



PROVISION OF ASSISTANCE TO THE SWAZILAND TOURISM AUTHORITY



DRAFT PRODUCT DEVELOPMENT STRATEGY AND PRODUCT PACKAGING TOOLKIT



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1. SUMMARY

The STA has made significant strides since its inception in 2003. The genesis of the current project is that with a more strategic approach to product development and marketing, tourism receipts to The Kingdom could be further increased. The notion was put forward that one of the reasons for the limited length of stay in Swaziland, was the limited product range. The analysis conducted and summarised in the report concurs with the assertion at a cursory level. It should be remembered that The Kingdom is small in physical area (17,364 km²). It does have a limited number of unique selling propositions. This is however supported by a comparative advantage in a number of unique events and special interest segments.

There is a lack of top-end accommodation product. Suggesting a programme of new investments, given the current constraints of market demand and financing coupled with no incentives, is clearly not viable. Investing in a 5-star luxury lodge may meet operator wishes, but would be inherently unviable given the short average length of stay, poor room occupancies and low average room rates in relation to the relatively high costs of construction.

The product development part of the report limits recommendations to four focus areas: improved access, improvements to the accommodation stock, upgrade and commercialisation of attractions and capitalising on events and special interest comparative advantage. The report also makes suggestions with respect to road quality, signage and visa facilitation.

The 'product packaging toolkit' is devised to support the implementation of the overall product development and marketing programme. The 'toolkit' has three components: 'read-made' packages, cross selling and the possibility of a booking engine on the STA website.

2. INTRODUCTION

The Terms of Reference of the project cite feedback from tourists, that the limited product range was one of the reasons for the short length of stay in Swaziland. The research undertaken by the consultants has found that this statement may be true at a cursory level, particularly with respect to iconic or unique selling propositions. However, further analysis points to a considerable number of products and activities that are not well positioned or packaged. This report aims at suggesting ways forward in terms of developing and enhancing the current product offering. It is geared towards working with the product that is currently

available, as opposed to 'creating' new product. It concludes with a 'product packaging toolkit', which contains recommendations on how to present products more effectively to the market.

2.1 Report Status

This draft follows an Inception Report of December 2012, and a Situation Analysis Report drafted in April 2013. Still to come is the draft marketing strategy and the final overall strategy.

2.2 The Tourism Market for Swaziland

Swaziland recorded 113,305 overseas arrivals in 2012, 9.8% up from 2011. Of this 64.5% were from Europe. Of concern is that although 2012 reflected an increase in overseas arrivals, this number is down 26.9% from 2007 to 2012.

The overseas arrivals can be delineated by two main segments. The first segment is the Group series – which are scheduled departures consisting of between 10 – 40 passengers per group. They generally stay for one night and conduct one visit to Ngwenya Glass or the Candle Factory. There is limited ability to extend the length of stay, and trying to alter the activity outing will result in a zero sum gain for Swaziland. The second segment is the FIT traveller. They generally travel in hired vehicles and either book accommodation directly with establishments, or through an operator in their country of origin. There is potential to increase this segment, and to increase the length of stay and spend.

Swaziland's main source market is South Africa. In 2012 a total of 871,459 South Africans visited The Kingdom. Of this 339,869 or 39% were leisure travellers¹. It is recorded that South Africans have a repeater rate in excess of 80%. The Kingdom has not been actively marketed in South Africa. There is potential to tap into regional markets of Gauteng, Nelspruit, northern KZN as well as Maputo in Mozambique.

A more in depth analysis of Swaziland's tourism market is contained in the Situation Analysis Report.

Comment [CCM1]: It will be helpful to point this out at this stage to avoid the reader concluding that this is all the market analysis that has been conducted.

¹ There have been some aspersions cast on the veracity of the number of leisure tourists from South Africa. The general assertion is that many travellers cite "holiday" as purpose of visit, rather than risk an inquisition on work related issues. However, visitors from Commonwealth member states are automatically given 30 days, irrespective of the nature of their visit, and the work permit is not an issue on arrival. Information on the main purpose of visit is gathered through the Exit Survey where respondents are informed about the purpose of the survey and as such are normally not intimidated by the enumerators in that regard. This is also confirmed by the proportion of South African travellers captured through other in-country visitor surveys in formal attraction sites, such as game parks, cultural/historical sites, major events, etc.

2.3 Product Assessment

A range of aspects have been assessed such as accommodation, attractions, access and service quality against a backdrop of regional comparisons. The assessment extends to include community based tourism, access and signage as well as visa facilitation. These were assessed by the consultants during a 14 person day product audit that spanned Swaziland. Important feedback was also gleaned from interviews and meetings with a range of operators in South Africa, UK, Germany and The Netherlands

2.4 Tourism Policy

Swaziland's first **National Tourism Policy** was adopted in 2000. The establishment of the Swaziland Tourism Authority was provided for under this Policy. The Policy was revised in 2010. The Goal for the Policy is for tourism to be developed as a national priority in a sustainable and acceptable manner taking full advantage of regional and international trends and developments so that it will significantly contribute to the continued improvement of the quality of life in the Kingdom while promoting the country's cultural and natural heritage.

The Policy contains the observation:

"The major attractions of the Kingdom of Swaziland are the unique culture of the people and the scenic beauty of the country. The fact that Swaziland has no single globally identifiable feature on which to hinge its promotion on the international tourism market, does not preclude the potential for the national tourism product to emerge as an international attraction, alongside other regional attractions."

The six Key Principles of the Policy are:

1. Tourism development will be private sector driven with the role of Government being to create an attractive investment environment for the tourism industry to flourish;
2. Tourism development will be managed to ensure sustainability and the conservation of the country's environmental and natural resources;
3. Tourism development will promote active Swazi participation in the sector both as entrepreneurs and suppliers of goods and services and as customers of tourism;
4. Tourism development will aim to maximise the opportunities afforded by strategic regional opportunities such as the Lubombo Spatial Development Initiative;
5. Swaziland will build on its existing strengths to develop tourism including via linkages with other sectors;
6. Swaziland will aim to develop a marketable identity focusing on selected niches and products in order to attract visitors to the country and to differentiate itself, where necessary, from its neighbours.

Among the potential areas for the future product development were seen:

- Adventure tourism
- Cultural tourism
- Festivals
- Meetings, incentives, conventions and exhibitions (MICE)
- Water-sports tourism at dams and rivers.

Improvement of the arrival experience for tourists at border posts is envisaged as one of the activities of an Inter-Ministerial Committee for tourism sector development. This is to include better information and signage, longer opening hours and more friendly and efficient services such as visa requirements and issuing procedures.

