

Maximising the local development potential of Nature Tourism accommodation establishments in South Africa

Jayne M. Rogerson*
Department of Geography, Environmental Management & Energy Studies,
Faculty of Science, University of Johannesburg.
Tel: 27-11-559-2439
Email: Jayner@uj.ac.za

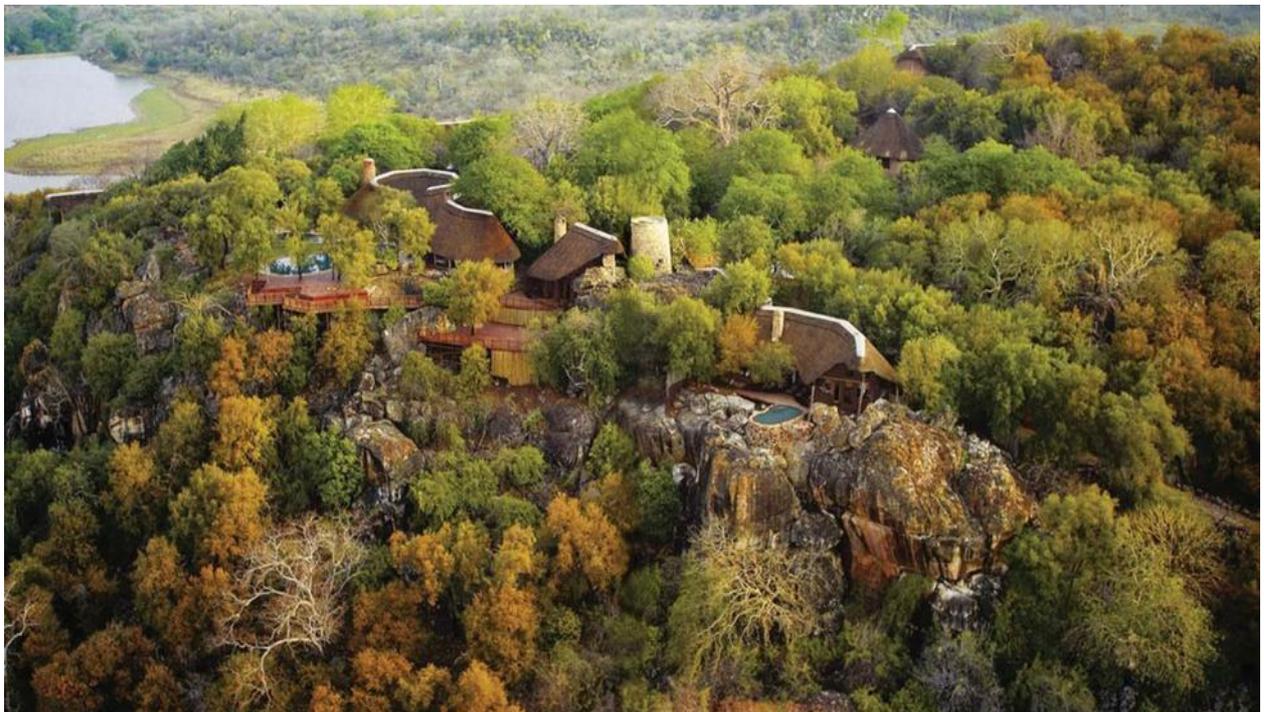
Christian M. Rogerson, School of Tourism and Hospitality,
Faculty of Management, University of Johannesburg.

Corresponding author*

Abstract:

Within extant scholarship on tourism and local development one knowledge gap concerns the role of the accommodation sector as a base for tourism-led local development in rural areas and small towns. The focus is upon nature tourism accommodation establishments which cluster mainly in geographically marginal areas in South Africa where poverty levels are high and the imperative exists for new drivers of economic and social development. A national audit of nature tourism accommodation establishments confirms their potential critical relevance for local development planning in many parts of the country. Nevertheless, existing evidence points to limitations in local linkages through the food supply chain. A critical review is given of several constraints which impact upon tourism-agriculture linkages with policy conclusions for strengthening such linkages.

Keywords: local linkages; nature tourism accommodation; local development; rural South Africa.



