Tourism Market Potential Analysis in Botswana: A Delphi Study

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This article explores what would be the most probable scenario for the tourism industry in Botswana by the year 2020. A modified Delphi technique was used to generate data from 68 industry experts. The findings show that experts forecast progressively more changes and higher impact as one moves from values, structures, and events. The implication for policy makers and industry operators is that efforts aimed at increasing tourism may prove more fruitful if focused on changing structures and hosting events, rather than changing the values of the people. The study also improves on the understanding of Delphi forecasting behavior. It demonstrates that an expert who is optimistic on one factor—say, values—is likely to perceive the same with regard to other factors such as structure and events.

Keywords: *tourism; social exchange; Delphi; Botswana*

INTRODUCTION

This article reports the results of a modified Delphi study designed to provide tourism policy makers with a forecast on the most probable scenario for the tourism and hospitality industry in Botswana by the year 2020. The study is based on two underlying assumptions. First, the level of tourism is in the main part not a matter of chance but depends on certain identifiable factors, the understanding of which is a precondition for designing successful strategies. Second, the essence of marketing is to design the product to fit the market. In Botswana, where the main product already exists, the situation is reversed. The main task is to attract the market that fits the experiences offered at a destination. This begs two main questions: what attractions does Botswana offer, and what changes in key factors that affect tourism are expected in Botswana by the year 2020? These questions constitute the main subject for investigation in this study.

Relative Importance of Tourism

Tourism is reported to be the largest industry in the world, with receipts totaling about US$474 billion in 2002, surpassing automobiles, petroleum, weaponry, telecommunication equipment, and textiles (World Tourism Organization [WTO] 2003). Moreover, it is a labor-intensive industry, employing directly an estimated 74 million people around the world as of 2003 (Halicioglu 2004). Consistent with global trends, in Botswana tourism has been growing substantially. Between 1994 and 2000, the number of recorded holiday arrivals in the country grew by an average of 8.5% per year (table 1).

The rapid expansion in tourism suggests that it has considerable potential to contribute toward Botswana's economic diversification away from dependence on diamond mining, which currently forms between 65 and 75% of exports and accounts for about 30% of GDP. The rapid decline, however, since September 11, 2001, when hijacked aircrafts were used as weapons of destruction in the United States, suggests that travel and tourism are vulnerable to violent events such as terrorism, political unrest, and military conflicts.

Although tourism is contributing only about 5% to GDP, its contribution is considered significant, as it creates employment to impoverished communities in remote areas of the country where other forms of paid employment are scarce.

Institutions and Policy

Recently, the government established the Department of Tourism (DoT) and the Department of Wildlife and National Parks within a new Ministry of Environment, Wildlife and Tourism to underscore its commitment to tourism development. The intention is to establish an autonomous tourist board. It is envisaged that the two departments will concentrate on legislation and policy, and the proposed tourist board will focus on product development and marketing.

The Tourism Policy (Republic of Botswana 1990) has two salient features. First, it requires that tourist activity be carried out on a sustainable basis. Thus, the policy emphasizes

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TABLE 3

THE MODIFIED MODEL OF DESTINATION COMPETITIVENESS

Broad Factor	Factor Details
Endowed resources	a. Natural resources
	b. Cultural/heritage resources
Created resources	a. Tourism infrastructure
	b. Events
	c. Range of available activities
	d. Entertainment
	e. Shopping
Supporting factors	a. General infrastructure
	b. Quality of service
	c. Accessibility of destination
	d. Hospitality
	e. Market ties
Destination management	a. Destination management organization (coordination, provision of information, monitoring, and evaluation)
	b. Destination marketing management
	c. Destination policy planning and development
	d. Human resource development
	e. Environmental management
Situational conditions	a. Destination location
	b. Competitive (micro) environment: capabilities of firms, strategies of firms, industry structure, and firm rivalry
	c. Global (macro) environment: political/legal/regulatory, economic, sociocultural, and technological
	d. Security/safety
	e. Price competitiveness
Demand conditions	a. Tourist preferences
	b. Awareness of destination
	c. Destination image

Source: Adapted from Dwyer and Kim (2005).

TABLE 4

DEVELOPMENT AND ATTITUDES TOWARD TOURISM

Economic Development	Tourism Development: Low	Tourism Development: High
High	Negative attitudes	Positive or negative attitudes
Low	Positive attitudes	Negative attitudes

and Vaughan 2003), or from welcome to resentment (Akis, Peristianis, and Warner 1996). This presupposes that there is a "carrying capacity" threshold for tourism, and once development passes a certain point, negative effects outweigh the initial positive effects and attitudes become less positive. One study (Long, Perdue, and Allen 1990) attempted to estimate the threshold and found that when more than 30% of retail sales are derived from tourism, perceptions of the benefits of tourism tended to become negative.

Another study investigated the relationship between combinations of various levels of economic and tourism development, on one hand, and attitudes toward tourism held by residents of selected Colorado towns (Allen et al. 1993), on the other. The study concluded that low levels of both economic and tourism development tend to elicit positive attitudes toward tourism—implying that such residents build high expectations on the benefits that tourism would bring to the community (table 4). Areas with high levels of economic activity tend to have less economic pressure for promoting tourism. On the contrary, communities with low economic development and high tourism tended to lead to discouragement because expected benefits are not realized.

The main contribution of the social exchange theory to tourism is the hypothesis that tourism comes with benefits and costs. It follows that those residents who personally perceive actual or potential benefits from tourism (such as local land owners, investors, and employees in the tourism sector) are likely to be more favorably disposed toward tourists and further tourism growth (Andriotis and Vaughan 2003). As tourism grows and the consequent interaction between the tourists and residents increases, residents are expected to display more resentment to the tourists. Other factors expected to influence tourism attitudes are the level of development of the local economy and maturity of the destination in question.

