

Series of Papers on Rural-Urban Linkages: Tourism

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1. Background

The context for this investigation is the importance for SACN of developing an improved understanding of urban-rural interdependencies or linkages and of their implications for policy development and the development of strategic frameworks. Ndabeni (2013: 1) argues rural-urban linkages can be defined broadly as “the structural, social, economic, cultural, and political relationships maintained between individuals and groups in the urban environment and those in rural areas”. Rural-urban linkages involve both spatial and sectoral flows which occur between urban and rural environments. The former refers to, for example, flows of people, goods, money or information whereas the latter would incorporate agricultural goods moving from rural to urban areas or manufactured goods in the other direction (Ndabeni, 2013). The core aim of this project is to highlight and unpack the complexities in the relationships between the urban and the rural through undertaking an investigation of rural-urban linkages through the lens of one particular economic sector. More specifically, the central goal in this project is to undertake an economic analysis to deepen understanding of how the rural and urban interact and how such interactions might offer important policy or planning implications.

The select case sector is tourism which involves spatial and sectoral flows between urban and rural environments. From international experience it is evident that the growth of tourism and recreation activities can have critical impacts for local economies and especially for catalysing economic and social development in marginal regions or rural areas. For example, Hall (2007: 19) maintains that tourism represents “a significant tool” for regional and local development in many areas of both developed and developed countries. The significance of tourism is especially high in marginal, peripheral or rural areas where the sector has been used as a driver for economic growth, welfare and employment opportunities (Saarinen, 2007). In particular, across the developing world the need to promote and maximising the benefits of tourism for local communities is acknowledged as a vital policy issue, not least for planning for local economic development (Goodwin, 2006; Goodwin & Bah, 2013).

Since the democratic transition and South Africa’s reincorporation into the global tourism economy, the tourism sector has grown in economic and policy significance. Tourism has been identified in national government economic planning as a critical pillar for national economic development in the immediate future (Department of Tourism, 2011). Tourism is recognised as a priority economic sector with considerable potential for leveraging job creation and SMME development and thereby to contribute towards achieving goals as laid down in both the New Growth Path and the 2030 National Development Plan (National Planning Commission, 2011). The major planning framework guiding current development for the tourism sector is the National Tourism Sector Strategy which was launched in 2011 (Department of Tourism, 2011). Of note for rural development, however, is the appearance

in 2012 of the Rural Tourism Strategy and the National Heritage and Cultural Strategy both of which are targeted specifically to mobilize and maximise tourism assets and product development in rural areas and to address the uneven spatial development impacts of tourism in South Africa (Department of Tourism, 2012). Importantly, the tourism sector is viewed as a base for promoting local economic development across the spectrum of settlements from large urban centres, through secondary cities, small towns and rural areas. In many parts of South Africa the tourism sector is the lead sector for stimulating local economic development. This tourism sector economic analysis will address the core aims of the SACN Rural-Urban linkages project area and offer a body of evidence and insight into little understood dimensions of rural-urban dynamics and further to inform management interventions around the rural-urban nexus.

2. Organization, Methods and Sources

In terms of organization of material and discussion, four themes or sections of material will be presented. These four themes represent the bases of the work undertaken on this project.

- Theme 1: Understanding Tourism in Urban versus Rural Spaces:

This work will unpack the quantitative importance of tourism in urban and rural spaces of South Africa and assess the differential importance of different segments of tourism for urban versus rural spaces.

- Theme 2: Understanding Rural-Urban Interactions Through Tourism.

This work will examine and highlight the connectivities between rural and urban spaces that exist through tourism. It will examine the relationships between rural and urban spaces both on the demand side (the tourists) and the supply-side (the tourist product). The linkages between urban and rural spaces will be focussed through the lens of examining three different forms of tourism which link together urban and rural spaces. All the three case studies under investigation involve urban-rural mobilities for purposes of tourism consumption. The case studies are of nature-based tourism, agritourism (ie farm and farm products as the tourism product) and visiting friends and relatives (VFR) tourism.

- Theme 3: The Tourism-Food Nexus:

This section will narrow the focus upon the critical issue of linking together the sectors of tourism and agriculture. The limited planning around linking tourism and agriculture means that opportunities often are lost for maximising income opportunities in rural areas from visits by urban consumers. This section will focus specifically on the lucrative safari lodge market and examine food supply chains and flows of food produce between urban and rural environments.

- Theme 4: Policy Implications:

The concluding section of analysis will draw out policy and strategic issues around rural-urban linkages particularly relating to local economic development, enterprise development and urban-rural interdependence.

In terms of methodology and sources the study draws upon different approaches and sources. The project aims are addressed through a range of different source material and approaches. For Theme 1 an analysis of a local level data set on tourism accessed from Global Insight will be undertaken. This data base contains details of the tourism performance of all local authorities in the country in respect of *inter alia*, the number of tourism trips differentiated by purpose of trip; bednights by origin of tourist (domestic or international); calculation of tourism spend; and of the contribution of tourism to local gross domestic product. Data is available for the period 2001-2012 relating to travel as differentiated for all local, district and metropolitan authorities in the country. In terms of examining urban vs rural spaces cognisance is taken of the focus by the Department of Rural Development and Land Reform (DRDLR) upon promoting economic development in the 23 Priority District Municipalities or 'distressed areas' which essentially cover the former Homelands areas. In collaboration with DRDLR and CSIR the EDD is engaged in a regional economic programme which seeks to take up the development challenges of 23 priority district municipalities. These areas constitute South Africa's peripheral lagging regions which experience "high levels of poverty, service constraints, high unemployment and low levels of economic development" (CSIR, 2013: 2).

For Theme 2 on tourism urban-rural connectivities, the analysis will involve both an extended desk top review of existing research studies on South African tourism as well as the analysis of primary material. The desk research involves a review of material which incorporates recent academic scholarship on tourism as well as national and local policy documents. In terms of the three case studies on urban-rural interdependencies different source material is utilised. The discussion on VFR tourism is drawn mainly from an analysis of the Global Insight data. The analysis on agritourism and nature-based tourism is anchored upon a national audit that was undertaken of farm-based accommodation and nature-based accommodation. This audit draws upon an internet search and detailed analysis to build up a profile of nature tourism and of agritourism as examples of forms of tourism in rural spaces that engage urban consumers.

For Theme 3 a review of existing research studies is undertaken on international and local research around tourism-agriculture linkages and the food supply chains of rural safari lodges in order to highlight the complex policy issues around the urban-rural interface. The central focus is upon the food supply chain to rural safari lodges which are visited by mainly urban consumers from both international and domestic source markets. The final section is Theme 4 concerning the policy implications and recommendation. The material in this section draws from the analysis presented on Themes 1, 2 and 3 and offers a set of policy-related issues which flow out of the analysis of tourism urban-rural linkages.

3. Understanding Tourism in Urban vs Rural Spaces

The purpose of this section is to demonstrate the different patterns of tourism and characteristics of the tourism economies in urban vs rural spaces. In undertaking this task the focus is upon three sets of national regions or different spaces. First, is the group of metropolitan areas which we have taken as the eight recognized metropolitan municipalities of Buffalo City, Cape Town, Ekurhuleni, eThekweni, Johannesburg, Mangaung, Nelson Mandela Bay, and Tshwane. Second, is the group of 23 Priority Development Districts / Distressed Areas, which cover the former Homelands, and are the specific focus of national government development interventions led by DRDLR. For the most part these are deep rural spaces although it should be noted that they include the two provincial capitals and significant secondary centres of Nelspruit and Polokwane. The three group is what might be called intermediate spaces and is represented by those District Municipalities which are not priority areas for current government planning intervention. In large part these are more prosperous rural spaces which also include a number of important secondary centres such as George, Kimberley, Knysna, Rustenburg and Stellenbosch.