Strategies for marketing that are foreseen under the Policy are for:

- Development of linkages with surrounding tourism areas and regions;
- Development of a culture that facilitates customer service excellence;
- Cooperative marketing activities through membership of appropriate regional bodies;
- Training of e.g. frontline providers for them to better market the country's tourism product;
- Differentiation and branding to strengthen Swaziland's unique identity;
- Effective use of the internet as an advertising and promotional tool;
- Showcasing Swaziland's tourism product at regional and international forums.

The promotion of domestic tourism is a part of the Policy including via events, tourism education in the school curriculum, provision of preferential rates for locals at tourism attractions and other means for local people to visit the country's tourism attractions.

A **National Tourism Development Plan 2006-2020** was prepared by Graham Muller & Associates under the European Union funded Private Sector Support Programme which ran from 2001 to 2006. While this Plan mentions tourism related proposals already formulated under the Government's Swaziland Millennium Project, the focus in terms of product development is more on smaller scale local actions and on infrastructure development, notably road improvements of relevance to tourism development. The principal tourism related proposals under the **Millennium Project** are for:

- A new International Airport with Link Road
- An International Convention Centre
- A new 250 room 5-star Hotel
- An African Theme Park
- International Trade Centre
- A Sporting Complex
- An Amusement Park

Implementation of individual projects envisaged under the Tourism Development Plan and as part of the Millennium Project has been slow, with very few completed.

The **National Tourism Strategy and Action Plan, 2012-2016**, contains specific objectives and targets. These include:

- The development of new tourism products of the kind identified in the National Tourism Policy in an effort to extend the short average length of stay. This includes the design of new product packages and engagement with tour operators with a view to selling these packages;
- Marketing of existing and new tourism products via an increased marketing budget;
- Increasing the number of international visitors from 1.2 million (including visitors in transit) to 1.5 million, the number of domestic bed nights and the average length of stay from 2 nights to 3 nights overall.

2.5 Product Development

Product Development is mentioned in the National Tourism Strategy and Action Plan produced by the Ministry of Tourism and Environmental Affairs. *“The country will constantly improve its tourism offering as well as build new products and services to target both old and new visitors. This calls for market research to ensure that the products are market driven. Such products should be those that sought to strengthen the country’s tourism image.”* There did not appear to any visible links to national, regional or district level planning.

Proposals for product development have been made in relation to the marketing strategy that is in the process of being developed to be drafted by the end of June. The recommendations are limited to four focus areas: improved access, improvements to the accommodation stock, upgrade and commercialisation of attractions and capitalising on events and special interest comparative advantage. The report also makes suggestions with respect to road quality, signage and visa facilitation.

2.6 Product Packaging Toolkit

The toolkit is devised to support the implementation of the overall product development and marketing programme. The ‘toolkit’ has three components: ‘ready- made’ packages, cross selling and the possibility of a booking engine on the STA website.

Comment [CCM2]: Could you include a description of what is guiding product development in Swaziland – e.g. is there a tourism master plan/development plan, any links to country and town planning e.g. areas for tourism development designated by the local council/government. If there are any limitations arising from such plans or the lack thereof. I am not sure if this was covered in the Situation Analysis.

3. PRODUCT ASSESSMENT

3.1 'SWOT'

TABLE 3.1: 'SWOT' ANALYSIS

STRENGTHS	WEAKNESSES
Swazi culture - which offers safety, friendly people and a feeling of relaxed comfort	Limited destination awareness in current originating markets
English speaking	Lack of co-ordination and co-operation between STA and private sector players
Geographical position - between Kruger National Park/Mozambique and Kwa-Zulu Natal	Constrained financial resources in both the public and private sectors including for conservation
An additional country to visit on a South African and/or Mozambique itinerary	Shortage of tourism 'icons'
Un-spoilt landscape and scenery	Difficulty in accessing 'Royal experience'; no fixed dates for major cultural festivals
Proximity to Gauteng economic hub of RSA as well as Nelspruit, Maputo and KwaZulu-Natal north of Durban	Air access expensive and only from Johannesburg
Wildlife viewing up close including on foot and mountain biking	Insufficient human resource skills and capacity
Events programme including Bushfire festival	Malaria risk in eastern Swaziland
Range of adventure activities - including white water rafting, caving and quad trails	Limited capacity in languages other than English and Swazi
Attractive for volunteer tourism	Limited high end accommodation
Quality handicrafts - relative to many other destinations	Perceived border difficulties/visa requirements for some countries with limited number of foreign embassies
Exemplary rhino conservation record	Weak private sector sales and marketing capacity - poor positioning with regional inbound market
Good quality major roads	Poor quality access roads in certain areas and poor signage
"Not South Africa" - discernible absence of angst	Weakness in tourism in Mpumalanga and Mozambique - limits to regional positioning
OPPORTUNITIES	THREATS
Grow the regional self-drive market	Trend of decreasing length of stay for overseas visitors to Southern Africa
Increase length of stay among overseas FIT travellers - through focused & targeted sales effort	Negative perceptions of Swaziland linked to Swazi Royal Family
Niche market potential, e.g. hiking, mountain biking, bird watching, river rafting	Global and regional competition
Regional golf group market	Increased prices, e.g. of fuel
Development of the domestic market	Regional instability, e.g. Zimbabwe
Growth of volunteer tourism	Continued weakness in the economy

Enhanced collaboration with neighbouring destinations/businesses	Dramatic decline in arrivals from Europe
Greater collaboration between the Swazi public and private sectors and between private sector tourism businesses	
Enhanced events programme	
Modular product packaging	

3.2 Key Product Characteristics

It needs to be remembered that Swaziland is a relatively small country. The country is 17,364 km². It is marginally smaller than Wales (20,779 km²). In comparison, the Free State province in South Africa is 129,825 km². The Kingdom has a limited array of unique selling propositions (USPs). Three key USPs are the Sibebe Rock, Ngwenya Mine and the Royal Events. Swaziland does boast an impressive list of special selling propositions. These are attractions and events that have a special appeal, but may not be unique to Swaziland. They are set out below.

On the positive side, a key comparative advantage Swaziland enjoys (especially relative to South Africa) is the safe and friendly environment it affords to travellers. This 'context' cannot be understated and should be utilised extensively when marketing The Kingdom. Swaziland has magnificent pristine walking trails, but then so does South Africa for example along the Wild Coast of the Eastern Province. The key difference is that the hiker/walker in Swaziland is totally safe, whereas there have been various instances of hikers along the Wild Coast being attacked and robbed².

Although The Kingdom is small in size, it boasts four unique geographical zones at different altitudes and vegetation. The mountainous Highveld, the subtropical Middleveld and the Lowveld as well as the Lubombo Mountains.

