

## Accommodation services for competitive tourism in Sub-Saharan Africa: Historical evidence from Malawi

Alice Magombo<sup>1, CDF</sup>, Christian M. Rogerson<sup>2, CFMR</sup>, Jayne M. Rogerson<sup>3, CMR</sup>

<sup>1</sup>Ministry of Tourism, Wildlife and Culture, Lilongwe, Malawi, phone: +265 775 499, e-mail: [Alice.magombo@gmail.com](mailto:Alice.magombo@gmail.com); <sup>2</sup>University of Johannesburg, School of Tourism & Hospitality, Kerzner Administration Building, Bunting Road Campus, Bunting Road, Auckland Park, 2006, Johannesburg, South Africa; phone: +270 115 591 167, e-mail: [crogerson@uj.ac.za](mailto:crogerson@uj.ac.za) (corresponding author); <sup>3</sup>University of Johannesburg, Department of Geography, Environmental Management and Energy Studies, D3 Lab Office 331, King-sway Campus, Kingsway, Auckland Park, 2006, Johannesburg, South Africa; phone +270 115 592 439, e-mail: [jayner@uj.ac.za](mailto:jayner@uj.ac.za)

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**Abstract.** The accommodation services sector is a vital underpinning of the competitiveness of destinations in especially emerging tourism regions of the global economy. Within the environment of Africa building the competitiveness of countries as tourism destinations is inseparable from the challenge of establishing a network of different forms of accommodation at competitive prices and internationally acceptable quality standards. This paper uses a longitudinal approach to analyse the development of the accommodation services sector in one African country – Malawi – which is scaling up its tourism industry. Using historical evidence the objective is to examine the unfolding evolution of accommodation services as a factor in enhancing tourism destination competitiveness. The chequered pathway followed in Malawi to building the country's network of hotels and small-scale accommodation establishments is traced from the colonial period to post-independence developments. It is argued that in understanding the historical evolution of accommodation services policy re-orientations have been significant drivers of change.

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## 1. Introduction

Across Africa considerable importance is attached to tourism as a lever for job creation, poverty reduction, improving livelihoods and generating local economic development prospects (Ashley, Roe, 2002; Mitchell, Ashley, 2006; Rogerson, Rogerson, 2010; Spenceley, Meyer, 2012; Saarinen, Rogerson, 2014; UNWTO, 2015a; Butler, Rogerson, 2016; de Boer, van Dijk, 2016). It is argued that whilst the economic importance of tourism in Africa in the global tourism economy remains modest, as indexed by its 5 percent share of international arrivals and 3 percent share of tourism receipts, since 1990 the sector has been steadily rising in terms of its significance for economic and social development (Rogerson, 2007; Novelli, 2015; UNWTO, 2015b; World Travel & Tourism Council, 2015). This said, the state of tourism in Africa must be looked at in relation to its unexploited potential for development given the continent's extraordinary rich tourism assets of wildlife, biodiversity, natural scenery and culture (Blanke et al., 2011; World Bank 2014; Saarinen, Rogerson, 2015; UNWTO, 2015b; Manwa et al., 2016). In order to maximise tourism development opportunities as well as contribute to the achievement of the United Nations Sustainable Development Goals it is essential that African countries build their competitiveness as tourism destinations and overcome barriers that are constraining tourism development (Blanke et al., 2011; Manwa, 2011; Mayaka, Prasad, 2012). Among several factors that can influence tourism demand and competitiveness one essential prerequisite for the growth of any tourism destination is that different forms of accommodation be made available to tourists at competitive prices and acceptable quality standards (Dwyer, Kim, 2003; Ritchie, Crouch, 2003; Ernst & Young, 2011; Christie et al., 2013; Rogerson, 2016a).

The aim in this paper is to examine the unfolding evolution of accommodation services as a factor

in enhancing tourism destination competitiveness in one African country. Under scrutiny is the case of Malawi, a landlocked country of central Africa bordered in the north and east by Tanzania, Zambia in the west and Mozambique in the south and east. As the former British colony of Nyasaland, Malawi gained independence on 6 July 1964. From the earliest colonial days to the present-day the economy has been narrowly based with agriculture the main source of growth. Only in the past decade and a half has there occurred a positive structural change with a gradual shift out of agriculture into higher productivity non-agricultural sectors (World Bank, 2016). Among opportunities for economic diversification an interest emerged in the late colonial period concerning the potential for tourism to develop as an alternative source of employment, income and livelihoods in Malawi. Throughout the post-independence years tourism has been a continuing focus for promotion and embedded in national economic development planning prioritisation (African Development Bank, 2012; Mwanakatawe, Kebedew, 2015).

The volume of tourism scholarship on Malawi remains relatively limited even compared to that of several other African countries (Rogerson, Rogerson, 2011). Only a small number of works exist which deal with a range of issues around entrepreneurship (Chilembwe, Gondwe, 2015; Krishnan, 2016), the development pathways of the tourism industry (Magombo, Rogerson, 2012), voluntourism (Freidus, 2016), tourist guides (Chilembwe, Mweiwa, 2014), employment and poverty alleviation (Gartner, Cukier, 2012), cultural heritage (Gilman, 2015) as well as recent ecotourism initiatives in protected areas for leveraging international tourism (Novelli, Scarth, 2007; Snyman, 2013; Bello, 2015; Bello et al., 2016). Among academic observers and policy-makers alike there is consensus that, relative to its neighbours, Malawi underperforms as a tourism destination (World Bank, 2011; Magombo, Rogerson, 2012). Key factors are the lack of air connectivity to the country from Europe and

Asia, and limited and/or poor tourism marketing of the so-called “Warm Heart of Africa” (World Bank, 2011; Krishnan, 2016). Beyond issues of air access and of shortcomings in international marketing, however, it is acknowledged widely that progress of tourism development has been stifled continuously by the underdeveloped state of accommodation services. In a report produced by the World Bank in 2011 the imperative to increase the competitiveness of Malawi’s accommodation sector was identified as a core challenge for moving towards a more efficient local tourism economy (World Bank, 2011: 44).

It is against the above backdrop that this investigation adopts an historical longitudinal approach to unpack the emergence and geographical patterns of accommodation services in Malawi. Extensive use is made of colonial and post-independence policy documents and archival material sourced at the Malawi national archival depot in Zomba. In an early review of African tourism scholarship, it was urged that further research is required into the locational attributes of the accommodation sector (Hyma et al., 1980: 543). This knowledge gap is addressed here with the issue of the spatial evolution of accommodation services situated at the heart of building the competitiveness of Malawi as a tourism destination.

## 2. Tourism competitiveness and accommodation services

Destination competitiveness and the determinants of comparative and competitive advantage have attracted much writing in the context of countries in the global North (Dwyer, Kim, 2003; Ritchie, Crouch, 2003; Enright, Newton, 2004; Komppula, 2014; Abreu-Novais et al., 2016). In understanding destination competitiveness within emerging tourism regions of the global economy (Cohen, Cohen, 2015) it is emphasised that the concept of a ‘tourism destination pyramid’ provides a useful start point (World Bank, 2014). Arguably, by building competitiveness, countries ascend the tourism destination pyramid. With a corresponding expansion of tourism flows additional employment opportunities can be generated, the tourism value chain is strengthened and ultimately the prospects improve for in-

clusive development through the tourism sector (Bakker, Messerli, 2016).