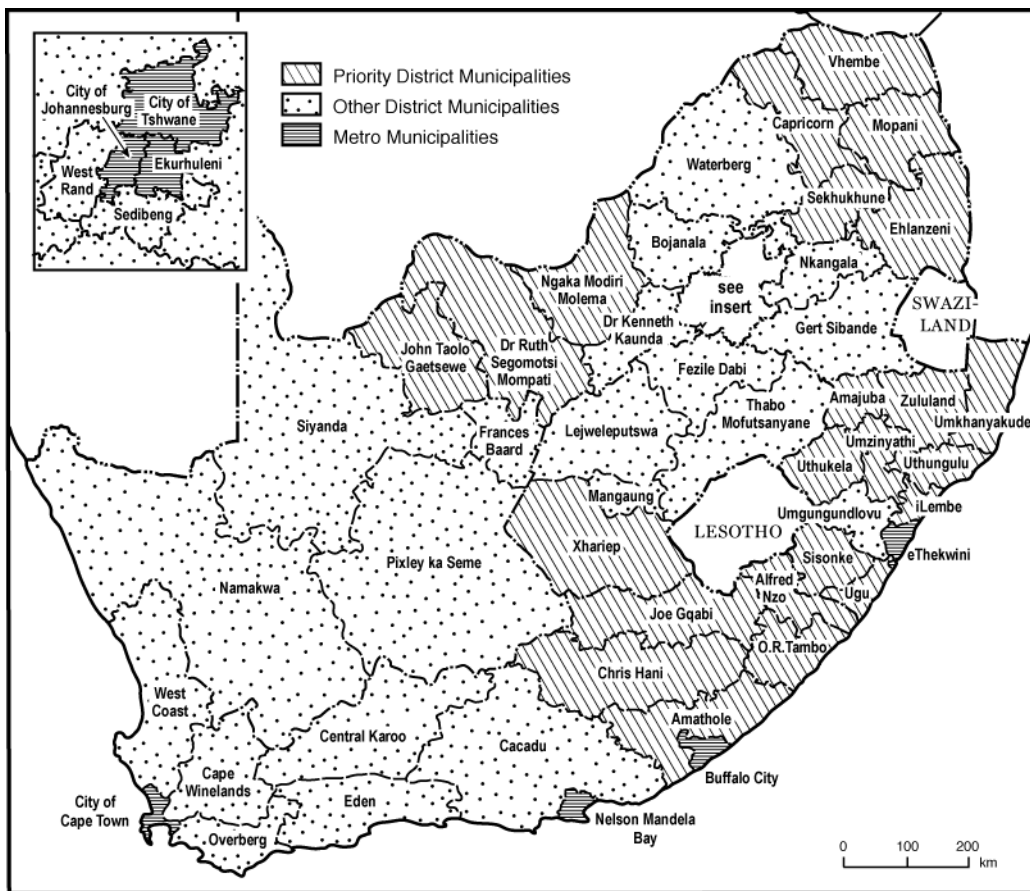


Figure 1: The three different sets of economic spaces under investigation

These three groups of municipalities – the metropolitan areas or large urban areas, the 23 priority development districts or distressed areas, and the intermediate space of the non-priority districts form the basis for understanding tourism in urban versus rural spaces of South Africa. Figure 1 shows in detail the three sets of regions under investigation. The analysis of tourism flows uses the Global Insight data base which is the only municipal level data available relating to tourism in South Africa.

Table 1: Total tourism trips and bednights, 2001-2012 by region

	Metros		Priority Districts		Non-Priority Districts	
	Total Tourism Trips	Total Bednights	Total Tourism Trips	Total Bednights	Total Tourism Trips	Total Bednights
2001	9018345	65461209	7585502	4772428	6543855	44476414
2006	11825467	76175235	12363895	60970522	9046914	52439199
2010	14026046	89580599	13136571	68556141	10210274	57720126
2012	13586902	90759798	11707606	66363634	9251392	59538774

Source: Author calculations from Global Insight data

Table 2: Total tourism trips and bednights, 2001-2012, share of national total

	Metros		Priority Districts		Non-Priority Districts	
	Total Tourism Trips	Total Bednights	Total Tourism Trips	Total Bednights	Total Tourism Trips	Total Bednights
2001	39.0	41.5	32.8	30.3	28.3	28.2
2006	35.6	40.2	37.2	32.2	27.2	27.7
2010	37.5	41.5	35.2	31.8	27.3	26.7
2012	39.3	41.9	33.9	30.6	26.8	27.5

Source: Author calculations from Global Insight data

Table 3: Estimated total tourism spend by region (R1000, Current Prices)

	Metros		Priority Districts		Non-Priority Districts	
	Tourism Spend	Percent	Tourism Spend	Percent	Tourism Spend	Percent
2001	33731482	52.7	10575898	16.5	19711374	30.8
2006	61167164	51.3	21982508	18.4	36061357	30.3
2010	86943420	51.6	32570084	19.3	48981496	29.1
2012	88604362	53.6	33024060	20.0	43739941	26.4

Source: Author calculations from Global Insight data

Tables 1, 2 and 3 provide a profile of the growth of tourism in the three areas as a whole. Several important trends can be observed. Table 1 discloses that between 2001 and 2012 there has been a net growth in indicators of numbers of tourism trips and bednights. The net expansion of trips and bednights varies across the three regions showing uneven patterns of tourism growth. For example, the metropolitan areas expand by respectively 4.6 million trips and 25.3 million bednights or 50.7 percent and 38.6 percent growth as compared to an expansion of 2.8 million trips and 15.5 million bednights in the priority districts representing respective growth of 43.0 percent and 34.8 percent. It is observed that whilst the numbers of tourism trips to all three regions peak in 2010, the year of South Africa's hosting of the FIFA World Cup, that bednights have continued to grow between 2010 and 2012. The unevenness of growth across the three regions is evidenced in Table 2 which shows their relative share of total trips and bednights for the period 2001-2012.

Certain minor shifts have taken place in this period most notably that in terms of both total tourism trips and bednights there is an increased share for the metropolitan areas and the priority districts with a reduction in relative share of the intermediate spaces of the non-priority districts. Table 3 directs attention to the important issues of estimated tourism spend in each of the three regions. Three points are of note. First, is the growth in tourism spend in each of the three regions. Second, is that uneven rates of growth is reflected in the rising relative share of total visitor spend which is captured by both the metropolitan areas and the priority districts at the expense of the intermediate spaces as a whole. Three, it is observed however that if a comparison is undertaken of the relative share of total trips and visitor spend that the visitor spend proportion is higher in both metropolitan areas and the intermediate spaces and lower in the priority districts. This finding points to the higher value of average tourism trips taken to destinations in the metropolitan areas and intermediate spaces as compared to the lower spend on trips taken to destinations in the priority districts.

Table 4: Total tourism trips by source

	National		Metros		Priority Districts		Non-Priority Districts	
	Domestic	International	Domestic	International	Domestic	International	Domestic	International
2001	83.6	16.4	79.4	20.6	91.2	8.8	80.5	19.5
2006	83.4	16.6	77.1	22.9	91.3	8.7	80.9	19.1
2010	79.9	20.1	74.2	25.8	87.6	12.4	60.1	39.9
2012	75.0	25.0	69.4	30.6	83.8	16.2	57.2	42.8

Source: Author calculations from Global Insight data

Table 5: Total bednights by source

	National		Metros		Priority Districts		Non-Priority Districts	
	Domestic	International	Domestic	International	Domestic	International	Domestic	International
2001	77.3	22.7	71.9	28.1	88.4	11.6	73.3	26.7
2006	76.3	23.7	69.6	30.4	88.6	11.4	71.5	28.5
2010	70.7	29.3	61.9	38.2	84.4	15.6	68.2	31.8
2012	66.7	33.3	56.7	43.3	83.6	16.4	62.9	37.1

Source: Author calculations from Global Insight data

Tables 4 and 5 disaggregate the data for numbers of trips and bednights in terms of source of visitor, whether domestic or international. The category 'international' includes both the lucrative market of longhaul travellers to South Africa, mainly leisure tourists from Europe and the USA, as well as the market of regional African tourists, the largest share of which are involved in cross-border shopping/trading and business tourism rather than leisure tourism (Rogerson & Visser, 2006). It is shown on Tables 4 and 5 that the sources of tourists differ greatly between the different tourism spaces. It is observed that in particular the tourism economy of the priority districts is heavily dominated by domestic visitors. A comparison of the three regions with the national profile of tourists shows that as indexed both by trips and bednights that the relative importance of metropolitan areas for international tourists as opposed to domestic tourists is increasing in significance. In addition, the tourism trips in the intermediate spaces are weighted proportionately towards international

rather than domestic visitors. By contrast, in the priority districts, there is an overwhelming concentration of domestic tourists in these areas.

