2	*
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )		2	2	1	*
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )		2	1	2	*
17. Hotel management	1	2		2	*
18. Hospitality management	2	1		2	
19. Tour organisation and management	2	1	1	1	*
20. Tourism attraction management			2	3	
21. Conference, Exhibition and Event management		2		3	
22. Protected areas and ecotourism management		2	1	2	**
23. Field guiding ( <i>cultural and natural</i> )	1	2	1	1	*
24. Food and beverage management	1	2	1		
25. Retail travel		1	3	1	
26. Transportation for tourists			3	2	
27. Impacts of tourism – economic, environmental, social and cultural		2	1	2	
28. Tourism research methods			2	2	
<b>Other courses</b>					
Management and leadership in tourism				1	*
Languages – French, English, German, Swahilli				1	
Conflict management				1	
Interpersonal development				1	
Management and marketing of ecotourism				1	*
Information management	1				
Ticketing	1				
NB: Number of institutions = 5					

<b>Table 107: Purpose and reasons for training among large enterprises in Madagascar</b>	
<b>Reasons for training</b>	<b>Level of agreement (n=3)</b>
<b>Purpose of training</b>	
Increase performance	66%
Increase efficiency	66%
Acquire skills	100%
Obtain accreditation	33%
Gain knowledge	33%
<b>Reasons to undertake training</b>	
Changes in technology	-

Changes in systems	-
Upgrading to international standards	66%
Launching new products or services	-
Need for greater professionalism	100%
Performance improvement	66%
Correction of repetitive mistakes	66%
Gaining accreditation	33%
To be better than my competitor	66%

<b>Problems</b>	<b>Level of agreement (n=3)</b>
Scarce financial resources	66%
Scarcity of local resource people (trainers)	66%*
Unqualified trainers	33%
Inexperienced trainers	66%
Trainers with poor communication skills	66%*
Poorly designed training (i.e. lecture-heavy, poor handouts)	33%*
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	66%*
High turnover of employees (implying constant need for training and retraining)	66%*
No training follow-up	100%*
No link or relevance between training and bottom-line of business	66%*
Lack of awareness of availability of training	66%*

*\* If at least one interviewee thought the problem was serious*

<b>Type of training</b>	<b>Level of agreement (n=3)</b>
Face-to-face (traditional classroom) training delivery	33%
Workbook independent study	33%
CDs and DVDs	66%
Internet	
Radio or television broadcast	33%
Audio-conference or videoconference	33%
Distance education approach with tutor support by mail, fax, email or telephone	
Language - English, French, Portuguese	French and English
Location: onsite or off-site?	Onsite; within 8 km
Timing preferences: business hours, evenings, weekends?	Business hours & evenings
Type of certificate required to show training completed	From FHORM; from UNWTO; professional diplomas

<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules (not done)</b>
<b>General business modules</b>					
1. Business management	1			1	
2. Business planning			1		
3. Financial management		1		1	
4. Marketing and marketing management	1	1			
5. Human resources management		1	1		
6. HIV/AIDs in the workplace		1			
7. Computer literacy		1			
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory		1			
10. Tourism policy and legislation				1	*
11. Tourism resources (including natural, cultural, infrastructure, human and			1		

<i>financial, macro-environment)</i>					
12. Tourism destination planning and development		1			
13. Tourism business planning			1	1	
14. Tourism business development (including entrepreneurship and SME development)				1	
15. Responsible and sustainable tourism (including conservation and poverty alleviation)	1				
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)		1			
17. Hotel management		2			
18. Hospitality management		2			
19. Tour organisation and management			1		
20. Tourism attraction management			2		
21. Conference, Exhibition and Event management				1	
22. Protected areas and ecotourism management		1			*
23. Field guiding (cultural and natural)		1			
24. Food and beverage management		1			
25. Retail travel				1	
26. Transportation for tourists		1			
27. Impacts of tourism – economic, environmental, social and cultural		1			*
28. Tourism research methods			1	1	
NB: Number of institutions = 2					

**Table 111: Purpose and reasons for training for Madagascan SMEs**

Reasons for training	Level of agreement (n=5)
<b>Purpose of training</b>	
Increase performance	100%
Increase efficiency	100%
Acquire skills	100%
Obtain accreditation	20%
Gain knowledge	40%
<b>Reasons to undertake training</b>	
Changes in technology	60%
Changes in systems	-
Upgrading to international standards	100%
Launching new products or services	20%
Need for greater professionalism	80%
Performance improvement	80%
Correction of repetitive mistakes	60%
Gaining accreditation	-
To be better than my competitor	60%

**Table 112: Problems with training for SMEs in Madagascar**

Problems	Level of agreement (n=3)
Scarce financial resources	66%*
Scarcity of local resource people (trainers)	100%*
Unqualified trainers	66%*
Inexperienced trainers	33%
Trainers with poor communication skills	33%
Poorly designed training (i.e. lecture-heavy, poor handouts)	66%

Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	33%
High turnover of employees (implying constant need for training and retraining)	33%
No training follow-up	66%*
No link or relevance between training and bottom-line of business	66%*
Lack of awareness of availability of training	-
* If at least one interviewee thought the problem was serious	

Type of training	Level of agreement (n=5)
Face-to-face (traditional classroom) training delivery	100%
Workbook independent study	80%
CDs and DVDs	80%
Internet	40%
Radio or television broadcast	40%
Audio-conference or videoconference	20%
Distance education approach with tutor support by mail, fax, email or telephone	20%
Language - English, French, Portuguese	French and English
Location: onsite or off-site?	Onsite (60%); within 5 km (40%)
Timing preferences: business hours, evenings, weekends?	Business hours (60%); evenings (80%)
Type of certificate required to show training completed	Internationally branded (80%); national certificate (20%); graduate school certificate (20%)

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management		3		1	
2. Business planning		2		2	
3. Financial management		3		1	
4. Marketing and marketing management		3		1	*
5. Human resources management		3		1	
6. HIV/AIDs in the workplace			1	3	
7. Computer literacy	1	1		2	
8. Corporate social responsibility			1	3	
<b>Specific tourism modules</b>					
9. Tourism theory		3		1	
10. Tourism policy and legislation		2		2	
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)	1	1		2	
12. Tourism destination planning and development		1		3	
13. Tourism business planning		1		3	
14. Tourism business development (including entrepreneurship and SME development)		1		3	*
15. Responsible and sustainable tourism (including conservation and poverty alleviation)	1			3	
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)		1		3	*
17. Hotel management		3		1	
18. Hospitality management		3		1	
19. Tour organisation and management	1	1		2	

20. Tourism attraction management	1	1		2	
21. Conference, Exhibition and Event management	1		1	2	
22. Protected areas and ecotourism management		2	1	1	
23. Field guiding ( <i>cultural and natural</i> )	1		2	1	
24. Food and beverage management		1	1	2	
25. Retail travel	1		1	2	
26. Transportation for tourists		1	1	2	
27. Impacts of tourism – economic, environmental, social and cultural		1		3	**
28. Tourism research methods		2		2	*
NB: Number of institutions = 4					

## MOZAMBIQUE

Additional courses offered by training institutions in Mozambique:

- ISPU – Bachelors in Business management (4 yr), Accounting (4 yr); Postgraduate in Business management (1-2 yr)
- Universidade Eduardo Mondlane – Bachelors in Economics (4 yr), Financial management (4 yr), Management (4 yr); Postgraduate in Economics and development (1 yr), Business management (1 yr)
- Hotel School Andalucia - Basic translation – Portuguese & English (25 hours), English language course (120 hours), English conversation (25 hours)

Problem noted	% agreement	Comments
Scarce financial resources	100%	People cannot afford to go for a training course for six months.
Scarcity of local trainers	100%	
Unqualified trainers	83%	
Inexperienced trainers	83%	
Trainers with poor communication skills	50%	
Poorly designed training	66%	Sometimes very theoretical.
Inappropriate attendees at training	17%	
High turnover of employees	33%	Staff are poached by different companies, and so they do not want to send them for training.
No training follow up	83%	
No relevance of training and bottom-line of business	83%	
Lack of awareness of availability of training	66%	
Adequacy of vocational skills and hotel schools (national or private)	100%	Lack of programs outside higher education
<i>No. respondents = 6</i>		

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management	3	2			**
2. Business planning	1	1	1	1	
3. Financial management	3	2			
4. Marketing and marketing management	2	2		1	
5. Human resources management	4	1			
6. HIV/AIDs in the workplace	1	1		2	*

7. Computer literacy	2	3			
8. Corporate social responsibility		2		1	
<b>Specific tourism modules</b>					
9. Tourism theory	4	1			
10. Tourism policy and legislation	3	1			
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )	1	1		1	
12. Tourism destination planning and development		3		1	
13. Tourism business planning		2	1		*
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )		1	1	2	
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	1	1	1	2	*
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )		2	1	2	****
17. Hotel management	3	2			**
18. Hospitality management	2	1		1	*
19. Tour organisation and management		1	1	1	*
20. Tourism attraction management		1	1	1	
21. Conference, Exhibition and Event management	1	2		2	
22. Protected areas and ecotourism management		3		1	*
23. Field guiding ( <i>cultural and natural</i> )		1	1	2	*
24. Food and beverage management	1	1	1	1	
25. Retail travel	1			2	*
26. Transportation for tourists			1	2	
27. Impacts of tourism – economic, environmental, social and cultural		2		2	*
28. Tourism research methods		1	1	1	*
<b>Other courses</b>					
Tourism sensitisation (how to deal with tourists)					*
Housekeeping					
Diving					
Languages					
NB: Number of institutions = 5					

<b>Table 117: Number of Mozambican training institutions reporting specific tourism module needs</b>					
<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management	1	4	2		
2. Business planning	2	3	2		
3. Financial management	1	3	2	1	
4. Marketing and marketing management	2	1	3	1	
5. Human resources management	1	2	2	2	*
6. HIV/AIDs in the workplace		3		4	*
7. Computer literacy	1	4	2		
8. Corporate social responsibility		1	2	4	
<b>Specific tourism modules</b>					
9. Tourism theory	2	2	2	1	

10. Tourism policy and legislation	2		2	3	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )		3	2	2	**
12. Tourism destination planning and development	1	2	2	1	
13. Tourism business planning	1	2	2	1	**
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	1	2	3	1	***
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	1	1	2	3	
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )		1	2	4	*
17. Hotel management	1	2		4	**
18. Hospitality management		4		3	***
19. Tour organisation and management		1	2	4	
20. Tourism attraction management		1	2	4	*
21. Conference, Exhibition and Event management		3	1	3	***
22. Protected areas and ecotourism management		1	2	3	
23. Field guiding ( <i>cultural and natural</i> )		1	1	5	
24. Food and beverage management		4	1	2	****
25. Retail travel	1		2	4	
26. Transportation for tourists		1	2	4	
27. Impacts of tourism – economic, environmental, social and cultural		1	2	4	
28. Tourism research methods		2	1	3	
<b>Other courses</b>					
English for hospitality industry		1			**
Health and Hygiene	1				
Nutrition					*
Housekeeping, service, kitchen and guest relations	1				
NB: Number of institutions = 6 (but 7 responses)					

**Table 118: Purpose and reasons for training among large Mozambique tourism enterprises**

Reasons for training	Level of agreement (n=2)
<b>Purpose of training</b>	
Increase performance	100%
Increase efficiency	50%
Acquire skills	50%
Obtain accreditation	50%
Gain knowledge	50%
<b>Reasons to undertake training</b>	
Changes in technology	-
Changes in systems	-
Upgrading to international standards	100%
Launching new products or services	-
Need for greater professionalism	50%
Performance improvement	100%
Correction of repetitive mistakes	50%
Gaining accreditation	-

To be better than my competitor	-
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**Table 119: Problems with training in Large hotels in Mozambique**

Problems	Level of agreement (n=2)
Scarce financial resources	
Scarcity of local resource people (trainers)	50%
Unqualified trainers	
Inexperienced trainers	
Trainers with poor communication skills	
Poorly designed training (i.e. lecture-heavy, poor handouts)	50%
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	
High turnover of employees (implying constant need for training and retraining)	
No training follow-up	
No link or relevance between training and bottom-line of business	
Lack of awareness of availability of training	
Other	

**Table 120: Preferred method of training and requirements for large Mozambican tourism enterprises**

Type of training	Level of agreement (n=2)
Face-to-face (traditional classroom) training delivery	100%
Workbook independent study	50%
CDs and DVDs	
Internet	
Radio or television broadcast	
Audio-conference or videoconference	50%
Distance education approach with tutor support by mail, fax, email or telephone	
Language - English, French, Portuguese	English and Portuguese
Location: onsite or off-site?	Onsite (100%); within 20 km (100%)
Timing preferences: business hours, evenings, weekends?	Business hours and evenings
Type of certificate required to show training completed	Internationally branded certificate (50%); not important (50%)

**Table 121: Mozambican large tourism enterprises reporting specific tourism module needs**

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (not done by all)
<b>General business modules</b>					
1. Business management	1				
2. Business planning			1		
3. Financial management	1				
4. Marketing and marketing management	1				
5. Human resources management	1				
6. HIV/AIDs in the workplace			1	1	*
7. Computer literacy	1			1	
8. Corporate social responsibility		1		1	
<b>Specific tourism modules</b>					
9. Tourism theory	1				
10. Tourism policy and legislation	1				
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)	1				
12. Tourism destination planning and development	1				
13. Tourism business planning		1			

14. Tourism business development (including entrepreneurship and SME development)		1			
15. Responsible and sustainable tourism (including conservation and poverty alleviation)	1			1	
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)		1		1	*
17. Hotel management	1				
18. Hospitality management		1		1	
19. Tour organisation and management	1				
20. Tourism attraction management	1				
21. Conference, Exhibition and Event management	1				
22. Protected areas and ecotourism management	1		1		
23. Field guiding (cultural and natural)		1			
24. Food and beverage management	1			1	
25. Retail travel		1			
26. Transportation for tourists	1			1	*
27. Impacts of tourism – economic, environmental, social and cultural	1			1	
28. Tourism research methods	1				

NB: Number of institutions = 2 (one prioritised)