Synthesis

The reviewed theories suggest the absence of a single unifying framework to guide research in tourism. The existing theories should be treated as complementary rather than competing with each other. Each emphasizes different aspects of the determinants of tourism. Each aspect and, therefore, each theory contribute toward a better understanding of tourism. The lack of a unifying theory is a major

TABLE 1
HOLIDAY/TOURIST ARRIVALS

Year	Number	Annual Growth (%)
1994	112,501	—
1995	149,652	14
1996	165,259	5
1997	185,996	6
1998	205,146	5
1999	237,618	7
2000	316,847	14
2001	306,980	–2
2002	197,219	–22

Source: Central Statistical Office (2003).

promotion of high-cost, low-volume tourism. This approach was adopted when it was observed that only 20% of the tourists accounted for more than 80% of the revenues. Thus, to raise the revenue performance of tourism, the policy advocated pursuing a strategy that will shift the mix of tourists away from those who are casual campers in favor of those who occupy permanent accommodation. It is presumed that low-volume tourism is consistent with the need to protect the environment. The second feature of the policy is that the sector should provide local communities with direct and indirect benefits. The policy encourages communities to appreciate the growing opportunities in rural areas for participation in wildlife-based industries, including tourism.

Tourist Attractions

Botswana's tourism is concentrated in terms of both types of attractions and their geographical distribution. Wildlife is the dominant attraction and is concentrated in two areas located in the northwest part of the country. The first area is the Okavango Delta, the largest inland delta in the world, which is a unique area of lagoons, reed-fringed waterways, and islands. The second area is the Chobe-Kasane National Park. All of Africa's big five game animals (elephants, lions, buffalo, leopard, and rhinos) are available in abundance.

Other natural attractions can be found in the Kalahari Game Reserve, the Makgadikgadi Pans, and the Tuli Block. The Tsodilo Hills are the site of an amazing collection of prehistoric art. The government plans to diversify the country's tourism product away from endowed attractions into cultural, historical, and other manmade attractions.

Social Impact and Perceptions

Tourists are people on vacation. They may behave in abnormal ways and give an erroneous impression of their culture to the locals. In some cases, tourists may not be interested (really or perceived) in the local people as such, but rather as curiosities to be photographed or, worst still, as sexual attractions. Local people may view tourists as a noisy nuisance. Some tourists may look down on locals. This can result from the better-off tourist giving orders to the less well-off native. This can be compounded when hotel owners are rich and foreign, and the porters and waiters poor and local. Foreign investors who are insensitive to local feelings can make things worse.

Local people, however, may view tourists as fair game for hard-nosed commercial exploitation. Widespread public resentment may breed when locals feel they have to compete with tourists for public infrastructure and services financed with taxpayer monies, or, even worse, when tourist villages or camps are off-limits for locals and the impression is given that tourists have taken over the country.

There is evidence to suggest that these negative social impacts and perceptions are being experienced in Botswana (Republic of Botswana 1999, p. 5). These include the following:

- Tourism is an industry dominated by expatriates and provides few career or investment prospects for local peoples.
- The camps are mystery areas where illegal activities such as poaching and trophy smuggling take place.
- Safari camp operators have discriminatory tendencies toward locals; the presence of locals is shunned in front of tourists.

There is, however, some evidence of positive impact and perceptions, and these include the following:

- Tourism is projecting a favorable national image to the outside world. Tourists visiting Botswana find a clean and orderly country, with a convertible currency, a low crime rate, and a stable democracy.
- Visits by two American presidents (Bill Clinton in 1998 and George W. Bush in 2003) and the election of a Motswana as Miss Universe in 1999 provide unprecedented favorable exposure of the country.

Environmental Impact

Tourism carries within it the seeds of its own destruction, because successful development of a site can damage those very qualities that attracted visitors in the first place. The cycle is well-known: it goes through the three phases of discovery, development, and decline.

In the case of Botswana, the resources are clearly wildlife and its habitat. The challenge is to determine how many tourists an area can receive without endangering the resource or before tourists find crowding intolerable. The geographical concentration of Botswana's tourism is a good example of the need to plan the carrying capacity of an attraction. A vast majority (90%) of tourists confine most of their holiday time to the 16,800 square kilometers of the Okavango Delta and the 33,200 square kilometers of the Chobe-Kasane National Park (Republic of Botswana, 1999, p. 28). The immediate challenge is to ensure that the growth of tourism in the Okavango and Chobe-Kasane areas does not destroy the natural environment.

CONCEPTUAL FRAMEWORK

It is important to understand those factors that influence attraction of tourists to a destination before attempting to forecast them. An examination of the pertinent literature reveals that destination competitiveness theory and social exchange theory can be used as bases to discern the main factors influencing tourism.

TABLE 2

DESTINATION COMPETITIVENESS OF BOTSWANA IN 2004-2005

Botswana	Index Value	Ranking
Price competitiveness	n.a.	n.a.
Human tourism	n.a.	n.a.
Infrastructure	n.a.	n.a.
Environment	52	88
Technology	43	104
Openness	43	104
Human resources	37	106
Social	32	130

Note: index value: 0 = least competitive, 100 = most competitive. Ranking: 1 = most competitive country, 212 = least competitive country.

Destination Competitiveness

The concept of destination competitiveness is salient in the literature, and there are two models for analyzing competitiveness. These are Porter's model and Crouch and Ritchie's model.

