

DEMAND JUSTIFICATION SURVEY FOR TOUR/FIELD GUIDE TRAINING IN MALAWI



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DEMAND JUSTIFICATION SURVEY FOR TOUR/FIELD GUIDE TRAINING IN MALAWI

(Draft Report)

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ABSTRACT

Tourism in Malawi has not been that developed if consideration is made on the riches and natural beauty that the nation has. Besides all its endowment the nation has trailed behind as far as tourism destination placement is concerned. Largely visitors who have been coming to Malawi have been those either on duty or visiting relations. In trying to improve the sector, the government has made tourism a priority area among priorities with a view of making Malawi a vibrant tourist destination. Though this is the case, tour/field guiding services have not been much emphasized in national policies; however the service forms the spinning point of tourism development in any country. This report therefore presents findings of the demand justification survey for tour/field guiding training development in Malawi. The findings indicate the need to develop the training to international standards as those propagated by FGASA and ZAWA with an informal sector consciousness and ushering in of discipline in the occupation.

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LIST OF ACRONYMS AND ABBREVIATIONS

FGASA	-	Field Guides Association of Southern Africa
GDP	-	Gross National Product
GoM	-	Government of Malawi
MIT	-	Malawi Institute of Tourism
MSCE	-	Malawi School Certificate of Education
NSO	-	National Statistical Office
TEVETA	-	Technical, Entrepreneurial, Vocational Education and Training Authority
UNESCO	-	United Nations Education, Science, and Culture Organization
ZAWA	-	Zambia Wildlife Association

Demand Justification Survey for Tour Guide Training in Malawi

CHAPTER ONE

1.0 Introduction

Over the past decade (2000-2010), Malawi has experienced an increase in the number of international visitors visiting the nation from 227,576 to 746,129 representing an overall 228 percentage increase above the initial figure (NSO, 2007, 2008, & 2010). According to classification, these visitors are divided into three categories based on their purpose namely; holiday, official/business, and visiting friends/relatives. Based on these categories, Malawi has the highest number of visitors coming on official/business trips compared to the two. During this reference period, the category had an average annual growth rate of 23 percent compared to the two which are at 18 percent. Overall assessment further indicates that the category has also grown with 251 percent which is above the total growth for the sector. The other two categories fall below the total growth, calculated at 203 percent for Visiting Friends and Relatives (VFR), and 199 percent for those on holiday. Below is a table and graph indicating the growth and comparison of these categories over the reference period.

Table 1: Number of visitors into Malawi from 2000 to 2010

Year	Number of Visitors	Purpose of Visit		
		Holiday	Official/ Business	VFR
2000	227,576	63,239	124,082	40,254
2001	266,339	71,415	144,314	50,610
2002	382,647	101,466	205,586	75,595
2003	424,000	112,240	208,790	102,970
2004	427,360	94,658	208,368	124,334
2005	437,718	114,362	227,140	96,216
2006	637,772	167,707	312,083	156,879
2007	734,431	212,172	388,064	134,196
2008	742,458	179,300	372,276	190,881
2009	755,031	245,527	381,845	127,658
2010	746,129	189,239	434,957	121,933

Source: Statistical Year Books (2007, 2009, & 2010)

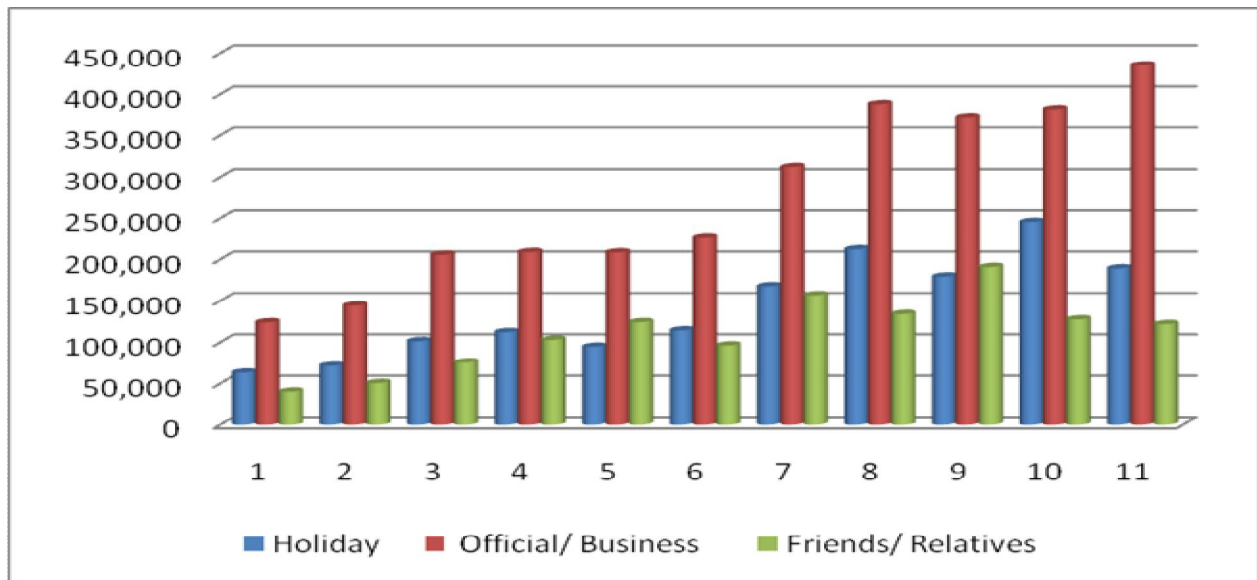


Figure 1: Comparing the growth of visitor's categories

A comparative analysis of the contribution of these categories indicates that over the reference period, 52 percent of the visitors came on official/business trips, 27 percent on holidays, and 21 percent VFR. As can be noted from the characteristic of these trips, official/business and friends/relatives trips though are part of tourism; they have an inelastic demand choice compared to those of holiday trips. In other words the other two do not have that elastic demand as compared to the holiday destination demand. This tourism destination placement of the country compared to other countries is what forms the backbone of the tourism industry, and it is this quality of trips that brings in a competitive advantage in tourism across countries. However, Malawi looks not positioned to exploit the advantages of this demand to her advantage. Over the years, there has been a lower percentage growth and contribution, and the stochastic trend for those on holiday as can be noted above.