**Table 122: Purpose and reasons for training in Mozambique among SMEs**

Reasons for training	Level of agreement (n=3)
<b>Purpose of training</b>	
Increase performance	100%
Increase efficiency	100%
Acquire skills	100%
Obtain accreditation	33%
Gain knowledge	66%
<b>Reasons to undertake training</b>	
Changes in technology	33%
Changes in systems	33%
Upgrading to international standards	100%
Launching new products or services	33%
Need for greater professionalism	66%
Performance improvement	100%
Correction of repetitive mistakes	100%
Gaining accreditation	33%
To be better than my competitor	33%

**Table 123: Problems with training in Mozambique cited by SMEs**

Problems	Level of agreement (n=3)
Scarce financial resources	33%
Scarcity of local resource people (trainers)	66%*
Unqualified trainers	-
Inexperienced trainers	33%
Trainers with poor communication skills	-
Poorly designed training (i.e. lecture-heavy, poor handouts)	33%
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic)	-

taught)	
High turnover of employees (implying constant need for training and retraining)	33%
No training follow-up	33%
No link or relevance between training and bottom-line of business	33%*
Lack of awareness of availability of training	33%*
* If at least one interviewee thought the problem was serious	

Type of training	Level of agreement (n=3)
Face-to-face (traditional classroom) training delivery	100%
Workbook independent study	33%
CDs and DVDs	66%
Internet	33%
Radio or television broadcast	-
Audio-conference or videoconference	33%
Distance education approach with tutor support by mail, fax, email or telephone	66%
Language - English, French, Portuguese	English and Portuguese
Location: onsite or off-site?	Onsite (33%); within 14 km (100%)
Timing preferences: business hours, evenings, weekends?	Business hours (66%). Anytime (33%)
Type of certificate required to show training completed	IATA, University, Internationally branded certificate.

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management	1	2			*
2. Business planning	1	1		1	
3. Financial management	1	1		1	
4. Marketing and marketing management	1		1	1	
5. Human resources management		1		1	
6. HIV/AIDs in the workplace	1		1	1	
7. Computer literacy	1	1		1	
8. Corporate social responsibility		1		2	
<b>Specific tourism modules</b>					
9. Tourism theory		2	1		
10. Tourism policy and legislation				3	
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)		1		2	
12. Tourism destination planning and development		1		2	
13. Tourism business planning		1		2	
14. Tourism business development (including entrepreneurship and SME development)		2		1	
15. Responsible and sustainable tourism (including conservation and poverty alleviation)		1		2	*
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)	1			2	
17. Hotel management	1	1		1	

18. Hospitality management		1		2	
19. Tour organisation and management		2		1	*
20. Tourism attraction management		1		2	
21. Conference, Exhibition and Event management		1		2	
22. Protected areas and ecotourism management		1		2	
23. Field guiding ( <i>cultural and natural</i> )		1		2	*
24. Food and beverage management		2		1	
25. Retail travel		1		2	*
26. Transportation for tourists		1		2	*
27. Impacts of tourism – economic, environmental, social and cultural		1		2	
28. Tourism research methods		1	1	1	
NB: Number of institutions = 3					

## RWANDA

Additional courses offered by training institutions in Rwanda:

- School of Finance and Banking - Certificate in accounting; Bachelors in Business administration, Accounting, Finance, and Banking; Postgraduate in Accounting, Finance, Marketing, Human resource management.
- CAPMER (SME courses) - Marketing and sales management, Training of the trainers in management and business plans, Entrepreneurial and management capacity, Train trainers – entrepreneurship and SME management

<b>Problem noted</b>	<b>% agreement</b>	<b>Comments</b>
Scarce financial resources	57%	
Scarcity of local trainers	86%	There are no training schools
Unqualified trainers	43%	Government hired trainers from RSA to come and train their staff.
Inexperienced trainers	43%	
Trainers with poor communication skills	43%	Often trainers do not have the correct language, and they need English and French.
Poorly designed training	71%	
Inappropriate attendees at training	57%	
High turnover of employees	57%	
No training follow up	43%	
No relevance of training and bottom-line of business	71%	
Lack of awareness of availability of training	29%	
Adequacy of vocational skills and hotel schools (national or private)	71%	Government is working with the private sector to develop a training institution. Training needs are being assessed by ORTPN.
<i>No. respondents = 7</i>		

<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management	2	3		1	
2. Business planning	2	3	1		
3. Financial management	2	3	1		
4. Marketing and marketing management	2	3		1	*

5. Human resources management	2	3		1	
6. HIV/AIDs in the workplace		4		2	
7. Computer literacy	3	2		1	
8. Corporate social responsibility	1	1		3	
<b>Specific tourism modules</b>					
9. Tourism theory		2		3	
10. Tourism policy and legislation		1		5	**
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )		2		4	
12. Tourism destination planning and development		3		3	
13. Tourism business planning	1	3		2	**
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )		3		3	***
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )		1		5	***
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )		2		4	*
17. Hotel management	1	3		2	**
18. Hospitality management		4		2	**
19. Tour organisation and management		3		3	*
20. Tourism attraction management		2		4	
21. Conference, Exhibition and Event management		2		4	
22. Protected areas and ecotourism management		3		3	**
23. Field guiding ( <i>cultural and natural</i> )		2		3	
24. Food and beverage management	1	4	1		
25. Retail travel	1	2		2	
26. Transportation for tourists		3		3	
27. Impacts of tourism – economic, environmental, social and cultural		2		4	**
28. Tourism research methods		2		4	
<b>Other courses</b>					
Languages – French and English		1			
NB: Number of institutions = 6 indicating courses availability; 7 indicating priorities					

<b>Table 128: Number of Rwandan training institutions reporting specific tourism module needs</b>					
<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management	2	1		1	
2. Business planning	1	1	1	1	*
3. Financial management	1	1		2	
4. Marketing and marketing management	1	1		2	
5. Human resources management	1	1		2	
6. HIV/AIDs in the workplace	1			3	
7. Computer literacy	1	2	1		
8. Corporate social responsibility		2		2	
<b>Specific tourism modules</b>					
9. Tourism theory	1	1	1	1	*
10. Tourism policy and legislation		1	1	2	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and</i>	1	1	1	1	

<i>financial, macro-environment)</i>					
12. Tourism destination planning and development	1	1		2	
13. Tourism business planning			1	2	**
14. Tourism business development (including entrepreneurship and SME development)	1	1		2	**
15. Responsible and sustainable tourism (including conservation and poverty alleviation)		2	1	1	
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)		1	1	2	
17. Hotel management		2		2	**
18. Hospitality management	1	2		1	
19. Tour organisation and management		2	1	1	
20. Tourism attraction management		2	1	1	
21. Conference, Exhibition and Event management		1	1	2	*
22. Protected areas and ecotourism management		2	1	1	
23. Field guiding (cultural and natural)		2	1	1	
24. Food and beverage management		1		3	**
25. Retail travel	1	1	1	1	
26. Transportation for tourists	1	1	1	1	
27. Impacts of tourism – economic, environmental, social and cultural		2	1	1	*
28. Tourism research methods	1	1	1	1	
<b>Other courses</b>					
History of tourism in Rwanda				1	
NB: Number of institutions = 4					

**Table 129: Purpose and reasons for training in Rwanda among large enterprises**

Reasons for training	Level of agreement (n=2)
<b>Purpose of training</b>	
Increase performance	50%
Increase efficiency	100%
Acquire skills	100%
Obtain accreditation	0%
Gain knowledge	50%
<b>Reasons to undertake training</b>	
Changes in technology	50%
Changes in systems	50%
Upgrading to international standards	50%
Launching new products or services	50%
Need for greater professionalism	100%
Performance improvement	50%
Correction of repetitive mistakes	50%
Gaining accreditation	0%
To be better than my competitor	50%