Porter's model. A convenient starting point for understanding destination competitiveness is Porter's (1990) definition of competitiveness as the ability of entrepreneurs of a country to design, produce, and market goods and services, the price and nonprice characteristics of which form a more attractive package than that of competitors. Porter's work was seminal, for it introduced the concept of "National Diamond," in which competitiveness of a nation is analyzed at sectoral level and is determined by factors that fall into five groups: (1) factor conditions; (2) demand conditions; (3) supporting and related industries; (4) firm strategy, structure, and rivalry; and, lastly, (5) chance factors.

Porter's (1990) work stimulated development of several measures of competitiveness, one of the most popular ones being the *Competitiveness Monitor*, which has been produced annually by the World Travel and Tourism Council (WTTC) since 2003. The *Monitor* is an index that indicates to what extent a country offers a competitive environment for travel and tourism. In the 2004-2005 report, eight indices of competitiveness were used: (1) price, (2) human tourism, (3) infrastructure, (4) environment, (5) technology, (6) human resources, (7) openness, and (8) social (WTTC annually).

In 2004-2005, Botswana's best ranking was on environment at 88th of the 212 countries included in the analysis (table 2). Results for a few other countries (tables not shown) reveal that whereas Brazil and India were the most price-competitive countries in the world, South Africa was seventh.

In the empirical literature, price has been found to be the most important factor in influencing visitor flows to a given destination (Lee, Var, and Blain 1996; Song, Witt, and Li 2003). Many studies usually distinguish between two types of prices: travel price, which is the cost of movement to and from a destination, and ground price that relates to cost of goods and services within the destination.

The Crouch and Ritchie model. The second destination competitive model is the Crouch and Ritchie (1999) model as modified by Dwyer and Kim (2005). Applying the Heckshcher-Ohlin theory, the authors argue that comparative advantage is based on the endowment of factors of production, and these include both natural and created tourist resources. Then, they identify six broad factors that influence the level of tourism: (1) endowed resources, (2) created resources, (3) supporting factors, (4) destination management, (5) situational conditions, and (6) demand conditions (table 3).

According to the model, the measurement of competitive factors can be in objective or subjective terms. Examples of objective measures in respect of, say, natural resources would be indicators such as the size of areas devoted to nature reserves, topography, mean temperatures, sunshine levels, and the number of coral reefs (Dwyer and Kim 2005). In contrast, subjective measures are those that relate to visitor perceptions of a destination's natural resources such as the aesthetics, grandeur, and beauty (Ritchie, Crouch, and Hudson 2000).

Critique of the models. Proponents of the Porter and the Crouch and Ritchie models have hailed them on their ability to be used to compare competitiveness of destinations in respect of all the determinants taken together, as well as their ability to gauge competitiveness in respect of the constituent dimensions of the models. Critics have, however, also raised a number of limitations inherent in the models. First, the models are intended to serve as a framework for analyzing competitiveness at a macro level for an entire nation or region; the relevance of the models at a micro level such as a city, village, or particular site is not discussed. Second, the relative importance of different factors in determining tourism flows in different market segments is not considered.

The Social Exchange Theory

The social exchange theory is more suited to an analysis at a micro level and is based on the premise that all relationships have give and take. In the context of tourism, for sustainable tourism to occur in a community, certain exchanges must take place. Local residents or entrepreneurs attract tourists to their community because of the desire to improve their economic and social conditions. The resident may get employment, enhanced leisure, and the joy of mixing with foreign cultures. They understand, however, that to get the benefits, they will have to reciprocate. The resources that the resident would be required to give in return include participation in the planning, development, and running of tourist attractions; extending their friendliness, courtesy, and hospitality to tourists (Inskeep 1991); and tolerating inconveniences caused by tourism, such as queuing for goods and services, sharing local facilities, overcrowding and traffic congestion (Rothman 1978), increased cost of living (Cooke 1982), drug abuse, vandalism, violence, sexual harassment (Haralambopoulous and Pizam 1996), and destruction of the environment.

There is some qualified empirical support for the social exchange theory in the literature. One study (Allen, Long, and Perdue 1988) was concerned with the impact of tourism on 20 rural communities at different levels of tourism development. The findings supported the life cycle model (Butler 1980) that as a community moves from the early stages to full tourism development, attitudes toward tourism also change from "euphoria to apathy to annoyance to antagonism" (Andriotis

limitation in advancing knowledge on tourism. This makes the process of deriving hypotheses and variables for inclusion in a study more complex because of lack of a theory. The result has been that some studies apply statistical techniques on a myriad of variables without actually providing theory linking them together.

In the absence of a unifying theory, it is important in forecasting tourism in a particular situation to be guided by a theory in which the factors and the assumptions suggested by a particular model are most likely to apply. For example, in forecasting tourism at a macro level or between countries or regions, the destination competitive models may be more useful, but when the study is about a particular site or locality, the social exchange theory may be more useful. In other situations, a combination of models might offer a better forecast than each one separately. In other words, a good understanding of factors influencing tourism requires an eclectic approach. In this study, the issues covered span from macro (structure, events) to micro (attitudes), thus requiring use of the theories in an eclectic way. The following broad conceptual issues or research areas evolve from the two theories reviewed, knowledge of business and economics and intuition.

Perceptions and attitudes—values. The social exchange theory suggests that residents would develop positive or negative perceptions and attitudes toward tourism, and these would change throughout time depending on changes in the variables constituting the theories. The social exchange theory implies that attitudes toward tourism are partially based on the economic, social, or environmental trade-offs, and that there is a point of diminishing returns for benefits gained through tourism. Assuming that perceptions and attitudes are good predictors of behavior in this context, it follows that an estimate of the changes in community attitudes, values, and perception would provide a reasonably good input in forecasting the level of tourism from one period to another. Some of the attitudes, values, and perceptions captured in this study relate directly to tourism, and others are more general, but all have implications for tourism development.

