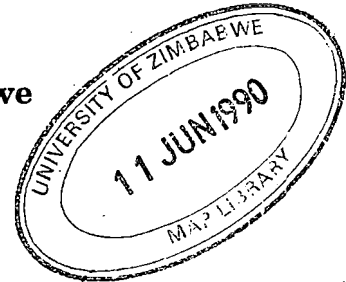


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CONTENTS

	Page
Editorial	iii
Weathering and winds in deserts	1
An introduction to weathering	14
How to undertake a field study: a visit to a manufacturing industry	23
The Kadoma/Chegutu Workshop – 1988	33
Tourism in developing countries: selected case studies	37
Recommended teaching aids	52

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TOURISM IN DEVELOPING COUNTRIES: SELECTED CASE STUDIES

by

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In a previous paper (Heath, 1989) the changes which tourism may bring to developing countries were discussed in general terms. Which changes will occur and whether those changes will be beneficial or detrimental depends upon many variables. Of particular significance are the policies adopted, by individual countries, towards tourism and its role in development. Not only are there different costs and benefits in different areas, but different countries handle tourism in different ways, and with different results.

This paper begins by discussing some of the less developed areas of Europe, where tourism has generally been very successful. It then moves on to deal with islands in the Pacific and Indian Oceans and the Caribbean, ending with African examples and the specific case of Zimbabwe.

EUROPE

Portugal

Portugal combines a mild climate with scenic beauty and a rich history. Lying close to the industrialised and urbanised areas of Europe, it is ideally placed for tourism which became an important factor in Portugal's economy in the 1960s. Successive governments have paid increasing attention to the industry (Farai e Maya, 1986), as it is seen as a major earner of foreign currency.

Table 1: Tourism in Portugal: 1984

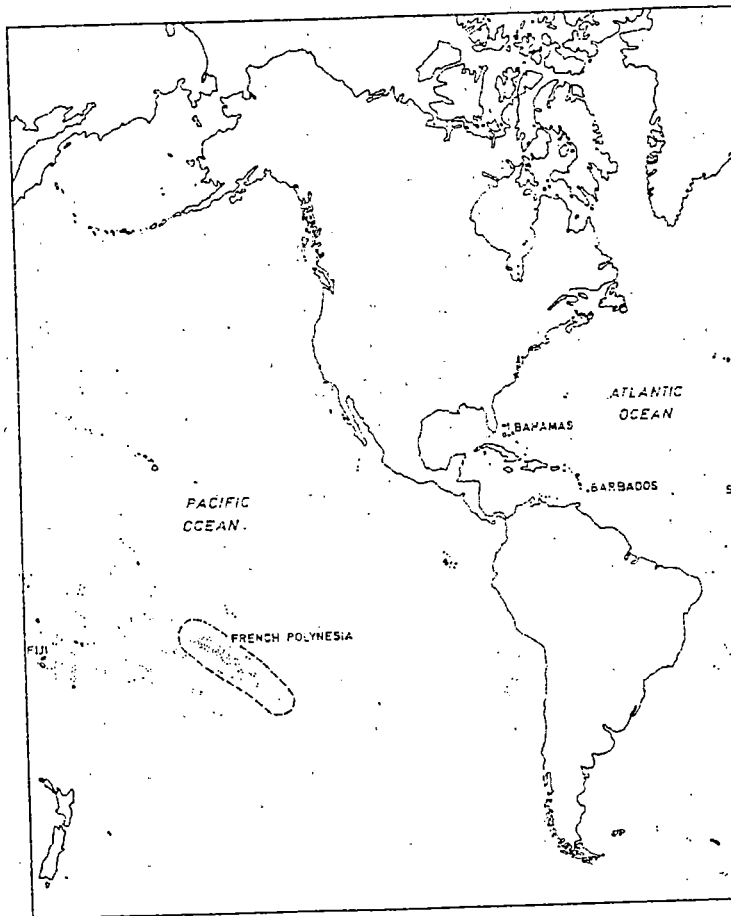
Tourist arrivals	4,119 million
Excursionists (day visitors)	5,692 million
Total visitors	9,811 million
Visitors from Spain	74,5% of all tourists and excursionists
Main markets	Spain, UK, W. Germany, France, USA
Revenue earned	107,6 million contos approx. US\$1,323 million approx. £735 million

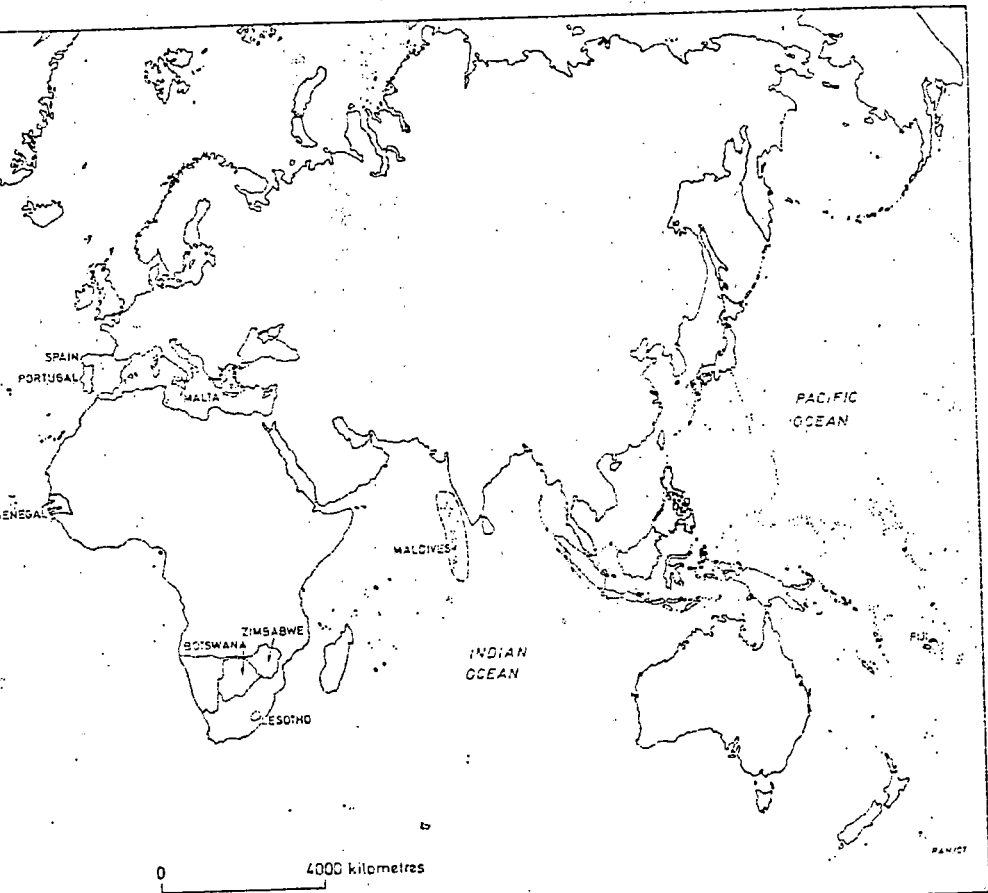
Tourist expenditure (domestic and foreign) was approx. 8% of GDP.