**Table 130: Problems with training in Rwanda reported by large enterprises**

Problems	Level of agreement (n=1)
Scarce financial resources	100%*

Scarcity of local resource people (trainers)	100%*
Unqualified trainers	
Inexperienced trainers	100%
Trainers with poor communication skills	100%*
Poorly designed training (i.e. lecture-heavy, poor handouts)	
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	100%*
High turnover of employees (implying constant need for training and retraining)	100%*
No training follow-up	100%*
No link or relevance between training and bottom-line of business	
Lack of awareness of availability of training	100%*
* If at least one interviewee thought the problem was serious	

Type of training	Level of agreement (n=2)
Face-to-face (traditional classroom) training delivery	100%
Workbook independent study	50%*
CDs and DVDs	50%
Internet	50%*
Radio or television broadcast	
Audio-conference or videoconference	
Distance education approach with tutor support by mail, fax, email or telephone	50%
Language - English, French, Portuguese	French <sup>1</sup>
Location: onsite or off-site?	Onsite or within 150 km
Timing preferences: business hours, evenings, weekends?	Business hours
Type of certificate required to show training completed	Certificate from the training institution
Other: Exchanges with other hotels	50%
1. Many of the training and strategic institutions indicated that courses should be in both French and English. In these two hotels both interviewees were French in origin.	

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management		2			
2. Business planning		2			
3. Financial management		2			
4. Marketing and marketing management		2			*
5. Human resources management		2			
6. HIV/AIDs in the workplace		2			
7. Computer literacy		2			
8. Corporate social responsibility		2			
<b>Specific tourism modules</b>					
9. Tourism theory			1		
10. Tourism policy and legislation			1	1	
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)			1	1	
12. Tourism destination planning and development		1	1		
13. Tourism business planning		1	1		
14. Tourism business development (including entrepreneurship and SME development)		1	1		
15. Responsible and sustainable tourism		1	1		

<i>(including conservation and poverty alleviation)</i>					
16. Options for local communities in tourism <i>(including joint ventures, public-private partnerships, community based tourism)</i>		1			
17. Hotel management		1		1	*
18. Hospitality management			1	1	
19. Tour organisation and management		1	1		
20. Tourism attraction management			1		
21. Conference, Exhibition and Event management		1	1		
22. Protected areas and ecotourism management		1	1		
23. Field guiding <i>(cultural and natural)</i>		1	1		
24. Food and beverage management		2			*
25. Retail travel			1		
26. Transportation for tourists	1		1		
27. Impacts of tourism – economic, environmental, social and cultural			1		
28. Tourism research methods		1	1		
<b>Other courses</b>					
Hygiene		1			

NB: Number of institutions = 2 indicating course availability; 1 prioritised courses for development

<b>Reasons for training</b>	<b>Level of agreement (n=5)</b>
<b>Purpose of training</b>	
Increase performance	80%
Increase efficiency	80%
Acquire skills	60%
Obtain accreditation	20%
Gain knowledge	60%
<b>Reasons to undertake training</b>	
Changes in technology	
Changes in systems	20%
Upgrading to international standards	60%
Launching new products or services	
Need for greater professionalism	100%
Performance improvement	80%
Correction of repetitive mistakes	40%
Gaining accreditation	
To be better than my competitor	40%

<b>Problems</b>	<b>Level of agreement (n=5)</b>
Scarce financial resources	40%*
Scarcity of local resource people (trainers)	60%
Unqualified trainers	20%
Inexperienced trainers	20%
Trainers with poor communication skills	40%*
Poorly designed training (i.e. lecture-heavy, poor handouts)	
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	
High turnover of employees (implying constant need for training and retraining)	40%*
No training follow-up	60%
No link or relevance between training and bottom-line of business	
Lack of awareness of availability of training	60%

\* If at least one interviewee thought the problem was serious

Type of training	Level of agreement (n=5)
Face-to-face (traditional classroom) training delivery	60%*
Workbook independent study	40%
CDs and DVDs	100%*
Internet	40%*
Radio or television broadcast	20%
Audio-conference or videoconference	20%
Distance education approach with tutor support by mail, fax, email or telephone	40%
Language - English, French, Portuguese	French (40%), English (80%)
Location: onsite or off-site?	Onsite (100%); within 200 kms
Timing preferences: business hours, evenings, weekends?	Business hours (20%); Evenings (60%); Weekends (60%)
Type of certificate required to show training completed	Internationally branded certificate (60%); Does not matter (40%)

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (by majority)
<b>General business modules</b>					
1. Business management	1	1	1	1	
2. Business planning	1		1	2	
3. Financial management		1	2		
4. Marketing and marketing management		3		1	Majority (impr.)
5. Human resources management	1	1	1	2	
6. HIV/AIDs in the workplace	1	1	2		
7. Computer literacy	2	1	1		
8. Corporate social responsibility		1	2	1	
<b>Specific tourism modules</b>					
9. Tourism theory		1		3	Majority
10. Tourism policy and legislation			1	3	Majority
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )		1	1	2	
12. Tourism destination planning and development		1	1	3	Majority
13. Tourism business planning	1	1	1	1	
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )		2	1	1	
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )		2	1	2	
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )			1	4	Majority
17. Hotel management	1	1		2	
18. Hospitality management	1	1		3	Majority
19. Tour organisation and management	1			3	Majority
20. Tourism attraction management		2		2	
21. Conference, Exhibition and Event management			1	3	Majority
22. Protected areas and ecotourism management			1	3	Majority

23. Field guiding ( <i>cultural and natural</i> )		1	1	2	
24. Food and beverage management		1	1	1	
25. Retail travel		1	2	1	
26. Transportation for tourists	1		1	3	Majority
27. Impacts of tourism – economic, environmental, social and cultural		1	1	2	
28. Tourism research methods			2	2	
NB: Number of SMEs = 5					

## SENEGAL

Additional courses offered by training institutions in Senegal:

- CESAG- Certificates in Entrepreneurship, Marketing, Human Resources, Project Management, Business Management Postgraduate MBA and Executive MBA
- IAM – Certificates in Business, Finance, Marketing, Management; Postgraduate courses include MBA and PhDs
- ISM – Certificate in Business administration; postgraduate in Business administration (MBA)

Problem noted	% agreement	Comments
Scarce financial resources	100%	There is not enough emphasis on training in Senegal
Scarcity of local trainers	100%	
Unqualified trainers	66%	
Inexperienced trainers	66%	
Trainers with poor communication skills	66%	
Poorly designed training	66%	
Inappropriate attendees at training	66%	
High turnover of employees	100%	
No training follow up	66%	
No relevance of training and bottom-line of business	33%	
Lack of awareness of availability of training	33%	
Adequacy of vocational skills and hotel schools (national or private)	100%	This was seen as the greatest deficiency
<i>No. respondents =3 (With Formal Surveys)</i>		