TABLE 4.2: UNIQUE AND SPECIAL SELLING PROPOSITIONS

UNIQUE SELLING PROPOSITIONS	
Sibebe Rock	World's largest exposed granite dome, 3 billion years old, but for a full appreciation it is necessary to climb to the top (approx. 2.5 hours for an ascent)
Ngwenya Mine	Oldest mine in the world (at least 43,000 years) with good interpretative displays (EU funded)

² A leading product owner in Swaziland likened The Kingdom and South Africa to Ireland and the UK. Ireland does not have many USPs, but one of the main attractions is the friendliness and warmth of the Irish people.

SPECIAL SELLING PROPOSITIONS	
Annual Events e.g. MTN Bushfire, Simunye Country Club Annual Fair	A distinctive music festival that already attracts about an audience of about 20,000 each May and a three day event each October that, in 2012, featured 31 live bands and DJs as well as fire dancing and belly dancing, traditional songs and dance
Mlawula Nature Reserve	A rare opportunity to wander unguided in pristine African bushveld, with facilities including Magadzavane Lodge, opened in March 2012
Malolotja Nature Reserve	Some of the finest hiking in Southern Africa – scenery, wildlife and unlike better known destinations such as the Drakensburg, little patronised
Hlane Royal National Park/Mkhaya Game Reserve	Opportunity to see e.g. white and black rhino at close quarters: “Better than and not so crowded as Kruger” (visitor comment, August 2012)
Unusual quality handicrafts	Swazi candles (distinctive products); Ngwenya Glass Factory (figurines, vases and tableware all made from recycled glass); Tintsaba; Gone Rural; Coral Stephens
Nsangwini	Only Rock Art Wildebeest south of the Zambezi, but with challenging access for 2 wheel drive vehicles
Golf	Appeal to self-drive golfing group market in RSA – 2 world class 18 hole courses, one hosting two Sunshine Tour events
Adventure activities	Mountain biking, canopy tours and white water rafting

3.3 Accommodation Characteristics

Swaziland has some 140 registered accommodation establishments, with an average size per establishment of just 19 rooms. Although it was not possible to visit every hotel/resort, 60% of the hotels/resorts of over 25 rooms were visited by the team, as well as a range of smaller properties.

About 70% of the establishments are hotels, guest houses or B&B's with the majority of the remainder being self-catering. Two thirds of all available rooms are in the centre of the country, i.e. in Mbabane, the Ezulwini Valley and Matsapha/Manzini.

There are a mere nine hotels/resorts with more than 50 rooms each and only 29 with 25 rooms or more. While the majority of the larger properties have websites that are linked into the STA (Geo Group) website, only 10 offer direct online booking through their own site (Table 3.1).

A considerable number of properties perforce have to focus on the domestic and/or regional market, either because of their location, or simply because of their product characteristics. The number of properties that can be sold effectively in long-haul markets is small, particularly to group tours. A symptom of this is that,

for example, Cox & Kings feature only five properties in Swaziland, the two Sun International hotels, the Royal Villas, the Foresters Arms and Mkhaya Game Lodge (Big Game Parks). Only six properties have a TripAdvisor score of 4.5 or 5.0 (the maximum). While these scores are dependent on client reviews of varying character and number, they do indicate some measure of customer satisfaction. That a considerable number of properties have no score at all, as a result of a lack of customer reviews, is an indication of low penetration of international markets.

Swaziland lacks any upmarket lodges of the kind found in and around the Kruger National Park, for example, as commented on by several European tour operators. The dilemma is that the current market for such facilities is likely to be low, making it difficult to achieve viability. Indeed, the indicators are that the profitability of accommodation operators in Swaziland is relatively low, with some making serious losses. Only the Ezulwini area has, on average, achieved room occupancy rates that would internationally be regarded as reasonable.

A further feature is the lack of any international brands such as Accor, Hilton, Marriott and Starwood. The only branded properties are the two hotels managed by the regional operator, Sun International Hotels. This limits staff exposure to the in-house training provided by international brands. With the limited tourism training available in Swaziland focusing on theoretical rather than practical training, this leaves many staff with very limited, if any, training.

TABLE 3.1: ACCOMMODATION WITH 25 OR MORE ROOMS

OVER 100 ROOMS

Name	Area	Size (rooms)	On line booking	TripAdvisor Score	Comments
Esiyayeni Lodge	Close to current airport	227	X	None	Focus on domestic conferences/meetings/events
Lugogo Sun	Ezulwini Valley	202	✓	3.5	Sun International hotel used by international tour groups
Royal Swazi Spa	Ezulwini Valley	149	✓	4.0	Sun International flagship hotel in Swaziland
Piggs Peak Hotel and Casino	Piggs Peak (North West)	104	✓	3.5	Government owned, previous management contract, low current average room occupancy

50-99 ROOMS

Happy Valley Hotel	Ezulwini Valley	60	✓	4.0	Renovated 2009; privately owned
Milwane Wildlife Sanctuary	Lobamba/Ezulwini Valley	55	✓	4.0	Part of Big Game Parks
Royal Villas	Ezulwini Valley	56	✓	3.5	Tibiyo Leisure Resorts/Tibiyo Taka Ngwane
George Hotel	Manzini	53	X	3.0	In centre of Manzini; used by foreign tour groups
Mountain Inn	Mbabane	52	✓	4.0	Especially appropriate for Mbabane business market

25-49 ROOMS

Nhlangano Casino Royale	Nhlangano (South West)	48	X	None	Previously a Holiday Inn/Sun International hotel, now privately owned and run-down
Bethel Court	Ezulwini Valley	47	X	None	Includes self-catering section
Thakozza Anglican Conference	Mbabane	44	X	None	Budget accommodation
Mantenga Lodge	Ezulwini Valley	38	✓	4.0	Views across Mantenga Nature Reserve (SNTC)
Park Hotel	Manzini	36	X	2.0	Budget accommodation in town centre
Nisela Safari Lodge	Nsoke (South East)	36	X	4.5	Own game reserve; main business is tour group meal stopovers; wish to increase overnights
Maguga Lodge	Piggs Peak	36	X	3.5	On shore of the Maguga Dam
Nkomyeni Golf Club	Nkomyeni (South West)	35	X	4.5	18-hole golf course and nature reserve
Castle Hotel	Mbabane	33	X	None	
Foresters Arms	Mhlabanyatsi (Mbabane)	33	X	4.5	Locational drawback overcome by a highly distinctive offering; only privately owned hotel regularly marketed in Europe, with both tour groups and FITs
Simunye Country Club	Simunye (North East)	32	X	None	Holds annual fair each October
Siteki Hotel	Siteki (North East)	33	X	None	1930's hotel renovated in 2005; focused on domestic market
Phumula Farm Guest House	Nhlangano (South West)	31	X	None	Attractive property focused on domestic market including conferences/meetings
Timballi Lodge	Ezulwini Valley	30	X	3.5	Founded in 1968; offers B&B and self-catering
Sibane Hotel	Ezulwini Valley	30	X	3.0	Relatively new hotel
Bend Inn	Big Bend (South East)	26	X	None	Oldest hotel in the Big Bend area
Swazi Oak Lodge	Mbabane	26	X	None	Budget accommodation
Global Village Guest House	Manzini	25	X	None	B&B in quiet suburb
Hlane National Park	Simunye	25	✓	4.0/4.5	Part of Big Game Parks; Two camps offering relatively simple accommodation
Summerfield Botanical Garden	Nokwane (Manzini)	25	✓	4.5	Recently built upmarket boutique resort of unusual character