In terms of the tourism destination pyramid Christie et al. (2013) and the World Bank (2014) differentiate African countries on the basis of income ranking and the scale of tourism development. Using these criteria, a fourfold typology is set forth of sub-Saharan African countries as tourism destinations. First, are pre-emergent destinations which have not yet developed their tourism economies. Examples include The Central African Republic, Eritrea, Liberia or South Sudan which represent countries with governance problems, low government policy interest in tourism, and, in the short- to medium-term, necessarily limited prospects for tourism growth. Second, are potential tourist destinations – such as Benin, Burundi or Cameroon – which are countries in the process of initiating tourism development. Such countries are considered as having certain basic infrastructure for tourism albeit “still face market failures, such as with regulation, resources and institutions” (World Bank, 2014: 5). The third group are styled emerging tourism destinations, including The Gambia, Mozambique or Senegal, which are scaling up their tourism economies in terms of national development. Although the governments of these countries prioritise tourism development and have solid institutions, several barriers remain to maximising tourism competitiveness. The final group of countries are those with established tourism industries engaged in maintaining and deepening the success of tourism by diversifying tourism products, building human resources and monitoring environmental and social impacts (Christie et al., 2013; World Bank, 2014). In sub-Saharan Africa, the countries classified in this last group encompass Botswana, Cape Verde, Mauritius and South Africa.

It is argued that there exist different challenges and constraints for tourism development for African countries at different levels of the tourism pyramid (World Bank, 2014). This said, a cluster of key determining factors are isolated for maintaining and enhancing the competitiveness of African countries as tourism destinations, *viz.*, the quality of tourism assets; efficiency and safety in transport to and from countries; adequacy of infrastructure; policy support from national government and local communities for tourism development; safety

and security of destinations for tourists (including health issues and terrorism), human resource capacities, and the availability and quality of accommodation services (Christie et al., 2013; Mihalic et al., 2013; World Bank, 2014; Novelli, 2015). Blanke et al. (2011) identify three groups of factors that affect competitiveness in contemporary Africa. First, is the regulatory and policy frameworks that impact safety and security, health and hygiene, environmental sustainability and the overall prioritisation of tourism. Second, is a suite of issues around the business environment and infrastructure amongst which are included air transport, ground transport and ICT, representing the essential 'hard' infrastructure for tourism development. Third, is the 'softer' human, cultural and natural element of each destination's tourism assets (Blanke et al., 2011).

Overall, however, the availability of a range of accommodation services is consistently isolated as one of the essential underpinnings of an infrastructure for competitiveness at any tourism destination (Christie et al., 2013). The undersupply of adequate accommodation services, particularly of hotels, is identified in World Bank reports as one of the prime constraints on contemporary tourism development across many countries in sub-Saharan Africa (Ernst & Young, 2011). Evidence from Ghana reinforces the critical role assumed by accommodation services and points to the value of pursuing an historical approach to particularly understand the trajectories of development of the hotel sector. The historical development of different forms of tourism accommodation in Ghana is analysed by Mensah and Mensah (2013). It is demonstrated that at the time of independence in 1957 that Ghana's accommodation services were below international standards which constrained the expansion of the country's tourism economy. A marked upgrading in the quantity and quality of hotels occurred from the late 1970s such that "Ghana's accommodation sector has since 1987 become a fully-fledged and internationally competitive sector" (Mensah, Mensah 2013: 44). Akama (1999) discloses that much of the first conventional hotel and lodge facilities in Kenya were built during the early British colonial rule by the colony's white settler community. In the case of

Tanzania an historical analysis reveals that upgrading of the accommodation sector was an essential component for raising the country's competitiveness to attract international leisure tourists (Salazar, 2008). Nwosu (2016) shows the historical development of the hotel industry as a critical component also of Nigeria's tourism and hospitality sector.

The complete absence or poor quality of accommodation services is observed among the group of countries defined as Africa's pre-emerging destinations. In countries such as South Sudan or Central African Republic the virtual absence of a hotel infrastructure outside the capital city is a major barrier to any tourism expansion (Euromonitor International, 2013, 2014). Correspondingly, in those destinations with mature tourism industries and involved in deepening the success of tourism development there are available a variety of different forms of accommodation services (Ernst & Young, 2011). The South African case is instructive. During the 1970s the radical transformation of the hotel sector in South Africa from a focus on liquor sales to the provision of quality accommodation was fundamental to the growth of international leisure tourism in the country (Rogerson, 2011). The subsequent restructuring of the accommodation sector since the 1994 democratic transition has been an essential platform for building the country's competitiveness as a destination for international tourism (Rogerson, 2013a, 2013b, 2013c). As a consequence of the historical expansion and upgrading of accommodation services, tourists in South Africa can select from establishments ranging from five star luxury hotels and safari lodges, boutique hotels, self-serviced apartments, all-suite hotels, time-shares or guest houses to cheaper budget accommodation in the form of bed and breakfasts, backpacker hostels or Airbnb home stays (Rogerson, 2010, 2011a, 2011b, 2012, 2014a, 2014b; Pandey, Rogerson, 2013, 2014a, 2014b; Greenberg, Rogerson, 2015). In furthering the competitiveness of accommodation services much contemporary interest surrounds issues of 'greening' and the environmental management of commercial accommodation establishments (Rogerson, Sims, 2012; Hoogendoorn et al., 2015; Ismail, Rogerson, 2016).

### 3. The Evolution of accommodation services in Malawi

A longitudinal analysis of the evolution of accommodation services in Malawi is undertaken in relation to the transition from British colonial rule to the post-independence period. In Malawi this political transition was a critical moment for changing pathways of tourism development as also has been shown so for several other African countries (Harrison, 1995; Akama, 1999; Salazar, 2008; Mensah, Mensah, 2013). It will be demonstrated that the establishment of a hotel sector was central to the development and planning of tourism in Malawi and that without the provision of appropriate accommodation services the newly independent country could not aspire to be a competitive tourism destination. Using a range of different primary and archival sources the discussion below analyses the unfolding accommodation sector during the colonial years, the planned growth of the hotel industry in the post-independence period, and the shifting roles of government and the private sector across the evolution of the hotel sector in Malawi. In interpreting the evolution of accommodation services in Malawi it is contended that policy re-orientations have been significant drivers of change.

#### 3.1. Accommodation services in the Colonial Era

British colonial rule was established in the territory of Malawi during the late 19<sup>th</sup> Century as British Central Africa which in 1904 was renamed as the Nyasaland Protectorate. Only limited archival material is available to trace the beginnings of accommodation services and of early hotel developments in the territory. From the available historical record, local settlers and pioneers were the first entrepreneurs of small scale accommodation developments in the early colonial period.