Source: <http://4.bp.blogspot.com/-8FLJmIjP77M/UOnpu9vGIEI/AAAAAAAAAW3c/Oye8JNSZwgk/s1600/zambia-resort.jpg>

Introduction

From international experience the growth of the tourism sector can exert positive impacts for local economies, most especially for galvanizing economic and social development in marginal regions or rural areas. As a consequence of modernisation, the advance of globalization and neoliberal governance processes —the economic and employment potential of traditional rural livelihoods has decreased (Saarinen, 2014: 110). For many localities across both developed and developing countries tourism represents a new and vital tool for regional and local development (Hall, 2007; Brouder, 2013; Saarinen, 2014). Saarinen (2007) adds tourism's significance is especially pronounced for marginal, peripheral or rural areas where the sector is used as a driver for economic growth, welfare and employment opportunities often where few other development options may be available. Indeed, in relative terms

Brouder (2013: 15) observes —tourism may be more important in peripheral places than central places. Muller & Brouder (2014) caution, however, that tourism development in peripheral areas may not always deliver dynamic development on a long-run basis.

One aspect of maximising the impact of tourism in local communities is through better integration and planning of tourism projects in destination economies (Saarinen & Lenao, 2014). In the developing world the urgency to maximise the benefits of tourism for local communities is recognised as a vital issue for policymakers concerned with tourism-led development both in respect of objectives of poverty reduction (Saarinen & Rogerson, 2014) and for planning local economic development (Goodwin, 2006; Goodwin & Bah, 2013). The question of local economic development is of high priority for development scholars in Africa (Rogerson, 2009; Rogerson & Rogerson, 2010). For rural areas of South Africa there is rising interest in maximising the

local development potential of tourism investments for local communities. The National Department of Tourism (NDT) is targeting to mobilize and maximise tourism assets and product development in rural areas including for the objective of addressing the uneven spatial development impacts of tourism in South Africa (Department of Tourism, 2011, 2012). Tourism is considered a lead sector for triggering dynamic processes for local development across the settlement hierarchy in South Africa. In particular, in many rural areas of the country it is viewed as potentially the only economic driver for stimulating local development, job creation and entrepreneurship.

It is against this background that this article contributes to an expanding scholarship on tourism and local development by investigating one neglected theme, namely the role of the accommodation sector as a focus of tourism-led local development in rural areas and small towns. Specific attention is upon nature tourism accommodation which usually is found in geographically marginal areas in South Africa where poverty levels are high and the imperative exists for new sources of economic and social development. The nature tourism sector is part of rural tourism and involves establishing tourism products based upon rural assets mostly targeted at urban consumers. The activity of nature tourism can be understood as a form of rural tourism which seeks to maximize rural assets for urban consumer markets. At one level it represents a form of rural-urban linkage in terms of the definition put forward by Ndabeni (2013: 1) as —the structural, social, economic, cultural, and political relationships maintained between individuals and groups in the urban environment and those in rural areas. The nature tourism accommodation sector illustrates an array of complex linkages and connectivities between urban and rural environments through both spatial and sectoral flows. Spatial flows are evidenced in movements of tourists across

urban and rural spaces and sectoral flows are evidenced through linkages between tourism and agriculture.

Three sections of material are discussed. First, the study is situated briefly in the context of research debates about the accommodation sector and the centrality of building local linkages as an aspect of maximising the potential for tourism-led development. Second, the findings are presented from a national audit conducted in 2014 of nature accommodation providers. The audit of nature tourism accommodation confirms its potential critical relevance for local development planning in many parts of the country. In section three the focus turns to building local linkages from the network of nature accommodation establishments through the food supply chain. A critical review is undertaken of constraints which impact upon tourism-agriculture linkages with conclusions offered in relation to strengthening such linkages.

THE ACCOMMODATION SECTOR AND LOCAL LINKAGES

Over the past decade the accommodation sector has been a growing focus for research both in South Africa as well as in other parts of sub-Saharan Africa. However, detailed analysis of the state of the art of African research on accommodation reveals that most existing work is conducted from a hospitality management perspective which provides useful insights on a range of important management-related topics including hospitality service management, human resources or training (Rogerson, 2013a). Beyond such perspectives from hospitality studies, however, the 'research take up' on accommodation has been much less strong in Africa, an observation confirming international trends in scholarship on the lodging sector (Timothy & Teye, 2009). In Africa research investigations focus on

interrogating the evolution and contemporary structural issues surrounding a range of different forms of accommodation including hotels (Rogerson, 2010, 2011a, 2011b, 2012a, 2012b; Rogerson & Sims, 2012; Rogerson, 2013b, 2013c, 2013d, 2014a, 2014b, 2014c), guest houses (Visser & Van Huyssteen, 1997, 1999), second homes (Hoogendoorn et al., 2005; Hoogendoorn & Visser, 2010a, 2010b, 2011), timeshare (Pandy & Rogerson, 2013a, 2013b, 2014), and bed and breakfasts, including in townships (Rogerson, 2004; Hoogendoorn et al., 2015). The broader situation and contribution of the accommodation sector as critical assets in local and national tourism economies is so far an under-represented theme in African tourism research (Rogerson & Visser, 2011; Adiyia et al., 2014). Existing work on the accommodation sector in the South African tourism economy is mainly urban-focused and indicates that its local development impacts can be positive albeit not always maximized through local linkages. One study investigating the food purchases of hotel establishments in Durban and surrounding coastal resorts revealed local purchasing cannot automatically be associated with pro-poor impacts (Pillay & Rogerson, 2013).