Note: On line booking refers to ability to make an instant booking via a property's own website. Almost all these properties have websites that are linked into the STA (Geo Group) website. TripAdvisor scores can reflect a relatively small number of comments e.g. whereas there are 108 reviews of the Foresters Arms, the score for the Sibane Hotel is derived from just one review (as at 22 May 2013). Sources: STA, TripAdvisor, Bradt Guide to Swaziland, Consultants

3.4 Attractions

Swaziland benefits from considerable natural beauty and a considerable number of specific attractions, only a small number of which are visited by tour groups on a South Africa multi-stop tour. The principal attractions are listed in Table 3.2.

TABLE 3.2: SWAZILAND ATTRACTIONS

NAME	AREA	COMMENT
Bulembu	North West	Valiant tourism development project based around a disused asbestos mine; constrained by seriously difficult road access on Swazi side – but good quality road on RSA side
Kophola River Caves	Ezulwini Valley	Only major granite caves known in Southern Africa; adventure caving organized by Swazi Trails
Lubombo Conservancy	North East	Includes Hlane Royal National Park (BGP), Mlawula Nature Reserve (SNTC), Mbuluzi Game Reserve and Shewula community mountain camp. Hlane offers 4 of the 'Big 5'
Maguga Dam	North West	Scenic attraction offering fishing and boating
Mahamba Gorge	South West	EU funded community tourism operation under aegis of Methodist church, with accommodation, trails and self-catering accommodation. Difficult to access without 4 WD vehicle
Malandela's/House on Fire	Malkerns Valley	Performance arena (with annual festival), art gallery and handicrafts of distinctive quality
Malotja Nature Reserve (SNTC)/ Canopy Tour	North West	Walking trails in need of maintenance; canopy tour relatively new attraction, but very difficult to access even by 4WD
Mananga Country Club & Guesthouse (LC)	North East	Hunting lodge, house boat, booze cruise, golf course, yacht club & varied accommodation and restaurant
Mantenga Nature Reserve/Cultural Village (SNTC)	Ezulwini Valley	Replica Swazi village with twice daily dance show. One of the few ways for a visitor to access Swazi culture; country's largest waterfall
Manzini Market	Manzini	Largest market in the country with range of products and no hard selling
Matsamo Cultural Park	North West	Swazi cultural dancing, restaurant and accommodation on South African border with Swaziland, featured by some group tours (competing with Swazi ventures that are inside the country)
Mbuluzi Game Reserve (LC)	North East	Self-catering lodge & camping accommodation in well-stocked game reserve
Mlawula Game Reserve (SNTC / LC)	North East	Well located game reserve on Lubombo escarpment – beautifully located and maintained Magadzavane Lodge
Mlilwane Wildlife Sanctuary (BGP)	Ezulwini Valley	Mammals and birds with associated accommodation; both self-drive and guided tours, all on a relatively modest scale
Mkhaya Game Reserve	South East	Small reserve offering exceptional viewing of black and white rhino
National Museum	Ezulwini	Well presented and interesting displays covering both natural

(SNTC) Ngwempisi Wilderness Area	Valley South West	history and the history and culture of the country Hiking trails in beautiful landscape with two EU funded community tourism projects both impossible to access without 4 WD and difficult even then
Ngwenya Glass Factory	Ngwenya, close to SA border	Well laid out attraction with 'free to visit' glass factory and shop, range of handicraft outlets and café with Wi-Fi. Access and parking for coaches
Ngwenya Mine (SNTC)	Ngwenya	World's oldest mine (at least 43,000 BC), beautifully situated, with adjacent visitor centre. Access only possible by car; no coach access
Nkonyeni Golf Estate	Manzini District	World class 18 hole golf course – luxury accommodation and spa & game reserve
Nsangwini Rock Art	North West	Swaziland's best bushmen paintings but challenging to access without 4WD vehicle. EU funded community venture with low visitor numbers
Peak Fine Craft Centre	North West	Craft centre (Tintsaba, Likwheti and Coral Stephens Handweaving) & coffee shop with fine viewpoint but struggling to attract sufficient numbers
Phophonyane Falls Nature Reserve	North West	Small mammals and birding with walking trails
Shewula Mountain Lodge (LC)	North East	Beautifully located community lodge – difficult access road and poorly sign posted
Sibebe Rock	Mbabane	World's largest granite dome, requires a hike with an element of risk
Simune Country Club	North East	Good value accommodation with self-catering options – conference facilities and good restaurant plus tennis, squash and short 9 hole golf course
Swazi Candles	Malkerns Valley	Candle factory, free to access, and shop combined with other handicraft outlets and area for coach parking which, with toilets, makes it a good and popular coach stop
Swazi Secrets	North East	Natural cosmetic factory with small shop; limited visitor appeal

KEY: BGP = Big Game Parks; SNTC = Swaziland National Trust Commission; LC = Lubombo Conservancy

The challenge for Swaziland is that none of the attractions have iconic status and many are difficult to access, especially for coaches operating group tours. This has led to these tours stopping at a small number of locations, notably Ngwenya Glass Factory or Swazi Candles, with this being the only attraction in Swaziland mentioned in the respective tour operator brochure. These attractions also have the benefit to operators of being free of charge.

While there is a very modest effort at cross selling between SNTC attractions, there are no promotions as is common elsewhere to encourage self-drive visitors to visit a number of attractions.