Source: Farai e Maya (1986)

Since the 1960s, which was a time of economic boom in Europe, tourism has played a remarkable and increasingly positive role in Portugal's balance of payments. For this reason, tourism is seen as being extremely important to the national economy and considerable investment is taking place in the tourist industry, particularly in enlarging the hotel capacity and the provision of alternative accommodation, such as self-catering apartments and rented housing. Tourism is seen as the means to improve balance of payments, create employment and increase the national income. Generally, the Portuguese have a highly optimistic viewpoint about the role of tourism in development.

FIGURE 1: THE CASE STUDY AREAS





Spain

In Spain, too, there has been considerable government involvement in the tourist industry. The 1964 Economic and Social Development Plan led to the investment of large amounts of public and private capital in tourism infrastructure and facilities, especially in the Balearic Islands, the Costa Brava and the Canary Islands (Valenzuela, 1988). In 1962, Spain hosted 6,1 million visitors and by 1984 this figure had risen to 42,9 million or 9% of the world's tourist trade (Valenzuela, 1988). So, Spain has been a far more significant tourist destination than Portugal.

Tourism to Spain is now beginning to tail off as equally cheap competitors begin to develop elsewhere in Europe. However, tourism financed the 'economic miracle' in Spain in the 1960s and early 1970s. Spanish receipts from tourism in 1983 were US\$6,3 billion, representing 10% of the GDP - a percentage surpassed only by the USA and Italy. At the same time, employment in the tourist sector was 10,9% of the total employed population, with 650 000 people employed directly by the industry and a further 530 000 employed indirectly (Valenzuela, 1988).

In certain parts of Spain, there has been a transformation of regional landscapes and economies. For example, in Malaga *per capita* incomes increased significantly between 1969 and 1981. However, tourism has been predominantly a coastal phenomenon, with much of the interior remaining under-developed. Tourism has increased regional differences in income within the country, and tourism and the tourist industry seem almost certain to grow with a momentum of their own, having little to do with the rest of the local economy.

Malta

Tourism has played a major role in the development of Malta. It is one of the few realistic options for earning foreign exchange and providing employment on these islands. However, since 1981 there has been a decline in the number of visitors to Malta. Lockhart and Ashton (1987) maintain that this decline is largely due to:

- Malta's dependence on British visitors, which means that the islands were affected by the recession in Britain in the early 1980s;
- the seasonality of the tourist industry, which means a reliance upon summer visitors from Britain and northern Europe; and
- a failure, during the boom period, to maintain an adequate infrastructure. Facilities in Malta have not kept pace with the rising standard of living in Europe, so that tourists are not getting what they want.

Table 2: The Growth of Tourism in Malta 1959-1980

	1959	1980
Number of hotels	25	112
Number employed in tourist industry	500	5159
Number of visitors	12600	730 000
Revenue earned	£0,8 million	£110 million

Source: Lockhart and Ashton (1987)

Malta's Development Plan for 1986-88 sought to promote cultural and conference tourism and the marketing of the smaller islands as high income tourist destinations (Lockhart and Ashton, 1987). The Plan also hoped to increase mass tourism, with a target of 1 million arrivals in 1990. The question arises as to whether these objectives can be achieved.

In all three examples drawn from Europe, tourism has been an important means for economic development but it appears to be tailing off in the late 1980s, as other venues become better known and increase in popularity. Official views in the three countries discussed take little cognisance of the social or cultural impacts, possibly because the cultural differences between visitors and the host countries are not very great. Generally, the governments are in favour of tourism and do as much as possible to encourage the industry.

THE PACIFIC ISLANDS

A similar growth in tourism has taken place in the Pacific islands. Pearce (1987) quotes tourist arrivals in French Polynesia as increasing from 1472 in 1959 to 98 826 in 1981. Of the visitors in 1981, 43% were from the U.S.A., 14% from France and 9% from Australia. In the main, tourism in the Pacific has been in the hands of foreign investors and entrepreneurs and there is little local spin-off. Many of the smaller island states offer very similar 'sea, sun and sand' attractions, so that tourist patronage is almost entirely dependent on airlines or major cruise ships. Stop-overs in places like Fiji are incidental to the traffic between major 'gateway' cities on the surrounding continents. Any rationalisation or changes of air routes can have disastrous effects on the tourist industry of an island destination.

Many of the island states rely heavily upon tourism for their income. In 1986, for example, Fiji earned about US\$1 million from tourism. This was second only to sugar production (earning US\$1,5 million) as an earner of foreign exchange. Political upheavals can have major adverse impacts on tourism. In the case of Fiji, with a total of 241 144 visitors in 1986, there was a significant drop in arrivals immediately after the first coup in April 1987. Tourist arrivals began to increase later in the year, only to experience another major drop after the second coup at the end of 1987.