Created resources—structures and events. From the modified model of destination competitiveness (see again table 3), we select variables relating to the box called *created resources*. The rationale for the choice of "created" rather than "endowed" resources is as follows. Endowed resources are given, and a nation can do little to change them. In contrast, as the name implies, created resources can be controlled or influenced by a policy maker. Research on controllable resources is considered more useful to a policy maker because the nation can influence them more easily. As illustrated in the box, created resources are of many types, but we will focus on two types, namely, *structure* and *events*. Thus, the study is based on the hypothesis that the tourism level that a country attains is partly a function of the community perception, values, and attitudes toward tourism; the tourism infrastructure put in place by a country; and the occurrence of certain events, all of which encourage or discourage tourists to visit a particular destination.

It follows that to design successful tourism policies and strategies, policy makers need to understand how the relevant attitudes, structures, and events would be in the medium- to long-term period. In the light of this objective, the issues to be studied revolve around seeking answers to the following four questions:

- What changes in perceptions, attitudes, and values are expected in Botswana by the year 2020?
- What about changes in tourism industry structure?
- What events having significant impact on the tourism and hospitality industry are likely to occur by that year?
- What would be the impact of these changes and events on the tourism and hospitality industry?

The year 2020 is chosen because it is a date used by the World Tourism Organization (WTO) in its 1997 Delphi survey of 50 experts (Vellas and Bécherel 1999, citing WTO 1998) and is close enough to the government's vision to make Botswana a "prosperous, productive, and innovative" nation by 2016 (Republic of Botswana n.d.).

Choice of Analytical Technique

The Delphi method was selected as an appropriate technique for estimating the future scenario in the industry. The type of data we have elected to collect is qualitative and requires industry expert knowledge. The Delphi technique is a good means of using people's skills of interpretation and foresight through systematic gathering of opinions from experts and determining the extent of consensus regarding the issue (Taylor 1992). The technique has a number of advantages that tie well with characteristics of the tourism industry. First, it is suitable when forecasting uncertain factors that affect or may alter the future of an industry. Historic data cannot adequately determine these factors (Kaynak, Bloom, and Leibold 1994). Second, the Delphi method provides the comfort of anonymity, allowing panelists to freely express their opinions. It thus ensures that opinions reflect rational judgment, not the influence of opinion leaders as often occurs when using a committee or jury of expert opinion approaches (National Delphi Study 2000; Starling 1988). Third, the Delphi method is dependent on judgment by experts. This is a particular strength because the respondents whose opinions are represented are often in a position to influence events and, thus, make their forecasts come true.

THE DELPHI RESEARCH PROCESS

In a classic Delphi survey, the technique proceeds in a series of rounds. The first round is unstructured, allowing panelists to freely identify issues that they consider important. These are then consolidated and used to produce a structured questionnaire.

The consolidated structured questionnaire is presented to the panel in round 2, at which time they place estimates on key variables, such as the probability, impact, and time that an event would occur. These responses are then summarized, and information is presented to the panelists, who are invited to reassess their original opinions in light of the anonymous individual responses. In addition, if respondent assessments fall outside the upper or lower quartiles, they may be asked to reassess their positions or provide justifications as to why they consider their estimates are more accurate than the median values. Further rounds of estimates are

collected, summary information is compiled, and revisions continue until there is no further divergence of opinions.

Round 1

This study used a modified Delphi method to synthesize opinions of key experts who may shed light on the tourism scenario for Botswana's future. The questionnaire used was modeled on a previous South African study (Kaynak, Bloom, and Leibold 1994), adapted to take into account the specific nature of the tourism environment in Botswana. Additional inputs were solicited from the Department of Tourism (DoT) and the Hotel and Tourism Association of Botswana (HATAB), and pretested on 30 MBA students. Following the finalization of the instrument, the unstructured first round was replaced with a highly structured set of questions.

The questionnaire (including a cover letter explaining the Delphi technique, plus a self-addressed, stamped return envelope), containing 273 research variables, was mailed to experts in September 2003. The cover letter requested respondents to fill out the questionnaire without consulting colleagues. The list and addresses of the experts were obtained from the DoT and the HATAB. The respondent's task was first to rate the expected changes in and impact from attitudes and industry structure. Second, they had to assign a probability of occurrence, time of occurrence, and impact of certain events that affect tourism. In this first round, a total of 300 questionnaires were mailed and 104 were completed and returned by December 2003, producing a 35% response rate. The statistical summary of all responses was calculated for each variable.

Round 2

In mid-January 2004, the period of the second and final round, all 104 respondents from round 1 were mailed the group mean of each variable and the original questionnaire. The respondents' initial assessment on the round 1 questionnaire was identified with a yellow text liner marker. Based on the group mean, the respondents could keep their initial assessment or change it by placing a tick (✓) in the space for the new assessment.

By the end of February 2004, only eight respondents had returned the questionnaires. Follow-up telephone calls were not as successful as expected. It was decided that the researchers and their assistants would pay personal visits to the respondents to encourage them to fill out the questionnaires. To achieve best productivity, personal visits were carried out only in those areas that have a high concentration of tourist activities, namely, Chobe-Kasane and Maun. This combined effort of mail, telephone, and personal visits improved the response rate to 68 questionnaires (65% response rate from the 104 questionnaires sent after round 1). The responses were collated on an SPSS file and analyzed.