Mitchell (2010: 3) states —mounting empirical evidence shows that tourism can transfer significant benefits to local economies and communities around tourist destinations, making a case for identifying tourism as a mechanism for poverty reduction in some low-income countries. Nevertheless, whilst in many areas of the developing world tourism is expanding rapidly and often the principal source of income, its local economic impact is disappointing. The impact of tourism on local economies is tempered by the frequent occurrence of high levels of external leakage which relates to the failure of tourist expenditure to remain in destinations (Sandbrook, 2010a). Actual levels of leakage are inseparable from the

presence/absence of local capacity to furnish necessary skills, food and other supplies which are demanded by tourism enterprises. Often the inability to link local economic activities to tourism is a consequence of the fact that destinations usually are —unable to supply the tourism industry with the goods it needs to sustain itself at a competitive price (Lacher & Nepal, 2010: 82).

In the absence of the growth of local linkages, economic leakages are persistent as —revenue leaves the destination as profit to non-local businesses or for the purchase of external goods and services (Sandbrook, 2010b: 21). Commonly, the existence of economic leakages is cited as a core reason for tourism's failure to generate the desired or expected level of local economic development in peripheral regions (Rogerson & Rogerson 2010; Goodwin & Bah, 2013). Mitchell & Ashley (2006: 1) direct attention to local linkages as shorthand for a multitude of ways —in which well-established businesses (corporates and medium-sized businesses) can build economic links with micro-entrepreneurs, small enterprises and residents in their local economy.

Several observers contend this creates a win-win situation through harnessing the power of private businesses for catalysing local development. Arguably, where tourism has been demonstrated to have strong pro-poor impacts, it is because —the impact is the result of strong linkages (

(Mitchell, 2010: 5). The British Overseas Development Institute, one of the originators of the concept of pro-poor tourism, maintain —it is very important for mainstream tourism to develop and maintain tourism poverty linkages (

(Mitchell, 2010: 6). Correspondingly, much of the practice of pro-poor tourism is associated with incorporating local producers into supply chains (Mitchell & Ashley, 2010).

The nurturing of greater linkages between tourism establishments and local

economies is one key intervention point of the pro-poor tourism agenda (Goodwin, 2006, Meyer, 2007). The building of local business linkages is a critical 'pathway' by which the tourism sector can transfer benefits to local communities in and around destinations (Mitchell, 2010; Mitchell & Ashley, 2010). Among others Scheyvens (2011: 153) asserts that —reducing leakages and maximizing multiplier effects should perhaps be a major goal of governments in developing countries with a significant tourism sector. A critical influence for local economic development in rural areas can be the potentially catalytic role of the accommodation sector as axis for linkage development. This theme is beginning to attract interest in terms of scholarship on pro-poor tourism which highlights the significant role that can be played by accommodation establishments especially through their networks of food sourcing (Meyer, 2006, 2007). The role of food sourcing and of the tourism-agriculture nexus is an essential part of an expanding scholarship on local linkages in the tourism sector. Mao et al (2014: 2) aver that without linkages at the local level between tourism and agriculture

—communities could forego an important element of tourism's potential contribution to local development and poverty alleviation.

In policy terms often the limited strategic planning around linking tourism and agriculture means opportunities can be lost for maximising income opportunities in rural areas from visits by urban consumers. The analysis of patterns of food sourcing raises a number of significant policy issues in South Africa. The first relates to national government inaction regarding inter-sectoral planning. The NDT views its Rural Tourism strategy as a complement to agriculture for rural development (Department of Tourism, 2012) with the latter a central focus for action by the Department of Rural Development and Land Reform. What is absent, however, in both the

Comprehensive Rural Development Programme and the Rural Tourism Strategy is any attempt to strategize and maximise the potential for linking together agriculture and tourism. For example, government initiatives are minimal to support tourism establishments situated in rural areas to source, wherever possible, local food supplies. Initiatives for strengthening the inter-sectoral linkages between tourism and agriculture offer multiple opportunities for LED policy intervention in many parts of South Africa. Such opportunities would also harmonise with climate change/green economy interventions as they would promote reduction in food miles and thus a step towards a low carbon tourism economy. As yet, however, these opportunities remain for the most part 'missed opportunities' because of the silo planning of agriculture and tourism which results in neglect of potential synergies between the two sectors. LED policy and practice can play a useful role in linking together the two sectors of tourism and agriculture through the nature accommodation sector.

