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Research article

Institutional barriers to inclusive transformation in South Africa's tour guiding sector

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ABSTRACT

This research examines the institutional barriers to transformation in the tour guiding subsector of South Africa, focusing on the entry and growth of previously disadvantaged communities. Drawing on in-depth interviews with key governing authorities as well as leading industry associations, the findings highlight that while there have been several policy and structural efforts to foster a transformed tour guiding sector, the institutional structures guiding the operations and career progression of the sector present substantial barriers for previously disadvantaged communities to enter and grow as tourist guides. Specifically, these barriers were found in tertiary (and post) training, tour guiding qualification framework as well as the registration and renewal of tourist guides. The study found that while these institutional points were positioned to drive transformation, the implementation, realities of the tour guiding sector as well as economic realities of previous disadvantaged communities poses challenges related to entry and progression in this career path. Overall, the study posits meaningful transformation necessitates addressing these strategic points in the sector.

KEYWORDS

tour guiding; tourism; South Africa; Transformation; inclusive development; institutional arrangements

Introduction

The global tourism industry has demonstrated remarkable expansion and resilience over the past few decades, cementing its position as one of the world's key economic sectors (Thwala & Slabbert, 2026; Khater, 2026). Consequently, many destinations have become increasingly reliant on the economic contribution of tourism, which has been accompanied by the complementary growth and development of the tourist guiding subsector (Ghasempour et al., 2026; Hong et al., 2022). Accordingly, tourist guides have been identified as one of the most important components of any tourism destination owing to the diverse roles they perform (Mbatha et al., 2021; Nyawo, 2020). Tourist guides are instrumental in shaping visitor experiences and behaviours within destinations while fostering learning, promoting pro-conservation behaviours, and supporting sustainable tourism practices (Khater, 2026). Despite their evolving role in response to increased access to information and digital technologies, numerous studies continue to reaffirm the significance of tourist guides to the visitor experience, particularly in nature-based tourism settings such as ecotourism and adventure tourism (Mackenzie et al., 2020; Tatar et al., 2018; Sengoz et al., 2025; Khafer, 2026). Consequently, many countries have regulated and institutionalised the tourist guiding sector, including the training of tourist guides, to promote professional standards and sustainable tourism outcomes (Kassawnh et al., 2019). Accordingly, recent scholarship has increasingly focused on the training and skills development of this specialised profession, recognising the diverse competencies, knowledge and personal attributes required to mediate the relationship between visitors and destinations (Jiang et al., 2023; Albrecht et al., 2021; Al-Okaily, 2022; Demirović Bajrami et al., 2020). Likewise, the working conditions and opportunities for career progression within the tourist guiding subsector have increasingly come under scholarly inquiry (De Beer et al., 2014; Ng et al., 2025; Kapa et al., 2023; Melubo & Buzinde, 2016; Mackenzie et al., 2020). Categories such as nature and adventure guiding are associated with harsh working conditions, including prolonged exposure to natural elements and significant physical demands (McKay, 2018), while other studies have highlighted concerns regarding the treatment of female tourist guides, demonstrating that challenges within the subsector are often exacerbated for marginalised groups (Nguyen

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& Nguyen, 2025; Mousa et al., 2023). Echoing these concerns, Kovalenko et al. (2021) argue that the current professional development of tourist guides is not sufficiently aligned with the evolving realities and demands of the tourism industry, nor with broader sustainability principles. These challenges raise important questions regarding the role of institutional arrangements and regulatory systems in fostering a transformative and inclusive tourist guiding subsector that enables previously disadvantaged communities not only to enter the profession but also to progress within it. Against this backdrop, the present study explores how institutional structures and arrangements shape the training, career progression and transformation of the tourist guiding sector in South Africa. Particular attention is given to South Africa, where the principles of transformation and inclusivity, especially for previously disadvantaged groups, are firmly embedded within national tourism policies and strategies (Abrahams, 2019). Despite the growing body of literature on tourist guide competencies, training and professional development, comparatively little attention has been paid to the institutional structures that shape access to the profession, career progression, and the long-term sustainability of tourist guiding as a career, particularly within developing-country contexts. This represents an important gap in the literature, where transformation, institutional capacity and inclusive participation remain central policy priorities. It is within this context that the present study examines the institutional factors that enable and constrain transformation within South Africa's tourist guiding subsector.