Table 6: Total trips by purpose of travel

	SA				Metros				Priority Districts				Non-Priority Districts			
	L	B	VFR	O	L	B	VFR	O	L	B	VFR	O	L	B	VFR	O
2001	22.4	10.8	57.3	9.5	27.1	14.2	51.7	6.9	11.1	5.4	69.0	14.5	29.1	12.4	51.3	7.2
2006	16.1	9.2	67.3	7.3	19.4	13.2	61.5	5.9	9.1	4.6	76.5	9.9	21.4	10.3	62.5	5.8
2010	19.9	10.2	63.1	6.9	23.6	14.9	56.1	5.4	12.1	5.2	72.8	9.9	24.7	10.2	60.1	4.9
2012	19.7	11.9	60.8	7.7	24.4	17.9	51.1	6.6	12.1	5.7	71.8	10.4	22.3	10.8	61.1	5.7

Source: Author calculations from Global Insight data

Table 6 is striking in terms of showing the relative shares of trips in terms of purpose of travel. Four categories of tourism are recognised, namely leisure (L), business (B), visiting friends and relatives (VFR) and other (O), which is mainly constituted by religious travel and travel for health purposes. It is shown that in terms of absolute numbers of trips the largest proportion of tourism to all destinations is represented by VFR travel. This finding is in line with national data that VFR travel in 2012 accounted for 60.8 of all tourism trips. Beyond VFR travel, the next most significant purposes of travel in terms of national patterns are travel for leisure and business purposes with the category other of only minor significance. A comparison of the relative profiles of these different categories of travel between the three different regions discloses, however, some significant differences.

Undertaking a comparison between the regional versus the national share of different forms of tourism the following observations can be made (Table 6). First, tourism to metropolitan destinations is relatively concentrated in leisure and business travel which are the two most lucrative forms of tourism as indexed by average spend per trip. Further, between 2001 and 2012 the relative share of metropolitan destinations in business tourism expands markedly from 14.2 percent to 17.9 percent. The forms of tourism which in relative terms are under-represented in metropolitan destinations as compared to the national situation are VFR travel and the category of other travel. Second, in the priority districts a contrasting picture emerges. In these areas the concentration in tourism trips is for VFR travel and other trips whereas the categories of leisure and business tourism in relative terms are underperforming. It is shown that in relative terms the share of VFR trips accounted for by the priority districts records an increase from 69.0 to 71.8 percent of all VFR trips in South

Africa. The significance of the category other in the priority districts is accounted for by religious pilgrimages. In these areas are the major pilgrimage sites of large African independent churches in South Africa, including in Limpopo, Moria village, site of the Zion Christian Church and Ha-Mavhungu village of the United African Apostolic Church; and, in KwaZulu-Natal the sacred places of the Nazareth Baptist Church. At various times of the year these (and other sacred) locations attract large gatherings of church followers with the most important, Zion City, drawing a more than one million church members for several days during the Easter pilgrimage. Finally, for the group of intermediate spaces the most striking observation is that the tourism economies of these areas are most strongly dominated by the lucrative leisure tourism market. As a whole these areas are under-represented in the remaining forms of travel, albeit with the exception that in 2012 the share of VFR trips marginally exceeded the national proportion.

Table 7: Metropolitan Areas Profile: Share of National Tourism – Summary Indicators

Indicator	2001	2006	2010	2012
Total Tourism Trips	39.0	35.6	37.5	39.3
Total Domestic Trips	37.0	32.9	34.8	36.4
Total International Trips	48.9	49.3	48.2	48.1
Total Leisure Trips	47.1	42.9	44.6	48.8
Total Business Trips	51.3	51.2	54.7	59.4
Total VFR Trips	35.2	32.5	33.4	33.0
Total Other Trips	28.3	28.6	29.7	33.8
Total Bednights	41.5	40.2	41.5	41.9
Total Domestic Bednights	38.6	36.7	36.3	35.6
Total International Bednights	51.4	51.4	54.0	54.4

Source: Author calculations from Global Insight data

Table 8: Priority Districts Profile: Share of National Tourism – Summary Indicators

Indicator	2001	2006	2010	2012
Total Tourism Trips	32.8	37.2	35.2	33.9
Total Domestic Trips	35.8	40.7	38.5	37.9
Total International Trips	17.7	19.7	21.8	22.0
Total Leisure Trips	16.3	20.9	21.4	20.8
Total Business Trips	16.4	18.4	18.0	16.3
Total VFR Trips	39.5	42.3	40.6	40.0
Total Other Trips	50.2	50.1	50.9	46.2
Total Bednights	30.3	32.2	31.8	30.6
Total Domestic Bednights	34.6	37.4	37.9	38.4
Total International Bednights	15.6	16.2	15.6	15.4

Source: Author calculations from Global Insight data

Table 9: Non-Priority Districts Profile: Share of National Tourism – Summary Indicators

Indicator	2001	2006	2010	2012
Total Tourism Trips	28.3	27.2	27.3	26.8
Total Domestic Trips	27.2	26.4	26.7	25.7
Total International Trips	33.4	31.1	29.9	29.9
Total Leisure Trips	36.7	36.2	34.0	30.4
Total Business Trips	32.3	30.4	27.3	24.3

Total VFR Trips	25.3	25.3	26.0	26.9
Total Other Trips	21.5	21.4	19.4	20.0
Total Bednights	28.2	27.7	26.7	27.5
Total Domestic Bednights	26.8	25.9	25.8	25.9
Total International Bednights	33.0	32.4	30.4	30.2

Source: Author calculations from Global Insight data

Overall these findings about purpose of travel provide a base for interpreting the lower visitor spend which was recorded per trip in priority districts as compared to the higher proportion of spend which accrues per trip in both metropolitan destinations and the intermediate spaces. What is revealed in Tables 1-6 as a whole is a different profile and performance of tourism in the three different sets of regions, namely the metropolitan areas, the intermediate spaces and the priority districts. The key indicators relating to these three different regions are captured in summary form in Tables 7, 8 and 9. These confirm the important point that urban and rural spaces of tourism in South Africa exhibit different characteristics in terms of growth performance (numbers of trips, bednights and visitor spend), origin of visitors (domestic versus international) and purpose of travel (leisure, business, VFR and other). Among the most notable observations are the following:

- Different forms of tourism economies exist in urban (metros) vs priority areas vs non-priority areas
- All regions growing but differently
- The metropolitan areas gain largest share of tourism spend
- The metropolitan areas are relatively concentrated for leisure and business travel and not for VFR or other
- The metropolitan areas are relatively concentrated for international as opposed to domestic travel
- Priority districts concentrate massively on domestic, VFR and other (religious/health) travel
- Priority districts have limited business travel/international travel and some leisure tourism
- The intermediate spaces or non-priority districts are especially strong on leisure travel and have a high share of international travel

In interpreting these results it must be reiterated that they relate to the aggregate categories of metropolitan areas, priority districts and intermediate spaces or non-priority districts. The important caution must be made that each of these three sets of regions is diverse in terms of tourism flows and development. A full discussion of these differences would demand separate and comprehensive analyses for the metropolitan areas, priority districts and

intermediate spaces. For purposes of this analysis it is necessary to indicate that variations exist between the different metropolitan areas, between several of the priority districts and between the different non-priority districts or areas defined as intermediate spaces.