Generally, the tourist industry in the small Pacific states is extremely vulnerable to both internal and external events, suffers from considerable economic leakage and displays many examples of the social and cultural costs of international tourism.

THE INDIAN OCEAN

The Maldives

Here, tourism appears to be a success story, due in part to the physical structure of the island republic, and in part to government attitudes towards the industry. The Maldives consist of hundreds of small tropical islands, with an immense variety of scenery and marine life, as well as 'sand, sea and sun'. Moreover, the Islamic Republic of the Maldives is one of the poorest island developing countries in the world and one of the most densely populated. In 1980, the per capita GNP was US\$260 (Mandleberg, 1984). Apart from tourism, fishing is the only other industry. It would appear, from this, that the Maldives would be highly susceptible to the economic, social, cultural and environmental costs of tourism.

Instead, tourism has allowed the republic to earn much needed foreign currency without significantly affecting its traditional way of life and values. The reason that this has been possible is because tourism in the Maldives is 'isolated' with the tourist resorts located on otherwise unpopulated islands. The tourist is offered a holiday of isolation and peace on the island of his choice. Each island is totally self-contained and there is little development of tourist infrastructure outside the resorts. Male, the capital island, has no tourist facilities and is rarely visited by foreigners (Mandleberg, 1984). This means

that there is a minimal social cost, as the average Maldivian has no contact with the tourists.

Furthermore, there is a high proportion of Maldivian ownership of the resorts, maximising the profit accruing to the republic. During the first six years of the development of the tourist industry (1972-1977) the Maldivian government owned or was involved in the development of ten of the eleven resorts which were built. Between 1978 and 1982, a further 30 resorts were developed, of which only one was owned by the government, while the majority were owned by Maldivian private investors (Mandleberg, 1984). The resorts are locally designed and built with local materials. The employees are mainly local men, are well paid and return to fishing during seasonal lay-offs.

Tourism in the Maldives has had an annual growth rate of 12,5%, with visitor arrivals increasing from 16 846 in 1972 to 49 328 in 1981. There are, of course, some problems associated with the tourist industry.

- The high cost of imports to supply tourist needs is a major problem for a poor country like the Maldives. However, the high demand from tourists, and the prices they are prepared to pay, offsets this import cost.
- Development tends to be inhibited by a lack of suitable islands within boating distance of the airport. Further development will probably have to take place on unsuitable islands where beaches will have to be created. However, the average return on tourism investment is high in the Maldives, making it worthwhile undertaking these developments.

The success of the experiment with tourism in the Maldives has been influenced by the attractions of small secluded islands combined with careful planning and strong government control (Mandleberg, 1984).

THE CARIBBEAN

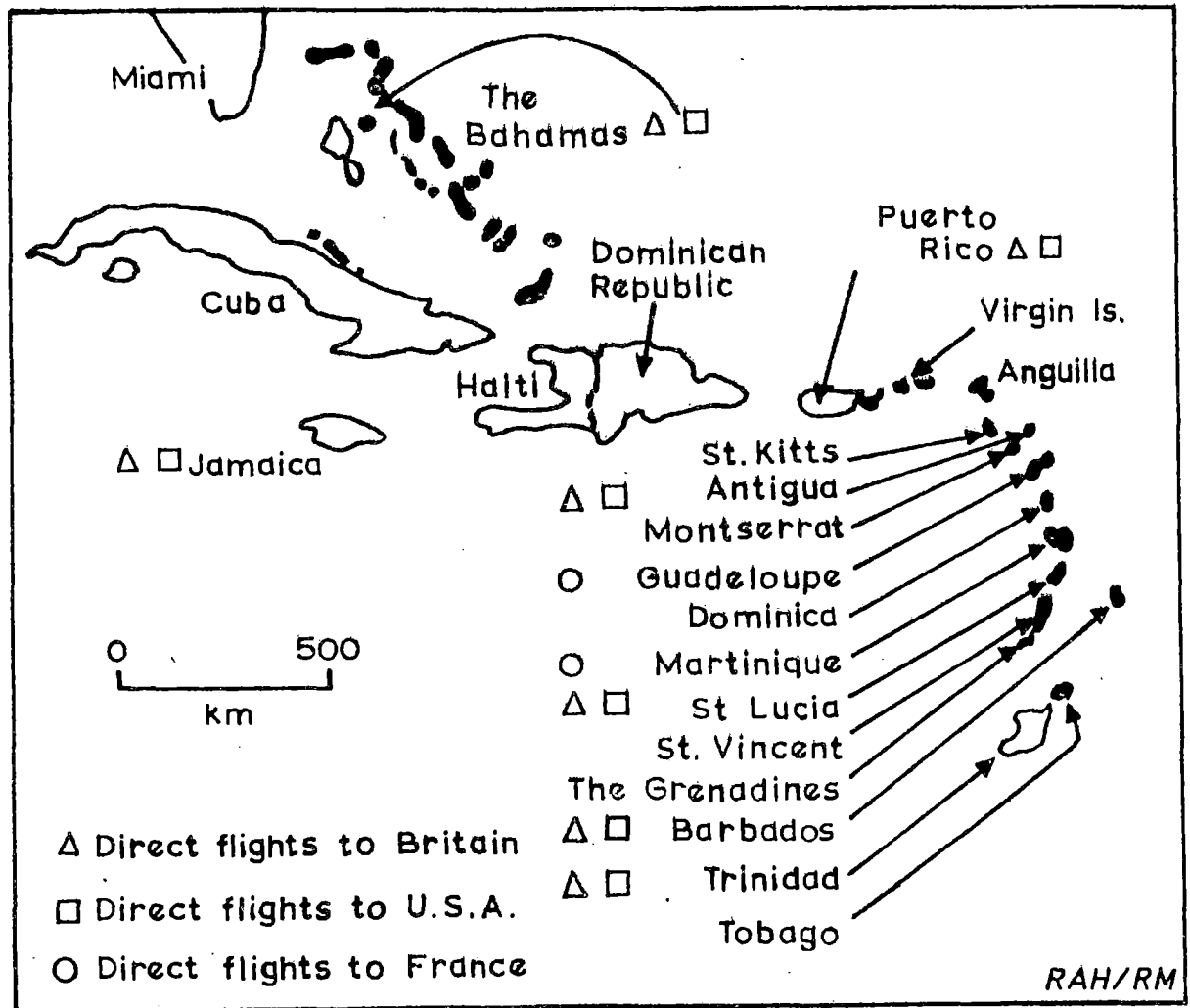
Certain islands in the Caribbean have been developed as tourist resorts for decades, or even centuries, partly because of their position in relation to the U.S.A., and partly because of their colonial heritage, which means that they provide a familiar language and lifestyle to tourists from Europe (Mandleberg, 1984).