Literature review

Training and skills development in tour guiding sector

Although tourist guiding is widely recognized as an important subsector of the overall tourism sector, research on the design, implementation, and evaluation of training programmes remains scarce, especially in developing countries (Sumanapala et al., 2025; Ng et al., 2025). The effectiveness of tourist guides is directly linked to the overall success of the tourism industry (Lin et al., 2015; Mbatha et al., 2021; Kapa et al., 2023), with Jiang et al. (2023) emphasising that industry success depends heavily on the quality of tourist guide services. Tourist guides influence travel operators' reputations, generate positive word-of-mouth promotion, and shape a destination's image and visitors' willingness to return (Lin et al., 2017). Additionally, tourist guides can transform sightseeing into memorable learning experiences (Kapa et al., 2022) while enhancing visitors' environmental awareness and understanding. Studies such as Jiang et al. (2023) and Khafer (2026) further affirm the crucial role played by tourist guides in natural and cultural heritage sites through managing tourist behaviour, applying interpretation skills that foster appreciation and protection of heritage assets, and acting as cultural brokers who shape the tourist experience and overall destination satisfaction. Beyond these roles, tour guides take numerous roles, including cultural broker, educator, protector and destination ambassador. Given these diverse responsibilities towards visitor experience and satisfaction as well as destination competitiveness, the competencies required of tourist guides have received increasing scholarly attention (see, for example, Albrecht et al., 2021; Jiang et al., 2023; Al-Okaily, 2022; Demirović Bajhrami et al., 2020). Indeed, several studies have found that competent and qualified tourist guides positively influence tourist satisfaction (see Demirović Bajhrami et al., 2020; Al Jahwari et al., 2015; Lin et al., 2017). For instance, Luo et al.'s (2026) study identified professional knowledge, interpretation skills, and positive attitudes as essential competencies within the senior tourist market segment, while Demirović Bajhrami et al. (2020) concluded that tourist guide competencies are strong predictors of visitors' learning in protected areas. Similarly, Al Jahwari et al.'s (2015) study on tour guides' communication competency revealed that guides themselves emphasise the importance of these skills and knowledge for effective performance. This importance is closely linked to the nature of tour guiding, where certain guiding activities require specialised skills and knowledge to ensure tourist safety, while others rely heavily on interpretation skills to meaningfully connect visitors to destinations (Albrecht et al., 2021; Mackenzie et al., 2020; Luo et al., 2026). This supports Demirović Bajhrami et al.'s (2020) assertion that tour guiding is a complex profession, with the competencies required varying according to the guiding environment and type of tourism activity.

Consequently, Harilal et al. (2025) and Demirović Bajhrami et al. (2020) highlight the need for governments and tourism organisations in developing countries to enhance service quality, including guiding performance and regulation. Regarding the latter, the regulation and institutional arrangements guiding important aspects such as training and career progression is central to ensuring satisfactory and memorable tourist experiences, destination competitiveness but in developing destinations, also ensuring that the sector is able to absorb and foster the development of the unemployed population. This is particularly relevant in a country such as South Africa, with attractive and compelling natural and cultural heritage which constitute the primary basis of the tourism industry (Murudu et al., 2025; Ariya et al., 2020), as well as a dire socioeconomic reality with high unemployment and poverty rates, particularly previous disadvantaged

groups. The tourist guiding subsector is therefore well positioned to provide employment and entrepreneurial opportunities. However, realising this potential requires an institutional environment that is capable of training, regulating, supporting, retaining, and professionally developing tourist guides throughout their careers, particularly those from previously disadvantaged communities. The following section provides an overview of the institutional context of the tourist guiding sector in South Africa, thereby establishing the context for understanding the institutional barriers that constrain the development and transformation of the subsector.

A legislative and institutional view into the tourist guiding sector of South Africa

The current legislation governing the tourism sector, more specifically the tourist guiding subsector, is the 2014 Tourism Act (Act 3 of 2014). This Act was enacted as the previous Act (Tourism Act 1993) predated South Africa's (new) democratic government and, subsequently, the Constitution (Harris et al., 2018). Additionally, the Act mainly referred to the South Africa Tourism Board, with the tourism sector falling under the Department of Environmental Affairs and Tourism. Therefore, a new Act was needed to recognise the democratic value and priority of the country, as well as the mandate of the Department of Tourism (Mogale & Odeku, 2018), specifically as the tourism sector could not be adequately catered for under separate pieces of legislation that did not fall under the mandate of the Department. Moreover, the tourism sector of South Africa had grown significantly since 1994, and was facing inadequate, inconsistent and fragmented planning and development. Additionally, the lack of information provision was a widely acknowledged challenge impeding the growth and development of the tourism sector. Importantly, the need for transformation within the tourism sector of South Africa pre-empted this Act. Within the context of the Tourism Act, No. 3 of 2014, for an individual to be considered a legal tourist guide, they must, foremostly, enrol for, and complete, the requisite qualification and assessment with an institution accredited by CATHSSETA, and then be registered in the province in which they reside or will operate (Kapa et al., 2023). In terms of the law, illegal guiding carried out by unqualified and unregistered tourist guides is prohibited and punishable (Colman, 2016). The Tourism Act establishes the authority for the Minister to designate an official from the National Department of Tourism as the National Registrar of Tourist Guides. In addition to delineating the responsibilities of the National Registrar in a specific section, the Act empowers the relevant Member of the Executive Council (MEC) to designate the Provincial Registrars of Tourist Guides, each overseeing tourism within their respective provinces. This section also delineates the duties of Provincial Registrars, as well as outlining the process for the registration of tourist guides. Furthermore, it addresses matters concerning the code of conduct and ethics to which tourist guides must adhere, procedures for handling complaints against tourist guides, the authority of Provincial Registrars in the disqualifying of tourist guides, the taking of disciplinary actions against errant tourist guides, and the required procedures for appeals and reviews. Furthermore, the Act includes key differences relating to the valid period of registration (from 2 to 3 years), in order to align with other registration requirements, such as the first aid certificate. Also, the fines for non-compliance were increased, and requirements such as those for driver guides and carrying capacity were removed. Three different categorisations of tourist guides are determined by their qualifications.