Table 10: Domestic Tourism Bednights by Metropolitan Area 2001-2012

	2001		2006		2010		2012	
	Trips	%	Trips	%	Trips	%	Trips	%
Buffalo City	2830587	6.0	3410734	6.4	4128026	7.4	3135909	6.1
Cape Town	10247719	21.8	9814343	18.5	9181313	16.6	6808278	13.2
Ekurhuleni	5965658	12.7	5925644	11.2	5562390	10.0	5816428	11.3
Ethekwini	7903763	16.8	12602922	23.8	14548886	26.2	13906728	27.0
Johannesburg	8877633	18.9	9305058	17.5	9313495	16.8	10113889	19.6
Mangaung	1906779	4.1	2257065	4.3	2007581	3.6	1309819	2.5
Nelson Mandela Bay	3126697	6.6	3747082	7.1	4548237	8.2	3411142	6.6
Tshwane	6170488	13.1	5963871	11.2	6185718	11.2	6976638	13.6

Source: Author calculations from Global Insight data

Table 11: International Tourism Bednights by Metropolitan Area 2001-2012

	2001		2006		2010		2012	
	Trips	%	Trips	%	Trips	%	Trips	%
Buffalo City	613551	3.3	563570	2.4	586691	1.7	625918	1.6
Cape Town	4018646	21.8	6280106	27.1	8760679	25.7	9953284	25.3
Ekurhuleni	1926275	10.5	2366178	10.2	4390401	12.9	5898995	15.0
Ethekwini	2349906	12.8	2623180	11.3	2718561	8.0	3284251	8.4
Johannesburg	4469055	24.3	5743501	24.8	9273669	27.2	10031295	25.5
Mangaung	922376	5.0	721959	3.1	1051951	3.1	1387101	3.5
Nelson Mandela Bay	446200	2.4	570073	2.5	659823	1.9	814332	2.1
Tshwane	3685891	20.0	4217605	18.2	6672382	19.6	7279916	18.5

Source: Author calculations from Global Insight data

Table 12: Selected Non-Priority Districts, Number of trips and bednights by origin of tourist

	Trips		Bednights					
	Domestic	International	Domestic	International	Domestic	International		
	2001	2012	2001	2012	2001	2012	2001	2012
West Coast	80.3	68.4	19.7	31.6	67.9	43.8	32.1	56.1
Cape Winelands	79.3	68.1	20.7	31.9	66.1	43.7	33.8	56.3
Overberg	73.0	64.1	27.0	36.0	56.7	39.6	43.4	60.4
Eden	77.8	67.1	22.2	32.9	63.6	42.1	36.3	57.9
Central Karoo	82.9	70.1	17.1	29.8	71.9	46.8	28.1	53.2
Frances Baard	86.0	78.4	14.0	21.6	85.7	81.5	14.3	18.5
Bojanala	83.0	70.0	17.0	30.1	79.4	74.1	20.6	25.9
Waterberg	93.0	62.4	7.0	37.6	88.9	70.3	11.1	29.7

Source: Author calculations from Global Insight data

Table 13: Selected Non-Priority Districts, Number of trips by purpose

	Leisure		Business		VFR		Other	
	2001	2012	2001	2012	2001	2012	2001	2012
West Coast	39.9	38.6	14.8	16.0	40.8	42.1	4.5	3.3
Cape Winelands	44.6	43.9	14.1	15.3	35.5	36.5	5.7	4.2
Overberg	59.5	54.3	17.1	17.9	20.7	25.3	2.7	2.4
Eden	57.7	36.3	13.5	10.5	26.2	51.8	2.6	1.5
Central Karoo	30.2	44.8	14.6	23.0	50.7	30.0	4.7	2.3
Frances Baard	20.0	17.7	14.0	17.6	61.5	61.3	4.5	3.4
Bojanala	20.5	17.1	10.5	10.0	59.3	65.3	9.7	7.6
Waterberg	37.4	35.6	5.3	7.0	53.0	55.4	4.3	2.0

Source: Author calculations from Global Insight data

Table 14: Selected Priority Districts, Number of trips and bednights by origin of tourist

	Trips		Bednights					
	Domestic	International	Domestic	International	Domestic	International	Domestic	International
	2001	2012	2001	2012	2001	2012	2001	2012
Amatole	95.9	94.7	4.1	5.3	94.9	89.8	5.1	10.2
O.R. Tambo	95.5	93.0	4.5	7.0	94.3	86.5	5.7	13.5
Alfred Nzo	97.1	95.4	2.9	4.6	96.7	90.7	3.3	9.3
Uthukela	90.0	87.0	10.0	13.0	84.0	80.0	16.0	20.0
Uthungulu	92.3	89.8	7.7	10.2	88.4	84.8	11.6	15.2
Zululand	92.9	93.3	7.1	6.7	89.1	89.3	10.9	10.7
Sisonke	89.6	95.8	10.5	4.1	84.0	93.6	16.0	6.4
Ehlanzeni	70.8	61.1	29.3	38.9	71.6	67.1	28.3	32.9
Capricorn	95.5	79.2	4.5	20.9	92.1	81.6	7.9	18.4

Source: Author calculations from Global Insight data

Table 15: Selected Priority Districts, Number of trips by purpose

	Leisure		Business		VFR		Other	
	2001	2012	2001	2012	2001	2012	2001	2012
Amatole	7.1	6.1	3.7	3.6	84.7	86.9	4.5	3.4
O.R. Tambo	6.6	5.9	3.9	4.9	80.1	79.5	9.5	9.7
Alfred Nzo	1.9	1.6	1.9	2.0	86.7	87.5	9.6	8.9
Uthukela	13.3	11.4	6.6	4.6	71.2	77.1	9.0	6.9
Uthungulu	9.8	11.5	5.0	5.4	83.7	81.7	1.5	1.4
Zululand	7.5	5.9	3.5	2.9	77.9	81.0	11.1	10.2
Sisonke	13.6	4.7	5.7	2.4	78.9	92.2	1.7	0.8
Ehlanzeni	28.8	29.6	12.3	9.8	50.1	55.1	8.9	5.6
Capricorn	7.0	8.4	3.6	7.4	41.9	49.2	47.4	35.1

Source: Author calculations from Global Insight data

These variations and different trajectories of tourism development are illustrated here with the findings shown below in Tables 10 and-11 for metropolitan areas, Tables 12 and 13 for a selection of non-priority districts and in Tables 14 and 15 for a selection of the 23 priority districts. Illustrative points to observe which confirming the existence of marked variations within the three categories of regions or spaces are:

- Between the eight metropolitan areas Cape Town is distinguished by a declining role and share of domestic tourism as opposed to a strengthened role in international tourism. By contrast EtheKwini shows the obverse picture and is strengthening as a focus for domestic tourism whilst weakening in terms of its role and relative share for international tourism.
- Between the group of priority districts major variations exist in the patterns of travel to destinations with the contrasts especially evident between districts such as Ehlanzeni and those in northern KwaZulu-Natal which border or are close to nature protected areas as opposed to deep rural spaces such as Alfred Nzo, Sisonke or Vhembe where the tourism economy is overwhelmingly focussed around only VFR travel. The districts where religious travel is extensive such as Capricorn also emerge as highly distinctive in terms of their profile.

- Finally, major variations can also be observed in terms of the intermediate spaces or non-priority districts. Highly distinctive in terms of the strength of their leisure components are for example the districts of Bojanala, which includes the Sun City mega-resort, the Cape Winelands and the Waterberg, which is one of the fastest growing leisure destinations in the whole of South Africa.

4. Understanding Rural-Urban Linkages through Tourism

Rural-urban linkages through tourism take a variety of forms. Connections between urban and rural spaces through tourism take many forms including both spatial and sectoral flows. Among the spatial flows are investment channelled from urban areas into rural tourism products and tourism movements from urban to rural areas for various purposes as well as counter flows from rural to urban areas for various trip purposes. In terms of sectoral flows once again a range of these flows occur through tourism including of supply chain linkages both from urban to rural environments of a range of commodities and from rural to urban areas of mainly agricultural products.

In this section of the study the connections between urban and rural tourism spaces will be illustrated in terms of the following discussion. First, a detailed examination is undertaken of VFR tourism as the most distinctive link between urban and rural spaces. Second, the focus turns to interrogate the development patterns of tourism products in rural areas which are targeted for urban consumers. Two case studies are given of agrotourism and nature tourism products.