However, during the 1980s, the traditional resorts of Barbados, Puerto Rico and Antigua are being challenged by smaller islands and are suffering considerable losses in tourist traffic.

Barbados

Barbados has suffered from the type of over-development which leads to the economic, social and environmental costs discussed in an earlier paper (Heath, 1989). Tourism growth was substantial between the mid-1950s and 1980. In 1950 Barbados with a local population of 193 000, received 15 000 visitors. In 1980, there were 396 915 tourists and 156 759 cruise day excursionists, making a total of 526 674 visitors to an island with a local population of 248 983 people (Potter, 1983). In other words, there had been a 35 fold rise in the visitor arrivals and a 12% population increase in this period. In 1954, tourist expenditure on beds was US\$6 million, while in 1979 it was US\$358,4 million. Potter (1983) points out that by 1979, the tourist industry was contributing 11,8% of the GDP compared with sugar (5,4%) and manufacturing (11,3%).

FIGURE 2: THE ISLANDS OF THE CARIBBEAN



Source : Mandleberg (1984)

Obviously tourism has done a great deal to stimulate the Barbadian economy and has facilitated the development of vital infrastructure such as the deep water harbour and the new international airport terminal buildings. Why, then, have tourist numbers begun to decrease substantially during the 1980s?

- Potter (1983) suggests a variety of reasons for this decline. He points out that:
- There has been insufficient planning and control in the tourism sector.
 - There is foreign ownership of vast hotel complexes. Some 44% of the beds are owned by foreigners, particularly in the up-market sector, thus leading to economic leakages. For this reason, the tourism income multiplier is fairly low and the benefits are not widely spread, leading to marked economic dualism.
 - Tourism has created physical demands on land, marine and beach resources, destroying the very attributes which attract tourists.
 - Neighbouring islands have developed their potential for tourism, offering greater variety than the purely beach-based holidays provided by Barbados.

- Barbados is directly dependent upon economic conditions elsewhere, especially in the developed countries, and is affected by events such as economic recessions, increases in oil prices and even the demise of Laker Airways which used to run cheap flights from the UK.
- The long term need to alter the nature of the holidays offered, in order to attract the lower income market, has been realised and Barbados is developing holiday apartments, and time sharing apartments where a group of people purchase an apartment and then share the use of that apartment amongst themselves in proportion to the amount each contributed to the purchase price. However, this change in the nature of the facilities offered has led to a significant loss in employment and income.
- The large numbers of tourists in the 1970s created many social changes in Barbados. There was an increase in crime, marked seasonality in employment which drained the local agricultural sector of manpower at certain times of the year, and feelings of dependency and even hostility towards tourists developed. In fact, in 1981, the Barbados Tourist Board found it necessary to launch a scheme to enhance public awareness amongst the people of the importance of tourism to the island.

It appears to be very important that Barbados attempts to lessen its reliance upon tourism, as it is proving an unreliable source of income.

The Bahamas

The Bahamas is also a traditional tourist destination in the Caribbean but is an example of a country which has continued to attract increasing numbers of tourists during the 1980s (Mandleberg, 1984). Its continued success is based, to a large extent, on the policies of the Ministry of Tourism which:

- ensures liaison between the various sectors involved in the industry, such as hotels, airlines and car rental firms, and enables a realistic overall plan for tourist development;
- places a strong emphasis on market research;
- concentrates on the wealthier end of the market, where there are greater profits and people are less affected by recessions; there is also less social impact caused by this sector of the tourist market; and
- preserves the seclusion and unspoilt quality of the environment.

This professional approach ensures the Bahamas' continuing success as a tourist destination in the international market.