It is recorded that the oldest hotel in Malawi is Hotel Masongola, formerly known as Government Hostel, which is situated on the slopes of Zomba Mountain in the Zomba District and still retains

its colonial style architecture (Malawi Government, 1970). The hotel was built by the agricultural pioneer John Buchanan in 1886. Its location in Zomba, the declared capital of British Central Africa, was chosen for purposes of controlling the slave trade that was rampant at that time, which David Livingstone and the early British colonial administration vowed to stamp out. Another early accommodation establishment was Limbe Hotel founded by the settler Louisa Ryall in 1914 at Limbe (Garland, 1996). It was stated that Louisa Ryall, whose husband worked for the Nyasaland Volunteer Reserve as builder and contractor, responded to an advertisement appearing in the Nyasaland Times in 1919 requesting: "Will some enterprising person start a hotel? There is nowhere for us to stay". Ryall converted one of the buildings that used to be a concentration camp during the First World War as the first premise for a hotel in Blantyre (Garland, 1996). The building later became Nash's Hotel, a family business owned by Mr Nash. The early hotel entrepreneur Louisa Ryall subsequently built a new establishment, Ryall's Blantyre Hotel, which opened in 1922 (Garland, 1996). This particular hotel, built in the post-World War One period, was characterised as one of the major modern developments in colonial Blantyre and patronised by bank clerks, Portuguese businessmen (from Mozambique), missionaries, tobacco growers, insurance men and commercial travellers from Rhodesia (now Zimbabwe).

Outside of the colonial administrative centres, which were hubs for business travellers, the shores of Lake Nyasa (now Lake Malawi) became the focus of accommodation services more directly oriented at the leisure traveller. It is recorded that the privately owned Grand Beach Hotel was the oldest hotel along the lakeshore and built in the 1930s (Braggs, Barnett, 1996). Further developments of accommodation services at the lakeshore were pioneered by Louisa Ryall with the opening of the Cape Maclear Hotel (probably in 1930s). This particular hotel, however, was closed in 1951 due to considerable losses which resulted after the cancellation in 1950 of the services of a flying-boat plane which used to travel from Britain and land in the waters of Lake Nyasa (Lake Malawi) in front of Cape Maclear Hotel en route to Johannesburg, Cape Town or Victoria Falls (Colby, 1988). In 1946 the ownership of Ryall's hotel merged with the Grand Beach

hotel to form Nyasaland Hotels Company, the first corporate hotel formation. In parallel with accommodation services trends in South Africa the hotel sector in colonial Malawi was taken over by the liquor sector as Nyasaland Hotels merged with a local beer brewery and re-named Nyasaland Hotels and Brewery Ltd. During the 1950s after years of restraint in development due to the Second World War Nyasaland Hotels and Brewery Ltd built two additional hotels, namely the Shire Highlands Hotel in Limbe and Angoni Highlands Hotel in Dedza. Apart from the existence of these early hotel developments of the colonial era certain other forms of accommodation were established. With the expansion of the colonial government a series of rest houses was built under the office of District Commissioner. These rest houses were simple forms of accommodation which mainly were to cater for the needs of travelling civil servants.

In sum, during the formative years of colonial rule in Nyasaland therefore the initial accommodation services were small scale privately run establishments which were primarily concentrated in the colony's administrative centres (especially Blantyre). Outside of these urban settlements other small scale accommodation services were situated at the lakeshore for leisure travellers or on the plateau where the focus was for travelling government personnel.

From the 1950s more detailed material is available in the archival record to trace the evolution of accommodation services. The late colonial period was punctuated by Nyasaland's incorporation into the Federation of Rhodesia and Nyasaland which was proclaimed on 4 September 1953 and constituted from the three British colonies of Northern Rhodesia, Southern Rhodesia and Nyasaland (Fig. 1).

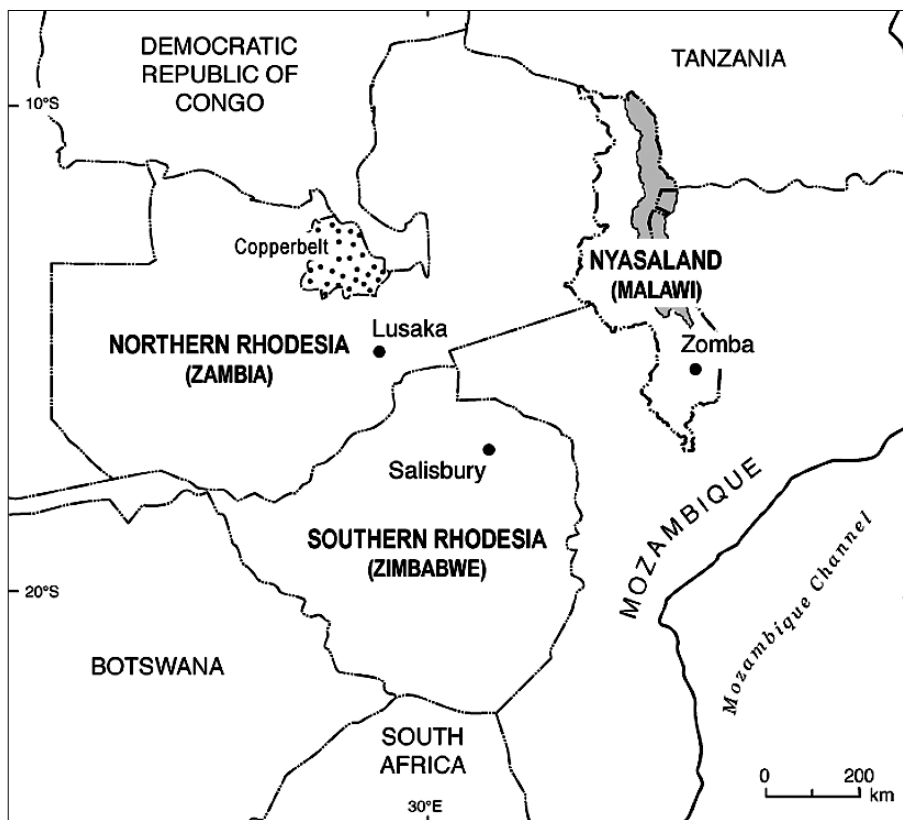


Fig. 1. Federation of Rhodesia and Nyasaland

Source: Authors

Under the federal government efforts were made ostensibly to promote tourism development across all three territories by the Federal Tourist Develop-

ment Board. Nevertheless, despite a growth of marketing, the major promotional initiatives benefitted the territory of Southern Rhodesia and for the most

part the tourism potential of colonial Nyasaland was neglected (Magombo, Rogerson, 2012). This said, a set of further small hotel developments by private sector investors occurred around the lakeshore seeking to offer cheap holiday offerings to visitors from both Northern Rhodesia and Southern Rhodesia. The focal points were at Lake Nyasa (Lake Malawi) at the holiday centres of Salima and Fort Johnston (Mangochi) which offered accommodation services, safe bathing, good fishing and boating in a delightful setting. At these lakeshore resorts most visitors were drive tourists. Other visitors – both business and leisure – were air travelers as flight air connections expanded between Blantyre and Salisbury (now Harare) increasing to six flights a week by the early 1960s. These developments were a stimulus for further new hotel projects undertaken by private entrepreneurs, including Mwanza Inn at the border town of Mwanza and Keiller's Transcontinental Hotel which was established in Blantyre (Garland, 1996).

Fig. 2 presents the results of an audit of hotels based upon available telephone directories sourced in the Malawi National Archives. The information and listings in these directories (triangulated with other sources) allow a picture to be painted of the growth occurring in the hotel economy of Malawi at the close of the colonial period. By the end of the colonial period it is estimated a total of 25 hotels were spread across the colony with nearly half located in the Blantyre-Limbe area. Fig. 2 shows the geographical concentration of hotels in the Blantyre-Limbe node, which was the economic as well as the administrative heart of the colony. The growth of this accommodation services network around the colony's major urban centre and other towns was led by private sector investors. The only government involvement remained that of the hostel, renamed Hotel Masongola at Zomba.