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management		1		2	**
2. Business planning		1		2	
3. Financial management		1		2	
4. Marketing and marketing management		2		1	
5. Human resources management		1		2	
6. HIV/AIDs in the workplace		1		2	
7. Computer literacy		2			
8. Corporate social responsibility		1	1	1	
<b>Specific tourism modules</b>					
9. Tourism theory		2	1		**
10. Tourism policy and legislation		2	1		
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )		1		2	
12. Tourism destination planning and development		1		2	
13. Tourism business planning				3	

14. Tourism business development (including entrepreneurship and SME development)				3	**
15. Responsible and sustainable tourism (including conservation and poverty alleviation)				3	*
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)				3	
17. Hotel management		1		2	
18. Hospitality management		1		2	
19. Tour organisation and management				3	
20. Tourism attraction management				3	
21. Conference, Exhibition and Event management				3	
22. Protected areas and ecotourism management				3	
23. Field guiding (cultural and natural)				3	
24. Food and beverage management		1		2	
25. Retail travel		3			
26. Transportation for tourists				3	
27. Impacts of tourism – economic, environmental, social and cultural				3	
28. Tourism research methods		1		2	
<b>Other courses</b>					
English Language Courses		1			*
Customer Service		1			*
Vocational		1			*
NB: Number of institutions = 3					

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management	3			1	*
2. Business planning	3			1	
3. Financial management	2	1		1	
4. Marketing and marketing management	2	1		1	
5. Human resources management	2	1		1	
6. HIV/AIDs in the workplace		1		3	
7. Computer literacy	3	1			
8. Corporate social responsibility	1	1	2		
<b>Specific tourism modules</b>					
9. Tourism theory		1		3	**
10. Tourism policy and legislation	1			3	**
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)	1	1		2	
12. Tourism destination planning and development		1		3	
13. Tourism business planning		2	1	1	*
14. Tourism business development (including entrepreneurship and SME development)		1		3	**
15. Responsible and sustainable tourism (including conservation and poverty alleviation)			1	3	
16. Options for local communities in			1	3	

tourism (including joint ventures, public-private partnerships, community based tourism)					
17. Hotel management	1	1	1	1	
18. Hospitality management	1	1	1	1	
19. Tour organisation and management	1	1	1	1	*
20. Tourism attraction management		1	1	2	*
21. Conference, Exhibition and Event management		2	1	1	
22. Protected areas and ecotourism management		1	1	2	
23. Field guiding (cultural and natural)		1	1	2	
24. Food and beverage management		1	1	2	
25. Retail travel		1	2	1	
26. Transportation for tourists		2		2	
27. Impacts of tourism – economic, environmental, social and cultural		2		2	
28. Tourism research methods		1		3	*
<b>Other courses</b>					
NB: Number of institutions = 4					

<b>Table 140: Purpose and reasons for training in Senegal for SMEs</b>	
<b>Reasons for training</b>	<b>Level of agreement (n=7)</b>
<b>Purpose of training</b>	
Increase performance	86%
Increase efficiency	86%
Acquire skills	86%
Obtain accreditation	0%
Gain knowledge	42%
<b>Reasons to undertake training</b>	
Changes in technology	42%
Changes in systems	29%
Upgrading to international standards	57%
Launching new products or services	42%
Need for greater professionalism	85%
Performance improvement	100%
Correction of repetitive mistakes	71%
Gaining accreditation	0%
To be better than my competitor	57%

<b>Table 141: Problems with training identified by Senegal SMEs</b>	
<b>Problems</b>	<b>Level of agreement (n=7)</b>
Scarce financial resources	14%
Scarcity of local resource people (trainers)	57%
Unqualified trainers	29%
Inexperienced trainers	29%
Trainers with poor communication skills	42%
Poorly designed training (i.e. lecture-heavy, poor handouts)	29%
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	-
High turnover of employees (implying constant need for training and retraining)	-
No training follow-up	14%
No link or relevance between training and bottom-line of business	-
Lack of awareness of availability of training	-
* If at least one interviewee thought the problem was serious	

<b>Table 142: Preferred method of training and requirements reported by Senegalese SMEs</b>	
<b>Type of training</b>	<b>Level of agreement (n=7)</b>
Face-to-face (traditional classroom) training delivery	57%

Workbook independent study	71%
CDs and DVDs	85%
Internet	29%
Radio or television broadcast	-
Audio-conference or videoconference	-
Distance education approach with tutor support by mail, fax, email or telephone	29%
Language - English, French, Portuguese	French (100%)
Location: onsite or off-site?	Onsite (85%); Offsite within Senegal (15%)
Timing preferences: business hours, evenings, weekends?	Business hours (29%); Evenings (57%); Days off (29%)
Type of certificate required to show training completed	Internationally branded certificate (57%); National Certificate (14%)

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (not done)
<b>General business modules</b>					
1. Business management	1	1		3	***
2. Business planning	1			3	
3. Financial management				2	
4. Marketing and marketing management		1		3	***
5. Human resources management		1		4	**
6. HIV/AIDs in the workplace				2	
7. Computer literacy	2			2	
8. Corporate social responsibility	1	1		2	
<b>Specific tourism modules</b>					
9. Tourism theory	4	1			
10. Tourism policy and legislation	2	1		2	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )	1	1		3	
12. Tourism destination planning and development	2	1		4	
13. Tourism business planning	1			2	**
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )		1		3	***
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	2			4	*
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	1	1	1	3	*
17. Hotel management	4	1		1	
18. Hospitality management	4	1		2	
19. Tour organisation and management	4	1		2	
20. Tourism attraction management	2			3	
21. Conference, Exhibition and Event management	1	1		3	

22. Protected areas and ecotourism management	1	1		4	**
23. Field guiding ( <i>cultural and natural</i> )		2	1	1	*
24. Food and beverage management	3	1		2	
25. Retail travel	3	1		2	
26. Transportation for tourists	3	1		2	
27. Impacts of tourism – economic, environmental, social and cultural	2	1	1	2	
28. Tourism research methods	2		1	3	
<b>Other courses</b>					
NB: Number of institutions = 7					

## SOUTH AFRICA

Problem noted	% agreement	Comments
Scarce financial resources	100%	
Scarcity of local trainers	50%	
Unqualified trainers	50%	
Inexperienced trainers	50%	
Trainers with poor communication skills	50%	
Poorly designed training	50%	
Inappropriate attendees at training	50%	
High turnover of employees	50%	
No training follow up	50%	
No relevance of training and bottom-line of business	50%	
Lack of awareness of availability of training	50%	
Adequacy of vocational skills and hotel schools (national or private)	50%	
<i>No. respondents = 2</i>		

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management	3	1	1	1	
2. Business planning	2		1	1	
3. Financial management	3		1	3	**
4. Marketing and marketing management	4	1	1	1	*
5. Human resources management	2	1	1	1	*
6. HIV/AIDS in the workplace	2		1	2	
7. Computer literacy	4		1	2	
8. Corporate social responsibility	1		1	3	
<b>Specific tourism modules</b>					
9. Tourism theory	5	1		1	*
10. Tourism policy and legislation	2	2		1	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )	3	2			
12. Tourism destination planning and development	2	1		1	**
13. Tourism business planning	2			3	*
14. Tourism business development ( <i>including entrepreneurship and SME</i> )	2	1		2	****