THE NATURE TOURISM ACCOMMODATION SECTOR

Nature tourism represents one of the major anchors for the growth of South Africa's tourism economy as a whole. With the growth of nature tourism various forms of accommodation have emerged. In this analysis an audit was undertaken of nature tourism accommodation as an index of rural tourism product development which is targeted at urban-based consumers, both domestic and international visitors. As is shown elsewhere, longhaul international visitors to South Africa's rural nature tourism attractions are channelled through the country's urban centres which are gateways for international travellers (Rogerson & Rogerson, 2014).

The most distinctive form of nature tourism accommodation is the safari lodge. This

represents a form of high-value, low-volume accommodation that provides non-consumptive game viewing experiences in an atmosphere of luxurious hospitality (Massyn & Koch, 2004). Massyn & Koch (2004:103) contend that what makes safari lodges distinct from other forms of lodging is offering —the preserved remnants of Africa's charismatic mega fauna and biological diversity in a global context, which is experiencing waves of species extinction elsewhere. An upturn in the numbers of safari lodge establishments has occurred during the past 15 years in response to growing demand following the end of apartheid, the dropping of international sanctions and South Africa's re-entry into the global tourism economy. The character of the safari lodge has been impacted by wider structural changes in the tourism economy (Massyn & Koch, 2004: 106). This includes the rise in community-based conservation programmes throughout Southern Africa, 'green movements' and a greater emphasis on social consciousness. This triggered an expansion in the numbers of travellers desiring to participate in forms of tourism that 'give back' to the communities and environments that they visit. In response to such changes, safari lodges no longer focus exclusively on marketing a luxurious 'wild Africa' image and rather incorporate into their marketing, elements of environmental protection and community development (Massyn & Koch, 2004).

In western parts of South Africa, in particular the Western Cape province, the form of nature tourism and the evolution of nature tourism accommodation differs from that in the eastern parts of the country. Here the emphasis is upon tourists experiencing the attractions of marine tourism, especially whale watching, or of the region's biodiversity.

Although the region of Western Cape does offer so-termed 'safari lodge accommodation, most nature tourism accommodation in this region takes on a different character and lodging

accommodation includes forest lodges, eco-lodges, tented camps and nature lodges. The audit and analysis of nature tourism (conducted as an internet search)

which is presented below incorporates both the classic African safari lodge and the nature tourism accommodation offerings in the Western Cape.

Table 1: Nature-based Tourism in South Africa: A Provincial Analysis

Province	No. Accommodation	Percentage
Eastern Cape	60	6.5
Free State	16	1.7
Gauteng	46	4.9
KwaZulu-Natal	145	15.7
Limpopo	181	19.6
Mpumalanga	161	17.4
Northern Cape	48	5.2
North West	69	7.5
Western Cape	197	21.3
TOTAL	923	100.0

Source: Author Survey

The national audit reveals a total of 923 accommodation establishments which provide lodging in relation to nature tourism activities. Table 1 provides an analysis on a provincial basis and reveals an uneven spatial distribution of nature tourism activities. The analysis reveals two different dimensions of the nature tourism accommodation. First, in the Western Cape there is a thriving lodging sector which aligns to the province's marine tourism assets and biodiversity. Much of this accommodation in the Western Cape

occurs in small-scale forms of accommodation such as eco-lodges, tented camps and chalets rather than large lodges. The classic safari lodge industry is found in the remainder of the country.

In terms of numbers of lodge establishments the leading provinces are shown Limpopo, Mpumalanga and KwaZulu-Natal followed by North West, Eastern Cape and Northern Cape. The recent establishment of Dinokeng has

precipitated the growth of nature tourism linked accommodation establishments in Gauteng. Of South Africa's nine provinces

nature tourism is of least significance in Free State province.

Table 2: Leading Nature-based Clusters in South Africa

Cluster	No. Accommodation	Nature Based Activity
Kruger National Park	88	Wildlife
iSimangaliso Wetlands Park	81	Wildlife and wetlands
Sabi Sands Reserve	37	Wildlife
Hluhluwe	30	Wildlife
Magaliesberg	23	Small game, fauna and flora
Madikwe Nature Reserve	22	Wildlife
Marloth Park	21	Wildlife
Addo	21	Wildlife
Vhembe	20	Wildlife
Hoedspruit	20	Wildlife
De Hoop Nature Reserve	19	Marine life and Cape Fauna
Balule Nature Reserve	17	Wildlife
Swartberg Nature Reserve	17	Small game and Cape Fauna
Waterberg	17	Wildlife
West Coast National Park	17	Small game and Cape Fauna