During the period of the Federation between 1953 and 1963 a growth occurred in the number of hotels. In addition, there occurred a widening spread in the geographical distribution of accommodation services. This expansion of the number of hotels was taking place, however, at a time of only marginal growth in the tourism economy of the colony (Magombo, Rogerson, 2012). A churning occurred in the mix of hotels as some hotels closed operations as a result of the political uncer-

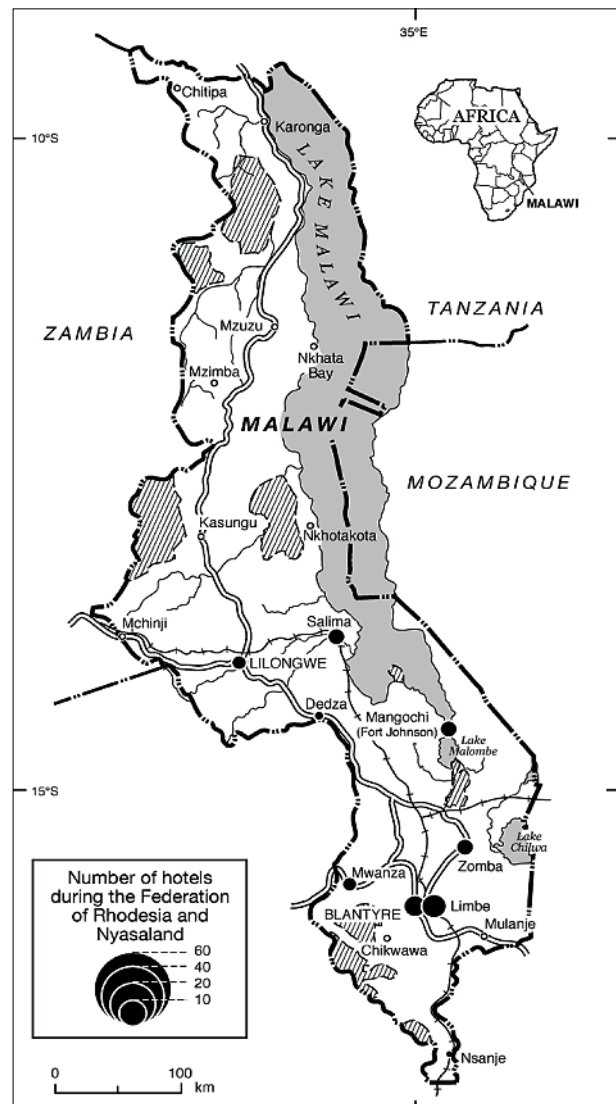


Fig. 2. Distribution of hotels in Malawi during the Federation of Rhodesia and Nyasaland 1953-1963

Source: Authors

tainties brought about by the federation (Garland, 1996) whereas the operations of other hotels established in the early colonial era continued into the federation of Rhodesia and Nyasaland.

### 3.2. Accommodation services development since independence

Malawi gained independence on 6<sup>th</sup> July, 1964 from British rule. At independence the immediate task ahead for the government was to galvanize economic development and meet the basic needs of the population. Since the majority of the country's pop-

ulation were peasant farmers the agriculture sector inevitably was prioritised. Nevertheless, there was an emerging interest in economic diversification and support for the development of other sectors of the economy and in particular to catalyse those sectors that might support agriculture. As a component of diversification planning the tourism sector was identified as part of 'industry development' as a viable and potentially high yielding business activity that might supplement agriculture in economic development (Magombo, Rogerson, 2012).

Two distinct phases in accommodation services development since independence can be differentiated. The first phase extends from 1964 to 1981 and is distinguished by a programme of government-led interventions for the planning and upgrading of the Malawi hotel sector. The second phase commences in 1981 with the implementation of World Bank/International Monetary Fund Structural Adjustment Programmes which resulted in a progressive retreat of government from direct intervention and instead towards facilitation of the private sector for leading the development of accommodation services in the country.

### **3.2.1. Government planning and direction of the hotel sector**

In many respects Malawi's planning for tourism as a sector for new post-independence development was a direct parallel to that of other countries (such as Kenya and Tanzania) in the region which also were expanding their infrastructure for international tourism (Salazar, 2008). For the Malawi government, the expectation was that a large proportion of the business and tourist visitors to Africa who were entering and leaving via gateways in East and South Africa would include in itineraries those countries in between which had good air and road communications and reasonable hotels. Malawi thus sought to position itself to capture these markets but in order to do so it had to have a network of modern hotels in towns, lodges in the tourist centres, and rest houses in the outlying districts (Malawi Government, 1968).

The territory's assets and prospects for tourism development came under scrutiny by national government. In a government survey of the country's stock of hotels and other accommodation units con-

ducted in 1965, however, it was revealed that the state of existing hotels was considered unfavourable and unsuitable for long-term development (Malawi Government, 1966). The survey revealed a condition of poor standards of existing hotel accommodation which did not meet existing acceptable international standards. The poor quality of the existing stock of Malawi hotels was considered a major hindrance upon the future progress of tourism in the country. It was recommended that much existing hotel stock simply be turned over into offices, showroom and hostels. Arguably, whilst the country had a wealth of natural attractions, the tourism infrastructure was inadequate and among the existing stock of privately-owned hotels only the Lilongwe hotel in Lilongwe and the Ku Chawe Inn at Zomba were viewed as offering acceptable standards of accommodation services (Malawi Government, 1966). It was noted other local hotels had not kept standards in line with the requirements of more 'sophisticated tourists'. Indeed, with the exceptions of the Lilongwe Hotel and the Ku Chawe Inn, it was considered that no local hotel offered suitable standards of service, food or accommodation and all hotel structures regarded as seriously sub-standard and virtually impossible to adapt or renovate (Malawi Government, 1969a).

The need to have new international standard hotels was deemed urgent if Malawi was to be established as a successful tourist destination. Accordingly, because of the poor state of private sector hotel developments in Malawi and of the critical need for acceptable accommodation of international standards to take forward the development of the tourism sector, the government prepared a plan for the improvement of the country's hotel sector. A central part of this plan was for more direct involvement of the government in the establishment of hotels in post-independence Malawi. In 1966 the strategy for hotel development was produced by the Division of Tourism and endorsed by the National Development Committee responsible for scrutinising sectoral development plans (Malawi Government, 1966). This plan became the country's official blueprint for upgrading the hotel sector with the starting point the provision of a network of professionally managed hotels of adequate standard. As a matter of guiding principles for building hotels it was stated that no



building would be developed in isolation but instead as an integral part of complex of recreational facilities including marinas, golf courses as well as infrastructural connections in terms of airports and good standard roads. For example, the building plans of lakeshore hotels would include necessary holiday recreational activities such as boats, sports equipment, and tennis courts (Malawi Government, 1965). The choice of hotel location was to be influenced by the attractiveness of local tourism assets, including the lakeshore with beaches, spectacular plateaux, a pleasant climate, conveniently-sited game-viewing areas, and strategic position in terms of developing air routes.