<i>development)</i>					
15. Responsible and sustainable tourism (including conservation and poverty alleviation)	3	1		1	***
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)	1	2		1	***
17. Hotel management	1		3	1	*
18. Hospitality management	2		2	2	*
19. Tour organisation and management	2	1	1	2	*
20. Tourism attraction management	1		1	3	***
21. Conference, Exhibition and Event management	2		1	4	**
22. Protected areas and ecotourism management	1	1	1	2	***
23. Field guiding (cultural and natural)	1		4		
24. Food and beverage management	1	1	3		
25. Retail travel	3		2	1	
26. Transportation for tourists	3		2	2	*
27. Impacts of tourism – economic, environmental, social and cultural	3	2			*
28. Tourism research methods	2	2	1	1	**
<b>Other courses</b>					
Tourism information management	1				
Project management	1				**
Operations management	1				
Strategic planning and tourism					*
Tourism management	1				
Business economics and tourism					*
NB: Number of institutions = 10					

**Table 146: Purpose and reasons for training reported by South African large enterprises**

Reasons for training	Level of agreement (n=2)
<b>Purpose of training</b>	
Increase performance	100%
Increase efficiency	100%
Acquire skills	100%
Obtain accreditation	-
Gain knowledge	100%
<b>Reasons to undertake training</b>	
Changes in technology	50%
Changes in systems	100%
Upgrading to international standards	50%
Launching new products or services	100%
Need for greater professionalism	100%
Performance improvement	100%
Correction of repetitive mistakes	100%
Gaining accreditation	50%
To be better than my competitor	100%

**Table 147: Problems with training according to large South African enterprises**

Problems	Level of agreement (n=2)
Scarce financial resources	-
Scarcity of local resource people (trainers)	100%

Unqualified trainers	-
Inexperienced trainers	-
Trainers with poor communication skills	50%
Poorly designed training (i.e. lecture-heavy, poor handouts)	-
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	50%
High turnover of employees (implying constant need for training and retraining)	50%
No training follow-up	100%
No link or relevance between training and bottom-line of business	50%
Lack of awareness of availability of training	-

**Table 148: Preferred method of training and requirements**

Type of training	Level of agreement (n=2)
Face-to-face (traditional classroom) training delivery	SANParks preferred shoulder to shoulder training. Grootbos agreed face-to-face
Workbook independent study	-
CDs and DVDs	50%
Internet	-
Radio or television broadcast	50%
Audio-conference or videoconference	50%
Distance education approach with tutor support by mail, fax, email or telephone	-
Language - English, French, Portuguese	English
Location: onsite or off-site?	Onsite (100%)
Timing preferences: business hours, evenings, weekends?	Business hours (100%)
Type of certificate required to show training completed	Any (SANParks); City and Guilds or Cornell (Grootbos)

**Table 149: South African large tourism enterprises reporting specific tourism module needs**

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (not done)
<b>General business modules</b>					
1. Business management					
2. Business planning					
3. Financial management					
4. Marketing and marketing management					
5. Human resources management					
6. HIV/AIDs in the workplace	1				
7. Computer literacy					
8. Corporate social responsibility				1	
<b>Specific tourism modules</b>					
9. Tourism theory					
10. Tourism policy and legislation					
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)					
12. Tourism destination planning and development					
13. Tourism business planning				1	
14. Tourism business development (including entrepreneurship and SME development)					
15. Responsible and sustainable tourism (including conservation and poverty alleviation)		1			

16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )					
17. Hotel management				1	
18. Hospitality management				1	
19. Tour organisation and management					
20. Tourism attraction management					
21. Conference, Exhibition and Event management					
22. Protected areas and ecotourism management					
23. Field guiding ( <i>cultural and natural</i> )		1			
24. Food and beverage management		1			
25. Retail travel					
26. Transportation for tourists					
27. Impacts of tourism – economic, environmental, social and cultural		1			
28. Tourism research methods					
NB: Number of institutions = 1					

**Table 150: Purpose and reasons for training in South Africa for SMEs**

Reasons for training	Level of agreement (n=3)
<b>Purpose of training</b>	
Increase performance	100%
Increase efficiency	100%
Acquire skills	66%
Obtain accreditation	0%
Gain knowledge	0%
<b>Reasons to undertake training</b>	
Changes in technology	66%
Changes in systems	0%
Upgrading to international standards	33%
Launching new products or services	0%
Need for greater professionalism	33%
Performance improvement	100%
Correction of repetitive mistakes	0%
Gaining accreditation	0%
To be better than my competitor	0%

**Table 151: Problems with training identified by South Africa SMEs**

Problems	Level of agreement (n=3)
Scarce financial resources	0%
Scarcity of local resource people (trainers)	0%
Unqualified trainers	0%
Inexperienced trainers	0%
Trainers with poor communication skills	0%
Poorly designed training (i.e. lecture-heavy, poor handouts)	33%*
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	0%
High turnover of employees (implying constant need for training and retraining)	66%*
No training follow-up	33%*
No link or relevance between training and bottom-line of business	33%*
Lack of awareness of availability of training	0%
* If at least one interviewee thought the problem was serious	

Type of training	Level of agreement (n=3)
Face-to-face (traditional classroom) training delivery	100%*
Workbook independent study	-
CDs and DVDs	-
Internet	33%*
Radio or television broadcast	-
Audio-conference or videoconference	-
Distance education approach with tutor support by mail, fax, email or telephone	33%
Language - English, French, Portuguese	English (66%), Afrikaans (33%)
Location: onsite or off-site?	Offsite (100%)
Timing preferences: business hours, evenings, weekends?	Evenings (66%); Off Season (33%)
Type of certificate required to show training completed	National certificate (33%) Graduate School certificate (66%)

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (not done)
<b>General business modules</b>					
1. Business management	1				
2. Business planning	2				
3. Financial management	1				
4. Marketing and marketing management		2			*
5. Human resources management					
6. HIV/AIDs in the workplace		1			
7. Computer literacy		2			*
8. Corporate social responsibility					
<b>Specific tourism modules</b>					
9. Tourism theory		1		1	
10. Tourism policy and legislation				1	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )					
12. Tourism destination planning and development		1			
13. Tourism business planning	1				
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )					
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )		1			
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )				1	
17. Hotel management					
18. Hospitality management		1			*
19. Tour organisation and management	1				
20. Tourism attraction management					
21. Conference, Exhibition and Event management					
22. Protected areas and ecotourism management					
23. Field guiding ( <i>cultural and natural</i> ) <sup>1</sup>					
24. Food and beverage management					
25. Retail travel					

26. Transportation for tourists		1			
27. Impacts of tourism – economic, environmental, social and cultural					
28. Tourism research methods					
NB: Number of institutions = 2 – but not all answered all					

## TANZANIA

Additional courses offered by training institutions in Tanzania:

- University of Dar es Salaam - Bachelors in Commerce; postgraduate courses include MBA, Executive MBA, Part-time MBA, PhD
- Management Training Institute – Certificates in Organizational development, Human resource development, Soft skill development, CEO and strategic goal orientation
- ESAMI – diplomas in Management, human resources and IT; postgraduate courses in business administration