Source: Authors

Nature tourism accommodation providers cluster within or close to the country's major protected areas. Table 2 reveals the leading clusters of nature tourism accommodation providers. It shows that the core clusters of safari lodge establishments occur in and around Kruger National Park, Sabi Sands, the iSimangaliso Wetlands, Hluhluwe and Madikwe. The nature tourism attractions of Magaliesberg, close to the country's major urban market, make it a pleasure periphery that is locally significant with a

marked cluster of accommodation providers linked to nature tourism products. Beyond these areas there are smaller clusters in parts of the Eastern Cape, Limpopo, and Western Cape. The existence of these clusters is of critical importance for the small towns that are proximate to or at the heart of these clusters with implications for local economic development programming for relevant District and Local Municipalities.

Table 3: Leading Nature-based Clusters by Province

Province	Cluster	Nature-based accommodation
Eastern Cape	Addo	21
	Shamwari	6
Free State	Golden Gate Highlands	6
	iSimangaliso Wetlands Park	81
KwaZulu-Natal	Hluhluwe	30
	Nambiti Reserve	7
	Dinokeng	10
Limpopo	Hoedspruit	20
	Mapungubwe	20
	Balule Reserve	17
	Waterberg	17
	Timbavati Game Reserve	16

	Thornybush Reserve	15
Mpumalanga	Kruger National Park	88
	Sabi Sands Reserve	37
	Marloth Park	21
Northern Cape	Kgalagadi National Park	12
	Namaqua National Park	11
North West	Magaliesburg	23
	Madikwe Game Reserve	22
	Pilanesberg Reserve	13
Western Cape	De Hoop Nature Reserve	19
	Swartberg Nature Reserve	17
	West Coast National Park	17
	Agulhas National Park	15

Source: Authors

Finally, in Table 3 is shown the leading local clusters for nature based accommodation providers on a provincial basis. This analysis once again highlights the need for recognition by relevant district and local municipalities close to or incorporating the nature tourism accommodation providers.

As is indicated in the next section the planning and policy issues relate not simply to increase the volume of tourists but of increasing and supporting local spread impacts through expanded

participation of local producers in the supply chains of accommodation establishments.

BUILDING LINKAGES

Across the developing world the food supply chain to the tourism sector is viewed as one important potential source of linkages, local multiplier impacts and of pro-poor impacts (Torres & Momsen, 2004; Meyer, 2006, 2007; Mitchell & Ashley, 2010; Scheyvens, 2011; Rogerson, 2012; Saarinen & Rogerson, 2014). In the Caribbean arena Jenkins

(2014: 1) points out that linking agriculture with tourism —provides for natural synergiesll which when realized, can spur economic development, increase farm incomes and stimulate expanded employment opportunities in both sectors. Further benefits are the making of low carbon destinations as a result of a reduction in food miles (Pratt, 2013).

It is forwarded that the promotion of local food production for tourism consumption can —affect significantly the economic and social impact of tourismll (Belisle, 1983: 498). According to Torres (2003: 562) the failure to stimulate the sourcing of local food represents —both a lost opportunity for local agriculture and a hemorrhaging of tourism benefitsll. The food supply chain to tourism accommodation establishments is vital as it can disperse the benefits of tourism geographically far beyond that of

the destination itself (Mitchell *et al.*, 2007). In the developing world most research on tourism-agriculture linkages is on enclave mass tourism resorts (such as Cancun) or beach tourism in small island tourism economies such as Lombok or in the Caribbean (Belisle, 1983; Telfer & Wall, 1996, 2000; Torres, 2002, 2003; Torres & Momsen, 2004; Timms, 2006; Kock, 2013; Jenkins, 2014). The concept of linkage, as Kock (2013) points out, is generally understood in terms of the potential and capacity of local farmers to supply fresh produce to restaurants, resorts and accommodation establishments. Most research on tourism-agriculture linkages focuses on the demand-side, looking at the perspectives of lodge owners or chefs; a welcome development is the appearance of supply-side investigations which interrogate the perspectives of local farmers (see Mao *et al.* 2014).