In the presence of such a trend, the pleasing news is that in the just adopted Malawi Government overarching policy, the Malawi Growth and Development Strategy II, the government would like to reposition the tourism sector and insure

Malawi is a tourist destination for travelers from all over the world. Further development on the tourism platform indicates that Malawi will now be engaged in developing a tourist route from Southern to Northern Region which will therefore indicate a need of supporting service sector especially that of tour guiding and travel agent. Summing it all, the government has adopted the development and promotion of a vibrant tourism industry as a goal for the tourism industry, with the following expected outcomes and strategies.

Medium-Term Expected Outcomes

- Increased contribution of the tourism industry to GDP;
- Improved environment for doing business in tourism;
- Increased number of tourists; and
- Increased local participation in the tourism industry.

Key Strategies

- Providing infrastructure that is supportive to tourism development;
- Promoting the development of high-quality tourism facilities in designated areas including Lake Malawi;
- Enforcing tourism industry standards and planning controls;
- Strengthening institutional capacity at all levels;
- Promoting eco-tourism;
- Promote participation of local investors in tourism industry; and
- Enhancing marketing of Malawi's tourism products.

To achieve these, the government will need to address some of the bottlenecks existing in the tourism sector. One of the bottlenecks is the existence of a gap in the training of tour guides and subsequent large number of tour guides which do not qualify to be tour guides at all. Despite such a gap, these tour guides form the spinning point of achieving the outcomes of the policy, and the prevailing condition would therefore greatly compromise the achievement of the stated goal. It is also worth noting that beyond the achievement of the goal,

even in the absence of the development of the tourism route if Malawi has to reap more from tourism in terms of foreign exchange, employment, cultural export, and environmental conservation, then will need properly trained tour guides who can market the country in both knowledge and expertise, and help preserve the environment.

In cognizance of this crucial role tour guides play and the subsequent benefits, Ministry of Tourism, Wildlife and Culture, and Wilderness Safaris wrote TEVETA to help in improving the sector by introducing training of tour guides in Malawi. The notable bottle necks in tourism sector with special reference to tour guides are:

- Lack of continued training of tour guides as a result of absence of training institution.
- Lack of training personnel.
- High costs of formal training in tour guiding.
- A high number of unqualified tour guides, which can be stated to be partly enforced by the informal nature of their operations and a resultant effect of the above bottle necks.
- No properly remuneration for tour guides due to lack of qualifications.
- Low motivation resulting to low performance due to low wages.
- Unorganized supply of tour guide services.

Despite the presence of such conditions, it is worth noting that Tour guiding training in the tourism sector is fundamental in enhancing efficiency in the operations of tourism and also a motivation to uncover the hidden treasures of Malawi tourism sector in the end contribute to the economic growth of the nation by attracting more tourists to Malawi *i.e.* making Malawi a tourist destination as is being envisioned. The availability of competent tour guides therefore forms a panacea in value addition to the industry and enables the growth of tourism sector that has potential to contribute to social and economic

development of the country. With the Presidential acknowledgement and government stand it is therefore imperative to address the bottle necks if strides must be registered towards the policy for economic development.

This report will therefore focus on validation of the demand by the two institutions, Ministry of tourism, Wildlife and Culture, and Wilderness Safari, the biggest tour operator in Malawi. The exercise establishes the market performance (both demand and supply), performance gaps of the Tour Guides and institutions that can ably handle the training.

1.1 Arrangement of the report

Having presented the background, the report will in second chapter focus on developments and gaps that have been there in the tourism sector in reference to tour guiding, then in chapter three will present the descriptive statistics and market analysis, and lastly chapter four will present the recommendations and conclusion.

CHAPTER TWO

CURRENT DEVELOPMENT AND TRAINING GAP

2.0 Introduction

This chapter looks at the development that has been there in regards to the tour guides. It will also focus on the gaps that have existed and therefore giving rise to the need for development of the training and the subsequent calls to the same.

2.1 Developments on the training of tour guides

In an effort to insure sanity and development of the tour guide market, the Ministry of Tourism, Wildlife and Culture, has at several occasions mounted up development and strategic operations in different areas of Malawi some according to need and some program focused. Amidst such operations has been the instituting of identity cards for proper identification of tour guides in Nkhatabay and Mangochi specifically Capemaclear, and training programs facilitated by district tourism officers in addition to those facilitated by the mother ministry and local and international institutions.

The development of identity cards to the tour guides followed a twofold crisis between operators and Tour Guides themselves. The first is the misconduct of the so called tour guides who are necessarily beach boys that led to loss of a life in Cape Maclear. Around the area tour guiding has come to be the common economic activity for the boys that are growing up. Different from other shore lying regions, Cape Maclear was declared a world heritage site by United Nations Education, Science and Culture Organization (UNESCO) making it a protected area from fishing such that the fishing business has not developed as has been in the other areas even those close to the site like Malembo therefore leaving tourism as the core advantage of the area. However the informal nature of the operations and the lack of regulation necessitated the development of

an offshoot, the beach boys, in place of the tour guides. The development could have been a good idea in filling up the service gap that existed however it turned to be an option in which tourists could be molested and abused to the point of one tourist being killed.

Above the abuse and exploitation done directly on the tourist, the operations of the beach boys came into conflict with the operations of the tourist resorts operators in that when the resort operators are ensuring the comfort and privacy of the tourists, the beach boys and jewel/curio sellers wanted to maximize their profits from the same visitors at their time of relaxation therefore affecting the value addition services of the resort operators. Sometimes the sellers could go to the point of forcing the visitor to buy things they are not willing to buy. Due to such occurrences, there has been a series of conflicts between the two groups which the Ministry had to arbitrate from time to time. In view of such developments as an informal arrangement, the Ministry in 2010 conducted training which led to distribution of identity cards and the subsequent offer of uniform by operators to those who are guiding visitors and selling curios around Cape Maclear. However, the identity cards expired in 2011 and there has been no renewal, the tour guides in Nkhatabay are not that willing to use the identity cards and the uniform given to those around Cape Maclear is not worn throughout the time they are on duty.