STUDY FINDINGS

Results from the study's second round are presented in a series of tables in which items are arrayed in descending order, whenever possible. In addition to looking at the average score of each item, it is also useful to consider the standard deviation, because this shows how widely the scores varied, giving one a sense of the diversity or consensus of opinion within the group on any particular item. There were three main sets of questions in this study.

Values: Changes, Impact

In the first set of questions, experts were asked to comment on the extent of changes in societal values by stating their opinions on a 5-point scale reflecting different degrees of change, ranging from 1 = *significant decrease* to 5 = *significant increase*; then, they were requested to rank the expected impact these changes would have on the industry on a 10-point scale ranging from 0 = *no impact at all* to 10 = *very high impact.*

The rationale for these questions is as follows. It was thought that it is perhaps appropriate to begin an empirical investigation of the future tourism scenario in Botswana by considering how the experts perceive future changes in tourism-related societal values. This is so because tourism is a service, involving mainly human interactions. It is our belief that although tourist attractions and supporting structures (mainly hardware) are preconditions for tourism to take place, whether a country actually gets tourists depends on the values of that society, their decisions, and in particular their values that attract or repel tourists.

As the statements and rankings of the mean presented in table 5 indicate, many of the societal values (14 out of 21) are expected to experience slight increases, with the highest mean occurring in *value of wildlife*. The experts see no change in *communal obligations*, *xenophobia*, *traditional approach to work*, *tribalism*, and *traditionalism in education*. They see a slight decrease in *dependence on expatriates* and *traditionalism in family norms*. None of the values would experience significant increases or decreases. All in all, these findings suggest that the experts forecast stability in the values of the people of Botswana by 2020.

It is important to note the relatively low value of standard deviation of 0.748 for the variable *rewarding work as a virtue*. This means that of the 21 societal values used, this variable attained the greatest level of consensus.

With regard to impact of the values, only one item, *value of wildlife*, was predicted to produce a high impact. The slight shifts in all other values, whether positive, negative, or neutral, were predicted to produce medium impact on the industry.

Structure: Changes, Impact

The second set of questions captured structure or infrastructure items of the industry. The experts were requested to express their opinions as to how these are likely to change between 2003 and 2020, again using closed-scale statements: 1 = *significant decrease*, 2 = *slight decrease*, 3 = *no change*, 4 = *slight increase*, or 5 = *significant increase*. In addition, respondents were asked to speculate what impact these changes would have on the industry on a 10-point scale ranging from 0 = *no impact at all* to 10 = *very high impact.*

Table 6 shows that of the 35 questions in this section, the experts foresaw a significant increase in four of these variables (*tourist homes*, *airlines traffic*, *hotels*, and *car traffic*) and a slight increase in the remaining variables except *game hunting*, which is expected to experience no change.

TABLE 5
CHANGES IN SOCIETAL VALUES AND THEIR IMPACT ON TOURISM

	Changes in Values			Impact on Tourism		
	(1)[a]	(2)	(3)	(4)[b]	(5)	(6)[c]
Values	Mean	Deviation	Change	Mean	Deviation	Impact
Value of wildlife	4.4	0.9	Slight increase	8.7	2.0	High
Mobility across the country	4.3	0.9	Slight increase	7.4	2.4	Medium
Materialism	4.3	1.1	Slight increase	6.2	2.5	Medium
Self-expression	4.2	0.8	Slight increase	6.7	2.7	Medium
Acceptance of change	4.1	0.9	Slight increase	6.9	2.6	Medium
Employee participation	4.0	0.8	Slight increase	6.6	2.9	Medium
Acceptance of urban life	4.0	1.3	Slight increase	5.9	2.8	Medium
Preservation of environment	4.0	1.1	Slight increase	7.2	2.3	Medium
Hard working as a virtue	3.9	1.0	Slight increase	7.4	2.7	Medium
Rewarding work as a virtue	3.9	0.7	Slight increase	6.3	2.5	Medium
Self-reliance	3.9	0.9	Slight increase	7.0	2.6	Medium
Individual involvement in society	3.8	1.0	Slight increase	6.2	2.8	Medium
Shift toward individualism	3.7	1.2	Slight increase	5.6	2.5	Medium
Political stability	3.5	1.2	Slight increase	6.1	2.6	Medium
Communal obligations	3.3	1.3	No change	5.9	2.7	Medium
Xenophobia	3.3	1.3	No change	6.3	2.7	Medium
Traditional approach to work	2.9	1.4	No change	6.7	2.7	Medium
Tribalism	2.6	1.2	No change	5.6	3.4	Medium
Traditionalism in education	2.5	1.4	No change	5.6	2.8	Medium
Dependence on expatriates	2.4	1.2	Slight decrease	6.3	2.9	Medium
Traditionalism in family norms	2.2	1.2	Slight decrease	5.5	2.8	Medium

a. Column 1: *changes in values* were measured on a 5-point scale where 1 = *significant decrease*, 2 = *slight decrease*, 3 = *no change*, 4 = *slight increase*, and 5 = *significant increase*.
b. Column 4: *impact on tourism* measured on a 10-point scale ranging from 0 = *no impact at all* to 10 = *very high impact*.
c. Column 6: 0-4 = low impact, 5-7 = medium impact, and 8-10 = high impact.

With regard to impact of the changes in structure, although the expected significant changes in airlines traffic and in hotels would lead to a corresponding high impact on the industry, the same significant increase in tourist homes and in car traffic would lead only to a medium impact. The expected slight changes in ecotourism and government involvement would lead to more than proportionate impact, that is, high impact. Changes in the remaining items would lead to a medium impact; none is foreseen to have a low impact.