Challenges facing tourist guides in South Africa – legislation, qualifications and registration

Some of the biggest challenges facing the tourist guiding subsector, in relation to legislation, centre on qualifications and registration. In 2021, the Occupational Qualifications Sub-Framework (OQSF) Policy stipulated that all existing skills programmes under CATHSSETA had reached their expiration date (Hes, 2023), with the relevant stipulation affecting not only the tourist guiding subsector, but also extending to all sectors within the CATHSSETA framework, thereby necessitating that urgent attention be paid to the matter. Moving forward, traditional unit standard qualifications will be phased out. Instead, each unit standard-based skills programme will transition to the OQSF format (Southern African Tourism Services Association, 2024). The new format encompasses theoretical, practical, and work experience modules (Ecotraining. 2025). Within this framework, options exist for full occupational certificates, for partial qualifications with elective components, as well as for skills programmes. Since such stipulations first were made, various other regulations and policy implementations have occurred in South Africa. However, it is at this juncture that the disparities in backgrounds with which various people have found themselves need to be considered, especially in regard to how the situation has impacted on people's ability to enter the sector, leading the central underpinning of the current study.

Research methods

A qualitative research approach was employed to explore barriers to transformation within the tourist guiding subsector. Qualitative methods are well suited to investigating complex and nuanced issues (Walters, 2016), such as the barriers to transformation, that may not be adequately captured through quantitative approaches. Purposive sampling was used to identify participants with specialised knowledge and experience relevant to the objective of the current paper, with the sample including the National Registrar of tourist guiding, provincial registrars, representatives of tourist guiding associations across South Africa, as well as specialised tourist guides. These participants were selected because of their roles in the regulation, administration, and representation of the tourist guiding profession. The study population comprised of 17 key informant stakeholders, including seven provincial registrars and one national registrar, four industry associations representing the nature, adventure and cultural tour guiding categories, as well as five interviews with tourism experts who have been active tour guides in the country for numerous years. In-depth semi-structured interviews were conducted to explore administrative, institutional, and practical perspectives on the barriers to transformation within the tourist guiding subsector, particularly for previously disadvantaged groups. Semi-structured interviews were selected as the primary qualitative data collection method because they enabled participants to discuss their experiences and perspectives in depth while ensuring that key topics aligned with the study's aims and objectives were consistently addressed. Ethical clearance was granted by the authors' institution and appropriate ethical practices were followed, including the explaining the study to the study participants and requesting written and verbal consent before commencing the interviews. Further, participants assured that all personal identifying information shared would remain confidential. Interviews were conducted primarily online using Microsoft Teams, and with participants' consent, all interviews were audio-recorded and subsequently transcribed using Otter.ai. The transcripts were reviewed for accuracy prior to analysis. The qualitative data were analysed using thematic content analysis with the support of Atlas.ti. The analysis followed an iterative process in which interview transcripts were first read repeatedly to achieve familiarity with the data. Initial codes were then developed and organised into broader themes aligned with the research objectives. Related subthemes were subsequently identified to capture more nuanced aspects of participants' perspectives. Manual coding was undertaken before the coded data were imported into Atlas.ti to facilitate organisation, retrieval, and interpretation of the findings. The study found that the institutional barriers to transformation of the tour guiding sector lied with matters relating to training and skills development, registration and renewal, which were adversely affected by financial costs and old and burdened administrative strain. These are thematically presented below, with quotes used to exemplify the themes. To ensure anonymity, participants were assigned identification codes. Codes P1–P9 refer to provincial and national registrars, P10–P13 to industry association representatives, and P14–P17 to experts in the tour guiding sector.