Another tourist attraction place which has Tour Guides services is Mulanje Mountain which is in the south eastern region of Malawi. From the organization perspective, it can be stated that the Tour Guides operating around the Mountain are highly organized than the rest. The Mulanje Mountain Tour Guides can be singled from the rest because of the existing division of labor and established career progression path. Three clear groups exist namely; the Jewel/Curio Sellers, the Porters, and the Tour Guides. The Jewel/Curio Sellers are specifically into the selling of the artisanal items they produce, while the Porters

are aids to Tour Guides. The career path is that a porter has to operate under the Tour Guide, and cannot offer the services of Tour Guides. If a porter wants to graduate to Tour Guide has to go through Tour Guide's training that is from time to time organized by the District Tourism Office.

Another thing to appreciate is that despite being in the informal market, the Tour Guides have the desire and empathy of eco-tourism which is the very basis of their being present around the mountain. This being the case, they have taken part in conservation of the forest and the ecology around the area.

From formal arrangement, in 2006 the Ministry of Tourism Wildlife and Culture implemented training programmes targeting the Tour Guides. However, the initiative lacked continuity. In 2010 the Ministry lobbied the Malawi Institute of Tourism (MIT) to include tour guiding among the tourism programs the institution is offering. Though there was the development of the training, MIT depended on the visiting institution from Belgium to run the program. The facilitation of the Belgium Institution was done between 2009 and 2010. The better part of this facilitation is that it developed the capacity of local trainers to ably deliver the course, however the low demand and structural constraints in the Malawi travel and tourism sector has impeded the growth of the training. As much as the efforts of MIT and the Ministry are for a noble cause, it has to be acknowledged that the institutions may not be able to suffice the demand of the market especially basing on bottlenecks one and three above.

It is therefore worthy acknowledging the contribution made by different actors in tourism especially Wilderness Safaris which has developed the training of their own tour guides. Largely, the organization trains the tour guides on the job as an orientation, however intends to invest more into developing the occupation and become the leader in the industry. Among the investments, the organization would like to develop an institution where the tour guides can be trained. The

current training being conducted is just an orientation and that the beneficiaries don't get any qualification that could be recognized for remuneration on the labor market. With the development of the institution, the organization will seek registration and accreditation with TEVETA and therefore contribute to the growth of the industry even beyond the nation.

2.2 Training Gaps

From the onset training looks to be far from the desired state which can ably address the desires and development of the tourism sector. As can be observed from the expression, three gaps can be isolated; the institutional gap, human resource gap, and training content gap.

2.2.1 Institutional Gap

Basing on the National Directory of Training Providers and the other available sources of training being provided in Malawi it shows that only two institutions have been involved in the training of tour guides in namely; Malawi institute of Tourism and Wilderness Safaris. Regardless of all the efforts Malawi Institute of Tourism (MIT) and Wilderness Safaris have been making, it has been observed that the institutions are still below the operational status that can produce the desired number and quality of tour guides in Malawi. Furthermore two polar modes exist between these two institutions without proper coordination; MIT has focused on tailor made courses and much of their programs targeting the informal while wilderness Safaris has targeted the formal with their staff only benefitting from the programs. It has to be noted also that MIT has largely depended on external facilitation of an institution from Belgium.

It is worth mentioning that operations of the Tour Guides as can be appreciated from the introduction are largely informal with an exception of those employed by tour operators. This might be a resultant effect of low education background and also lack of strategic operations on the market. On the other hand the

institutions that can ably handle the training for such a group are highly formalized despite some initiatives to deliver the training. This would therefore mean if to develop the capacity of the tour guides available, there is a need of inculcating informalization principles within the formal sector *i.e.* reforming the course delivery and approach to informal set up while maintaining the core purpose of the training. This reformation though might be simple is one of the difficult tasks that the available institutions can have if they have to strike a balance between producing a tour guide who can deliver from such a background, at the same time keeping the training material undiluted.

From such a premise it might be assumed that developing an institution will be a better choice, however, the proposition would be the refocusing of the delivery.

2.2.2 Human Resource Gap

As observed earlier, different from other trades, the tour guide sector has limited number of people who can act as trainers of the tour guides. This is because so far the professional training on tour guiding that people have been accessing has not been done in Malawi and similarly when these people have come back home, they are directly absorbed by the operators. Beyond this, it can be stated that Malawians are not so familiar with the occupation except those in tourist sites or those who have been exposed to such services. Such being the case if training would start, it would then target the elementary training with the advanced content being offered largely by foreigners. In other words it can be stated that very few Malawians who are operating in this sector have reached that level of tour guide training which can be considered to have acquired the necessary skills for development of other tour guides.

The other unfortunate part is that this value addition service has not been appreciated by many Malawian's such that they have not taken it as a profession to get into. It therefore has to be noted that the having of foreigners training locals in a better option however, has to consider the sustainability of

the training and programs and also how prepared is the nation to take care of expatriates.

One thing to be noted in advance is that if those Malawians who have had such a training would go into training others, then the operators would compromise their services and possibly lose their business a thing that no business person would accept unless it is a social responsibility. Beyond the possession of the knowledge, in order to get into training, those who qualify have to possess pedagogical skills for better delivery of the subject areas. It is therefore imperative to consider if such a caliber of people exist.

2.2.3 *Content Gap*

Tour guiding though seemingly a new field in Malawi, it has been offered by several institutions as stated already, however the content has been specific to the needs and focus of that time. Beyond this, it can be stated that TEVETA the national training authority has not taken the step to bring the content together for the development of national training content. It is worth mentioning that for any training that has to take place in Malawi has to go through approvals and gusseting of the standards and alignment of the same to the Technical Qualification Framework as required by law and TEVETA is the one mandated to facilitate this process. Another provision is the one where institutions develop their own curriculum and submitted to TEVETA for approval. However none has submitted any developed curriculum for this approval. Therefore since neither TEVETA has not facilitated any development of the training content nor any institution submitting curriculum for approval, at the mean time no curricula on tour guiding has been approved. It therefore follows that there is no content or standard that has been aligned to the TQF and no content has been registered in tour guiding.