Problem noted	% agreement	Comments
Scarce financial resources	100%	
Scarcity of local trainers	66%	
Unqualified trainers	100%	
Inexperienced trainers	100%	
Trainers with poor communication skills	33%	
Poorly designed training	100%	No Standards – no national curriculum
Inappropriate attendees at training	33%	
High turnover of employees	33%	A fear of poaching if there is trained staff
No training follow up	0%	
No relevance of training and bottom-line of business	66%	Even vocational courses like food prep are inadequate
Lack of awareness of availability of training	0%	Didn't think was a problem because such limited training
Adequacy of vocational skills and hotel schools (national or private)	100%	Don't meet the markets needs
<i>No. respondents = 3 (With Formal Surveys)</i>		

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management	2			1	*
2. Business planning	2			1	
3. Financial management	2			1	
4. Marketing and marketing management	2	1			
5. Human resources management	1	2			
6. HIV/AIDs in the workplace	1	2			
7. Computer literacy	1	2			
8. Corporate social responsibility		1	1	1	
<b>Specific tourism modules</b>					
9. Tourism theory		3			
10. Tourism policy and legislation		2		1	
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)		1		2	
12. Tourism destination planning and development				3	**

13. Tourism business planning				3	
14. Tourism business development (including entrepreneurship and SME development)				3	*
15. Responsible and sustainable tourism (including conservation and poverty alleviation)				3	
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)				3	
17. Hotel management		1		2	*
18. Hospitality management	1	1		1	**
19. Tour organisation and management		1		2	*
20. Tourism attraction management		1		2	
21. Conference, Exhibition and Event management				3	
22. Protected areas and ecotourism management		2		1	
23. Field guiding (cultural and natural)		3			
24. Food and beverage management		3			
25. Retail travel	2	1			
26. Transportation for tourists		1		2	
27. Impacts of tourism – economic, environmental, social and cultural				3	
28. Tourism research methods				3	
<b>Other courses</b>					
Customer Service / Service Standards		2			*
NB: Number of institutions = 3					

<b>Table 156: Number of Tanzania training institutions reporting specific tourism module needs</b>					
<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management					*
2. Business planning	2		1		
3. Financial management	2		1		
4. Marketing and marketing management	2		1		*
5. Human resources management	2	1			
6. HIV/AIDs in the workplace		2			
7. Computer literacy	2	1			
8. Corporate social responsibility	1	1		1	
<b>Specific tourism modules</b>					
9. Tourism theory	1	1		1	
10. Tourism policy and legislation		1		2	*
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)	1	1		1	
12. Tourism destination planning and development	1			2	*
13. Tourism business planning	1	1		1	*
14. Tourism business development (including entrepreneurship and SME development)	1	1		1	***
15. Responsible and sustainable tourism (including conservation and poverty alleviation)		2		1	
16. Options for local communities in tourism (including joint ventures, public-		1		2	

<i>private partnerships, community based tourism)</i>					
17. Hotel management	1	1		1	*
18. Hospitality management	1	1		1	*
19. Tour organisation and management	1	2			
20. Tourism attraction management	1			2	
21. Conference, Exhibition and Event management	1			2	
22. Protected areas and ecotourism management				3	*
23. Field guiding ( <i>cultural and natural</i> )		1		2	*
24. Food and beverage management	1	2			
25. Retail travel	1	1	1		
26. Transportation for tourists				3	
27. Impacts of tourism – economic, environmental, social and cultural		1		2	
28. Tourism research methods	1	1		1	
<b>Other courses</b>					
Customer Service / Customer Care	1			1	*
Life Skills / Soft Skills	1				*
NB: Number of institutions = 3*					

<b>Table 157: Purpose and reasons for training in Tanzania for SMEs</b>	
<b>Reasons for training</b>	<b>Level of agreement (n=31)</b>
<b>Purpose of training</b>	
Increase performance	54%
Increase efficiency	65%
Acquire skills	45%
Obtain accreditation	32%
Gain knowledge	58%
<b>Reasons to undertake training</b>	
Changes in technology	32%
Changes in systems	29%
Upgrading to international standards	58%
Launching new products or services	39%
Need for greater professionalism	52%
Performance improvement	52%
Correction of repetitive mistakes	32%
Gaining accreditation	23%
To be better than my competitor	39%

<b>Table 158: Problems with training identified by Tanzania SMEs</b>	
<b>Problems</b>	<b>Level of agreement (n=31)</b>
Scarce financial resources	19%*
Scarcity of local resource people (trainers)	19%
Unqualified trainers	16%
Inexperienced trainers	19%*
Trainers with poor communication skills	19%
Poorly designed training (i.e. lecture-heavy, poor handouts)	19%
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	9%
High turnover of employees (implying constant need for training and retraining)	13%
No training follow-up	23%
No link or relevance between training and bottom-line of business	13%
Lack of awareness of availability of training	13%

\* If at least one interviewee thought the problem was serious

Type of training	Level of agreement (n=31)
Face-to-face (traditional classroom) training delivery	45%
Workbook independent study	19%
CDs and DVDs	32%
Internet	23%
Radio or television broadcast	16%
Audio-conference or videoconference	29%
Distance education approach with tutor support by mail, fax, email or telephone	16%
Language - English, French, Portuguese	English (100%), French (3%),
Location: onsite or off-site?	Onsite (29%) Offsite (within Tanzania) (32%)
Timing preferences: business hours, evenings, weekends?	Business hours (29%); Evenings (19%); Weekends (5%)
Type of certificate required to show training completed	Internationally branded certificate (29%), National Certificate (16%), Certificate from Graduate School (13%)

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (not done)
<b>General business modules</b>					
1. Business management	2	4		4	Majority
2. Business planning	2	4		5	Majority
3. Financial management	1	2		5	Majority
4. Marketing and marketing management	3	4		5	Majority
5. Human resources management	1	1		5	Majority
6. HIV/AIDs in the workplace	2	2		1	
7. Computer literacy	1	4		1	
8. Corporate social responsibility		1	1	2	
<b>Specific tourism modules</b>					
9. Tourism theory	3	1		2	
10. Tourism policy and legislation	3	1		3	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )	3			2	
12. Tourism destination planning and development	4	2		2	
13. Tourism business planning	2	3		2	
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	2	3		4	Majority
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	2	1		3	Majority
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	2	1		3	Majority
17. Hotel management	1	1	1	2	
18. Hospitality management	2	2		2	Majority
19. Tour organisation and management	2	2			
20. Tourism attraction management	2	3			
21. Conference, Exhibition and Event management		1		3	Majority
22. Protected areas and ecotourism management		1	1	3	Majority

23. Field guiding ( <i>cultural and natural</i> )	1	1		1	
24. Food and beverage management	1		1	2	
25. Retail travel	1	1		1	
26. Transportation for tourists	3	3		1	
27. Impacts of tourism – economic, environmental, social and cultural	2	3			
28. Tourism research methods	2	2		1	
<b>Other courses</b>					
NB: Number of institutions = 14					

## ZAMBIA

Other business courses offered in Zambia include:

- ZCAS - Certificate: Banking & Finance; NATech, CAT, Diploma: Banking & Finance; CIMA Degree: Banking & Finance; Chartered Accountancy

Problem noted	% agreement	Comments
Scarce financial resources	100%	
Scarcity of local trainers	100%	
Unqualified trainers	66%	
Inexperienced trainers	66%	Some trainers were students less than 1 year prior
Trainers with poor communication skills	33%	
Poorly designed training	100%	Courses are very old and not geared to the needs of the market
Inappropriate attendees at training	66%	Owners need to take the trainings not just staff
High turnover of employees	100%	Some are only given 2 month contracts
No training follow up	66%	
No relevance of training and bottom-line of business	100%	For management courses
Lack of awareness of availability of training	0%	Didn't think was a problem because such limited training
Adequacy of vocational skills and hotel schools (national or private)	100%	Don't meet the markets needs
<i>No. respondents = 3 (With Formal Surveys)</i>		