4.1 VFR Travel: Linking Rural and Urban Spaces

The segment of visiting, friends and relatives is one of the largest components of the tourism economies (Backer, 2012a, 2012b; Griffin, 2013a, 2013b). The size of VFR travel is estimated to form approximately half of the US pleasure travel market (Hu and Morrison, 2002) and in the case of Australia more than half of the country's domestic travel market (Backer, 2010a). Overall, Backer (2010a, 2012b) puts forward a definition that "VFR Tourism is a form of tourism involving a visit whereby either (or both) the purpose of the trip or the type of accommodation involves visiting friends and/or relatives". This definition is unpacked by several other investigators. For example, in interpreting the drive VFR market as a substantial component of the tourism economy of Florida (USA), Pennington-Gray (2003) builds upon the contribution of Moscardo et al. (2000) and identifies three segments. The three segments are *inter alia*, travellers whose main purpose is to visit friends and relatives, travellers whose main purpose is to visit friends and relatives but choose to stay in commercial accommodation; and travellers whose core purpose is not visiting friends and relatives but who stay with friends and relatives (Pennington-Gray, 2003). In a parallel categorisation of the VFR market Backer (2012a: 75) draws a distinction also between three groups. The first are 'pure' VFRs who are travellers who stay with friends and relatives and state VFR as the main purpose of a trip. Second, are the CVFRs or commercial accommodation VFRs who stay in commercial forms of lodging but who have travelled to particular destinations with a VFR purpose. Lastly, there are EVFRs who are styled as 'exploiting' VFRs as they are staying with friends and relatives, albeit the visit to them is not the prime purpose of a visit.

From this segmented perspective VFR travellers are not always attracted solely by hosts but instead the volume of VFR travel can be influenced in many cases by the attractiveness of the destination. This means that whilst any locality potentially can host VFR travellers the attractiveness of a particular locality may influence the amount of visitor spend as well as length of stay and, as such broaden the local impact of VFR travel upon the destination economy (Backer, 2008). For destinations the advantages of attracting such visitors can be substantial as VFR tourists are considered “less susceptible than other forms of tourism to seasonality issues” and can be a stabilising buffer against the economic shocks and downturns that can impact upon leisure travel (Backer, 2012b: 83). The economic implications of expanded VFR travel encompass more stable demand, greater dispersal of spending and the involvement of local residents as consumers (Griffin, 2013b). Asiedu (2008: 613) concurs that VFR travellers make substantial contributions to local economies, especially to restaurants, attractions and other tourism-related activities and that their longer stays in destinations compensates for their lower-than average spending habits as it offers opportunities for local spend. Arguably, therefore, in peripheral and remote areas particularly in advanced countries where historically outmigration has occurred, VFR tourism may constitute “an appropriate form of tourism” as shown by research in marginal regions of Scotland (Boyne et al., 2002: 253).

The pioneer works on VFR tourism pointed to its potential for local economic development impacts at destinations (Jackson, 1990). Based upon Australian research the influential works of Backer (2007, 2010a, 2010b, 2012a) confirm the economic implications of VFR tourism should not be overlooked for local development. In other recent scholarship the positive social impacts of expanded VFR tourism are highlighted. These include the ability of local communities to absorb the impacts of VFR tourism more readily than other forms of tourism and the potential beneficial impacts for the cultural and environmental aspects of local community development (Griffin, 2013b). In the case of the Pacific island of Niue it was revealed VFR tourism plays an important role in ensuring the survival of local culture and language as well as contributing to economic development and livelihoods through the skills and knowledge brought in by VFR travellers (Laskai, 2013). As a whole Griffin (2013b) contends that VFR tourism can be considered a sustainable form of tourism and offer destinations a viable strategy for sustainable tourism development.

VFR travel is among the least well-understood dimensions of the South African tourism economy (Rogerson, 2015). The National Tourism Sector Strategy, produced by South Africa’s National Department of Tourism, recognizes the so-termed ‘lack of travel culture’ amongst the country’s black population and that the dominant purpose for travel is VFR in which spending is usually lower than for leisure travel (Department of Tourism, 2011). It has been shown that VFR tourism is the largest element of the domestic tourism sector in South Africa (Rule et al., 2004; Rogerson and Lisa, 2005). In addition, the drivers of VFR tourism in South Africa are acknowledged as markedly different to those of, for example, leisure or business tourism (Rogerson, 2013). This said, in light of its size and importance for domestic tourism it is remarkable given the growth in tourism scholarship in South Africa over the past decade that minimal attention has been accorded VFR tourism. The only existing academic contribution which specifically relates to VFR travel in South Africa is that by Rule et al. (2004) which appeared a decade ago. These authors argued that policies and programmes to promote tourism as a major sector of the South African economy must “not forget VFR tourists” (Rule et al., 2004: 99).

VFR tourism is not a new phenomenon in South Africa. In terms of international tourism, visits to South Africa by overseas friends and relatives was one of the few growth segments during the era of international travel sanctions as experienced in the apartheid years. VFR

travel was an essential component also of the early emergence of domestic tourism amongst the country's white population (Rogerson and Lisa, 2005). This said, with the growth of Black urbanisation from the 1930s it is likely that the phenomenon of VFR travel involving return visits to rural areas with already was an established form of mobility, albeit uncounted in official tourism statistics. The major part of the expansion of VFR travel in South Africa is explained as a consequence of the growth and reinforcement of a migratory labour system.

The migrant labour system was inseparable from legislation and an apparatus of control that constrained the urbanization of Black communities (Steinbrink, 2010). With the transition to democracy in 1994, many analysts assumed with the collapse of the apartheid controls that circular migration between urban and rural areas would erode as people could settle permanently close to their urban places of work. The evidence suggests this not to have occurred as circular migration continues to be important (Todes et al., 2010). The continuation and even expansion of circular migration has produced in many parts of South Africa the formation of translocal households which transcend rural-urban boundaries and are maintained across considerable distance (Steinbrink, 2010). Steinbrink (2009: 248) points out "it can be assumed that the majority of the population in the rural areas of former homelands and also large parts of the population living within or on the fringes of urban centres are embedded in translocal contexts". Smit (1998: 77) found that "for many people in low-income areas of Durban, the urban area is only a temporary place to stay and the rural home is regarded as the real home". Similar findings have been revealed from other studies on migration and urbanisation in South Africa (Lohnert and Steinbrink, 2005; Steinbrink, 2009, 2010; Todes et al., 2010).