Institutionally, it was planned that hotels would be run as a company – Malawi Hotels Ltd – which would be a subsidiary of the Malawi Development Corporation (MDC), a statutory body directly under the responsibility of the Office of the President and Cabinet. The operation of these hotels, however, would be undertaken by Hallways Hotel Overseas Ltd., a UK based company that entered Malawi in 1965, and took over the administration and running of the existing government accommodation facilities. Hallways was responsible for supervision of the game camps at Lengwe Game Reserve, Lipupa in Kasungu and Chelinda at Nyika National Park, provision of catering services at Chileka and Lilongwe airports as well as on the MV Ilala II steamer ship on Lake Malawi, and management of the duty-free shop at Chileka airport. Above all the mandate of Hallways was to assist in the provision of an improved standard and level of service, food and accommodation for the travel trade in the country (Malawi Government, 1966, 1969b). As a further part of this government-led initiative to upgrade the quality standards of accommodation services the two exceptional cases of the Lilongwe Hotel and Ku Chawe Inn were bought out by government in 1969.

The centrepiece of the tourism strategy was direct government involvement in building a network of hotels. As government acknowledged that the future of Malawi tourism hinged on improved hotel development the Division of Tourism recommended the Malawi government should itself through the Malawi Development Corporation (MDC), enter the hotel business and erect a chain of strate-

gically-sited international standard economy class hotels (Malawi Government, 1968). The MDC was the most important investor in hotels in Malawi and undertook increased efforts to achieve its objective as a national development catalyst with hotel development representing one of the development agency's sectoral priorities (Malawi Government, 1965). Although government's policy was to partner with potential investors the development of hotel chains was solely done by MDC through its subsidiaries that were formed to build hotels. Government leadership was essential as private sector initiative to invest in the hotel sectors was lacking at that time.

It was proposed that the chain of hotels be established in strategic locations for the tourism economy and carried out in a phased process of development (Table 1). The planned hotels and lodges were to be developed simultaneously with the improvement of internal roads and airports. The first phase focussed on the provision of a commercial hotel, Mount Mlanje (now Mount Soche), with 100 double bedrooms in Blantyre, the country's commercial centre, where the most pressing hotel accommodation problems existed. Another development was a small tourist hotel (Nkopola Lodge) of 15–20 double bedrooms on the lakeshore near Fort Johnston (Mangochi) for internal and external drive tourists. It was anticipated that the Mount Mlanje hotel would enjoy high occupancy from business travellers to Malawi. The growth of business travel to Malawi generated a demand for higher standards of accommodation to be offered in Blantyre. Most business traffic originated from South Africa, Rhodesia (Zimbabwe), Zambia and Mozambique. In forward planning it was anticipated that a wider reach of business tourism might be attracted to Malawi, from East and West Africa, North America, and Europe with improved occupancy rates promoted by conferences and conventions in Blantyre. Not only would the success of the hotel depend on air links, but also on improved road networks, both internally and externally. It was anticipated that with improved road connections with surrounding territories that tourist traffic by road from South Africa, Rhodesia and Mozambique would increase considerably.

**Table 1.** Planned government hotel chain developmental phases

Location	No. of Bedrooms	Type
Phase 1		
Blantyre	100	Business, some leisure tourism
Fort Johnston (lake shore)	20 initial, 50 maximum	Leisure tourism, drive tourist hotel
Phase 2		
Salima (lakeshore)	30 initial, 50 maximum	Leisure tourism, air tourist hotel
Phase 3		
Nyika	10 initial, 20 maximum	Drive tourist hotel on the plateau
Lengwe	Lodge	Air and drive tourists
Kasungu	Lodge	Air and drive tourists
Vipya	10 initial, 20 maximum	Drive tourist hotel on the plateau
Other areas		
Limbe	Refurbishment of the existing one	Drive tourists
Mlanje Mountain	10 initial, 20 maximum	Drive tourist hotel in the foothills
Zomba	10 initial, 20 maximum	Drive tourist hotel on the plateau
Lilongwe	100	Business, some leisure tourism

Source: Malawi Archives, Zomba

The second phase for hotel development was to shift the geographical focus away from Blantyre. At the heart of planning was the provision of the first major tourist hotel along the lake, which was Malawi's prime tourist attraction. The main proposal was that an international standard tourist hotel be established at the lakeshore with initial development to be focussed at Salima (Malawi Government, 1968). The hotel development in Salima was chosen for a number of reasons. The lakeshore area was attractive and there were several suitable sites. Moreover, it was near to the established tourist market in Zambia's Copperbelt as well as close to the capital designate (Lilongwe) with its expanding airport programme. In addition, it was proximate to Chipoka for rail and lake steamer passengers and had its own dry-season Dakota airfield. The future tarring of the Liwonde-Lilongwe stretch of road would also bring the southern internal and external car markets within easy motoring distance of the new planned hotel at the lake (Malawi Government, 1968). The Salima hotel was designed to cater particularly for air tourists on package tours who would use regular schedule flights landing at Lilongwe and travel onward to Salima either by air or by luxury-coaches via the tarred Lilongwe-Salima road. The initial provision of 100 bedrooms was

considered the minimum for an economic operation for an air package tour hotel. The atmosphere of the new hotel, architecturally and socially was planned to be informal with emphasis on recreational activities linked to water sports.

A third phase for hotel development was planned to expand spatially the network of hotels away from the cities and the lakeshore and to open up the tourism opportunities of Malawi's other regions. In particular, in phase three the focus was to undertake complementary hotel development at game reserves and at scenic plateau areas. Complementary development would take place in three main game reserves which had major possibilities for tourist trade and existing facilities. Lifupa Camp in Kasungu National Park had an airstrip and 14 bed accommodations; the Malawi National Park (now Nyika National Park) in Rumphi District had 22 beds; and, Lengwe Game Reserve camp at Chikwawa had 8 beds and mainly was patronised by drive tourists coming from Blantyre (Malawi Government, 1968)

Overall, therefore, the intervention of government to upgrade the capacity and quality of the hotel industry in Malawi was to take place over a series of phased developments. The starting point would be Blantyre, the focus then shifting to the critical lakeshore node of Salima and then extend-

ing to other centres including Lilongwe, Limbe and the plateau areas. The planning of these various hotels was linked with different market segments and importantly was allied to improvements in transport infrastructure, both in terms of the country's

air access and road networks. Hotel planning included the provision of cheaper family accommodation for regional tourists from South Africa and Rhodesia who would be travelling by road with families.