The effect of such a gap has been manifested on the labor market, where the absence of a nationally recognized curriculum has resulted to the absence of a nationally recognized qualification. Though the institutions that have offered the training have developed a way of recognizing the acquisition of the competences by those whom they have trained, the credentials are only recognized within the institutions that have offered the qualification. This has limited the labor movement within the sector and may subsequently contribute to labor exploitation.

The persistence of such an environment also jeopardizes the development of the industry from two perspectives; regulation and quality development. In the absence of a training content which people have to acquire, it is impossible to set the minimum requirement of those who have to operate within the industry. Though Ministry of Tourism has had interventions, but there is no nationally operating guide regarding the minimum requirement. Secondly because there is no training content and the minimum operating guide, quality of the tour guide service is greatly compromised. This would therefore justify the development of the offshoot, the beach boys.

2.3 Conclusion

This chapter has managed to introduce the developments that has been there in tour guiding training more especially the initiatives of Malawi Institute of Tourism and Wilderness Safari and also exposed the three gaps that are in the industry as far as training is concerned. To this far it can be seen that more work as far as organization of the training is concerned is needed before getting started. The following chapter will therefore build on this, by providing empirical evidence related to the same.

CHAPTER THREE

DESCRIPTIVE STATISTICS AND MARKET ANALYSIS

3.1 Introduction

In response to this demand and government paradigm shift in economic priorities and key strategic areas, especially related to tourism, TEVETA organized a demand justification survey of the tour guides training in Malawi. This chapter therefore will present the empirical evidence of the gaps and the market analysis of the industry.

3.2 Descriptive statistics

The survey used pure random sampling for the five targets that were included in the study namely; tour guides, tour operators, lodge/hotel operators, training institutions, and tourists. The tour guides are to help in establishing the gap they are having and also the demand of both the training and their services. The tour operators are there to validate the gaps and also provide the market portfolio. The operators as the intermediaries for the service act as an enforcement beam of the tour guide services and also provide the business to the tour operators and the tour guides. To this effect since tour guiding is a complementary service that is offered to the tourists by the operators in conjunction with the tour guides as well as tour operators. Therefore these operators are to provide the direction of the complementary service and help to offer what the visitors want to have. The inclusion of training institutions in the study is to validate institutional availability and positioning in handling the training. Beyond the five targets, the study also incorporated Tourism Association of Malawi and Office of Parks and Wildlife to offer the guidance on Malawi tourism and demand of tour guiding. The table below provides the breakdown of participation to this study.

Table 2: Summary of Respondents

Tour/Field guides	Tour Operators	Lodge/ Hotel Operators	Training Institutions	Tourists
73	4	15	2	70

Each category is meant for specific expectations or interest. Among the interests are the following:

- a) Availability of these Tour Guides to be trained and their education qualifications
- b) Position of institutions in Tour Guide training.
- c) Technical qualifications of the current trainers who train Tour Guides on the job.
- d) Evidence from the sector to justify the demand for this training.
- e) Best approach to employ in up skilling these tour guides (Either on-the-job or attach them to a training institution, generally termed environmental analysis).
- f) Availability of experts in the tour guide that could participate during the development of this curriculum if the demand is justifiable.

3.2.1 *Tour/ Field Guides*

From the line of thinking built in this paper in Chapter One, it has to be stated that most of those people engaged in tour guiding are not tour guide per-se, they are field guides. Tour guides are those who lead a team and know more about the country while field guides are those who lead in the field and know in detail the fields they are operating in. The two trades can be complementary in that the tour guide may take people to a place and the field guide may be there to explain what people are seeing. It is therefore important to note that

this paper to capture both; they will just be called guides. If special cases are to be discussed, then proper reference will be made.

The respondents came from all over the nation: from Rumphi- Nyika National Park to Chinkhwawa- Nkulumadzi Lodge. From the distribution of the tour guides, the following picture presented in Table 3 can be gathered. It has to be noted that Nkhatabay, Mangochi, and Zomba, are among the major tourism centers in Malawi, especially Kande Beach, Cape Maclear, and Zomba Plateau respectively.

Table 3: Distribution of tour/field guide who responded to the questionnaire

District	Number
Karonga	1
Rumphi	2
Nkhatabay	13
Nkhotakota	1
Salima	5
Mangochi	26
Machinga	6
Zomba	13
Chikwawa	1
Mulanje	5

One thing that can be noted from these tour guides is that none is female, which then indicates how gender biased is the trade. Further analysis indicates that the ages range from 19 to 52 with a normal distribution and mean of 33. From marital perspective 82 percent are married, indicating only 18 percent being single. Examining from the stated bottlenecks perspective, it has been found that education status of the Tour Guides is really low with only 13 percent possessing Malawi School Certificate of Education (MSCE) and only 6 percent above MSCE of which they are 75 percent of these are employed by tour companies and are professionals. This therefore means 81 percent of the Tour

Guides have Junior Certificate and below to no formal education. With such a low education one may wonder as to why and how these people have been involved in tour guiding. It has to be noted that reasons for engagement in tour guiding range from having no choice of trade to just being interested, with some getting into the trade because of money and inheritance. The table below gives a distribution of engagement.

Table 4: Reasons of engaging in tour guiding

Reason	Number	Percent
Common activity around the place	11	15.94
Had no choice	5	7.25
Inherited from family members	10	14.49
Just interested	25	36.23
Money	10	14.49
Other reasons	8	11.59

The distribution of reasons of engagement into the trade vis-à-vis education background shows that largely those with low education background get into the trade because they have no choice of trade and also because they just inherited the trade from family members. A completely different picture is shown when dealing with those who have gone higher with their education. Their engagement into the trade is because they are qualifying to be in the trade.