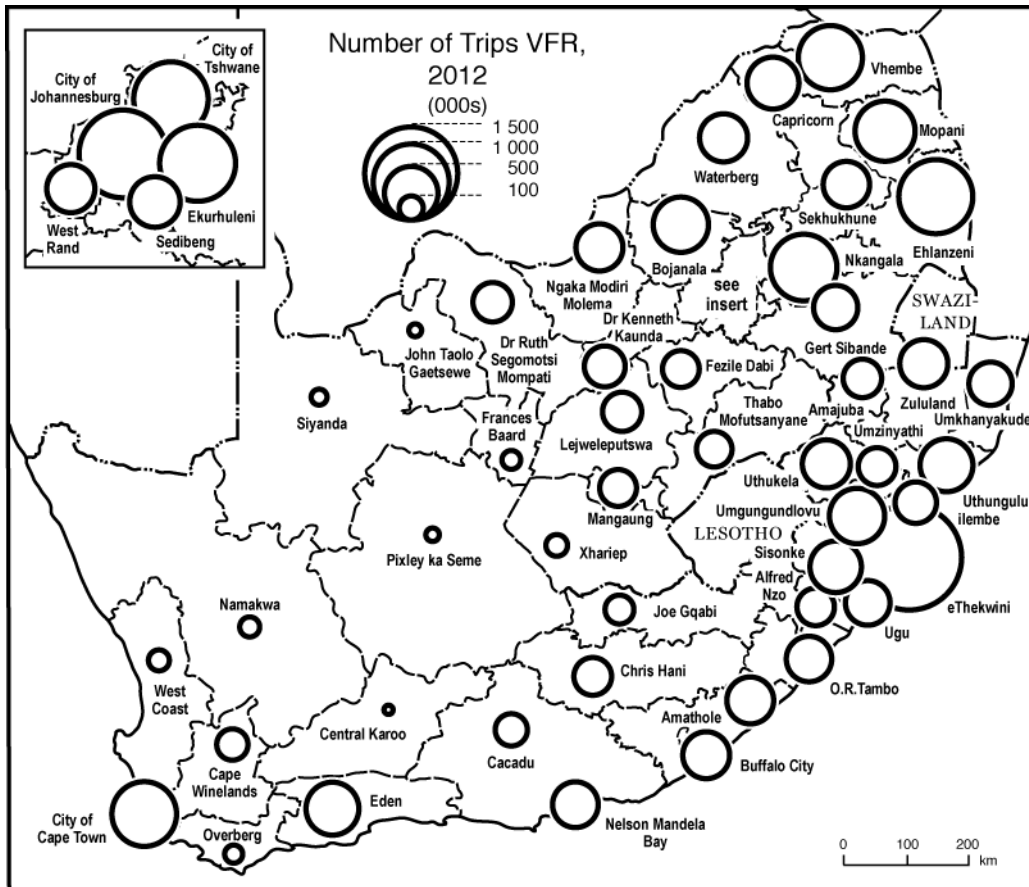


Figure 2: Spatial Distribution of VFR Tourism, 2012 (Source: Rogerson, 2015 based on Global Insight)

VFR tourism demonstrates clearly the linkages or connectivities that exist between urban and rural spaces. In terms of actual numbers of trips between 2001 and 2010 the amount of VFR travel escalated from 13.3 million trips to 23.6 million, a growth of 77.4 percent. Nevertheless, as a reflection of the global financial crisis and the economic downturn which has impacted South Africa since 2010 the numbers of VFR travellers has been reduced and by 2012 was at 21.0 million trips. The contemporary spatial patterns of VFR tourism show a close (but not perfect) relationship to the national distribution of population (Rogerson, 2005).

Figure 2 shows the number of VFR trips according to each local municipality in the country for 2012. It reveals a number of significant findings. First, that South Africa's largest cities are the major destinations for VFR travel and therefore that VFR travel is an important constituent of the expanding urban tourism economies of cities such as Johannesburg, Cape Town, Durban, or Pretoria. It is shown that in terms of local municipalities the four largest VFR destinations are Ethekwini (Durban), the City of Johannesburg, the adjoining municipality of Ekurhuleni, and the City of Tshwane (Pretoria). Together these four municipalities are destinations which account for 24 percent of all VFR travel in South Africa. Second, Figure 2 reveals a large number of mainly rural municipalities which are significant destinations for VFR travel in South Africa. District municipalities such as Capricorn, Vhembe, Ehlanzeni, Mopani, O.R. Tambo, Uthungulu, Amatole or uMgungundlovu are large receiving destinations for VFR travel. These particular district

municipalities encompass the major parts of what formerly were known as the Homelands or Bantustan areas that were created under apartheid. The Homeland areas traditionally were the source regions of migrant labour for the cities of South Africa. Indeed, such areas were the sending regions for ‘cheap labour’ and were created by a coercive labour regime that separated geographically the areas of labour force maintenance and renewal (Wolpe, 1972). The historical emergence and growth of VFR travel in South Africa therefore is essentially the other side of the making of a cheap migrant labour economy, part and parcel of the political economy of capitalist development.

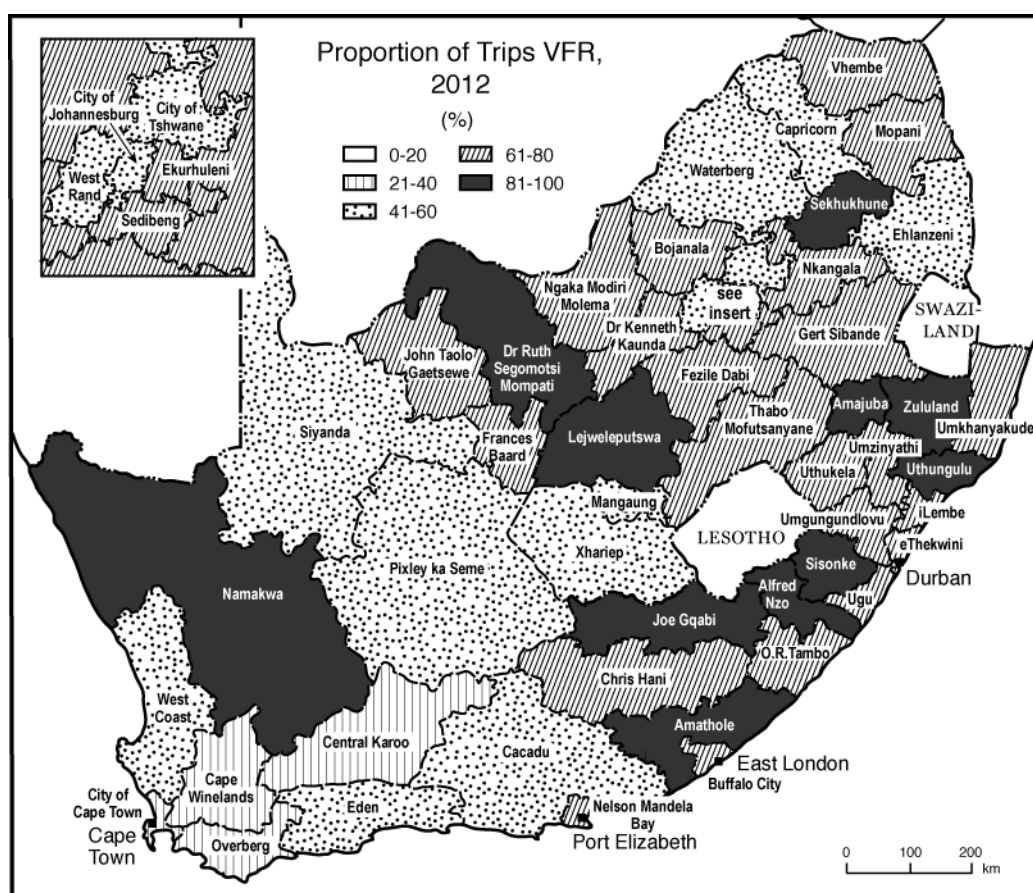


Figure 3: The Relative Share of VFR Trips in all trips for each municipality in South Africa, 2012 (Source: Rogerson, 2015)

Figure 3 maps out the proportion of VFR trips as a share of all travel trips for each local municipal area in South Africa. The geographical distribution and local impacts of VFR tourism in South Africa reflect a complex set of issues which relate to urban-rural mobilities, the maintenance of a rural ‘home’ by many black urban dwellers as well as a small layer of white domestic VFR tourism. Notwithstanding the large scale nature of VFR tourism the policy environment in South Africa mainly overlooks this aspect of the tourism economy which potentially can impact upon local economies. A number of important points can be observed. First, although the actual volume of VFR trips in South Africa’s major metropolitan centres is substantial, in relative terms the importance of VFR travel is diminished. Second, in several parts of South Africa VFR travel constitutes only a small

element in total recorded trips. In particular throughout much of the Western Cape the proportion of VFR travel in total travel is much less than the national average. For the Cape Winelands, Overberg and Eden municipalities, all attractive leisure destinations, VFR travel is only a minor component of local tourism economies. Three, the most striking feature of Figure 3 is the almost exclusive dominance of visitor trips in many parts of South Africa by VFR travel. For most of the eastern parts of the country VFR travel constitutes over 70 percent of all visits. In certain areas, however, the dominance of VFR travel exceeds over 80 percent. In district municipalities such as Sekhukhune, Zululand, Amajuba, Joe Gqabi, O.R. Tambo or Alfred Nzo there are few other forms of tourism mobilities apart from VFR travel. These are areas where labour migration persists and translocal livelihoods are articulated across large distances.