Table 4: Factors Impacting upon Low Levels of Local Linkages

Type of Factor	Characteristics
Supply-related factors	Poor local growing conditions
	Lack of local production of types of food demanded by tourists
	Lack of high-end or value-added products
	Price of local products is too high
	Local farmers do not want to change traditional production techniques
	Inconsistent quality of products
	Poor economies of scale
	Wage increase due to tourism decreases production
	Property value increase due to tourism decreases production

	Undercapitalization of local industries
	Uncertainty of future land tenure
	Necessary natural resources are increasingly rare
Demand-related factors	Tourists' preferences for familiar products
	Tourists' fear of illness from food
	Tourists' desire for cheap products
	Seasonal variation in demand
	Chefs' desire for more sanitary products
	Chefs' inexperience with local food
Market-related factors	Locals' inexperience in marketing
	Locals' failure to co-operate with one another
	Locals are unable to purchase from large wholesalers
	Locals cannot educate themselves in marketing technique
	Locals' inability to create strategic alliances with tourism industry
	Foreign corporations have strong links to overseas suppliers
	Predatory intermediaries
	Enclave tourism destination desire to keep expenditures in enclave
	Inability to compete with larger corporations
	Kickbacks paid to chefs by large corporations
	Local producers' inability to provide receipts

	Poor local infrastructure results in difficult transportation
Agro-Ecological	Low soil fertility
	Dependence often on variable rainfall
	Climate change impacts – drought or flood
	Water pollution
	Disease, pests

Source: Adapted from Lacher and Nepal, 2010, 82 and Mao et al. 2014, 9.

Despite the several benefits from strengthening tourism-agriculture linkages and of local food sourcing, the results from available existing research in the developing world show the existence of only limited linkages between the tourism and agriculture sectors (Telfer & Wall 1996, 2000; Torres 2003; Rylance et al., 2009; Saarinen et al., 2013; Mao et al., 2014; Saarinen & Rogerson, 2014). In a stark statement Pleumarom (2012: 24-25) warns that —If pro-poor tourism advocates believe a tourism can easily be linked to the agricultural sector so that poor farming communities can capture a share from the tourism income by providing their products to hotels and restaurants, experiences indicate the contrary. From a cross-section of international research investigations a profile can be built up of the key factors that can result in limited local linkages and multiplier impacts from tourism accommodation establishments in rural spaces (Table 4). Across international research relevant factors have been isolated as impediments to the evolution and consolidation of local agriculture-tourism linkages. Influential works are by Meyer (2007), Torres & Momsen (2004, 2011) and, most recently, Mao et al. (2014). These studies demarcate a range of restrictive factors that cause low levels of local linkage between agriculture and tourism.

The critical limiting factors are summarized on Table 4. As disclosed by extant international research clusters of demand-related, supply-side and marketing and intermediary factors can constrain the extent and density of linkages between the tourism and agriculture sectors. Other limitations on developing linkages between local agriculture and tourism concern shortcomings with respect to policy oversight by national and local governments of potential linkage opportunities (Meyer, 2007; Rogerson, 2012; Mao et al., 2014). Research on tourism-agriculture linkages uncovers several vital influences that constrain the involvement of local producers in tourism supply chains (Torres & Momsen, 2004, 2011; Rogerson, 2012; Jenkins, 2014; Mao et al., 2014). Existing scholarship spotlights different influences that impact upon food supply procurement patterns and backward linkage development. The characteristics and strength of linkages are considered as associated with several demand-related, supply- or production related and marketing or intermediary factors (Torres, 2003; Meyer, 2007). In addition, government policy or lack thereof must be taken into consideration.

In terms of production-related issues, critical relevant factors are the nature of

local farming systems, the lack of local production of goods or types and quality of food demanded by tourists and/or the high prices of local products (Meyer, 2006; Lacher & Nepal, 2010). In the specific case of Botswana's Okavango Delta, Harrison & Maharaj (2013: 37) note as follows:

—local produce also tends to be erratic with regard to both the quantity produced from season to season and the quality of crops. This is due to farmers being reliant upon seasonal climatic conditions and fluctuating water sources. As a result the tourism industry tends to purchase imported produce.

One critical demand-related factor is the trajectory of tourism development with foreign-owned or managed enterprises and expatriate chefs reliant upon imports and noted as evolving only weak links to local producers (Torres, 2003; Meyer, 2006; Rylance et al., 2009). Further, larger and higher-end hotels trend towards using imported foods rather than locally grown produce (Telfer & Wall, 2000; Kock, 2013). As Jenkins (2014: 22) points out many tourists have conservative tastes and as such prefer to eat food that they are more familiar with. Existing scholarship suggests the opportunities for —creating demand for local foods is greatest among certain nationalities and with more adventurous non-mass tourists (Torres, 2003: 548).