3.5 Community Based Tourism

As tends to be the case elsewhere, there is limited integration between community based tourism projects and the mainstream tourism industry. Shewula mountain camp was the first venture in Swaziland, opened in 2000, and it continues to attract patronage despite being challenging to access by road. Difficult road access afflicts subsequent ventures funded by the European Union, including the Nsangwini Rock Art and Mahamba Gorge. The latter benefits from the support of the local Methodist Church and continues to offer overnight accommodation as well as earning revenue from day visitors. The two accommodation enterprises within the Ngwempisi Wilderness Area are especially difficult to access even in a four wheel drive vehicle. One, Khelekhele, is effectively moribund. The other, Kopho Lodge, is in much better condition. However the ingenious design within a natural rock formation makes it only suitable for visitors who are young and fit, thus seriously limiting the potential market. There also appear to be issues relating to the distribution of such incomes as are earned.

The Lonhlupeko Craft Market is on the main route for visitors from Mozambique accessing Swaziland's central tourism belt. Also funded by the EU, it suffered a serious burglary in October 2012. This in turn led all the stall holders bar one to abandon the venture, only wishing to return if anti-theft measures are introduced. As of April 2013 this had not happened. Although the market is signposted these signs are all in error pointing at the wrong location and they are not clear as to what it is being signposted.

3.6 Access and Signage

There is a dire need to improve road signage generally throughout Swaziland. There are instances where key roads and split in roads are not sign-posted at all or very poorly marked. A case in point is the road from Tshaneni to Buhleni which splits between Mhlangatane and Buhleni with no road sign anywhere to indicate where to go. A suggestion is to brand the country into regions or areas with clear road signage on all main and secondary roads. A good example of regional branding is in Mpumalanga where the province is divided into various themed sub-regional branded areas.

Tourism attractions and product are also poorly sign-posted. A case in point is Shewula Mountain Lodge. There is no sign before the turnoff to Shewula pointing to the Lodge in either direction. At the turn-off there is a small 60cm diameter sign in small writing informing the prospective tourists that this is indeed the correct turn-off to Shewula Mountain Lodge.

Another example of poor signage is at Maguga Lodge. There is no signage before or even at the entrance to the Lodge when travelling from a northerly direction across the dam wall to the Lodge.

Equally poorly sign posted is the entrance to Malolotja Nature Reserve and the Canopy Tours. There is a sign, but it is right at the entrance, giving the prospective tourist no warning at all. Moreover, within Nature Reserves there needs to be good visible and clear signage showing directions and attractions. The signage within Malolotja is extremely poor and confusing (see photograph below) – utilising symbols that

Comment [CCM3]: There is no photograph above.

are not explained even on the map handed out at the reception). Moreover key viewing points are not sign posted.



In general what is needed is to get uniform tourism product signage posted at both the turnoff from the main road as well as 500 meters beforehand travelling in both directions. This should be the norm for all major tourism products.

3.7 Visa Facilitation

Indian tourist arrivals to South Africa have increased significantly over the past five years, from 51,823 in 2007 to 106,774 in 2012 – an increase of 106.0%! There is definite interest from both South African based inbounds as well as outbound operators in India in extending itineraries to include Swaziland. This interest is however severely tempered by the fact that prospective Indian tourists need visas to enter Swaziland. To obtain a visa it is necessary to send the passport to the Swazi High Commission in Malaysia.

A suggestion is that if a traveller has a visa to enter South Africa, they should receive automatic entry into Swaziland.

A possible further threat is the current discussion within South Africa about imposing reciprocal visa requirements on UK travellers to South Africa. In March 2009 the UK, in a response to the lack of controls within South Africa with respect to obtaining passports, imposed a requirement forcing South Africans travelling to the UK to obtain visas. The UK undertook to review this in five years' time. South Africa is not satisfied that this review has been objectively undertaken and thus is considering the imposition of reciprocal visas. This would impact negatively on tourism flows to South Africa and thus Swaziland.

4. PRODUCT DEVELOPMENT STRATEGY

4.1 Overall Strategy

The focus in this section is on a small number of actions that can be undertaken and achieved in next 3 -5 years. The thrust is to work with products and assets that are currently available. The report suggests ways that these could be better accessed and upgraded to improve the competitive positioning of the country.

The Product Development Strategy is designed to address the objectives of the National Tourism Strategy and Action Plan, 2012-2016, including extending the average length of stay and in raising international visitor arrivals.

A practical issue that needs to be widely encouraged is cross-selling between products. Not only does this have the potential to increase tourist receipts, but it also broadens the awareness of activities and accommodation options in The Kingdom and thus encouraging longer stays.

4.2 Improved Access

Air Access

A key impediment to increased tourism growth is the lack of direct international flights to Swaziland. Currently only Swazi Airlink flies four times a day to/from Johannesburg, Monday to Friday and three times day on weekends. Further compounding the air access issue is that Swazi Airlink has been black-listed by the European Union (EU). This precludes European based tour operators from booking the airline. Swazi Airlink is on EU banned airline list because the company is registered in Swaziland. In 2007 an International Civil Aviation Organisation (ICAO) review of Swaziland's aviation safety regulation concluded that it was not up to par. The EU took the lead from ICAO which is why the airline was put on the list. The Civil Aviation Authority (CAA) has been addressing this and now has trained inspectors. The ICAO has

Comment [CCM4]: What is the vision that this strategy is aiming at contributing to? Please make mention of this based on what the country/government/tourism sector/STA have set as the vision for tourism development.

recently been on a review visit. It is hoped that this will lead to Swazi Airlink being taken off the black-list later this year.

The new Sikuphe airport should be opened in October 2013. The availability of the airport is being promoted to airlines via the Routes conference. The ability of the STA with its current limited annual budget of E 16 million to engage in the type of subsidies established airlines look for, to fly to new destinations, is severely limited. It would be instructive to find out what level of support the new King Shaka airport in Durban provided to Emirates for the direct international flight. Qatar has recently begun direct flights to Maputo. The imposition of onerous visa restrictions in key European and North American markets may have a salutary effect on their operations and there maybe scope to engage Qatar about using Sikupe instead. Furthermore there is no ground handler in Swaziland able to service a TUI 787 (or similar) charter even if one could be persuaded to come (as well as there being insufficient accommodation within the 1.5 hours drive time of the airport that is a normal tour operator benchmark).

It is recommended that the STA keeps abreast of developments with respect to air access and offers support to allied agencies in this regard. Care should be taken not to be dragged into costly efforts to attract new carriers to the airport, which lie outside the STA mandate and core target markets as defined in the marketing strategy.