4.2 Rural Tourism Products for Urban Consumers

Two further case studies are undertaken here of agrotourism and nature tourism products which have evolved and targeted at mainly urban consumers. These two case studies once again furnish evidence on urban-rural linkages through attraction of spatial flows of urban-based visitors to rural tourism products. The category of agritourism products is marketed mainly at domestic tourists with a secondary market of international tourists. The category of nature tourism products, primarily safari lodges, is marketed both to international and domestic tourists with the majority of both consumers originating in urban areas.

Case 1: Agritourism

Agritourism (which sometimes is termed agrotourism) is a growing segment of the tourism economy of many countries. Agritourism is generally considered a subset of rural tourism (Sznajder et al, 2009; Kunasekaran et al, 2011). Despite a growth of the phenomenon the term agritourism remains contested and lacks a shared understanding in terms of precise definition (Sznajder et al, 2009; Arroyo et al, 2013). The work of Phillip et al, (2010) for example argues that despite a growth of academic research most studies have yet to provide a clear and basic understanding of the defining characteristics of agritourism. This said, much of the research which examines agritourism views the phenomenon as a form of leisure or recreational pursuit that is normally spent on farms and relates directly to agricultural activities (Veeck et al, 2006; Barbieri, 2010). In the developing world Kunasekaran et al (2011: 10) view agritourism as a form of rural tourism “that allows the tourist to visit farms and experience a farmers daily life”. More broadly, in the Malaysian context it is viewed as an activity which “maximizes the use of farm settings and the environment with hospitality” (Kunasekaran et al, 2011: 11).

Among a host of activities which can be linked to agritourism in both developed and developing world settings are country accommodation or lodging, farm restaurants, ranch resorts, leisure fishing, the letting of rooms on farms, and the provision of food to travelers. In addition, agritourism can be associated with wineries and visits to tea or cocoa plantations (Colton and Bissex, 2005; Carpio et al, 2008; Henderson, 2009; Hamzah et al, 2012). In the case of Virginia, United States, the most popular agritourism activities which were identified by McGehee and Kim (2004) were listed as pick your own produce, Christmas trees, hayrides, children’s educational programmes and visits to petting zoos. One study in the USA of residents’ preferences for agricultural landscape features to

encourage agritourism highlighted the most preferred pull attractions as wildlife, water resources and farm animals (Gao et al., 2013).

Arguably, over the past two decades, a major growth of agritourism has occurred in both developed and in developing countries as is shown by the work of Sznajder et al (2009). In the United States, however, there is an extensive history of agritourism activities (Barbieri, 2010). Across North America agritourism is recognized as an alternative farming activity that can contribute to agricultural sustainability through rural economic diversification and with the advantages of providing educational opportunities to urban visitors can engender greater community cohesion in rural areas (Colten and Bissex, 2005; McGehee, 2007). Das and Rainey (2010) point out large areas of rural North America are recording gradual economic decline with small and medium scale farms dwindling in numbers and experiencing income stagnation. Agritourism is viewed as a catalyst for revitalizing these troubled rural agrarian economies. In addition, LaPan and Barbieri (2013) draw attention to the further role and linkage between agritourism and heritage preservation in the context of North America.

The innovation of agritourism and its growth is driven both by economic considerations as well as what Barbieri (2010:2) describes as “a set of intrinsic and market related goals such as pursuing a rural lifestyle, creating employment for family members, and socializing with visitors”. The adoption of agritourism can be vitally important for farmers “because the additional revenues can help sustain their businesses, retain their rural lifestyles, and keep their farmlands” with benefits that extend beyond the farm gates to society which along with the production of food or fibres can incorporate “environmental amenities, recreational opportunities, landscape management, and biodiversity and cultural preservation (Barbieri, 2010:2). Overall, the advantages for rural areas of agritourism as suggested by Barbieri (2013) which go beyond economic revival, include environmental and socio-cultural benefits which contribute towards sustainable development.

In many parts of Western Europe agritourism is promoted as a diversification strategy in search of more diverse and sustainable rural economic development (Aikaterini et al, 2001; Nickerson et al, 2001; Hegarty and Przezborska, 2005; Loureiro and Jervill, 2005; Veeck, 2006; Kizos and Iosifides, 2007; McGehee, 2007; Phelan and Sharpley, 2011, Marsat et al, 2013). In certain European countries agritourism constitutes a major element in national tourism economies. Embacher (1994) draws attention to the fact that in Austria farmers represent as much as one sixth of the total supply of tourism beds. In Greece Kizos and Iosifides (2007) point out agritourism was officially introduced by European Union support programmes to Greek farmers or women’s cooperatives in the 1980s since when it has experienced substantial expansion because of its positive impacts for rural economies. Further benefits of agritourism including environmental and socio-cultural spinoffs which contribute towards sustainable development are reported from agritourism development in Tuscany by Sonnino (2004) and in Austria by Embacher (1994). In parallel research undertaken in the developing world the benefits of agritourism and its promotion also have been recognized within several countries including China (Lee, 2012), Iran (Hosseini et al, 2014) Malaysia (Kunasekaran et al, 2011; Hamzah, 2012; Shaffril et al. 2014), Nepal (Pandey and Pandey, 2011) and Sri Lanka (Malkanathi and Routry, 2011).

Internationally, the growth of agritourism in rural economies has raised a number of important policy-related issues for rural development planning. The most relevant are those surrounding support for agritourism entrepreneurship. From research undertaken in the United Kingdom Phelan and Sharpley (2011) highlight that whilst farmers are increasingly turning to agritourism as a means for income diversification, they do not always possess the

essential business competencies required for success. Ainley and Kline (2014) argue that supporting farms to enter into agritourism can best be accomplished by building business skills and entrepreneurship capabilities. Another policy tool is to foster networking especially in respect of farmer to farmer connections. Indeed, Phelan and Sharpley (2011) point to the imperative for policy initiatives that address skill deficiencies around product development and the running of small tourism business enterprises through the introduction of effective training support programmes.

For South Africa, despite a growth in scholarly research around tourism in the past decade, only limited research attention has been directed at agritourism activities. In the Western Cape van der Merwe et al. (2013) draw attention to the potential application of spatial computing technologies, more especially the use of geographical information systems, in support of planning for agritourism. The most important investigations around agritourism relate to the establishment and growth in the Western Cape of wine tourism and of wine routes which have spurred a burst of new agritourism enterprises in that province (Nowers et al. 2002; Brouwer, 2003). The research undertaken in this investigation builds upon these studies and offers the first attempt to provide a national profile of the state of agritourism across South Africa. The national audit was based upon an extensive internet search of accommodation establishments which were linked to agritourism activities.

Table 16: Agritourism in South Africa: A Provincial Analysis

Province	No. Accommodation	Percentage	Multiple Activities	Percentage
Eastern Cape	45	11.7	30	10.8
Free State	46	11.9	40	14.3
Gauteng	4	1.0	3	1.1
KwaZulu- Natal	39	10.1	29	10.4
Limpopo	14	3.6	11	3.9
Mpumalanga	35	9.1	26	9.3
Northern Cape	29	7.5	22	7.9
North West	11	2.8	9	3.2
Western Cape	163	42.2	110	39.4
TOTAL	386	100.0	279	100.0

Source: Authors

The national audit reveals a total of 386 accommodation establishments which provide agritourism linked activities. Table 16 provides an analysis on a provincial basis and reveals an uneven spatial distribution of agritourism activities. The Western Cape emerges as the leading destination for agritourism with an estimated 42 percent share of all such accommodation establishments. The next most important provinces for agritourism are shown to be Free State, Eastern Cape, KwaZulu-Natal, Mpumalanga and Northern Cape. The parts of South Africa with the lowest proportion of agritourism establishments are Limpopo, North West and especially Gauteng, South Africa's urban economic heartland and potentially the major source market for agritourists. Of note is one important observation about the geography of agritourism establishments and activities. It is evident that the majority of agritourism activity takes place outside of the 23 priority development districts and focused in what were earlier described as the intermediate rural areas of South Africa. Indeed, it must be stressed that the areas of the former Homelands exhibit little development of agritourism activity.