Events: Probability, Year, Impact

In the third set of questions, the experts were given a list of 37 events that may happen in the future, and for each event they were asked to give their perceptions on three related dimensions. The first was the *probability* of occurrence of each event on a scale ranging from 0% (never) to 100% (certain). The second was the *year* of occurrence from 2003 to 2020. The third was the *impact* of the event on tourism and hospitality industry development on a 10-point scale from 0 = *no impact* to 10 = *significant impact*.

Table 7 displays a summary of the findings, and the following main points emerge from the data:

1. The probability of occurrence of these events varied widely from 35% to 81% chance.
2. Eight events were considered by the experts to have the highest probability of occurrence (70% or better chance):
   - Tourism will be integrated into the national economic development program.
   - Land issues will be included as part of tourism development plans.
   - Tertiary institutions would integrate tourism programs into their curricula.
   - Demand for training programs in tourism will increase substantially.
   - More than 50% of the world's cash transactions will occur online on credit/debit cards.
   - Hotel managers will require more specialized formal training.
   - Most countries will establish economic incentives for the protection of wildlife, scenic beauty, and natural environments.
   - The majority of executives in tourism will be from Botswana.
3. It is interesting to note that the said eight events with the highest likelihood of occurrence were also, by and large, likely to occur relatively earlier. The earliest time for occurrence of any of the events was forecasted at 2009 and most of the eight items were to occur in 2009, 2010, and 2012. In addition, all eight events except one (*most transactions will occur online*) were considered by the experts to have a high impact on tourism.
4. Three events that had a lower chance of occurring were, nevertheless, thought to potentially have a high impact on tourism:

TABLE 6

CHANGES IN STRUCTURE OF THE TOURISM AND HOSPITALITY INDUSTRY

	Degree of Structural Change			Impact on Tourism		
	(1)[a]	(2)	(3)	(4)[b]	(5)	(6)[c]
Change in . . .	Mean	Deviation	Change	Mean	Deviation	Impact
Tourist homes	4.7	0.5	Significant increase	7.0	2.6	Medium
Airlines traffic	4.6	0.6	Significant increase	8.0	2.4	High
Hotels	4.5	0.5	Significant increase	7.6	2.3	High
Car traffic	4.5	0.8	Significant increase	6.4	2.8	Medium
Fast-food outlets	4.5	0.7	Slight increase	6.3	3.0	Medium
Ecotourism	4.4	0.8	Slight increase	7.9	2.4	High
Travel agencies	4.3	0.6	Slight increase	6.9	2.6	Medium
Intercity bus lines	4.3	0.7	Slight increase	6.7	2.9	Medium
Gift shops	4.3	0.6	Slight increase	6.0	3.3	Medium
Motels	4.3	0.8	Slight increase	6.6	2.8	Medium
Resort areas	4.3	0.6	Slight increase	7.3	2.5	Medium
Handcraft centers	4.3	0.7	Slight increase	7.3	2.4	Medium
Personal services	4.3	0.8	Slight increase	7.2	2.4	Medium
Bus tours	4.3	0.8	Slight increase	6.7	2.7	Medium
Package holidays	4.3	0.9	Slight increase	7.0	2.9	Medium
Heritage centers	4.2	0.8	Slight increase	7.1	2.7	Medium
Campgrounds/trailers	4.1	0.8	Slight increase	6.0	3.0	Medium
Sporting stores	4.1	0.7	Slight increase	5.3	3.4	Medium
Cruising services	4.1	0.7	Slight increase	6.8	2.5	Medium
Budget properties	4.1	1.0	Slight increase	6.3	2.6	Medium
Cultural activities	4.1	0.8	Slight increase	7.0	2.5	Medium
Government involvement	4.1	1.2	Slight increase	7.9	2.6	High
Local entertainments	4.0	0.9	Slight increase	5.6	3.1	Medium
Festivals and events	4.0	0.8	Slight increase	5.9	3.0	Medium
Cottages and vacation homes	3.9	0.9	Slight increase	5.5	3.0	Medium
Botanical parks	3.9	0.7	Slight increase	5.8	3.3	Medium
Local cuisine	3.9	0.8	Slight increase	5.8	2.7	Medium
Duty-free shops	3.8	0.7	Slight increase	5.3	3.2	Medium
Historical parks	3.8	0.7	Slight increase	6.0	3.1	Medium
Museums	3.8	0.7	Slight increase	5.7	3.2	Medium
Golf courts	3.8	0.9	Slight increase	5.7	2.7	Medium
Farm vacation	3.7	0.8	Slight increase	5.2	2.9	Medium
Water sport facilities	3.6	1.2	Slight increase	5.0	3.0	Medium
Train services	3.5	0.9	Slight increase	5.0	3.2	Medium
Game hunting	3.0	1.5	No change	6.4	3.0	Medium

a. Column 1: *changes in values* were measured on a 5-point scale where 1 = *significant decrease*, 2 = *slight decrease*, 3 = *no change*, 4 = *slight increase*, and 5 = *significant increase*.
b. Column 4: *impact on tourism* measured on a 10-point scale ranging from 0 = *no impact at all* to 10 = *very high impact*.
c. Column 6: 0-4 = low impact, 5-7 = medium impact, and 8-10 = high impact.

- Better cooperation in tourism among southern African nations.
- Public and private sectors will work together to increase acceptance of tourism.
- A network of international carriers is established, and Air Botswana provides a feeder service to it.