Among others Torres & Momsen (2004) and Hunt & Rogerson (2013) stress that certain marketing or intermediary related factors also can assume a vital role in defining tourism-agriculture linkages. Among the most influential can be the availability and quality of regional transport and distribution infrastructure, kickbacks paid to local chefs by large food suppliers and the inexperience of local producers in marketing. Beyond these issues Meyer (2006: 31) forwards the frequently limited communications between the tourism and agricultural sector which —means that there is generally limited awareness of what is required by tourists and what can be

produced locally to satisfy the demands of the tourism sector. Most recently, the work of Mao et al (2014) on the constraints of agriculture-tourism linkages in the Siem Reap-Angkor region of Cambodia, flags the need to acknowledge separately the significance of agro-ecological supply constraints. Issues of concern relate not only to rural Asia but much of the developing world where agricultural products can be limited variously by poor soil fertility, unreliable rainfall, water pollution, pests, drought or floods. In the specific case of St Kitts, Jenkins (2014) pays particular attention to the role of pests as constraint on local agricultural production. Overall, with the growing impact of climate change upon tourism in the developing world critical agro-ecological constraints can no longer be ignored (see Gossling, 2011).

Although the available scholarship paints an uneven picture it points to the general conclusion that most tourism accommodation establishments in the developing world source their food supplies from wherever is cheapest, most reliable, most easily accessible, and of assured quality (Torres, 2003; Rogerson, 2012; Hunt & Rogerson, 2013). Most importantly, the predominant pattern is for high-end tourism establishments to source from distant and mainly large suppliers rather than from local small enterprises or poor entrepreneurs (Torres & Momsen, 2004). The implications of this pattern of sourcing food products from distant large-scale suppliers for local economies is to erode the pro-poor local impacts of tourism projects (Rylance et al., 2009; Hunt & Rogerson, 2013; Saarinen et al., 2013; Jenkins, 2014; Saarinen & Rogerson, 2014).

South Africa is an interesting research environment for examining local linkages because of policy commitments which have been made by national government (and certain local governments) towards 'responsible tourism' and local economic development

(LED) (Hunt & Rogerson, 2013; Rogerson, 2013). In the 2011 South African National Minimum Standard for Responsible Tourism it is recommended that tourism organizations should buy local which is defined as the local area within which the establishment is situated (Republic of South Africa, 2012). The drive by national government for greater local procurement and its take-up by certain local governments dovetails into interventions to support local development (Rogerson & Rogerson, 2010). Promoting local linkages is one element of local development initiatives undertaken by South African local governments. In most cases the focus on local procurement occurs through public procurement programmes which, in many cases, accord a preference to sourcing required goods and services from local suppliers and local enterprises. Few local governments go further and pursue active initiatives to encourage local content initiatives in the private sector. As is shown below, the need for such interventions is one theme which emerges from South African research on tourism-agriculture linkages.

A synopsis is given now of key findings on supply linkages from rural investigations conducted at different locations across South Africa by Hunt (2010), Rogerson (2012, 2013), Hunt & Rogerson (2013) and Rogerson et al. (2013). This discussion builds upon and extends further these writings. In a safari lodge investigation 80 interviews were collected. It was revealed that the vast majority of food served at South African lodges was sourced from national suppliers, a finding which reflects the well-developed character of the country's agricultural sector (Rogerson, 2012). In terms of local food sourcing, however, the survey tried to calculate the proportion of food supplies obtained from sources within a 40 km radius of the lodge. It revealed the extent of local goods sourcing was limited as safari lodges secured the largest amount of their required supplies from distant urban markets rather than from local

sources (Hunt & Rogerson, 2013). A critical set of results relate to geographical patterns of food sourcing, especially for supplies of fresh vegetables which are considered as offering the greatest opportunities for sourcing from local communities. In terms of local food sourcing, the survey determined only 38 percent of lodges sourced the bulk of fresh vegetables from within a 40 km radius of the lodge location. Rather, most lodges opt to source their supplies through an intermediary supplier enterprise rather than purchase supplies directly from local producers. Intermediary suppliers purchased fresh vegetables and fruit supplies from the Johannesburg Fresh Produce Market, the largest national wholesale market, with such supplies delivered by refrigerated truck directly to the lodges. Local supply sourcing of fresh food from rural areas thus was limited as the bulk of fresh food sourced from urban markets (Hunt & Rogerson, 2013).