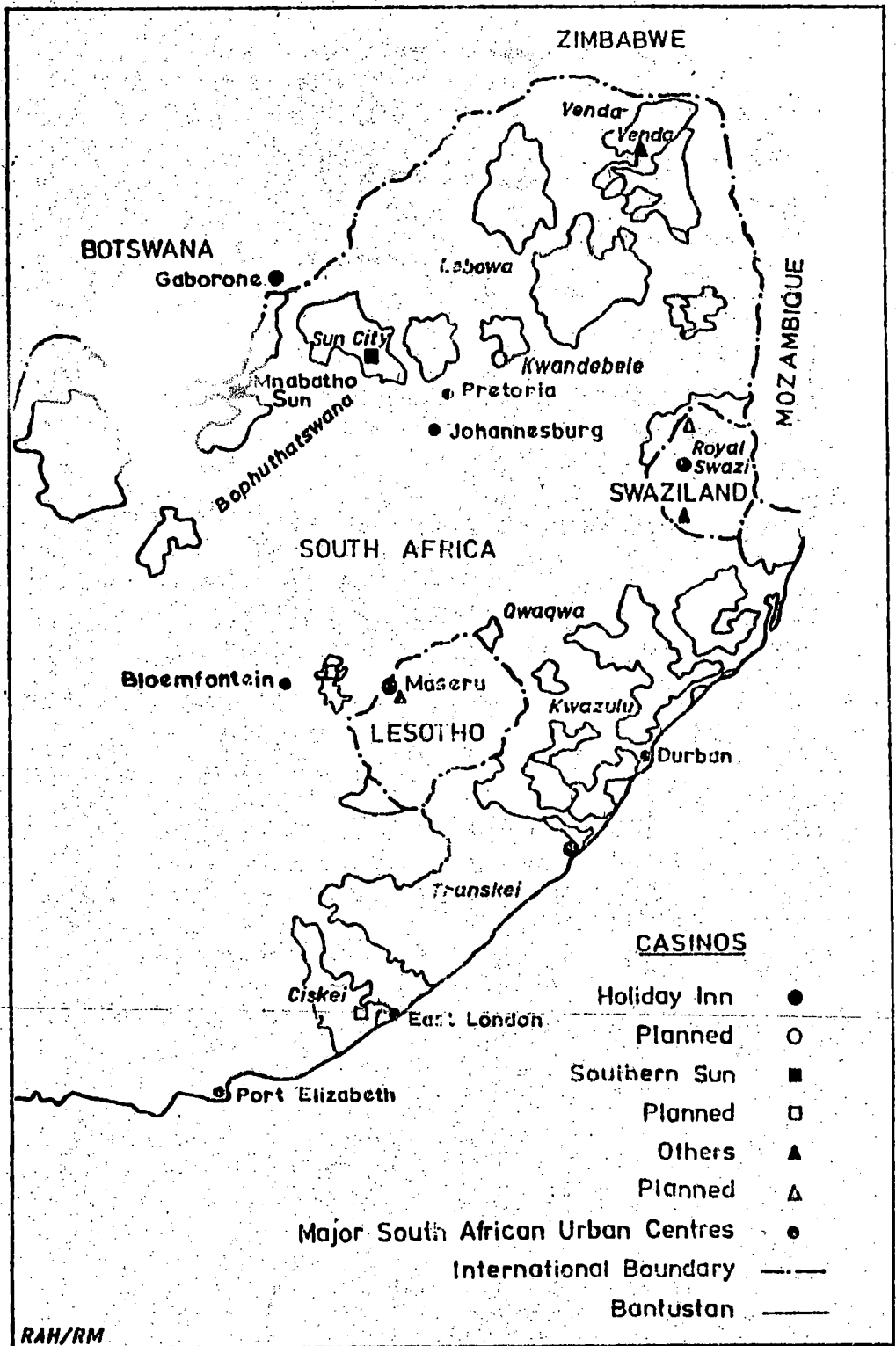
AFRICA

There are many different approaches to tourism in Africa, as indicated by the following examples.

Lesotho

Wellings and Crush (1983) point out that, during the 1970s, tourism developed rapidly in Lesotho. This was a vital source of foreign exchange for a country which depends largely upon peasant agriculture and remittances from migrant labour to South Africa. Hotels were established by the Holiday Inn group, a multinational organisation, in the capital Maseru. These were to provide the 'pleasure periphery' of the South African vice market and depended heavily upon the provision of casinos, prostitution and pornography — all severely controlled or illegal in South Africa. It is of interest to note that Swaziland also developed in the same way.

FIGURE 3: CASINO DEVELOPMENT IN SOUTHERN AFRICA



Source : Wellings and Crush (1983)

The major source of tourists to Lesotho (86% in 1980) is South Africa and the industry is concentrated in the capital, Maseru, which contains about 82% of the hotel beds. However, Wellings and Crush (1983) point out that there has been a serious downswing in the tourist industry in the 1980s, both in number of arrivals and in length of stay and bed occupancy. This has meant that the performance of the tourist industry has been considerably below government projections. For example, in 1980, the actual tourist arrivals were only 23% of the expected arrivals figures, and Lesotho was becoming increasingly a short-term destination.

Table 3: Changing Patterns of Tourism in Lesotho

	1976	1980
Average length of stay (days)	2,23	1,93
Bed occupancy	(1973) 49,3%	26,4%

Source: Wellings and Crush (1983)

Wellings and Crush (1983) maintain that the reasons for this downturn in tourism to Lesotho may be attributed to the highly specific nature of Lesotho's tourism industry, its dependence upon the South African market and the externally controlled corporate strategy within the hotel industry. During the early 1970s, the Holiday Inn group held a monopoly on gambling, based in Lesotho and Swaziland. But, in the late 1970s, the Southern Sun group (a corporate group controlled by South African Breweries) began to invest within the 'Bantustans', and was rapidly followed by the Holiday Inn. This move has been encouraged by the South African government as it is a way of attracting investment capital into these underdeveloped areas within South Africa. The future planning of both groups involves the transfer of investment from Lesotho and Swaziland to the closer 'homelands' (formerly termed 'Bantustans') where profitability is higher. Even by the early 1980s, Lesotho had lost its gambling market on the Witwatersrand to the much closer casinos in Bophuthatswana.

Despite this change in trends, tourism planning in Lesotho is still based upon its casino trade (Stern, 1987). On the one hand, the Lesotho government expresses concern over the negative effects of tourism, such as environmental degradation, the generation of further inequalities in income distribution, the high import content of the industry and undesirable social effects. On the other hand, the Lesotho government seeks to attract private investment in the tourist industry through incentives such as tax holidays. The Lesotho government appears to be prepared to accept social degradation in return for foreign exchange but, as Wellings and Crush (1983) point out, with the decline in tourist numbers, the main justification for the development of the infrastructure crumbles.

Senegal

Senegal has a very different approach to tourism, which appears to be proving successful. The country has adopted a 'low investment' approach which seeks to minimise the adverse social impact of tourism (Mandleberg, 1984). In 1976 a 'Tourism for Discovery' programme was launched. This is a form of integrated village tourism allowing for real contact between visitors and hosts. Tourist accommodation is built using traditional materials and methods, and village cooperatives are responsible for their operation (Mandleberg, 1984). Local people are involved at all stages of the industry – construction, management and operation – and tourists experience similar living conditions to those of the local people.