**Table 2.** Summary of hotels in the Hotel Development Programme

Location	Name of hotel	Comments
Blantyre	Mount Soche Hotel	Opened 1969
Fort Johnston	Nkopola Lodge	Opened 1970
Zomba	Ku Chawe Inn	Acquired by government 1969
Lilongwe	Lilongwe Hotel	Acquired by government 1969
Salima	Grand Beach Hotel	Government took over 1971
Fort Johnston	Club Makokola	Government took over 1971
Limbe, Blantyre	Hotel Continental	Government took over 1971
Lilongwe	Lingadzi Inn	Opened 1972
Kasungu	Kasungu Inn	Opened 1972

*Source:* Authors based on Malawi National Archives, Zomba

Table 2 summarises government planning in post-independence Malawi for a new chain of hotel developments. The establishment of this improved network of a government chain of hotels was seen as critical for strengthening the competitiveness of Malawi tourism as a whole and correspondingly of its contribution to national economic development (Magombo, Rogerson, 2012). The rollout of the planned programme was driven by national government through MDC and its three statutory bodies, Malawi Hotels Limited, Hotels and Tourism Ltd and Capital City Development Corporation (CCDC) which together embarked upon a hotel construction and improvement programme. Malawi Hotels Limited built the 193 bed Mount Soche Hotel in Blantyre and the 52 bed Nkopola Lodge in Mangochi which opened in April 1969 and May 1970 respectively. In addition, Malawi Hotels Limited took over, extended and refurbished Ku Chawe Inn on Zomba Plateau and the Lilongwe Hotel in Lilongwe (Malawi Government, 1970). All four hotels were managed by Hallways Hotels (Overseas) Ltd. Hotels and Tourism Limited. In order to open up tourist areas where hotel accommodation was unavailable the government handed over the running of its chain of rest houses to the Department of Tourism in 1969/70 fiscal year. After assuming the management of the rest houses the Department carried out extensive maintenance and refurbishments and added

three new inns as part of the chain of government rest houses. The three new developments were the 40 bed Kasungu Inn, Chitipa Inn with 20 beds and Chintheche Inn (20 beds). In addition, Malawi Hotels Ltd constantly made renovations on its acquired properties, including alterations to public rooms to provide additional amenities in the Mount Soche Hotel as well as installation of a radio network. At the Lilongwe Hotel a new 21 bed roomed extension was constructed in 1971. At Nkopola Lodge new amenities were added including a marina, beach pavilion and four blocks of self-contained chalets to provide additional 32 bedrooms (Malawi Government, 1972)

By 1972 Malawi had a total of nine hotels and inns that were owned by MDC (Table 2). Among these hotels, four were directly built by government while five were purchased in take-overs from private owners. During the 1970s government continued making plans to build or acquire more hotels, inns or resorts of acceptable international standards. Of special concern was the lakeshore area considered the axis of tourism development and with two hotels. This chain of hotels constructed through government intervention was essential for establishing the foundations for a 'modern' tourism economy. This said, it can be observed the chain was not likely to enable leisure tourism as Malawi's major focus as Blantyre was a business rather than a leisure

hub and not considered as a major tourist attraction. Tourists would therefore only use the Blantyre hotel en route to the major attractions, such as the lake. The Fort Johnston hotel along the lakeshore was a tourist hotel, which because of its position and restricted aircraft facilities, would cater mainly for drive tourists. The regional drive tourist trade, however, was viewed as less important as compared to the potential international air package market. Overall, it was accepted that of critical importance for accelerating tourism in Malawi was the construction of a hotel of international standards at the lakeshore which would be geared to the potential of promoting packages of tourists travelling by air (Malawi Government, 1969a). Salima was considered the best location for such a major hotel development variously because it had excellent sites suitable for a large hotel, its proximity to the Zambian Copperbelt market, and that a Salima hotel would enjoy support from Lilongwe, which was the planned new capital city for Malawi (Malawi Government, 1969a).

Using information collected from an analysis of telephone directories and government files, it is estimated that by 1974 there were at least 28 accommodation service establishments units (hotels, lodges and inns) a decade after Malawi obtained independence. Fig. 3 reveals that the distribution of hotels, resorts and inns was concentrated geographically in the southern region and the lakeshore. By 1975 there was anticipation of further expansion for the local hotel industry. Hotel occupancy rates were increasing now at a faster rate than expected from 43.8 per cent in 1972 to 50.0 per cent in 1973 and 54.4 per cent by 1974. In particular, the performance of the two lakeshore hotels was particularly strong recording average occupancy rates of 80 per cent in 1974 (Malawi Government, 1975). These figures signalled that at least one or more lakeshore hotel might be required to cope with a growth in tourism volumes. Accordingly, the government opted to continue its focus on the building of new hotels and the extension of existing establishments as part of “industrial development” in Malawi. This project was undertaken through its statutory companies and their subsidiaries. The subsequent plan for the lakeshore development was for the construction of two more hotels at Msumbi Bay and Cape Maclear in the Nankumba Peninsula. In addition as

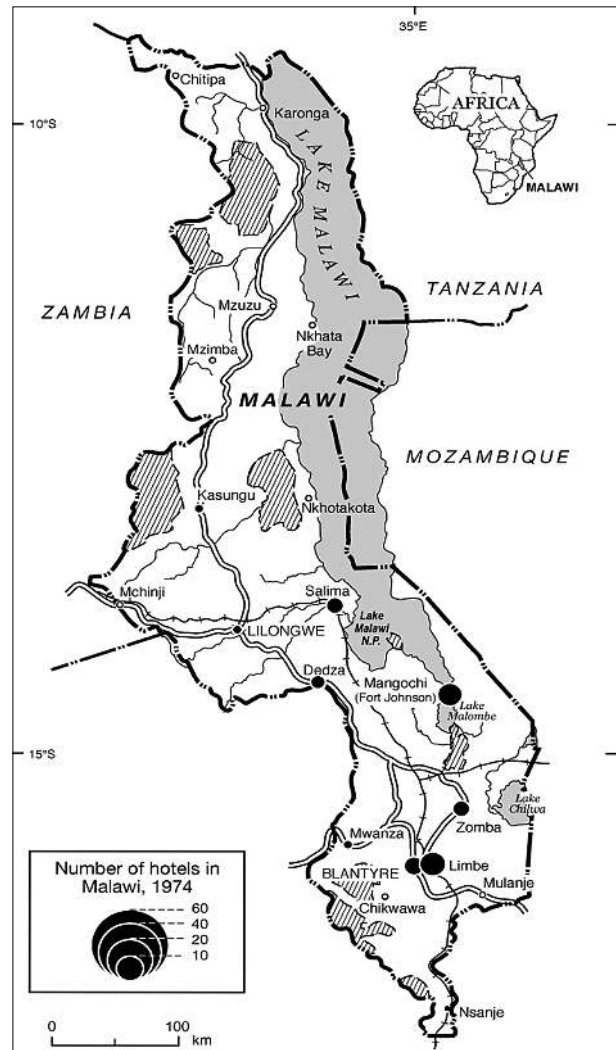


Fig. 3. Distribution of Hotels, Lodges and Inns in Malawi, 1974

Source: Authors

the hotel building and renovations processes were undertaken the Department took over Ngabu Inn at Chikwawa in 1975. In Lilongwe, the new capital city, the Capital City Development Corporation built the 142 bed Capital City Hotel which opened in 1976. Of note is that this hotel situated in Lilongwe was the first international standard hotel to be built by government in the central region of the country.

A further flurry of government-led construction, extensions and refurbishments to accommodation occurred during the period 1975–1983. Under its subsidiary Malawi Hotels Ltd, the MDC took over the management of Lifupa Lodge in Kasungu National Park on a full basis in 1975; formerly it had

been privately managed by a German entrepreneur who had incurred substantial financial losses. In addition Malawi Hotels Ltd undertook an extension of 50 rooms to the Mount Soche Hotel completed in 1979. This expanded the number of rooms at Mount Soche Hotel to 193 in total. Malawi Hotels also extended Lilongwe Hotel in 1981 by 52 rooms to make a capacity of 100 rooms. Through the Hotels and Tourism Ltd the MDC bought and renovated the Hotel Continental renaming it Hotel Chisakalime in 1978. In 1982 a 20-bed Chintheche Inn was completed by the Department of Tourism and at Balaka a 10-bedroom privately-owned motel was constructed. At Liwonde National Park, government built four self-catering rondavels which opened in 1982. Until this point, the hotel construction programme had been active mainly in the South and Central Regions of Malawi but in response to increased economic activities occurring in the Northern Region, particularly at Mzuzu, the demand for high standard hotel accommodation increased. In acknowledgement of this demand, the MDC built Mzuzu Hotel next to Mzuzu Club which had a golf course and other sporting activities (Malawi Government, 1983).