Findings

Cost of qualifications and certifications

The overarching concern regarding financial constraints is the costs of training for tourist guides, which were relatively acknowledged in the interviews, with one registrar aptly stating "*mainly financial, you know, because for you to be able to work as a guide, you've got to have been trained*"' (P5). Many participants stated that the training programmes cost a substantial amount of money, which could be accrued to the fact that the training programme can include practical components, like field trips, internships, or guided practical sessions, so as to provide hands-on experience to aspiring tourist guides. Additionally, some participants accounted for travel expenses (like transport and accommodation) to access practical learning experiences. Generally, participants estimated the cost of training for tourist guides, with the prices ranging from R3000 to R15 000: "*Mostly, [the challenge] is not having enough money. Because I went to check how much per trainee, and I was actually shocked that, for one year, it could go as far as around R10 000. That to us, in from our previously disadvantaged group, it's quite a steep number*" (P1). Interestingly, the findings suggested some intervention, to assist in covering some of the associated costs. Mostly, this was done by the different government departments such as Department of Tourism, as well as private tourist guides and employees. Unfortunately, even with these interventions, some challenges emerged. In terms of the government's intervention, the study found that, while some departments cover the costs of training, it is often limited to a number of individuals. This is due to the constrained budgets of tourism departments, with some representatives lamenting the continuous decrease in the funds allocated to tourism. These concerns are demonstrated in the quote below: "*In any case, I just wish that more money would have … be[en made available] to support this subsector. We are considered as a strategic economic subsector, but, in terms of budget allocation, it doesn't speak that strategic subsector. The thing that they say because most budgets … end up at enterprise development, most budget[s] end up at environmental affairs and all these other factors,*

and then we are always number last, and we tried to make the best, to do the best that we can do" (P4). From the perspective of the private sector, a few participants mentioned that, while some companies invest in their employees to become tourist guides, this can become a risk as they face a significant financial loss should a tourist guide not complete their training: "*This is a major problem for career entry. At present, several operators pay for their trainees to become qualified. The downside is that many drop out and the money is wasted*" (P10). "*There are also learnership schemes that offer funding for groups to train, but the bureaucracy is complex and time-consuming, making demands that operators are disinclined to undertake*" (P9). Furthermore, discussions with the registrars and associations highlighted substantial financial investment post-training, and after their registration.

Uncertainty over training programs

Another barrier to the growth and transformation of the subsector centres on the contested issues around the renewal of qualifications and certifications and the process therein. In 2022, it was announced that all current CATHSSETA qualifications were expiring, and that a new set of qualifications would be developed for the tourist guiding subsector. This was due to the OQSF Policy, 2021, which was implemented, and which stipulated that, as of 30 June 2023, all existing skills programmes under CATHSSETA had reached their expiration date, which affected not only the tourist guiding subsector. This new approach to skills development was premised on addressing the failures of the old qualifications systems, particularly in terms of opening up opportunities for additional service providers to offer tourist guiding qualifications and certifications. Additionally, these new qualification would allow for the diversification of service providers which could mean a variety of training programmes and subsequently associated costs, which would ease the financial barrier to entry. A quote below from the National Registrar appropriately explains these views: "*The advantage there would be to move away from favouring the continuation of the system that we found ourselves in. And this change seems to open it up for a better intake of participants, perhaps also removing some of the barriers that will come up with the curriculum. You know, there were known service providers, and you had no opportunity to go outside of these known service providers*" (P8). However, the news of the discontinuation of CATHSSETA qualifications was met with much confusion from the tourist guiding subsector, with several association participants raising concerns over the validity of tourist guiding licences obtained using the previous qualification set. Emerging in the ensuing debates over the new qualification was the question of whether recognition of prior learning (RPL) would be permitted, with some participants, such as that whose statement follows, believing that it would guarantee that existing tourist guides could continue working legally in the subsector: "*So now the issue is, now, they [want to] fix that problem, but there's a fear that they won't accept the current qualification as a historical qualification, which means that every guide who has this qualification will have to redo their qualification. So what's gonna happen if that happens? You're [going to] have a dip in the adventure tourism industry*" (P11).

Relatedly, insights gleaned from the representatives of tourism governing authorities suggest that the older qualifications from CATHSSETA will still be recognised. However, no certainty of such exists if previous qualifications are regarded as historical qualifications, or of whether tourist guides will be allowed to receive RPL, which may bear the risk of further training for the tourist guides, should their qualification not fit into the new NQF for guiding. Accordingly, other participants expressed concern over the willingness of tourist guides to invest in further training and skill development, considering the aforementioned challenges they face. The quote above similarly alludes to this concern, and suggests a surge in the number of unregistered tourist guides in the subsector. Such views are exemplified by the quote below: "*So, we've been lobbying quite hard that they accept the skills programme as a historical qualification, and then going forward, whatever the new qualification looks like, you know the new people will kind of take it on*" (P9). Furthermore, it was highlighted that the current qualifications will expire in June 2024, which has provoked some controversy among sector stakeholders. In fact, some association participants noted that certain members of the subsector had lobbied for the extension of this expiry date: *'[The] big thing that we are pushing for is to get them to extend the expiration date of the current qualifications, while we work at a new qualification that will help*" (P14). The above can be attributed to the fact that the National Department of Tourism along with CATHSSETA, is still in the process of developing these qualifications, which is an ongoing activity. As such, it will take some time, once the qualifications have been set and approved, for accredited training service providers to develop appropriate content. Therefore, this may lead to a period of stagnation in the training, registration and renewal of tourist guides in the different stages of their career. Beyond the question of RPL and/or historical qualifications, there was broad agreement among the participants on the possibility of the new qualification easing the barriers of entry for the tourist guiding subsector. Specifically, the study participants point out that such qualifications should enable different areas of specialisation, and not limit tourist guides to only culture, nature and adventure guiding, and, similarly, not limit them based on classification (i.e. site, provincial and national guide). Likewise, some participants