The aim of this programme is to help prevent rural-urban migration by offering a range of employment opportunities in rural areas. Profits from each project are

reinvested in the village concerned, which it is hoped will lead to an improvement of infrastructure and create new jobs (Mandleberg, 1984). The key to the success of the scheme has been in its respect for the traditions and lifestyles of the host country and its integration into the social and economic life of Senegal. This allows the tourist to participate in a different culture without debasing it.

Botswana

Tourism is a very small but growing sector of the economy of Botswana. The official policy has been to spend as little as possible on an industry with meagre returns. The basic strategy has been to offer high cost - low volume tourism, due largely to poor transport and communications infrastructure. The main attractions in Botswana are the national parks and game reserves in the north and west of the country (Figure 4), together with the hunting areas, which cover most of the country. Although direct employment in the tourist industry is limited (1032 in 1984), it has stimulated the informal sector in the form of production of curios and handcrafts for the tourist market.

Table 4: Tourism in Botswana, 1983

Number of visitors (but 50% on business)	152 642
Number of excursionists	63 611
Origin: South Africa	65%
Zimbabwe	25%
Room occupancy	47%
Bed occupancy	31%
Revenue accrued	US\$27 million

Source: Silitshena (1986)

Silitshena (1986) lists the constraints to the development of tourism in Botswana as:

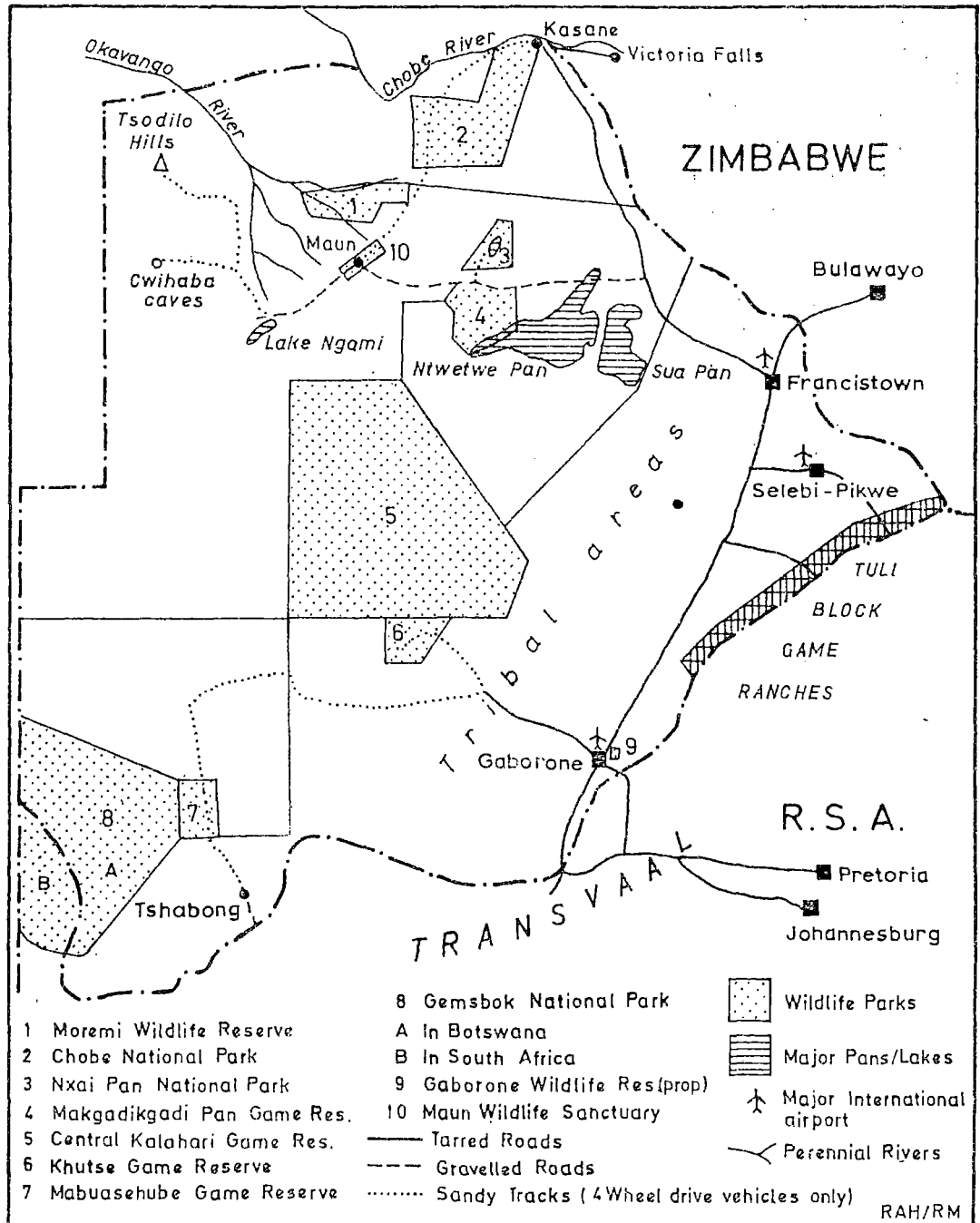
- the distance from major tourist generating countries in North America and Western Europe and the concomitant cost of air fares;
- political unrest in Southern Africa and the poor image of Africa, as a whole, as a holiday destination;
- inadequate communications facilities; and
- relatively low quality tourist facilities.

However, there is an increasing interest in tourism in Botswana and the exploitation of the wildlife reserves. Unfortunately the continued existence of Botswana's wildlife areas appears to be threatened by the growth in livestock ranching and the construction of cattle fences which have developed with the export of beef to the EEC. The necessity to control the movement of livestock in order to prevent the spread of 'foot-and-mouth' disease, so as to ensure disease free beef exports to Europe, has led to the construction of game fences separating domestic stock from wildlife. Not only have these fences prevented the traditional migration of game across large areas of Botswana, but they have cut wildlife off from existing water supplies, causing large scale death amongst certain species.