Scheduled Bus Service: Kruger Mpumalanga International Airport (KMI) – Swaziland – Southern Mozambique – Maputo

An idea put forward by the Managing Director of AAA Travel (a large inbound company based in Cape Town who service predominantly the Benelux and German markets and are passionate supporters of Swaziland) is to create a scheduled bus route that allows the massive volume of international tourists who visit the iconic Kruger National Park to access a beach destination. Notwithstanding the fact that South Africa has a coast line of 2,798 kms and generally very pleasant weather, there are almost no resort products that allow foreign tourists to access a beach holiday. There is a clamour from foreign tourists for access to a beach experience. Many tourists add a leg onto their South African holiday by visiting Mozambique or even Mauritius. This is however mainly accessed by air and is extremely costly.

The idea is to create a scheduled bus service that departs from KMI and travels south through Swaziland and out either at the Mhlumeni or the Namaacha border posts and onto Southern Mozambique and then up to Maputo. The service would then depart Maputo to KMI through the Komatipoort border post.

TAP flies direct from Lisbon to Maputo and has recently announced that it intends increasing its frequency of flights from three to four per week. Qatar has been flying three times a week between Doha and Maputo, since October 2012. These two routes provide a direct international access into the region and the bus service can act as a conduit between the three countries.

The idea was canvassed with various European tour operators at Indaba recently. The majority responded with interest. The operational logistics of stop overs and routes will have to be fine-tuned by the operator who undertakes the service. There are precedents for the national support of airlines in order to attract tourists to destinations. There could equally be an opportunity for the STA to collaborate with a bus operator and subsidise (on a sliding time scale) the venture. The quid pro quo of such support would be to engineer two or three night stop overs in Swaziland at selected attractions and suitable accommodation establishments. It is envisaged that properties benefiting from stop-overs would also contribute financially to the venture.

What is attractive about the idea suggested above, is that it emanates from the market. A South African based wheels operator with a national presence (including a base at KMI) has been sounded out and expressed firm interest in the venture. The current Mozambique visa regime which requires most key source market tourists to obtain visas for Mozambique prior to arrival is a deterrent to this initiative. Although the restrictive visa regime is officially in place, Mozambique authorities are issuing visas on arrival (which was the norm prior to the recent regulations being promulgated).

An interesting analogous case study of “plugging an access route” is the link between KMI and Livingstone (Victoria Falls). Five year ago there was no direct air link between the two iconic destinations of the Kruger National Park and Victoria Falls. Tourists had to fly back from the Kruger National Park to Johannesburg and then to Victoria Falls, which was costly and time consuming. Direct tour operator, Rhino Africa, invested in a private air charter between the two destinations. This proved the viability of the route and today this is offered by the scheduled carrier, SA Airlink, which flies the route four times per week.

4.3 Improvement to the Accommodation Stock

An overall impression of the accommodation product in Swaziland is that it appears somewhat ‘old and tired’. There were few examples of recent refurbishments. There is certainly an argument to be made for incentives for the upgrade of existing facilities.

A considerable number of countries have recognized that tourism is a distinctive sector where investment incentives are required to maintain competitiveness.

This reflects the relatively long time periods required for new tourism projects to achieve a satisfactory return on capital. Commercial sources of finance are often unwilling to lend for the kind of time periods that are required and/or at a rate of interest that enables a project to be viable without some form of intervention.

Most commonly these incentives are provided for new capital projects such as hotels and resorts, but increasingly it has become recognised that they are as important – if not even more important – for existing

tourism businesses. This is because these businesses are insufficiently profitable to enable upgrades to take place, which then leads to a spiral of decline where foreign tour operators put ever increasing pressure on the prices that they are prepared to pay, thus making refurbishment ever more difficult, resulting in a spiral of decline. Often only public sector intervention is able to rescue the situation.

Such interventions can take the form of:

- Grant funding for specific agreed product improvements
- Soft loan facilities
- Interest rate subsidies
- Tax incentives that may make a project viable when without them this would not be the case, including special depreciation allowances

A number of African countries provide specific incentives for tourism development, but not necessarily for refurbishment. An example where refurbishment is recognised as meriting special attention is Kenya where there are:

- soft loans provided via the Kenya Tourism Development Corporation
- tax incentives for hotel and resort refurbishment.

Under Kenya's Vision 2030, the Kenya Tourism Development Corporation The Corporation is tasked not only with the development of new accommodation but also the rehabilitation and upgrading of existing lodging facilities via credit funding to potential investors, In addition there is zero Value Added Tax rating for the construction of new hotels and for the rehabilitation of existing ones.

In Uganda there are specific initial tax allowances, a VAT exemption outside Kampala and customs duty exemptions for hotels. Tanzania offers a package of investment incentives for tourism development including zero import duty. In Zambia, there are tax allowances including for the extension of existing hotels. In South Africa, hotel refurbishment qualifies for special depreciation allowances.

Further afield, in **Malta**, Government considers that changes in business models require operators in the hospitality industry to innovate and align their offering with new market expectations. In their case the country provides an interest rate subsidy scheme to support hotels, restaurants and holiday accommodation providers in upgrading their operations and product offering so as to provide new and improved services. It is considered that these investments are necessary to enhance the competitiveness of such enterprises which in turn upgrades the image of the tourism sector.

Comment [CCM5]: Before talking about Malta, please bring to the fore a more relevant African example. Malta is in a different league to Swaziland. Malta does have access to some EU funding which Swaziland does not. The detail you have spent on Malta you could also dedicate to an African country. Maybe Namibia which you used as a more relevant example in the Situation Analysis Report would be useful.

The objectives of the Malta incentive package are to:

- Encourage holiday accommodation providers and restaurateurs to improve their product through upgrades and extension works;

- Support hotels and restaurants address the requirements of a wider client base through the diversification of products and services offered;
- Increase the competitiveness of the tourism sector, by increasing the number of satisfied visitors through the provision of value added hospitality services.

Such incentives are common elsewhere in Europe.

Given low levels of hotel occupancy in Swaziland especially outside the central belt, prima facie there does appear to be a distinct risk of declines in relative product quality taking place with a resultant loss of competitiveness. Indeed, there are individual examples where this is already occurring.

While grants or soft loans are likely to be difficult to implement in the Swaziland context, the review of tax incentives applicable to tourism accommodation – and in particular for the refurbishment of existing properties – could aim to ensure that they are appropriate in the Swaziland context and that they are directed at having a positive impact on product quality. These could be limited to those areas of the country where the risk of a loss of product competitiveness are at their greatest.

Another feature of the accommodation product is the limited bed stock at certain properties. The flagship Mkhaya Game Reserve, for example, has only 12 ‘rooms’ in total. Mkhaya is often touted as one of the iconic ‘things to do’ in Swaziland. However, with only 12 rooms this severely limits growth opportunities.

Whilst the ‘open’ nature of these rooms and the lack of electricity, will appeal to a certain more intrepid segment of tourist, it may be too exposed for those wanting more traditional lodge accommodation. There appears to be sound reasoning for extending the bed stock at Mkhaya. A cost-effective luxury tented camp could offer a solution, as opposed to a ‘brick and mortar’ option.