concurred that the qualification structure should be flexible, so as to allow for continuous professional development. These views are reflected in the two quotes below: "*Also, with the development of a new qualification, it seems very promising, but it must not become this doctrine that people have to do a three-year diploma. It is still [a] short course that there is some kind of professional body or association like us, that can assist with continuous professional development as well*" (P10).

Furthermore, other responses under this theme relate to the representativeness of the qualification of tourist guides in South Africa. For instance, one participant mentioned "I think it is important to have a qualification set up that represents the people that it's trying to train" [P10]. In conjunction with the above, a few of the participants asserted that current service providers are not from previously disadvantaged groups, and that the new qualification system should open opportunities for service providers in the targeted group to come onboard: "*First of all, I get the impression that the people that are training and … there are service providers … who are accredited, they are trained as accredited trainer[s] and [the] majority of them [are] not previously disadvantaged people. They've got a greater say, in terms of … what to train on the curriculum, which can, you know, perpetuate … that system where you find previously disadvantaged people are not they don't find it very easy to come on board*" (P8).

Disconnect between university qualification (theory) and tourist guiding (reality)

A major barrier to the growth of the tourist guiding subsector in South Africa is the disconnect between the university qualifications and the practical requirements of the tourist guiding subsector. These challenges were revealed as manifesting themselves in a couple of ways: (i) the misalignment of NQF levels obtained at tertiary institutions; (ii) high expectations of tertiary graduates, when entering the subsector; and (iii) the lack of a strong connection between tourism and tourist guiding. To begin with, tourist guiding qualifications and certificates offered by universities are not aligned with the registration requirements for becoming a tourist guide. In fact, some participants explained that tourist guiding certificates obtained at some institutions were insufficient for the individual to register at the provincial offices. Instead, individuals would have to supplement their learning with additional training courses, as can be seen below: "*I spoke to TUT [Tshwane University of Technology], now Mbombela campus. They've moved the adventure tours and diploma there. And I said the problem with doing this whole 3-year diploma, [is that] nobody comes out ready to register. They can't even work as a guide, because of what is included in their syllabus*" (P12). The situation was described as being due to the nature in which the tourist guiding certifications in such institutions are offered. Some participants were of the view that tourist guide training in universities in South Africa is too theoretical, and does not involve the required practical exposure and experience suitable for the field. This suggests a need to reexamine the outcomes of these qualifications against subsector requirements. Such views were further supported in the quote below: "*Tourism is doing great, but we are struggling to find guides in our subsector particularly, so it's definitely necessary and the subsectors are willing to transform.* SEP *It's just a matter of putting the tools in place to make it easier for them to do that, because they are expecting to take on a guide that knows what they're doing and [who] has the skills already.* SEP *And the entry-level qualification sometimes doesn't meet all those requirements*" (P14). This disconnect was further observed in the expectations of graduates leaving university and entering the subsector. Participants lamented the high expectations held by graduates, specifically associated with obtaining management roles/positions, owing to their qualifications. For example, one subsector representative broadened the topic by noting the following: "*And they do that degree, and then they come out. And they're very surprised that nobody wants to employ them. And it's because they've … got a sort of skewed idea of what the industry actually needs and opportunities that are in industry. So, you can't walk into a management position without having been through the whole process of learning the skill, becoming an expert at whichever, you know, whichever operation, whatever adventure they're involved with, they need to be able to do it. Running an adventure company, you do not need a degree like at all. You need a discipline-specific skill and understanding, and then you just need experience in the business. And that's where you learn you don't … need a degree in management. Yeah. So there's also that sort of your disconnect*" (P9)