Zimbabwe

Tourism in Zimbabwe is based very largely upon the Parks and Wild Life Estate located largely in the periphery of the country in generally sparsely populated areas.

FIGURE 4: MAJOR TOURIST ATTRACTIONS IN BOTSWANA.

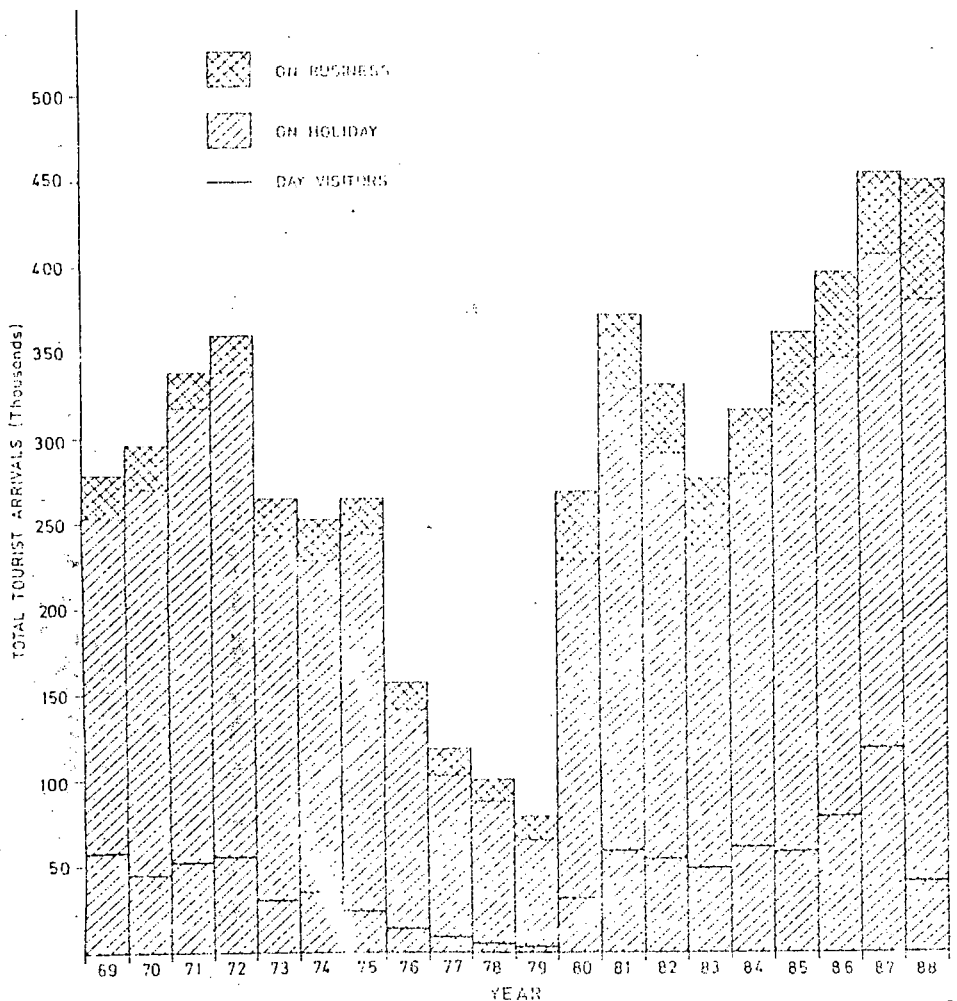


Source: Silitshena (1986).

Note: National Parks have a highly protected legal status. They are areas where the management of the natural ecosystem aims at minimal interference with natural processes. Game Reserves or Wildlife Reserves are areas which are set aside for occupation by game or other wildlife, but are not as highly protected.

Tourism grew slowly until the end of World War II. Small, rather primitive hotels were developed by individual entrepreneurs catering largely for local or South African visitors. Even at Victoria Falls, the premier tourist resort, there was only one hotel run by the railways (Heath, 1986). During the 1950s, larger, better hotels were constructed, but these were still mainly owned by individuals or small companies. With the world-wide increase in tourism in the 1960s, due largely to improved air services, local commercial companies developed small hotel chains. After the unilateral declaration of independence in 1965, there was a temporary drop in tourist arrivals, but the industry soon revived and 1972 saw a record number of 339 210 arrivals. The Southern Sun group began to build a chain of high grade hotels during this period such as Bumi Hills on the shores of Lake Kariba and the Makasa Sun at Victoria Falls. With the deteriorating security situation from the mid-1970s, tourist arrivals decreased rapidly and it was only after independence in 1980 that tourist arrivals began to increase again. Even this growth was temporarily halted by the unfortunate incidents of 1982 when two groups of tourists were murdered. Since 1984, tourism to Zimbabwe has been growing steadily and the 1988 tourist arrivals exceeded the previous peak in 1972. During the mid-1980s the Holiday Inn group opened two hotels in Bulawayo and Harare and the American Sheraton group opened one in the capital city. It therefore appears that the era of multinational involvement in Zimbabwe's tourist industry has commenced.