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules
<b>General business modules</b>					
1. Business management		2		1	***
2. Business planning				3	
3. Financial management				3	
4. Marketing and marketing management		3			
5. Human resources management		2		1	
6. HIV/AIDs in the workplace		1		2	
7. Computer literacy	1	2			
8. Corporate social responsibility		1	2		
<b>Specific tourism modules</b>					
9. Tourism theory		3			
10. Tourism policy and legislation		2		1	
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )				3	
12. Tourism destination planning and			1	2	

development					
13. Tourism business planning				3	*
14. Tourism business development (including entrepreneurship and SME development)				3	**
15. Responsible and sustainable tourism (including conservation and poverty alleviation)		1		2	
16. Options for local communities in tourism (including joint ventures, public-private partnerships, community based tourism)		1		2	
17. Hotel management		3			
18. Hospitality management		3			
19. Tour organisation and management		1		2	
20. Tourism attraction management				3	
21. Conference, Exhibition and Event management				3	
22. Protected areas and ecotourism management				3	
23. Field guiding (cultural and natural)		1		2	
24. Food and beverage management		3			
25. Retail travel		2		1	
26. Transportation for tourists		1		2	
27. Impacts of tourism – economic, environmental, social and cultural		1		2	
28. Tourism research methods		2		1	
<b>Other courses</b>					
Customer Service / Service Standards		1		1	*
Life Skills / Soft Skills		1		1	**
NB: Number of institutions = 3					

<b>Table 163: Number of Zambia training institutions reporting specific tourism module needs</b>					
<b>Tourism-related modules</b>	<b>Available</b>	<b>Available, needs improvement</b>	<b>Not available. Not needed</b>	<b>Not available. Needed</b>	<b>Priority modules</b>
<b>General business modules</b>					
1. Business management		1		1	**
2. Business planning				2	
3. Financial management		2			*
4. Marketing and marketing management		2			**
5. Human resources management		2			
6. HIV/AIDs in the workplace		1	1		
7. Computer literacy		1		1	
8. Corporate social responsibility			1	1	
<b>Specific tourism modules</b>					
9. Tourism theory	1		1		
10. Tourism policy and legislation		1		1	
11. Tourism resources (including natural, cultural, infrastructure, human and financial, macro-environment)		1		1	
12. Tourism destination planning and development		1		1	
13. Tourism business planning				2	
14. Tourism business development (including entrepreneurship and SME development)		1		1	
15. Responsible and sustainable tourism (including conservation and poverty alleviation)		1		1	

16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )				2	
17. Hotel management	1	1			
18. Hospitality management	1	1			
19. Tour organisation and management	1	1			
20. Tourism attraction management	1	1			
21. Conference, Exhibition and Event management		2			
22. Protected areas and ecotourism management		1		1	
23. Field guiding ( <i>cultural and natural</i> )		1		1	
24. Food and beverage management	1	1			
25. Retail travel	1			1	
26. Transportation for tourists	1	1			
27. Impacts of tourism – economic, environmental, social and cultural		1		1	
28. Tourism research methods		1		1	
<b>Other courses</b>					
Communication Skills		1			*
NB: Number of institutions = 2*					

\*ZCAS abstained from answering, as they have no experience in tourism.

Reasons for training	Level of agreement (n=16)
<b>Purpose of training</b>	
Increase performance	88%
Increase efficiency	81%
Acquire skills	81%
Obtain accreditation	19%
Gain knowledge	75%
<b>Reasons to undertake training</b>	
Changes in technology	56%
Changes in systems	50%
Upgrading to international standards	81%
Launching new products or services	50%
Need for greater professionalism	81%
Performance improvement	93%
Correction of repetitive mistakes	56%
Gaining accreditation	31%
To be better than my competitor	44%

Problems	Level of agreement (n=16)
Scarce financial resources	69%*
Scarcity of local resource people (trainers)	38%
Unqualified trainers	19%*
Inexperienced trainers	31%
Trainers with poor communication skills	25%
Poorly designed training (i.e. lecture-heavy, poor handouts)	38%*
Inappropriate attendees at the training (i.e. too sophisticated or too unsophisticated for the topic taught)	25%
High turnover of employees (implying constant need for training and retraining)	31%*
No training follow-up	38%
No link or relevance between training and bottom-line of business	31%
Lack of awareness of availability of training	19%
* If at least one interviewee thought the problem was serious	

Type of training	Level of agreement (n=16)
Face-to-face (traditional classroom) training delivery	88%
Workbook independent study	44%
CDs and DVDs	38%
Internet	25%
Radio or television broadcast	12%
Audio-conference or videoconference	12%
Distance education approach with tutor support by mail, fax, email or telephone	25%
Language - English, French, Portuguese	English (93%), French (7%)
Location: onsite or off-site?	Onsite (38%); Offsite within Zambia (42%)
Timing preferences: business hours, evenings, weekends?	Business hours (50%); Evenings (31%); Days off (6%)
Type of certificate required to show training completed	Internationally branded certificate (44%); National Certificate (25%) Graduate School Certificate (19%)

Tourism-related modules	Available	Available, needs improvement	Not available. Not needed	Not available. Needed	Priority modules (not done)
<b>General business modules</b>					
1. Business management	5	2		3	
2. Business planning	4	4		3	
3. Financial management	4	4		2	
4. Marketing and marketing management	4	4		3	
5. Human resources management	3	5		1	
6. HIV/AIDs in the workplace	3	2		3	
7. Computer literacy	5	2			
8. Corporate social responsibility	2	1		2	
<b>Specific tourism modules</b>					
9. Tourism theory	4	2		4	Majority
10. Tourism policy and legislation		1		5	Majority
11. Tourism resources ( <i>including natural, cultural, infrastructure, human and financial, macro-environment</i> )	4	1		3	
12. Tourism destination planning and development	1	2		5	Majority
13. Tourism business planning	2	2		5	Majority
14. Tourism business development ( <i>including entrepreneurship and SME development</i> )	2	1		4	Majority
15. Responsible and sustainable tourism ( <i>including conservation and poverty alleviation</i> )	2	1		5	Majority
16. Options for local communities in tourism ( <i>including joint ventures, public-private partnerships, community based tourism</i> )	1	2	2	2	Majority
17. Hotel management	5	3		4	
18. Hospitality management	3	2		4	Majority
19. Tour organisation and management	1	2		5	Majority
20. Tourism attraction management	2	2	2	3	
21. Conference, Exhibition and Event management	1	1	2	4	Majority
22. Protected areas and ecotourism management	2	1	2	2	

23. Field guiding ( <i>cultural and natural</i> )	3	1	2	2	
24. Food and beverage management	4	3		2	
25. Retail travel	1	1	2	3	
26. Transportation for tourists		1	1	5	Majority
27. Impacts of tourism – economic, environmental, social and cultural		1	1	4	Majority
28. Tourism research methods		3	1	3	Majority
<b>Other courses</b>					
NB: Number of institutions = 14					