Largely, the concern voiced among the study participants was that tourist guiding was not adequately represented in tourism qualifications in South African universities. Several participants agreed that, while some institutions offer tourist guiding, it is largely embedded in Tourism Management or Tourism Development degrees, diplomas or certificates. The concerns referred to limited scope in tourist guiding offered within university degrees, owing to this field being clustered into a broader tourism qualification that cannot accommodate the hard skills development necessitated in tourist guiding. Some participants went a step further, to argue that tourist guiding must be included in the curriculum of both primary and high school. This was, arguably, to raise awareness of tourist guiding as a subsector, as well as of the opportunities that exist in this field. "*I think actually engaging with the youth, I think educating [in] the schools and the young people in high school on the different career paths, I think that's where the biggest lapse is, … I've*

been to the national Tourism Career Expo now twice. All of these kids are in high school or in varsity; they have Tourism as a subject, and they want… how they explain it that is they want to be paid to see the world, but [instead] they need to be [learning] guiding" (P12). The introduction of tourist guiding very early on in the academic journey can provide substantial and meaningful benefits that could assist in transforming the subsector. Awareness is a huge concern within the subsector, with some participants mentioning that this awareness should begin in schools, and not necessarily when they are about to exit schools to go to university or to find employment.

Administrative strains in the registration and renewals processes

Overwhelmingly, one of the biggest challenges facing tourist guiding registration is centred on the financial requirements of the tourist guide. The associated findings indicate a misapprehension of the financial constraints faced by tourist guides, with some associations and registrars being of the view that such constraints relate to the costs of registration, with this R240, which is paid when tourist guides first register and upon their renewal of licence: "*But the registration cost, which is R240, I think is when you register with the provincial register, you pay the registration fee, which is R240. And you renew every three years. So, I am also battling to understand how difficult it is to get 250. Maybe because people are not gainfully employed, but I will find it very difficult to say the 250 is a barrier for people to participate*" (P12). In this regard, some participants argued the need for financial literacy for tourist guides, considering the amount to be paid, and intervals when it needs to be paid. Illustrating this perception, one participant averred:

"*If you are a professional guide, and you work 200, 250 days a year, and you earn R1000 a day, if you can't save R100 a month, then you can't call yourself proficient"* (P13). Officially, South Africa has between 6000 and 11 000 registered tourist guides. However, the interview process revealed the presence of a large number of unregistered tourist guides in the country, particularly in the adventure guiding specialisation, as described below: "*And obviously, it's a difficult one, because people are going to be … maybe unwilling to disclose that they are using guides that are technically illegal. But the reality is that, certainly in the paddling industry, I'd say 90% of them are unregistered. It's not reality that guides are registered and they're not registered, because it's not reasonable to expect them to register, because the system is so expensive and so complicated*" (P9).

While inquiry into unregistered tourist guides was beyond the scope of the current study, some participants explained that this might have been due to the fact that, in a number of cases, their international certifications might not be aligned with the national qualification. Additionally, they further pointed to the significant costs in tourist guide training in South Africa. Another barrier to the growth and transformation in the registration of tourist guides was found to be the renewal process. A number of participants pointed out the renewal process as being tedious, and the need for this process to be made simpler. Specifically, the physical nature of this renewal process was commonly criticised, with a few participants questioning the need for guides to have to travel to their respective departments to resubmit their documents. In some cases, this involved submitted documents that were submitted either in the registration process, or during the first renewal of licences. Such views are depicted in the statement below: "*How do you make the reregistration process easier? Guides have to renew. They renew every three years. It's a pain. Some provinces are fabulous. Some provinces need some work. Make it easier. Make it a digital thing. You've already got the guard on your database. You already know his name and his ID number, and you've already got his qualifications in there. Why do you [want to] make him come in again physically, to bring you the papers? So, I think streamlining the registration of guides definitely can work, and I think there are some employers that may not operate ethically*" (P14). Association representatives explain that, owing to the structure of their association and that they represent tourist guides across the country, their work is primarily online, and it becomes easier to track the progression of tourist guides in the country. Relatedly, the findings of the study suggest that there should be a focus on the number and nature of tourist guiding renewals. Beyond the challenges related to the process of renewal, a few of the participants stressed the importance of ensuring that the tourist guiding subsector has a consistently growing number of renewals: "*Yeah, so you know it is, I agree with training new disadvantaged people, but actually see what you need. And instead of training new ones every time, rather come back next year, take the same ones and take them a step further, because that is not what's happening*" (P13).

In addition to streamlining the registration process, some participants noted that the careful re-examination of this entire process could reveal some inadequacies and inconsistencies in the system. Primarily, the challenge of an accurate database was highlighted repeatedly, with some participants underlining that public resources were invested into incapacitating tourist guides and there tracking their career progression is important for both ensuring return on investment as well as ensuring that public resources are being used efficiently. One participants went on further to say that plans to digitalise the registration systems and improve their databases did not materialise despite financial investments: "*But [the]*