Further analysis shows that the experience of the guides is ranging from 1 year to 37 years, however linking this to education, it shows that those who have very low education got involved into tour/field guiding so early compared to those who have gone far with their education. It can therefore be stated that education increases the opportunity cost of time of getting involved in guiding early in life.

The other bottleneck mentioned in Chapter One and is the major concern of this survey is the lack of tour guide training. The survey validates the existence of the training gap of tour guides. From all the initiatives mentioned in Chapter Two, the study has found that only 46 percent of the guides have benefitted from the training. This therefore means 54 percent have not gone for any training despite operating as guides. The major reason why the guides have not been trained is because they have had no opportunity of that training as expressed by 68 percent of those who have not been trained. This therefore validates the training gap expressed in Chapter Two. Considering only the major tourist districts earlier mentioned, it is showing that Nkhatabay is the district that has most of its guides trained seconded by Mangochi and Zomba has none trained.

Another thing that has been noted of the training is that they have been stochastic and the years have ranged from 1994 to 2010 with no definite pattern of attendance except that of 2003 which happened in Mangochi. The time further suggest the need for more training or refresher course or else full time training that can be readily accessed. One other thing to be noted is that the training was under that affirmative action and 82 percent of those trained were sponsored for them to be trained. This therefore justifies the bottleneck in tour guiding that training for the sector is expensive and also that the training in tour guiding lacks continuity.

Though expensive, it is clear from the analysis that the training programs that the guides went through are very useful to their work. However 46 percent of those people who were trained did not get any qualification. Despite the number being lower than half, they still indicate the nature of operation in tour guiding training. This coupled with the fact that only 10 percent is employed and only those employed are in the informal sector, shows how informal the operations are.

It is very important to note that the informal nature of the operations does not mean that there is no organization in the informal sector as suggested by the organizational bottleneck. The study has found that the guides have set up associations which manage their operations and are a central link for interventions. The establishment of these associations is largely attributed to the efforts of Ministry of Tourism Wildlife and Culture, followed by the owners *i.e.* Guides, and lastly community leaders. The table below provides the distribution of these associations per district.

Table 5: Guides Associations

District	Name of the association	Establishment
Chikhwawa	African parks conservation Majete	Ministry
Machinga	Wilderness Safari Malawi	Organisation
Mangochi	Capemaclear Tour Guides Association	Ministry
Mulanje	Mulanje Mountain Tour Guides and Porters Association	Owners and leaders
Nkhatabay	Butterfly Space	Owners
	Cavas	N/A
	Chintheche Market	Owners
	Nkhatabay Safaris	Owners
	Wilderness Chintheche inn	Organisation
Rumphi	Wilderness Safari	Organisation
Salima	Tour guide association of sengabay	Owners

Considering the services that these tour guides offer their self assessment indicates that on a good day (business boom) they serve 1 to 200 tourists and on a bad day (business slump) they serve 1 to 25 people. However looking at the magnitude of the number it is doubtful if the numbers are real. The top most numbers above 30 to 200 are coming from Capemaclear seconded by Mulanje at 30. The outlier of 200 is far above the rest with the second being at 90 therefore giving a distribution that is not normal a thing which gives doubt on the truthfulness of this number.

Another bottleneck indicated in Chapter One was that of no proper remuneration for tour guides due to lack of qualifications which subsequently contribute to low motivation resulting from these lower wages. The does not support the argument because it shows that taking the government daily wage, only one person is below the stipulated daily income level of MK317.00. Similarly considering the poverty levels basing on the two definitions of poverty lines, only one person is below poverty line of \$1/day/person and only two people are below \$2/day/person. It would therefore mean on the assumption that the lowest number of people served per day is indeed one for all guides then they would not be considered as poor. This interpretation has taken all situations into consideration on the lowest number of people served, the charging in dollars which has been pegged at MK324/\$1, and the rating has been done for only local trips *i.e.* guiding done within their locality or areas of operation. It therefore means for trips outside their areas would cost more though with some diseconomies of scale on the amount depending on the contract agreed with their clients.

Considering those on wage employment as guides, the lowest has MK15,000.00 and the highest has MK190,000.00 as monthly wage. This therefore translates to MK535.71 and MK6785.71 respectively taking an average month of twenty eight days. As above this translates to none of these guides being below government stipulated rate and \$1/day/person. Considering \$2/day/person only one person would be below the poverty line.

In conclusion field/tour guiding has a lot to offer to those involved beyond the monetary values attached to the service. Among the notable things expressed by the guides are;

- Creates a chance for business
- Earn Money and gifts

- Travel Experience
- Learn other people's culture
- Learn other languages
- Creating friends from all over the world

However the occupation has also several challenges as below:

- Lack of good/proper training
- Training equipment
- Language barrier
- Lack of knowledge on vegetation
- Visitors ask for game that is not available within our areas
- Identification and synchronization of the needs of different visitors
- Lack of proper equipment
- Bad weather especially when it is raining
- Lack of Identity cards and uniform
- Lack of recognition by the public
- Lack of a good relationship with lodge/hotel operators
- Lack of business differentiation/specialization by lodge operators
- Being snatched customers
- Not being liked by visitors

- Tourists who don't want to take our prices
- Tourists who don't comply to our guidance
- Business slumps
- Lack of proper remuneration

Beyond the challenges the occupation has exposed the guides to some disadvantages like:

- Peer pressure
- Being associated with theft
- Selling and using drugs
- Prostitution, homosexuality and forced sex
- No life insurance
- Exposed to dangerous animals
- Inexperienced
- Not well informed
- Helpful
- More working hours in a day

3.2.2 Tourists

Tourists being the major beneficiary and target of the guiding services, they were included in the study. As shown above in Table 2, 73 visitors were approached. From the data collected, the survey managed to get data from visitors that had been in Malawi for days to those who have been in the country for close to a year. The most recent visitor had been in Malawi for 11 days and

the oldest was in Malawi for 11 months with an average of 1 month and 6 days. This therefore, indicates that the majority, 81 percent had been in the country for less than one month, with the highest being in the country for 25 days. Further analysis shows that 77 percent of the visitors were visiting Malawi for the first time. From these results it can therefore be stated that the visitors who are part of this study would largely need guidance than those who could have been in the country for a long period of time and therefore got used to the movements within, or else have visited the country before.