A further observation on Big Game Parks, is the diverse nature of the accommodation offering between Mkhaya Game Reserve and Hlane Royal National Park. The luxury tented option could also be introduced at Hlane, increasing bed stock and also harmonising the quality of accommodation.

Reilly’s Rock, within the Mlilwane Wildlife Sanctuary, offers the promise of a luxury experience. The ambiance and setting are world class. However, the room quality could be enhanced by offering a shower and bath option. The food and beverage service could also be significantly upgraded.

The product improvements suggested above are not meant to single out Big Game Parks for special attention. The intention is rather to create a three property product offering that would enable Swaziland to attract an upmarket regional self-drive market.

It would appear that there are currently no incentives for new investment in tourism. This should be re-evaluated and an attractive incentive for new investments should be developed. This may be outside the

remit of the STA, but it should aggressively lobby the Swaziland Investment Promotion Authority on the matter. An allied issue that should also be explored is tax rebates for refurbishments to existing tourism product. This could assist in upgrading the quality of the national product and raising the competitiveness of the country.

4.4 Attractions

Upgrade and Commercialisation of Hiking Product in Malolotja

A shining example of a hiking trail that has been 'created' and is extremely popular is the Whale Trail. This is a top quality hiking product that has been created along the southern coast of South Africa. It is managed by Cape Nature (the provincial parks board) and is fully booked a year in advance. The trail traverses one of the Western Cape's most unique and diverse nature reserves, while providing nature lovers and those who love the outdoors with unique comfortable overnight accommodation situated at spectacular locations. The route stretches over 55 km from Potberg to Koppie Alleen and includes five overnight stops.

All Whale Trail cottages accommodate up to 12 people in the configuration of 3 bedrooms with 4 beds in each (hikers bring their own bedding). The five overnight cottages all have a kitchen well equipped with gas stoves, pots, pans, cutlery and crockery enough for twelve. Braai tongs, dishwashing liquid, toilet paper, matches, candles and firewood are available at each cottage. All the huts have braai facilities. The cottages have reliable solar powered lights and gas geysers supply hot water for the showers and kitchen sinks. Every day the transport contractor is on standby to transport the luggage that the hikers do not want to carry to the next cottage, allowing hikers the luxury of carrying only a daypack, camera and field guides while walking.

This type of hiking product could be created in the Malolotja Nature Reserve. There are existing trails. It is a question of upgrading or building suitable accommodation and contracting a transport company to provide that service. The trail can be marketed by SNTC and STA and would greatly enhance the tourism product in Swaziland. Given the size of the Malolotja, several trails could be developed and sold on a modular basis.

The example of the Malolotja has been used above, but the principle of looking at creating more formal hiking and 'slack-packing' trails would apply to other areas within the Kingdom that have the potential for further development.

Dams

Swaziland has several accessible and extremely scenic dams that have an appeal to both leisure as well as special interest visitors. Included here are: Maguga, Mnjoli and the Sand River Dams. There is a fairly well developed array of accommodation around and nearby the Maguga Dam. IYSIS is considering investing in

a new upmarket lodge at the Sand River Dam. A key comparative advantage of this dam is the high number of fresh water fish species in the dam, which attracts special interest anglers.

4.5 Capitalising on Events and Special Interest Comparative Advantage

Mountain Biking

Swaziland, with its natural beauty and varied topography, is an ideal place for mountain biking. “The Swazi Frontier” is an iconic race held over 3 days in the north west of the country. Another high profile race is the Imvelo MTB Classic. Beyond these events which attract significant revenue and interest, accessing information of where and how to mountain bike in Swaziland is fairly arduous. Although there are many trails traversing the country, these are not well demarcated nor are they well marketed or packaged.

The Lubumbo Conservancy has recently launched a leisure eco-trail network that seeks to offer a combination of hiking, mountain biking and 4x4 trails. The trails have been mapped to create an eco-recreational zone along the Lubumbo ridge. Mike Nixon, a world famous mountain biker was part of the launch and endorsed the product as absolutely world-class. This model of product development linked to community involvement could act as a good model to be extended to other areas in Swaziland.

Golf

Swaziland has two world class 18-hole golf courses, in Royal Swazi Spa Valley and Nkonyeni. The Royal Swazi Spa Valley is home to two Sunshine Tour events, the Investec Royal Swazi Open and the Lombard Insurance Classic. This platform needs to be capitalised on in terms promoting Swaziland as a sought after golf destination to the regional golf market. There appears to be scope to increase the almost non-existent exposure of Nkonyeni at these events. The potential of using two courses for the first two days play (as is done at the Joburg Open³) should be explored, particularly with Nkonyeni being only 40 minutes drive away. This type of cross selling will raise the profile of Swaziland as a golfing destination. The two 18-hole courses should also cross sell or at least offer exposure to the good quality 9-hole courses that are available to the golf traveller such as Mbabane, Mananga, Nhlngano, Big Bend, Bulenbu, and Usuthu.

Bushfire

The Bushfire music festival is another good example of a well co-ordinated and sponsored event that attracts up to 20,000 people. The next stage in the evolution of the event is to explore ways to increase the exposure and traction from the event. One way is to link up with other regional music and cultural events (such as AfrikaBurn, Oppiekoppie and Splashy Fenn) and to investigate cross-selling and endorsement

³ The first two rounds are played on Royal Johannesburg & Kensington’s East and West courses, with the final two rounds played exclusively on the East course.

opportunities. Whilst Bushfire speaks to the 20,000 fans who attend the event, it would be useful to amplify the event by attracting key radio stations from regional target markets for Swaziland to broadcast from the event (e.g. Radio Jacaranda – Pretoria/Gauteng and 94.7 – Johannesburg/Gauteng).

4.6 Other Components of the Tourism Product

The following issues will need to be addressed as part of developing and promoting the country's tourism product:

Visa Requirements: There is a compelling case to be made to re-look at visa requirements to Swaziland. Forcing potential tourists to obtain visas from growing markets, such as India, renders The Kingdom uncompetitive. It is suggested that if a traveller has obtained a visa for South Africa, they should be allowed to travel to Swaziland without getting a further Swazi visa. This would be in keeping with the often touted moves to a regional uni-visa.

Road Signage: The issue of road signage has been mentioned in this report as well as in the Situational Analysis Report. It is suggested that key attractions, including community products, are well sign posted both at the turn-off from the main road as well as warning signs 500m before in both directions. In the case of a relatively lengthy distance that has to be travelled on secondary or poor quality country roads, to reach a particular destination, well posted visible signs that confirm the traveller is on the correct path should be placed at suitable intervals. Examples here include Shewula Mountain Lodge and the Nsangwini Rock Art, both of which are located a considerable distance from the main tar road.