Relationships among Variables

Another level of analysis involved testing for relationships, if any, among the variables studied. Due to inability to handle all correlations among all the myriad variables investigated in this study, these were reduced to seven factors capturing interrelated variables. Each of the new factors is a composite index created by averaging responses to the various questions measuring a particular construct. These seven aggregated underlying factors or constructs are labeled as *value changes*, *impact of values*, *structure changes*, *impact of structure*, *likelihood of occurrence*, *year of occurrence*, and *impact of events*.

Because the aggregated scales are an assembly of interrelated items designed to measure underlying constructs, it is important to know how well the set of items measures the latent construct. The questionnaire used had good internal validity (table 8), because six of the seven constructs had a Cronbach's alpha score greater than 0.7, conventionally considered to be an acceptable coefficient (Nunnaly 1978). The reader should note that lower thresholds such as 0.6 are sometimes used in the literature (Malhotra 1996).

The Cronbach's alpha is based on the assumption that if items are measuring the same thing, they should be correlated with one another. This makes sense intuitively—if the interitem correlations are high, there is evidence that the items are measuring the same underlying construct. As

TABLE 7
EVENTS HAVING IMPACT ON TOURISM AND HOSPITALITY INDUSTRY

	Likelihood[a]	Year[b]	Impact[c]
Government will integrate tourism in its economic program.	81	2010	8 High
Land issues will be part of Botswana's tourism plans.	79	2010	8 High
Tertiary institutions would integrate tourism in their curricula.	79	2010	8 High
Demand for executive training in tourism will increase.	76	2009	8 High
More than 50% of world transactions will occur online.	76	2012	7 Medium
Hotel managers will require more specialized formal training.	73	2010	8 High
Most countries will conserve wildlife and scenic beauty.	70	2012	8 High
The majority of executives in tourism will be from Botswana.	70	2015	8 High
Automated systems will provide travel information in real time.	69	2011	7 Medium
More foreign investment in tourism will take place in Botswana.	68	2011	7 Medium
Better cooperation will take place among southern African nations.	67	2011	8 High
Most restaurants will cater to the taste buds of tourists.	67	2011	7 Medium
Public and private sectors will strive to increase acceptance of tourists.	66	2011	8 High
Hotels will use agricultural output produced by local communities.	66	2011	6 Medium
A network of carriers is established, and Air Botswana feeds to it.	65	2010	8 High
Activity tourism (e.g., ecotourism, plowing, and milking a cow) increases.	64	2012	7 Medium
Videoconferencing will replace much business travel.	63	2012	6 Medium
Automation will replace most labor in urban areas.	63	2014	6 Medium
Rationing achieves limited access to natural resources.	62	2011	7 Medium
Landowners and craftsmen will have more say in Botswana tourism.	62	2012	7 Medium
Manmade lakes and artificial skiing platforms will be common.	62	2013	7 Medium
A data bank with real-time tourist information is established.	61	2013	7 Medium
Most restaurant revenues will come from fast-food outlets.	61	2011	6 Medium
50% of people will work for quality of life rather than subsistence.	59	2012	7 Medium
Underwater, underground, space, and desert will be open to tourism.	58	2013	7 Medium
Lower travel costs will be affordable by the middle class.	56	2012	7 Medium
Air taxis to within 300 kilometers will be integrated with main airports.	55	2013	6 Medium
The 40-hour workweek and annual month vacation will be worldwide.	54	2010	6 Medium
A majority of hotels will be self-service.	53	2012	7 Medium
Most people will travel on other continents as they do locally.	52	2012	6 Medium
100 million people will participate in time-sharing resorts worldwide.	52	2013	6 Medium
September 11, 2001, will dampen tourism growth worldwide.	51	2008	6 Medium
Border formalities (visa, customs) are relaxed worldwide.	50	2012	7 Medium
An international currency is used worldwide.	45	2015	6 Medium
Allocation of funds to travel and tourism will become a necessity.	43	2013	6 Medium
The world energy problem will have been solved.	40	2016	6 Medium
More than 50% of people in Botswana will have a budget for travel and leisure.	35	2014	6 Medium

a. Likelihood = likelihood of occurrence of event (0 = *never*, 1%, 2% . . . 100%).
b. Year = year of probable occurrence (2003, 2004 . . . 2020).
c. Impact = impact (0 = *no impact*, 10 = *significant impact*). Classification of impact is as follows: 0-4 = low impact; 5-7 = medium impact, 8-10 = high impact.

TABLE 8
CRONBACH'S ALPHA

Construct	Number of Variables	Cronbach's Alpha
Value changes	21	0.526
Impact of values	21	0.894
Structure changes	35	0.921
Impact of structure	35	0.964
Likelihood occurrence	37	0.918
Year of occurrence	37	0.944

interitem correlation increases, Cronbach's alpha increases as well, taking a value ranging from 0 to 1.

The Spearman's correlation coefficients among the seven constructs (table 9) show that the intercorrelations between any two of the constructs are positive except for *year of occurrence*. These correlations suggest that an expert who perceives a positive change in society *values* is likely to perceive a similarly positive change in all the other areas studied except *year of occurrence*. The negative correlation with *year of occurrence* means that the same expert who holds positive futuristic perceptions on changes in values, structure, and events would also perceive that the said changes and events would occur sooner rather than later.

CONCLUSIONS AND IMPLICATIONS

This study has explored the most probable scenario for the tourism and hospitality industry in Botswana by the year 2020 by asking the tourism industry experts. In this section, the key findings are translated into a meaningful set of conclusions. Based on these conclusions, implications for policy makers and practitioners are discussed.