Though the picture on the need for guidance indicating a possibility of higher usage of guiding services, 73 percent of the visitors report finding it easy to travel within Malawi. Despite the 73 percent finding it easy to travel within the country, 53 percent of these still indicate having at one point in time being guided. Further analysis of the same group indicates 37 percent has been guided more than once.

The picture for the whole study population is not that different from the majority who has found it easy to travel within the nation. 56 percent indicate ever being on a guided tour, a percentage slightly higher than of those who have found it difficult to travel in Malawi, 55 percent. The number of tours being guided ranges from none to three with the highest being those who have found it easy to travel within, a situation which is the opposite. In trying to reflect their preference in relation to being guided which might justify the scenario, it has been found that the majority, 51 percent would prefer being guided, however the percentage is so low for arriving at a better conclusion. The very reasons why they prefer being guided are security and easy of travel as illustrated in the figure below.

From the figure it is certain that security is a major worry for the visitors once they are in Malawi and therefore feel it ease when they are in the company of local

who are guiding them. Further analysis of those who were guided indicates that the majority 56 percent prefer being guided because of security, and for those who did not use any guiding services, the state no need for guidance as a reason.

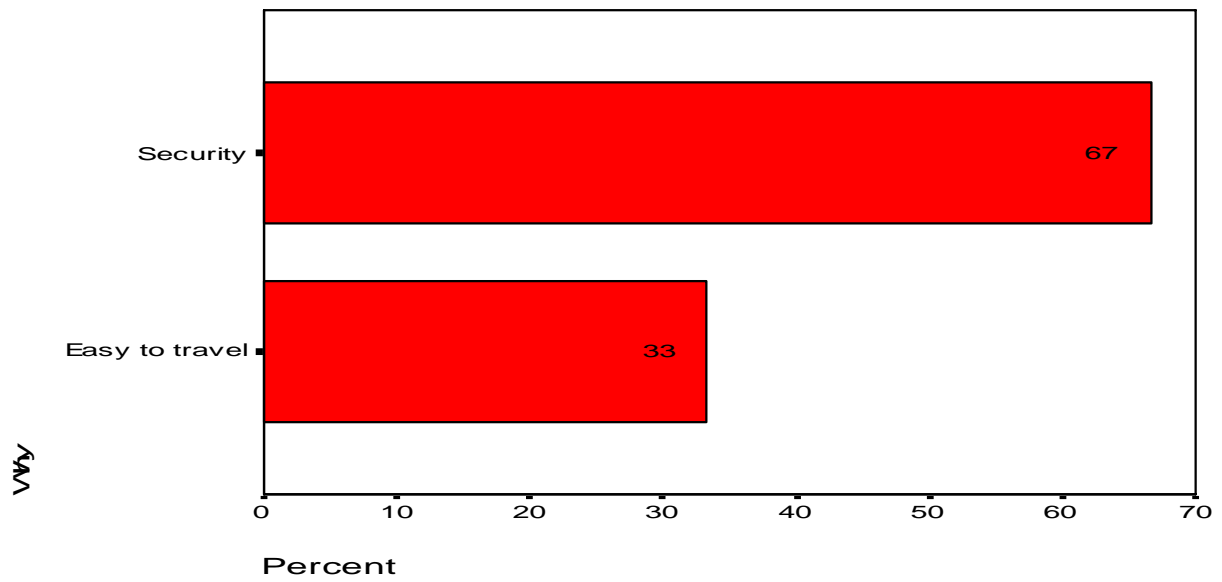


Figure 2: Reasons for preference of being guided

The study also gathered the perceptions that these visitors have regarding tour guiding in Malawi, the areas that need development, the skills that have to be developed, and topics that can be included in the skills development initiatives. Below is the outline of their contribution:

Perceptions

- Friendly
- Kind and open minded
- Keen to learn
- They love their job

- They are knowledgeable
- Good options for guided tours
- They never asked for a tip, they need to have a tip box.

However,

- it is not clear on how to find a good, dependable and honest guide
- Not well advertised
- Underdeveloped
- Have no information
- It is expensive,
- Mostly offered by foreigners, Malawians should come in and offer the services
- Good only in national parks
- Tourists are mobbed by vendors when travelling

Areas for Development

- Good education for guides
- A place to find tour guides
- Making affordable and trustable tour companies who employ locals who are very knowledgeable of the area, having fixed prices which are honest
- Set price list to avoid ripping tourists

- Guides should be recommended by guest houses/hotels
- Guides should have IDs
- Guides equipment
- Upgrade the roads
- Secure transportation system
- More road signs
- The northern Malawi is less toured despite being beautiful
- Vwaza offers great possibility for tourism

Skills Lacking

- Communication
- Professionalism
- Good interpersonal skills
- Language skills
- Honesty
- Knowledge on different aspects
- Specialization
- Botany
- Birding tours
- Archeology/Fossil tours
- Local history

- Geographic heritage
- Diving
- Hiking

Suggested Topics

- Culture
- Peoples Life - The way people live in Malawi and do their farming
- Dance and arts
- Politics
- History
- School systems
- Stories/Legends/Myths/Anecdotes
- Animals
- Natural Resource and sustainability
- Ethnobotany- Use of medical plants

3.2.3 *Tourism Association, Tour Operators, and Lodge/Hotel Operators*

In justifying the need for the training of the guides, the Tourism Association of Malawi, Tour Operators, and Lodge/Hotel Operators unanimously agree that there is a great need to train the tour guides and the training has delayed than necessary. If the tourism industry has to grow then the intermediary services of well trained guides play a crucial role because they will retain visitors, provide security (safety), create demand for the industry (derived demand) and improve visitor's experience in tourism. Among the roles that would help in this

growth are those of making right reservations, knowledge of the history of the country and important places, honesty, integrity, entertainment, and sense of what the group he is leading wants to see. With such attributes guides are able to offer maximum satisfaction to visitors who may want to visit more places or else market Malawi to their friends, therefore in the end creating a marketing chain. Guides also serve as watch dogs of improvement. They are able to get information from visitors and relay it to responsible people for developing places so that they can attract more visitors. In other words guides are *"latent marketing agents in tourism"*.