### **3.2.2. The retreat of government and facilitation of private sector investment**

The period of the early to mid-1980s marks the highpoint of direct government involvement in the ownership, refurbishment and upgrading of the accommodation services sector in Malawi. Although the economy of Malawi registered impressive growth rates from independence to 1979 from that year the country's economy suffered negatively the impacts of a series of exogenous shocks which included high import costs due to oil price shocks, droughts that disrupted agricultural production, and the influx of refugees from civil strife in neighbouring Mozambique. From 1981 Malawi began the implementation of the first of a series of Structural Adjustment Programmes supported by financial and technical assistance from the IMF and the World Bank (Chilowa, 1991; Ng'ong'ola, 1996). The initial suite of structural policy reforms were launched "in response to the deterioration of the Malawi economy mainly due to sharp increases in import prices, severe droughts, and rising transport costs caused by

the disruption of the rail route to the sea in Mozambique" (Ng'ong'ola, 1996: 9). From 1985 Malawi implemented trade liberalization measures in the form of import prohibitions and price controls, and tax rationalization. The World Bank regarded Malawi as a "strong adjuster" to its policy cocktail of structural reform measures which were introduced from 1981 (Chilowa, 1991). Overall between 1981 and 1994 Malawi enacted a total of six structural adjustment programmes. In 1994 an important political transition occurred in Malawi with the end of the 30 year rule of President Kamuzu Hastings Banda who had been in power since independence.

The impact of structural adjustment programmes from the mid-1980s and the subsequent ending of one-party rule and its replacement by multi-party democracy resulted in radical changes in the policy landscape around tourism development and more specifically the accommodation services sector. For the hospitality sector the programme adjustments associated with structural reform compelled the government to shift its policy directions regarding direct investments in the tourism sector. Since independence in 1964 government had planned and driven a host of different initiatives which were designed to restructure and upgrade the country's accommodation services sector to international standards. The results of these initiatives had been uneven. By 1985 only six hotels in the country offered the full range of services of international standards, albeit there were others suited to budget and less discerning holiday-makers. The six leading hotels were the Mount Soche Hotel in Blantyre, Capital Hotel and Lilongwe Hotel in Lilongwe, Mzuzu Hotel in Mzuzu, and, Club Makokola and Nkopola Lodge both at Mangochi at the lakeshore.

One critical factor behind this disappointing performance was that until 1983 hotel prices had been government-controlled at sub-economic levels with the result that most hotels incurred losses and thus not in a position to achieve adequate standards. Indeed, the government-owned company, Hotels and Tourism Limited, which operated three hotel and camp units as well as an international conference centre in Blantyre, went into voluntary receivership in 1983 with its holdings sold to private investors and the city of Blantyre. At the lakeshore the Grand Beach Hotel was privatised and sold to Dutch in-

vestors who renovated the establishment, renaming it as the Livingstonia Beach Hotel. Following the liberalisation of hotel prices in early 1984, however, the profitability of most hotels improved allowing certain improvements to be undertaken at the government-owned hotels. This said, hotel performance in general remained at low levels and in February 1986, the Malawi government introduced an austerity programme aimed at reducing central government budget deficits (Malawi Government, 1986). These austerity measures affected adversely the turnover and profitability of especially the business oriented hotels which relied heavily on government for patronage. In the country's two main city hotels, Capital Hotel and Mount Soche Hotel, room occupancy rates fell to just below 50% during 1986.

By 1986 a policy turnaround was clearly in evidence by government from direct involvement in the accommodation services sector and instead towards the promotion of greater private sector involvement. In 1986 the government issued a ten year statement on development policies which signalled its new policy directions for tourism overall and accommodation services in particular (Malawi Government, 1986). The policy document acknowledged the minor role of tourism in the country, albeit reiterated its considerable potential in terms of Malawi's assets of excellent beaches, scenery, and potential for game viewing. Over the previous decade, however, total visitor numbers had been virtually stagnant at 70 000 international arrivals of which 40 percent were business rather than leisure travellers and approximately half of the group of non-business travellers were VFR tourists who did not stay in paid accommodation (Magombo, Rogerson, 2012). In terms of constraints on the growth of leisure tourism in Malawi one of the major identified blockages remained the limited accommodation of international standard especially at the lakeshore which reduced the potential for package tours (Malawi Government, 1986). It was conceded that the progress that had occurred over the previous decade of government direct interventions had been largely focussed on city business hotels in Blantyre and Lilongwe. Arguably, therefore with Lake Malawi the country's prime attraction and the growing spatial focus on the plateau areas and game viewing these locations were targets for efforts to establish new accommodation services of quality standards. In an

important reversal of previous policy directions it was made clear that in future the provision of tourism accommodation would be the responsibility of the private sector. The Department of Tourism's role would be facilitative in terms of continuing to promote potentially profitable investments, to offer advice and assistance to hoteliers on management of establishments, and in cooperation with the MDC to focus efforts "geographically so that the symbiosis of accommodation and service development common in resort areas elsewhere can be realized in Malawi" (Malawi Government, 1988: 8). With the policy change towards providing a conducive environment for private sector investment the functions and importance of MDC gradually diminished. Finally, the withdrawal of government from engagement with accommodation services was further indicated by the commitment that the network of government rest houses and chalets outside of national parks would "where possible be sold or leased to private interests" (Malawi Government, 1988: 8).

Overall, the key underpinnings for the changed policy direction in favour of greater private sector involvement related to trade liberalisation and most importantly the introduction of the programmes of structural adjustment which forced the government to change its policy and retreat from direct ownership of hotels. As outcomes, of special importance is the emergence of Sunbird Tourism Ltd as the leading hotel enterprise of Malawi. This private company was incorporated in 1988 following the amalgamation and consolidation of hotels which were previously the chain of government-owned establishments in Malawi. During the 1990s the group operated through several management contracts with international hotel companies, most importantly the South African Protea Group in the period 1994–1998 and Le Meridien from 1999–2005. During 2002 the company listed for the first time on the Malawi Stock Exchange. In 2006 Sunbird Tourism came under local management and in March 2007 the group launched the brand Sunbird under which all its hotels now operate. The group has a total of seven hotels which spread across the leading business nodes and leisure hubs of Malawi. Its portfolio is as follows: in Lilongwe the Sunbird Capital and Sunbird Lilongwe; in Blantyre the Sunbird Mount Soche; in Salima the Sunbird Livingstonia Beach; in Mangochi, the Sunbird Nkopola Lodge; in Zom-

ba the Sunbird Ku Chawe and in Mzuzu City the Sunbird Mzuzu. This locally owned accommodation group emerged out of the consolidation of the hotel properties which had been acquired and upgraded by the Malawi Development Corporation.