TABLE 9

SPEARMAN'S CORRELATION COEFFICIENT

	C-Values	I-Values	C-Structure	I-Structure	Likelihood	Year	I-Events
C-values	—						
I-values	.307(*)	—					
C-structure	.311(**)	.537(**)	—				
I-structure	.208	.556(**)	.560(**)	—			
Likelihood	.120	.410(**)	.331(**)	.442(**)	—		
Year	−.217	−.186	−.134	−.187	−.143	—	
I-events	.115	.545(**)	.476(**)	.627(**)	.494(**)	.038	—

Note: C-values = changes in values; I-values = impact of values; C-structure = changes in structure; I-structure = impact of structure; likelihood = likelihood of occurrence of event; year = year of occurrence; and I-events = impact of events.
*Correlation is significant at the 0.05 level (2-tailed).
**Correlation is significant at the 0.01 level (2-tailed).

Conclusions

The finding that the *values* of the people in Botswana, taken as a whole, are expected to experience only slight shifts of medium-intensity impact implies that the experts forecast a *stable* society. These findings are both in conformity and at variance with a previous study in neighboring South Africa (Kaynak, Bloom, and Leibold 1994). The findings are similar because in both studies, many of the societal values indicated little change. This implies that perhaps societal values in the region take a longer time horizon to change.

The findings are also different in the sense that although the Botswana study showed that none of the values would change significantly, the South African study showed that two of the values would indeed change significantly: (1) participation in decision making, and (2) the acceptance of change. This can be explained in terms of the relatively unsettled South Africa, which must redefine and accept new values in work conditions in tourism in the postapartheid era. In contrast, Botswana has experienced a period of social and political stability and economic growth since independence in 1966, and experts see no reason why these values, which have served the country so well, should change significantly.

Whereas there would be little or no change in tourism values, the same is not true for industry structure and events. The respondents foresaw a significant increase in four structural areas. Although changes in values (mostly slight) were perceived to have a moderate impact on tourism, any change in structure was expected to have either moderate or high impact. This suggests, perhaps, that the experts feel that tourism demand responds more to changes in structure than in values.

Whereas the experts foresee little change in values and some limited change in structure (four areas), however, they see relatively more changes in *events* that affect tourism. Eight events were considered by the experts to have the highest likelihood of occurrence (70% or better chance). It is interesting to note that the eight events with the highest likelihood of occurrence were also, by and large, likely to occur relatively earlier. In addition, all eight events except one (most world's transactions will occur online) were considered by the experts to have a high impact on tourism in the country.

Furthermore, three events that had a low chance of occurring in comparison to the eight discussed above were, nevertheless, thought to potentially have a high impact. It appears that, in the eyes of the experts, events produce more impact than structures and values. One major conclusion can be drawn from the preceding analysis: *it appears that perhaps tourism demand responds more to changes in events, followed by changes in structure, and least to changes in values.*

These findings have produced a paradigm shift in our way of thinking. Early in this study, we thought and stated, "Although tourist attractions and supporting structures (mainly hardware) are preconditions for tourism to take place, whether a country actually gets tourists depends on the values of that society, their decisions, and in particular their values that attract or repel tourists." This belief, if correct, implies that societal values would be more important than structure and events in attracting tourism. The views of the experts do not appear to support this belief. The conclusion drawn from these findings is that, at the moment, events and structure appear to be more important than values in attracting tourism in Botswana.

Implications

This study may well be the first of its kind in Botswana; policy makers, management, and the academic community may benefit from the findings. On the basis of the conclusions, the following implications for policy formulation and theory development emerge.

This study is well placed to help policy makers who may use the findings in planning appropriate intervention strategies for attaining the national objective of transforming the economy from a mineral-based economy to a more diversified one. Public policy makers are advised that efforts aimed at increasing tourism may prove more fruitful if focused on dealing with events that attract or repel tourists and on improving structures rather than changing the values of the people toward tourists. For example, promoting an international event to take place in Botswana, or devising strategies on how to take advantage of the 2010 World Cup Soccer event in neighboring South Africa and improving the hotel infrastructure, may attract more tourism than fighting xenophobia or tribalism at the moment. Although it is important for the tourism education policy to deal with how to improve societal values toward tourists, the concentration of curricula should be on how to improve tourism events management and infrastructure.

Tourism management is made more aware of the likeliest scenario that will determine their destiny, and hence they will be better prepared when making business decisions for 2020 and beyond. The study has shown areas that are likely

to increase, remain the same, or decrease. This is important information for strategy formulation.

This study makes two contributions to the understanding of the relationship among values, structure, and events in the context of Botswana and South Africa from an academic standpoint.

First, in some way, the findings extend our knowledge by demonstrating that the relative importance of the value, structure, and event variables operating between the two countries appears different. Contrary to observations in Botswana, in South Africa value change factors seem to play a larger role than structure and event factors in affecting the future of the industry. Specifically, in South Africa, with a history of apartheid, the influence of value factors is more important than that of structure (infrastructure) and events that have stabilized throughout time and are relatively better developed. It follows that in a forecast of tourism in Botswana, focuses on value changes, already relatively stable, may be less revealing because structure and event factors appear to be relatively more important in tourism determination. These are tentative findings that require validation. Future research that focuses on investigating the relative importance of values, structure, and events on tourism determination may prove a worthwhile research direction.

Second, the study also makes an improvement in the understanding of Delphi forecasting behavior. It has demonstrated that an expert who perceives a positive change in society *values* is likely to perceive a similar influence on *impact* of those *values*, changes in *structure*, *impact of structure*, *likelihood* of occurrence, and *impact of events*, and would also perceive that the said events would occur sooner rather than later and vice versa. That is to say that a person who is optimistic on one variable is likely to be the same on most other variables, and vice versa.

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