The patterns of sourcing were found to vary between the different spatial clusters as well as between different kinds of food products (Rogerson, 2012). For example, a much higher degree of local sourcing of fresh food supplies was evidenced from the cluster of safari accommodation establishments situated in Western Cape as compared to those around Kruger National Park mainly because of their proximity to a well-established local and diversified agricultural sector supported by good local infrastructure (Hunt, 2010; Rogerson, 2013; Rogerson et al., 2013) Overall, in terms of tourism-agriculture linkages the most significant indicator related to supplier relationships concerning fresh vegetables. Strikingly, the overwhelming majority of safari lodges did not source the bulk of their fresh vegetable requirements from neighbouring local communities. Commonly, even in circumstances where local fresh produce is available, the majority of this local fresh produce is not sold directly to safari lodges but rather is channelled first to urban markets before returning back to the

lodges via the intermediary supplier. This arrangement adds greatly to the carbon footprint of these establishments and seemingly conflicts with commitments made to responsible tourism practices. Most commonly, the purchasing of local food is mainly either as 'top up' supplies for lodges or for use as staff rations (Rogerson, 2012; Hunt & Rogerson, 2013). The decision by accommodation establishments to use an intermediary supplier was made on grounds of convenience because of multiple difficulties of sourcing small amounts of goods and supplies from local enterprises. The results showed that only in isolated areas of South Africa, such as around Madikwe and areas surrounding the southern Kruger National Park, has the safari lodge industry managed to stimulate groups of small local producers to service part of the food supply chain of lodges and thereby to maximise local benefits from tourism development. Elsewhere widespread mistrust exists between tourism accommodation establishments concerning the reliability of local suppliers on the one hand and lack of information or awareness about the requirements of the safari lodge sector from producers on the other hand.

The findings confirm the most significant constraints on the establishment or strengthening of local linkages in rural South Africa are capacity shortcomings of local producers to offer the quality, consistency and volume of fresh produce required by nature tourism accommodation establishments (Hunt, 2010; Rogerson, 2012; Rogerson et al., 2013). For policy intervention of significance are findings that there is a need to transcend existing poor state of communication as well as deep mistrust between food supply decision-makers and local producers. Other policy considerations relate to the challenges around capacity building and support for small scale producers to enter into food supply chains. The research shows only limited local economic linkages exist

through the tourism-agriculture nexus. Linkages are constrained by a host of demand-side, supply-side and market related issues which mirror, to a large extent, several of the barriers as disclosed in international research. Government policy oversight is a further underpinning for missed opportunities around local supply chains (Hunt & Rogerson, 2013). One promising policy intervention is the establishment and roll out of a network of agricultural hubs which can provide extension support to small-scale farmers in order for them to build capacity to enter into public sector and potentially private sector supply chains. Overall, South African findings reinforce those conclusions reported also by Mao et al.(2014: 14) that in order to overcome blockages on local linkages —innovative and supportive government policy interventions aimed at improving the agriculture supply chain by fostering linkages between tourism and agriculture, would be necessary.

CONCLUSION

Improving local linkages must be an essential component on the tourism planning agenda (Scheyvens, 2011; Mao et al., 2014). The central argument in this paper is that nature tourism accommodation establishments potentially can be focal points for maximizing policy interventions to trigger expanded local impacts. In terms of policy and planning the analysis reveals the importance of understanding the issues around this form of tourism product development for local development. In many parts of South Africa, and most importantly in several of the country's priority rural development areas (which include former Homelands), the potential for local development linked to nature tourism must be understood and planned for. The findings in this investigation reveal the spatial distribution of nature tourism activities shows a widespread need for LED capacity

building and tourism training most especially for the country's poorer and less well-capacitated local governments. Given the weak state of tourism planning in these areas, the results of the audit of nature tourism accommodation establishments underlines the imperative both for capacity building programmes in local government as well as for engagement with the private sector enterprises engaged in nature tourism in launching local initiatives that can further galvanize tourism growth through local linkages. Of central importance is to acknowledge the current scale of external leakages and a need for enhancing opportunities for local suppliers to engage in the supply chain of the private sector accommodation providers.

International best practice points to the need for local interventions designed to raise the capacity of local enterprises to deliver at the quality standards and reliability required in nature tourism accommodation (Torres & Momsen, 2011; Rogerson et al., 2013). Support initiatives to build local linkages must compensate for the current lack of capacity of local producers to offer the quality, consistency and volume of fresh produce as required by nature accommodation providers. This challenge must be dealt with so that the goals of responsible tourism can be achieved (Rogerson, 2012). Tourism-agriculture linkages in rural South Africa are hindered by a host of demand- side, supply-side and market related issues which vary in different local areas (Hunt, 2010). The particular barrier issues in local areas need to be recognised particularly by local governments in order to enhance the potential for local producer participation in food supply chains. Overall, in South Africa the enhancement of tourism-agriculture linkages, including of local sourcing, necessitates that national governments and the tourism private sector both acknowledge the significance of boosting backward linkages through coordinated actions to address the specific local factors which presently

mitigate the formation of local supply linkages in the country's rural and often remote spaces (Hunt & Rogerson, 2013; Rogerson et al., 2013). This would constitute one necessary step for improving the integration of tourism within planning of local economies as well as a signal of progress towards responsible rural tourism planning in South Africa.

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