Department of Tourism cannot even give you a proper database of guides, because they don't have one. I think my database is better than it is. And that is where the problems [are]. I know for a fact they have spent millions and millions on trying to get apps and that and it's just not" (P13). Recently, although a digital solution was provided for the registration (and presumably renewal) of tourist guides in the subsector, the findings suggest the inefficiencies in utilising these mechanisms. Some participants related the importance of maintaining accurate databases of tourist guides to monitor of transformation imperatives and continued growth of the subsector accurately. Notably, views on this matter point to the provincial registrars being overwhelmed by their everyday tasks, and uncertain about their roles and responsibilities, which inevitably affects their ability to maintain and monitor accurate databases that can be used to inform decisions to support the subsector: "*Especially the officers of the provincial register, I think we can improve in terms of giving it more prominence, funding them and making sure that today those offices [run] efficiently and a[re] meant, but, as it stands now, the provincial registers are not solely performing the functions of recorded provincial register. We will take one person who's doing a whole lot of things, and put the tourist guiding and responsibilities … on that person, and my observation is that it becomes one of those things then, not necessarily something that … has tension, but they're saying the truth, but there is paper, that must be paperwork, and documents [must] be attended to … as well as the certificate*" (P8). Interestingly, a suggestion of having an incentive programme in place was presented in the interviews, to inspire and motivate the tourist guides to continue renewing their licences. As this idea emerged from one of the registrars, it could be postulated that there are a number of challenges that face the renewal process. The known barriers include the substantial funds involved in retraining (especially in first aid, which is a requirement). These challenges could suggest that individuals are opting not to register and rather to use their training to operate illegally.

Discussion

The findings suggest that transformation within the tourist guiding subsector extends beyond increasing the participation of previously disadvantaged groups and instead requires strengthening the institutional environment that supports entry, progression and long-term participation within the profession. While South Africa has introduced policies aimed at transforming the tourism sector, the findings indicate that institutional barriers continue to constrain the realisation of these objectives. In particular, although government and the broader tourism industry recognise the value of tourist guides in creating authentic tourism experiences through the interpretation of cultural and natural heritage, the financial costs associated with entering the profession remain prohibitive for many previously disadvantaged individuals. Consequently, transformation cannot be viewed simply as increasing representation within the subsector but must also address the structural conditions that enable equitable participation. This finding supports broader transformation literature, which argues that meaningful transformation requires removing systemic barriers to participation rather than merely creating opportunities in principle (Lekgau et al., 2024, 2025; Sixaba & Rogerson, 2023; Harilal et al., 2025; Bakker, 2019). The findings further demonstrate that training forms a critical component of institutional transformation. Consistent with previous studies (Albrecht et al., 2021; Jiang et al., 2023; Luo et al., 2026), participants recognised that the specialised nature of nature, cultural and adventure guiding requires distinct competencies and professional expertise. However, this study extends the existing literature by demonstrating that competency development is also a transformation issue. Without accessible and appropriate training pathways, previously disadvantaged groups remain unable to acquire the qualifications necessary to participate in higher-value segments of the tourist guiding subsector. This is particularly important given the absence of a qualification encompassing all three guiding specialisations in South Africa (SAQA, 2023). As Weiler & Ham (2002) argue, tourist guide training should be viewed as a mechanism for sustainable capacity building rather than merely a certification process. Consequently, strengthening training systems represents an important institutional intervention for promoting both professionalism and transformation within the subsector.

Beyond qualifications themselves, the findings highlight the importance of transforming who delivers training. Participants emphasised the inclusion of trainers from previously disadvantaged communities, not only to improve representation but also to ensure that training reflects local realities, indigenous knowledge and culturally relevant perspectives. Such an approach enables more authentic interpretation while supporting the use of local languages where appropriate, thereby facilitating more effective knowledge transfer. These findings reinforce arguments that tourist guide training should be contextually grounded and responsive to the social and cultural environments in which guides operate (Albrecht et al., 2021). Institutional transformation, therefore, requires changes not only to training curricula but also to the composition of those responsible for developing future tourist guides. The study also identifies weaknesses within the institutional systems responsible for regulating the profession. Participants described

considerable variation in the efficiency of registration renewal processes across provinces and highlighted the need for greater digitalisation of administrative systems. While previous research has largely concentrated on tourist guide competencies and visitor experiences (Lin et al., 2017; Demirović Bajhrami et al., 2020), comparatively little attention has been paid to the administrative institutions that support professional practice. The findings suggest that inefficient regulatory systems may discourage continued participation within the profession, ultimately undermining transformation efforts. Institutional effectiveness should therefore be regarded as an equally important component of tourist guiding development alongside training and competency development. This is especially important when monitoring the progress towards transformation outcomes, as well as planning further initiatives.