From 1994 further policy changes occurred with multi-party democracy and the opening up of new opportunities for the growth of small-scale accommodation developments alongside the country's network of hotels. A surge of both licensed and unlicensed (mostly unplanned) developments occurred particularly scattered along the lakeshore. Many of these small-scale developments have been controversial and targeted at budget tourists, especially backpackers, which became a popular focus in Malawi from the mid-1990s especially at Nkhata Bay (Gartner, Cukier, 2012; Magombo, Rogerson, 2012). The government's retreat from ownership in the hotel sector was further marked in 1997 when all the accommodation facilities under government inns and rest house chain (outside of protected areas) were privatised. In 2003 facilities in the protected areas were privatised in order to improve the services rendered to tourists. These privatised facilities were Chelinda and Kazuni Lodges in the North, Lifupa Lodge in Kasungu, Mvuu and Chinguni Lodges in Liwonde National Park.

Without the provision of financial incentives, however, the private sector did not engage in new large-scale hotel developments and thus the major growth in accommodation services continued to be around small-scale developments operated by local entrepreneurs. Specific targeted incentives for private sector to participate in the tourism industry through large scale investments were introduced by government only in 2008 (Malawi Government, 2008). This said, between 2005 and 2009 a number of privately-owned international standard hotels and lodges made their entrance to the market. These included the Pacific Hotel (2008), Crossroads Hotel (2005) and Nature Sanctuary Lodge (2006) in Lilongwe; and, Pumulani Lodge (2009) in Mangochi. Although the Malawi hotel industry remained largely under local control there occurred growing interest from foreign investors. The old Ryalls Hotel in Limbe was taken over to become part of the Protea Group, South Africa's largest hotel enterprise. Further, in 2010 it was announced that the Botswana based luxury safari lodge enterprise,

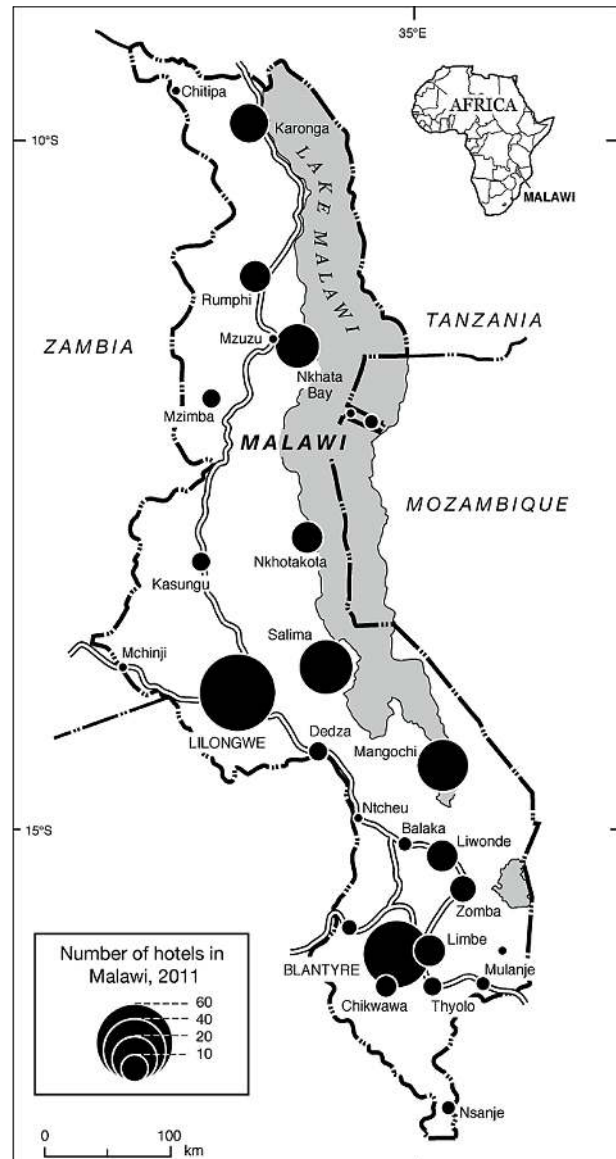


Fig. 4. Hotel and Small-Scale Accommodation Services in Malawi, 2011

Source: Authors

Wilderness Safaris secured a concession to build its first eco-lodge in Malawi. Also in 2010 it was announced that Chinese investors were engaged in developing a new hotel in Lilongwe, Malawi's expanding capital city. The hotel is Malawi's first 5-star hotel and financed under a Chinese loan agreement. The recent involvement of these foreign investors is a signal both of an emerging new competitive environment in the Malawi hotel industry and a reflection of wider trends of internationalisation taking place in the African hotel industry as a whole (Rogerson, 2016a).

Fig. 4 reveals the change which occurred in the patterns of accommodation services in Malawi as a result of these various policy changes which unleashed a more liberalised climate for accommodation development across the country. The map shows the geographical distribution of hotels combined with small-scale accommodation establishments. Three points are striking. First, is the enormous growth nationally in the actual numbers and range of accommodation establishments which include hotels, small scale accommodation units and backpacker lodges. Second is the spreading geographically of this network of tourism accommodation establishments. Third, is the element of 'continuity in change' as it is observed that the largest clusters of accommodation service establishments remain concentrated spatially in and around the two major urban centres of Blantyre and Lilongwe. Outside these areas the key changes in the geographical distribution of accommodation services are the emergence of new clusters around Mzuzu and lakeshore areas especially at Nkhata Bay.

#### 4. Conclusion

Globally, destination competitiveness is impacted by a range of factors (Dwyer, Kim, 2003; Ritchie, Crouch, 2003). For emerging tourism regions of the global economy the accommodation services sector is a vital underpinning of the competitiveness of destinations. Indeed, within the African context, building the competitiveness of countries as tourism destinations is inseparable from the challenge of establishing a network of different forms of accommodation at competitive prices and internationally acceptable quality standards. This paper applies a longitudinal approach to investigate the evolution of the accommodation services sector in one African country which in terms of World Bank (2014) classification is described as an emerging tourism destination and scaling up its tourism industry.

The value of an expansion of historical research and longitudinal studies in African tourism scholarship, including tourism geography, has been demonstrated by several observers in recent years (Harrison, 1995; Rogerson, 2011; Rogerson, 2013d,

2016b, 2017). The chequered pathway followed in Malawi to building the country's network of hotels and small-scale accommodation establishments to support the growth of tourism was traced from the colonial period to post-independence developments. The historical evidence reveals that during the colonial period the early accommodation developments in Malawi were mainly the product of local settler entrepreneurs. At independence there was an acknowledgement that in order to spur the growth of tourism as an element for diversifying the national economy that interventions were required to shift the existing trajectory of hotel developments. Major policy shifts ensued as a result of which for the next two decades national government assumed the role of driver of accommodation services through its direct ownership of hotel developments. By the mid-1980, however, the role of government was transformed by the external economic environment and the implementation of structural adjustment programmes in the country. The critical policy change was of government from direct owner of hotel properties to the facilitation of the private sector. Another important parallel policy shift was the liberalisation of accommodation services post-1994 which facilitated the mushrooming of a network of small-scale accommodation establishments. Finally – and most recently – the landscape of tourism accommodation services in Malawi has been impacted by globalisation and the advance of international accommodation providers into the country. This significant development challenges the long-established dominance of local capital and local entrepreneurs in the Malawi accommodation services sector.

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