With such a background, from operators' perspective, there is great need to develop the guiding sector. One notable thing from the lodge/hotel operators is that they have observed that the local guides have known guiding just as a way of living not as an occupation. Because of this, there is limited capacity to understand things. This is also coupled with the fact that their educational levels are lower, and do not have good language and writing skills. Besides the skills, their presentation as well leaves a lot to be desired.

Despite the realization of such problems, the threat previously has been those companies involved in tourism themselves: the lodges/hotels and tour operators. Each want to have a competitive advantage such that no company would like to come together and implement the training from two reasons; the guides once trained will become marketable and leave them, or else when trained will demand more money than before. It has been further noted that in other circumstances, the guides have duo role of in-house services and guides more especially in places which do not have visitors frequently. The duality would help in maximizing economies scale from these guides. What companies have not come to realize is that every guide would need the basic training and the business secrets would be added by themselves.

Therefore according to these targets to develop a guide the following content has to be included:

- First Aid
- Occupational Safety and Health
- Customer care
- Visitor empathy and interaction
- Discipline
- Etiquette
- Language - especially French, Germany, and Japanese
- Itinerary arrangements
- Group audit and management
- Geography and planning -Adventure travel
- Driving skills- with passenger driving permit
- Motor boat operating - for those in water travel
- Marine safety
- Walking safari
- Flexibility in prices and economies of scale that comes with transport indivisibility
- Law and protected areas
- Knowledge of Malawi
- Places of importance and interest
- History of Malawi
- Politics
- Local knowledge
- Natural Resources
- Animal behavior
- Culture
- Botany-Plant life including flowers

- Wildlife
- Geostronomy
- Arts
- Ecology
- Cichlids
- Orchids
- Astronomy
- Taxonomy- classification of animals
- Bush medicine

On the need to specialize, there is a mixed view among the targets. However one thing that can be traced in all their statements is that at one point in the advanced stage they must zero in to one subject. Among such specializations are:

- Grasses
- Botany
- Water travel
- Geology
- Arachnids- Spiders
- Orchids
- Cichlids (Reptiles)
- Insects
- Amphibians
- Bird life
- Dangerous games
- Marine life
- Bleeding Patterns
- Culture

3.3 Market Analysis

Having looked into the training aspects and validation of the bottlenecks, the chapter will now present the market analysis on the supply and demand side of the labour force. What is being presented is a simple analysis from the sampled areas which are believed to provide a trend that can be generalized to the whole industry. The situation of the market presents a stochastic trend for the supply of labour in the past three years, current supply and future demand. The present demand was not included the study, however the deviation from the supply is positive and negligible. A look into the past and current trends indicate a higher supply¹ of guide in Capemaclear, Sengabay, and Likhubula, with declining growth for all areas except Kande/Chikale Beach in Nkhatabay, Cape Maclear, Kuchawe and intersects at Kuchawe. This indicate that no big change has been there on the supply of guides at Kuchawe Inn on Zomba Plateau.

Overall the supply of guides for the past three years has been constant with a minimal increase of 2.3 percent. Based on the assumption of equal growth, then the supply has been increasing with 0.73 percent, a figure which is just so minimal. The intra-movements justify the trend with stagnation in the skill transferability to other sectors and also the low education hindering the progress of the guides. The years of involvement shows that 62 percent have a minimum of ten years offering guidance services.

Projecting the future demand, the picture seems promising in the coming three years except Sengabay where the demand will below the current levels. However, though below current levels the demand shows a recovery of the market from the slump which has affected all areas except Kande,

¹ The analysis uses averages (averaging out) therefore evening out some deviational effects from respondents.

Capemaclear and Kuchawe which has been constant. Overall the Market seems promising and will have a 55 percent growth *ceteris paribus*. This takes into consideration the sustainability of efforts that are being made in rejuvenating the tourism sector as alluded to in Chapter One. The graph below presents a picture of previous, current and future markets.

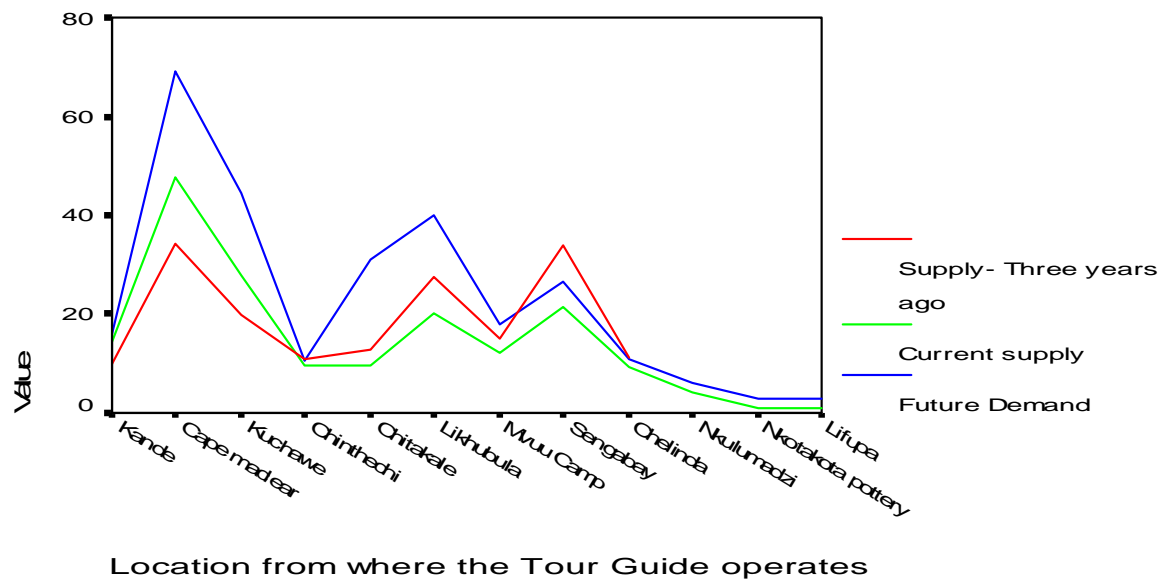


Figure 3: Skills demand and supply in guides market

3.4 Conclusion

The chapter has managed to validate the bottlenecks in the tourism sector as far as guiding is concerned. It has also presented a view of tour guiding in Malawi, the areas that need improvement, lacking skills, and topics that can be included in order to give appropriate skills. Lastly it has provided a market analysis of the guiding sector in tourism. The following chapter therefore builds on the analysis made in this chapter in providing recommendations on what can best be done to develop the sector.