Relatedly, the findings raise important questions regarding how transformation within the subsector is measured. Participants suggested that considerable emphasis has been placed on increasing the number of registered tourist guides, with less attention given to retaining experienced practitioners and supporting sustainable careers within the profession. This finding suggests that transformation indicators should extend beyond registration statistics to include career longevity, retention and professional progression. Declining registration renewals may indicate that structural barriers continue to prevent guides from remaining economically active, thereby reducing opportunities for experienced practitioners to mentor new entrants and contribute to the long-term sustainability of the profession. Transformation should therefore be understood as a continuous institutional process rather than a once-off increase in participation. The importance of institutional capacity was further illustrated through participants' reflections on the role of provincial registrars. Acting as intermediaries between tourist guides and the Department of Tourism, provincial registrars possess valuable knowledge of local challenges affecting guides, particularly those from previously disadvantaged backgrounds. However, the findings reveal important gaps in implementation capacity. For example, although national government funding was reportedly available to support guides unable to afford registration costs, poor communication between institutional actors prevented these resources from reaching intended beneficiaries. This demonstrates that transformation outcomes depend not only on policy design but also on the capacity of institutions to implement policy effectively. Similar observations have been made within broader tourism governance literature, which argues that implementation failures frequently undermine otherwise progressive policy objectives (Hall, 2012; Amore, 2024).

The findings also point to the need for stronger institutional linkages between higher education and the tourist guiding industry. Participants argued that greater involvement of experienced tourist guides within higher education programmes would strengthen the practical relevance of training by exposing students to contemporary industry practices, emerging challenges and professional expectations. Such collaboration would help bridge the persistent gap between academic knowledge and industry practice, while also contributing to the professionalisation of the subsector. Rather than viewing higher education solely as a provider of qualifications, the findings suggest that universities should function as active institutional partners in workforce development and transformation. Finally, the findings indicate that institutional transformation should begin well before individuals enter the labour market. Participants argued that tourist guiding needs to be promoted as a viable and desirable career from an early age so that young people can make informed educational and career choices. This suggests that transformation requires a longer-term human capital development strategy that incorporates career awareness, educational planning and structured professional pathways. Such an approach would strengthen both workforce sustainability and the broader transformation objectives of South Africa's tourism sector.

Conclusion

The foregoing results and discussion affirm that the transformation agenda within the South African tourist guiding subsector needs to extend beyond a relatively narrow focus on increasing the representation of previously disadvantaged individuals towards a more holistic, systemic approach that strengthens the institutional environment underpinning the profession. Meaningful transformation requires not only the inclusion of previously disadvantaged groups but also the removal of the structural barriers that constrain access, participation, progression and long-term sustainability within the subsector. Although tourist guiding presents a relatively accessible pathway into the tourism economy by enabling individuals to leverage their cultural heritage, indigenous knowledge and natural resources to create authentic visitor experiences aligned with South Africa's core tourism products, the findings demonstrate that entry into, and progression within, the profession continue to be constrained by financial, institutional, educational and administrative challenges—sentiments that have similarly been identified by Mbatha et al. (2021), Kapa et al. (2023) and Tichaawa & Chamboko-Mpotaringa (2025). These challenges include the affordability and accessibility of specialised training, inconsistencies in provincial registration and renewal processes, limited industry

engagement within higher education programmes, inadequate institutional capacity among regulatory stakeholders, and the absence of coordinated interventions that support career development across the tourist guiding lifecycle. Consequently, while the tourist guiding subsector possesses considerable potential to advance South Africa's transformation agenda and contribute to more inclusive tourism development, its transformative potential cannot be fully realised without strengthening the broader institutional ecosystem within which tourist guides are trained, regulated, supported and retained.

From a theoretical perspective, this study contributes to the growing body of tourist guiding literature by demonstrating that transformation within the subsector is fundamentally an institutional process rather than solely an outcome of demographic representation or regulatory compliance. While previous studies have predominantly focused on tourist guide competencies, service quality and visitor experiences (e.g. Weiler & Black, 2014; Kapa et al., 2022), this study shows that the effectiveness of transformation is equally dependent on the institutions responsible for developing, regulating and supporting the profession. In doing so, the study advances the understanding of transformation by conceptualising it as a multidimensional process encompassing access, participation, competency development, career progression, retention and professional recognition, all of which are shaped by the interaction between training institutions, regulatory systems, higher education, industry stakeholders and government. This institutional perspective extends existing scholarship by positioning tourist guides not merely as interpreters of destinations but as participants within a broader governance system whose effectiveness ultimately determines the extent to which the subsector can contribute to inclusive socio-economic development. Practically, the findings provide evidence-based recommendations for the Department of Tourism, national and provincial registrars, higher education institutions, industry associations and the private sector to strengthen institutional transformation within the tourist guiding subsector. Priority should be given to expanding accessible and contextually relevant training pathways, improving the efficiency and digitalisation of administrative systems, strengthening institutional capacity among regulatory stakeholders, fostering stronger partnerships between higher education and industry, and promoting tourist guiding as a viable and sustainable career from an early stage. Collectively, these interventions would contribute not only to a more professional and resilient tourist guiding workforce but also to a more inclusive, equitable and sustainable tourism sector in South Africa.

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