FIGURE 5 : TOURIST ARRIVALS TO ZIMBABWE 1969 - 1988

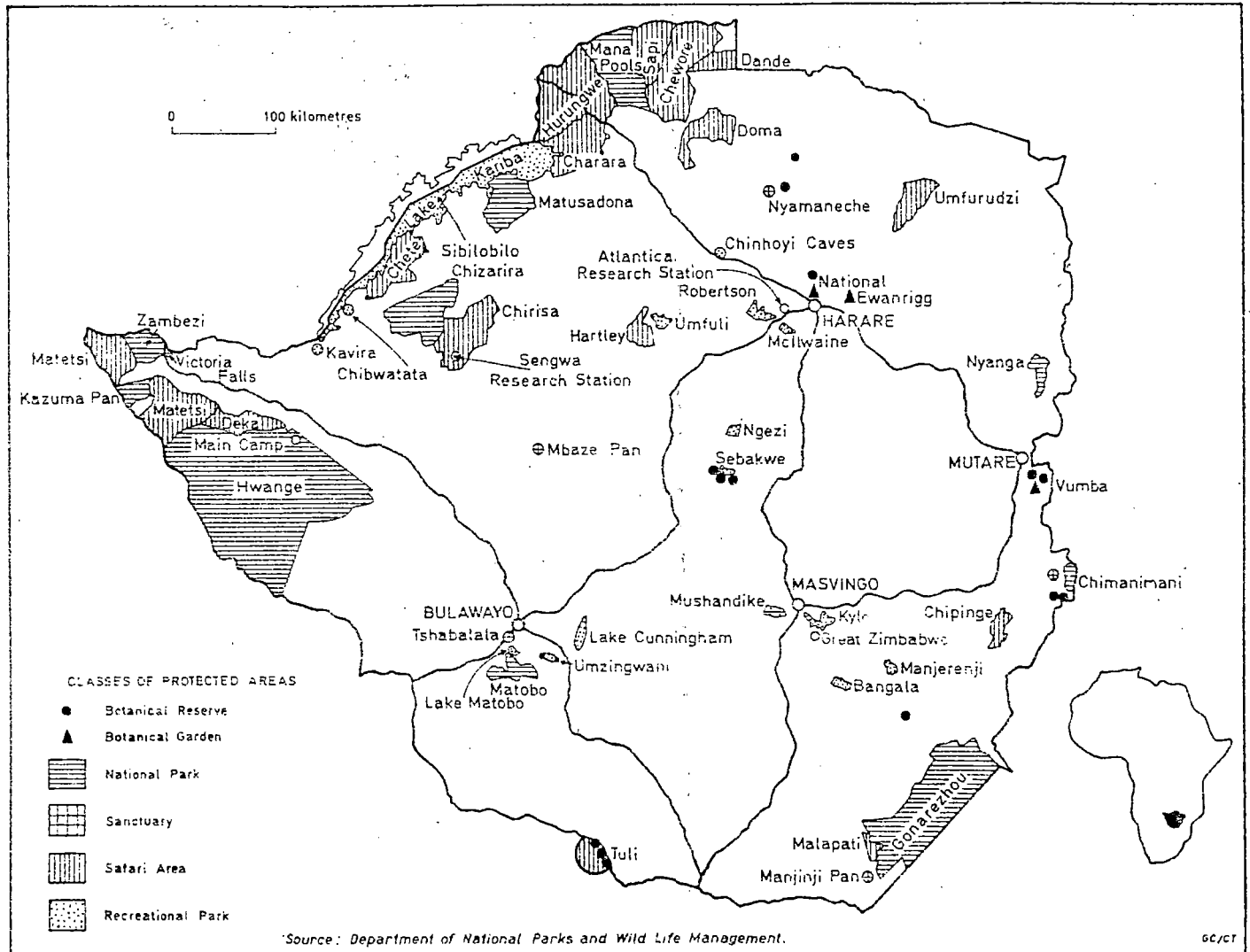


Source: Child *et al* (in prep.)

RAH/HH

* These figures exclude foreign visitors in transit and those entering the country for educational purposes

FIGURE 6 : THE PARKS AND WILD LIFE ESTATE, ZIMBABWE.



Source: Department of National Parks and Wild Life Management.

Tourism is seen by the government of Zimbabwe as an important earner of foreign exchange, but **not** at the expense of local social values or natural resources. Furthermore, because of the chequered history of the tourist industry in Zimbabwe, there is an appreciation of the uncertainty of foreign tourism. The Minister of Tourism and Natural Resources has stated 'We want tourism but we do not want our main attractions destroyed by encroachment or even by too many visitors upsetting or adversely affecting the natural environment' (Chitepo, 1986). For example, the 'Rain Forest' area at Victoria Falls, with its fragile ecology, has an upper limit of some 100 000 visitors p.a. if the essential qualities of the vegetation are to be preserved.

The current strategy towards tourism in Zimbabwe is to cater for the upper end of the market and encourage high cost - low volume tourism. Safari and hunting operations are in the hands of local entrepreneurs, as are many hotels, and there is a serious attempt to limit the economic leakages. The domestic airline is large monopolistic and there is very limited importation of luxury goods. Zimbabwe concentrates on selling a wilderness experience and, as other wilderness areas in Africa begin to suffer from over-exploitation, the country's cautious attitude towards tourism may well pay dividends.

Table 5: Tourism in Zimbabwe

	1972	1984	1988
Tourist arrivals	339 210	314 383	449 235
Bed occupancy	57%	33%	41%
Revenue earned (US\$million)	21	26	26 ^a

Source: Heath (1986), Child, *et al.* (in preparation) and Central Statistical Office (1988).

^a The Zimbabwean Tourist Development Corporation estimates revenue earned in 1988, based upon average expenditure per tourist day, as approaching US\$109 million.

CONCLUSION

In evaluating tourism's contribution to development, it is necessary to examine not only what has occurred in the past but who the agents of development were. One needs to examine the role of local and foreign participation, of private enterprise and of local, regional or central government. The case studies discussed in this paper indicate a wide range of attitudes towards tourism, and a wide variety of costs and benefits which have accrued to the various countries.

Three major conclusions may be drawn from these different experiences of tourism in less developed countries.

- The higher the degree of local participation, the greater the benefit to the host country.
- High cost-low volume tourism appears to have fewer deleterious effects upon the host country than does the less expensive mass tourism.
- Tourism needs to be strongly controlled and carefully administered.

If costs are minimised and benefits maximised, tourism can function as an important revenue earner and agent for development in developing countries.

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