CHAPTER FIVE

Recommendations and Conclusion

5.1 Recommendations

Having presented the overall picture in tourism as far as guiding is concerned; this chapter draws recommendations from the findings and proposes the best appropriate ways of developing training for the same.

It has been noted from the training perspective that very few guides have been formally trained calculated at 12 percent. Acknowledgement however has to be made that the informal sector outreach programs for the Ministry of Tourism and Culture have reached to 78 percent of the sample. With the insight into this scenario, the study recommends the establishment of both tour guide and filed guide trainings in Malawi. This will help in the growth of the tourism sector but also the associated industries in the ends contribute to overall growth of the economy.

The recommended model of training is that of Field Guides Association of Southern Africa (FGASA). The recommendation comes from its background of starting with Level 1 then attachments, after which one goes to level II then level III which is the level of specialization. Its major advantage is that it emphasizes on the acquisition of competence and the assessment of both practical and theory. However the major challenge in Malawi because of the environment and the stock of animals, practical reasons will need to be done in different places.

Appreciating the fact that most of these guides operate in an informal environment, the study recommends the prioritization of the informal sector

which leaves a lot to be desired and has no background information as what comprises guiding. As found in this study that the targeting of this sector has been through affirmative action. This study further recommends an established curriculum for the both formal and informal trainings with consciousness of level of understanding, educational background, area of operation, and the needs of the sector.

The study further recommends the development of those already in the field first before recruiting other people for the same training. This is with regard to the stagnation of the work force earlier discussed. With such a perception, it is highly recommended that on the job training and little class work will help in appreciating what is needed and what is involved in guiding. It has also to be emphasized that for adults and those with low education, on the job training is the best and helps in acquisition of both the skill and knowledge at the same time.

In the view that guides must be able to cater for all those who are visiting Malawi, specialization is the best. Specialization must come at two levels. The first has to be that of “category”; tour guide and field guide. Currently most of those people that are involved in guiding are basically field guides not tour guides as has usually been thought. This proposition however, does not mean that the specialization has to be that rigid. The second specialization is that of the type of field in which one is *i.e.* topical specialization. If prioritization has to be done then priority has to be on the category of guiding while shaping the training to advanced topical specialization as is the case with FGASA. For topical specialization this has to be done when the background is strong and good enough for such specialization as stated on specialization in previous chapter. It has to be noted however, that if field guides can be those responsible for tours, they can also get into the second specialization or else

those of the second specialization can be involved in tours depending on need and capacity development. This line of thinking would insure maximization of efforts within the sector.

Juxtaposed to the establishment of proper training there has to be the establishment of national qualification which is recognized and accepted by the industry. This qualification framework has to be for both formal and informal acquisition of skills.

The report further recommends that Malawi has to set a minimum operational standard for guides. Following the establishment of the training programs and certification, it has to be mandatory that no one should operate without minimal requirements stipulated in the established protocol of the guides. This therefore would suggest the establishment of such protocol guide lines.

It is also recommended that with such operational status, the guides need national identities which are clear and gazette. These identities must be issued only upon satisfying the minimum operating standards. It is also very important to take cognizance of the sectors of operation. The identities therefore would have to be coupled with batches which are different in color indicating unique identity number of every guide, while the color has to identify the specialization. This would help in proper identification of guides and also bring sanity in the industry. Beyond this the fears of security by visitors would be minimized.

Lastly recommendation is made of Mvuu Camp Environmental Resource Center to champion the training of guides and Malawi Institute of Tourism to Ensure Quality.

5.2 Conclusion

The establishment of tour/field guiding training remains vital to the growth of the industry. This report is therefore calling upon the establishment of such a training modeling it to international standards while at the same time trying everything possible to contextualize it. If curriculum has to be developed it therefore remains an endeavor that would call upon a consolidated effort from all stakeholders. To amass all support the best time for such development according to findings is between January and March when the tourism sector is in a slump of business. Below are names of people who can be involved.

Table 6: Names of those who can help in curriculum development

Name	Qualification	Place	Contact
Chris Kilner	Professional Guide	Nkulumadzi	0994492064
Abas Jana	Bird Guide	Wilderness Safari	
Robert Nyirenda	Bird Guide	Wilderness Safari	
Edmo Munthali			
Nicholas Dumba			
Jeff Roberts	Professional Guide/ Professional Hunter	Fat Monkeys	0999753257
Stedjiam Jali	Professional Guide	Monkey Bay- National Parks	0999313509
Catherine Weggler	Hotel Operator	Mayoka Village	0999268595
Wesley		Chinthechi Inn- Wilderness Safari	
Sam Nkhoma		Chelinda- Wilderness Safari	
Apollo	Dangerous Animala	Chelinda- Wilderness Safari	
Ryan		Mvuu Camp- Wilderness Safari	
Bright	Deputy Director	Wildlife Office	0999915411

Kumchedwa	Education and Extension		
Alfiace Lipiya		Kasungu	0999304402
Tull Makanjira		Nyika	0999304949/ 0881537651
Sam Nyangale		Liwonde	0888876743
Patricio Ndazela	Project Manager	Majete-chinkhwawa	0999965027
Chiza Manda	Assitant Director	Wildlife Office	0888351320

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