Regional Branding: Swaziland has four regions, Hhohho, Manzini, Lubombo and Shiselweni. The potential exists to do a regional branding exercise that assigns a tourism flavour to these regions. Mpumalanga province in South Africa has done this successfully. The regional branding could also be used in moving towards uniform signage for key tourism attractions.

Road Access: In general the quality of the main arterial roads in Swaziland is excellent. The main double lane highway from the Ngwenya border post to Manzini is world class. There are isolated instances of very poor quality roads that link tourism attractions to the main roads. This limits the potential tourism to these attractions and/or carries the danger that the potential positive endorsement of the attraction is sullied by a negative experience in getting to and from that place. It is concerning that access to three community products, namely Shewula Mountain Lodge, the rock art at Nsangwini and Mahamba Lodge at Mahamba Gorge is extremely arduous.

The road access between Pigg's Peak and Bulembu is very poor. By upgrading this to a good quality dirt road able to be driven by normal sedans, will enable the Bulembu/ Josefdal border post to become a new access point for Swaziland, thus enhancing the viability of Bulembu, not only as a tourism node but as an

economic gateway to The Kingdom. It is encouraging that although the road quality in the main was poor, an upgrade programme appears to be underway.

5. PRODUCT PACKAGING TOOLKIT

5.1 'Ready Made' Packages

The Situational Analysis Report reported low levels of awareness of Swaziland amongst the South African inbound market. Many companies did not feature Swaziland as a FIT holiday option. Common questions were 'what is there to do and see there?' and 'is there the potential for 2 – 4 night modules in Swaziland?'. The call for packaged modules also came from the Geo Group, who represent the STA in the UK.

The lack of this type of product packaging can be traced back to a climate within Swaziland where private sector product providers do not have a history of collaboration. This type of product packaging is normally put together by local DMCs or inbound operators. There is a dearth of such companies in Swaziland. Two companies, Swazi Trails and Taman Tours have both attempted to serve as fully-fledged Swazi based inbound operators. However, the presence of strong South African based inbounds, with long standing relationships with their source market principals has rendered the role of a Swazi based DMC unviable. There is simply not enough commission to sustain the chain from Swazi product, through Swazi DMC, through South African inbound to the overseas based operator (and in some cases beyond that to the travel agent). Both Swazi Trails and Taman Tours were sounded out about playing a role in terms of putting modular packages together. Both companies agreed that there was a dire need for this type of product packaging. However, both companies were unwilling to invest the time, given the threat of disintermediation.

There is clearly a need for some form of product packaging in Swaziland. This should not be limited to 2 – 4 night modules that only feature Swazi accommodation and products. It could also be broadened to include linking Swazi product with that in and around the southern Kruger National Park and northern KwaZulu-Natal. This could also be extended to include lodges in southern Mozambique. The aim would be to produce tailored packages that could be taken to market. This type of package could importantly combine accommodation with activities that have up to now been relatively invisible to the market (e.g. Visit to village located down the hill from Phophonyane Lodge or to Ngwenya Mine or Sibebe Rock) The important question remains - who (in the absence of Swazi DMCs) is best placed to put these packages together. The answer is that this task will fall to key product groups who are willing to take the lead and manage the process. There may be an argument that the STA should fulfil this function. However, given that part of the process of 'selling' may involve confidentiality issues related to tactical pricing, this task is best left to the private sector. The views of leading private sector players in Swaziland were canvassed in this regard. There have been embryonic attempts at taking 'packages' to the operator market. Very few

operators are not interested in this type of product. There are however some difficulties in actually ensuring the package is featured. Making this a priority to operators where Swaziland is a currently non-existent or a very small portion of their business is difficult. Moreover, the practicalities of who acts as the lead agency and 'takes' payment from the operator is another stumbling potential block.

Pricing of these packages is crucial. These could be offered as a tactical special with especially attractive pricing, below normal Standard Tour Operator (STO) rate level. The pricing of individual establishments would be hidden in the overall 'package' price. However if this were the case, one of the principal product participants in the 'package' would need to act as the 'one stop payment agent', to prevent the disclosure of individual establishment's prices. Moreover, tactical specials should be offered for limited periods at specific low season times. The packages could also be put together using normal STO prices, which would make their distribution by the Geo-Group, for example, in the UK far easier. Operators who specialise in Swaziland and who buy directly would be the preferred target market for these packages. This is assuming that accommodation providers in Swaziland would be comfortable disclosing their STO rates.

Comment [CCM6]: What is STO in full?

Once these packages are agreed on and available, they should be 'taken to market'. A key customer segment would be South African based inbound companies who have expressed an interest in Swaziland. It is imperative that packages are 'sold' in an holistic manner. There is clearly a role for some form of co-operative marketing support to enhance this offering. It would furthermore be useful if any consultant/agent educationals and/or journalist visits to promote the package offering, were also incorporated as part of the overall co-operative marketing agreement.

These product packages could also be offered to the regional outbound market and directly to regional consumers (Getaway, Beeld, Travel 24, etc.)

The 'toolkit' approach offers the potential to position Swaziland in a more attractive and accessible way to the regional and international traveller. The product packaging route suggested above offers a way of doing this. It is however fraught with several issues that will need to be overcome, such as pricing, rates and the perception that operator relationships and networks that have been nurtured are being 'opened up' to fellow competitors. The STA needs to work with willing product providers in Swaziland to encourage a more collaborative approach to selling The Kingdom.

5.2 Cross Selling

OPTION 1

Cross selling of SNTC attractions by pricing offers – joint ticket and/or reduced price ticket for the second attraction visited, applicable to national museum, Mantenga cultural village, and Ngwenya mine. In addition by ensuring that there are leaflets at each attraction for the others (which there are not at present) increases the awareness.

OPTION 2

Extended cross selling of attractions e.g. if you make a purchase in the Ngwenya glass factory shop, you get 25% off admission price to the mine (which would encourage visitors to visit the mine).

OPTION 3

Golfing 'ticket' – one price that affords discounted rounds at both Nkonyeni and Royal Swazi Spa. Could be extended to include various 9-hole courses.

5.3 Booking Engine on STA Website

Another channel that could be utilised is to establish a cost-effective booking engine behind the STA website that allows product owners in Swaziland to allocate inventory on a day to day basis. This will allow, particularly smaller product owners, to allocate inventory into a system for distribution. There are various products on the market in Southern Africa that facilitate this.

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