The national audit found a range of different activities or agritourism products which were offered as attractions in various parts of the country. In addition to the long established attractions of wine farms and ostrich farms the list of agritourism product attractions include visits to banana plantations, citrus, olive, avocado or macadamia farms, sheep and cattle farms as well as maize and potato farms. Further popular farm-related activities include strawberry picking, horse riding and especially various forms of fishing. Bird watching is also advertised as a supplementary attraction in many parts of the country. As is shown on Table 16 at the majority of the agritourism accommodation establishments, multiple attractions were on offer. Overall, 73 percent of the listed establishments advertise that they provide more than one agritourism activity or product offering.

Table 17: Leading Agritourism Destinations in South Africa

Town	No. Accommodation	Activities
Stellenbosch	9	Wine, olives, vinegar, proteas and roses, horse riding and farm animal petting and feeding
Montagu	7	Wine, fruit, apricots, olives, stud farm, horse riding, fishing, farm animals
Worcester	7	Grape picking, bird watching, fishing
Tulbagh	7	Olive and wine farming, fishing, orchards, horse riding
Oudtshoorn	7	Ostrich farming, horse riding, bird watching
Knysna	7	Fishing, berry farms, horse riding, jersey herd, collecting farm eggs
Citrusdal	7	Citrus farming, bird watching, fishing, horse riding

Dullstroom	7	Trout fishing, horse riding, cattle farming
George	6	Fishing, horse riding, strawberry picking, animal feeding
Memel	6	Fly fishing, cattle, maize and potato farms farming, bird watching
Paarl	6	Wine, fruit and olives, bird watching, fishing, horse riding

Source: Authors

Table 17 shows the leading agritourism destinations in South Africa as ranked by numbers of accommodation establishments that provide activities. The list of leading destinations is dominated by towns in the Western Cape with nine of the most important destinations found in that province. Heading the national list of agritourism destinations are the attractions of wine farms of Stellenbosch, Montagu, Tulbagh, Paarl and Worcester. Oudtshoorn is distinguished by its attractions of the area's ostrich farms whereas George, Citrusdal and Knysa offer an array of different agritourism products. Outside of the Western Cape the two most notable agritourism destinations are Dullstroom in Mpumalanga, which offers a combination of horse riding, visits to cattle farms and flyfishing, and Memel in Free State which offers a highly diverse range of attractions.

Table 18: Number of Towns with Agritourism Activities per Province

Province	1	2-3	4-5	>5	Total
Eastern Cape	18	7	2	0	27
Free State	13	6	3	1	23
Gauteng	1	1	0	0	2
KwaZulu-Natal	13	11	1	0	25
Limpopo	4	4	0	0	8
Mpumalanga	10	6	1	1	18
Northern Cape	7	9	0	0	16
North West	5	2	0	0	7
Western Cape	35	18	5	9	67

SOUTH AFRICA	106	64	12	11	193
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Source: Authors

Table 18 provides further detail and shows the widespread character of agritourism activities across South Africa. The table provides an analysis of the number of towns which are engaged in agritourism and the number of different agritourism accommodation establishments in each of these centres. The analysis reveals that there is an estimated 193 towns across South Africa in which agritourism is part of the local tourism economy. This finding is significant for it highlights the role of agritourism for economic development of small towns in many parts of South Africa. Although towns in the Western Cape emerge as numerically the most important for agritourism and LED the relevance of agritourism for small town local economic development in several other provinces is demonstrated. It is observed that agritourism is a component for LED in at least 15 small towns in each of the following provinces; Western Cape, Eastern Cape, KwaZulu-Natal, Free State, Mpumalanga and Northern Cape. This points to the need for dedicated awareness and capacity building for business development around agritourism in these provinces.

Table 19: Leading Agritourism Destinations on a Provincial Basis

Province	2-3 Farmstays	4-5 Farmstays	>5 Farmstays
Eastern Cape	Bathurst, Cathcart, Cradock, Kei Mouth, Rhodes, Tarkastad, Tsitsikamma	Addo, Graaff-Reinett	
Free State	Arlington, Bothaville, Frankfort, Harrismith, Verkykerskop, Vrede	Clarens, Fouriesburg, Gariiep	Memel
Gauteng	Heidelberg		
Kwa-Zulu Natal	Balgowan, Ballito, Champagne Valley, Dargle, Bergville, Howick, Lidgetton, Mooi River, Nottingham Road, Rosetta, Pongola	Underberg	
Limpopo	Hoedspruit, Magoebaskloof, Nylstroom, Vaalwater		
Mpumalanga	Belfast, Chrissiesmeer, Hazyview, Nelspruit, Piet Retief, White River	Wakkerstroom	Dullstroom

Northern Cape	Augrabies, Campbell, Carnarvon, Colesburg, Hanover, Kimberley, Richmond, McCarthy's Rest, Sutherland		
North West	Lichtenburg, Magaliesburg		
Western Cape	Beaufort West, Bonnievale, Botriver, Calitzdorp, Cederberg, De Doorns, Durbanville, Elgin, Heidelberg, Hermon, Ladismith, Malmesbury, Noordhoek, Rawsonville, Riversdale, Stanford, Vredendal	Clanwilliam, Franschhoek, Plettenberg Bay, Robertson, Wellington	Citrusdal, George, Knysna, Montagu, Oudtshoorn, Paarl, Stellenbosch, Tulbagh, Worcester

Source: Authors

Finally, Table 19 provides a fine-grained picture for each province of the small towns where there is a presence of agritourism as indexed by a cluster of two or more agritourism accommodation establishments. This listing of towns provides the base for rolling out of skills training and capacity building for agritourism development activities. In many of the small towns listed in Table 19 agritourism will be at the heart of small town local economic development programming.

Case 2: Nature Tourism

Nature tourism represents one of the major bases of the growth of South Africa's tourism economy as a whole. In support of the developing nature tourism economy, 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 these longhaul international visitors to South Africa's rural nature tourism attractions are channelled through the urban centres which are gateways for international travel.

The most distinctive form of nature tourism accommodation is the African Safari Lodge (ASL). This represents a form of high-value, low-volume accommodation that provides non-consumptive game viewing experiences in an atmosphere of luxurious hospitality (Massyn and Koch, 2004). The ASL originated in small rustic camps which were set in areas with large amounts of wildlife. Initially, ASLs were built mainly for friends and family, or hunters and adventure travellers who wished to 'safari' (Swahili for journey) through the wildlife and wilderness areas of Africa. Historically, the ASL phenomenon began in South Africa at locales such the Sabi Sands Game Reserve during the 1930s. Especially from the 1960s, growing numbers of international tourists, mainly from North America and Europe, began to travel in search of 'Wild Africa' because of increased disposable incomes, expansion of leisure time as well as technological advancements in aviation. During the 1980s as demand for this form of tourism further escalated, so did both levels of luxury and the cost

of tourist bed nights. Accompanying the growing profitability of safari lodges, ASLs expanded throughout South Africa. Massyn and Koch (2004:103) contend that what makes an ASL different from other forms of accommodation is that it offers “the preserved remnants of Africa’s charismatic mega fauna and biological diversity in a global context, which is experiencing waves of species extinction elsewhere”. Additionally, ASLs use the draw card of ‘romance’, marketing their products with a heavy focus on the created ‘legends’ and imagery of ‘Wild Africa’ (Massyn and Koch, 2004).

Considerable growth in the number of ASL establishments has taken place during the past 15 years coincident with the ending of apartheid, the dropping of international sanctions on the country and South Africa’s image change from global pariah to ‘rainbow nation’. Nevertheless, the nature of the safari lodge also has been impacted by wider structural changes in the tourism economy (Massyn and Koch, 2004:106). During the last decade the conservation industry witnessed a number of important shifts, not least the rise in community-based conservation programmes throughout southern and east Africa, the growth of ‘green movements’ and a stronger emphasis on social consciousness. Taken together, this triggered an increase in the numbers of travellers to Africa who wish to participate in forms of tourism that ‘give back’ to the communities and environments they visit (Ashley et al., 2007). In response to these changes, a ‘new generation’ of ASLs appeared, which no longer are focused exclusively on marketing a luxurious ‘wild Africa’ image. Instead, the ‘new wave’ of ASLs incorporate into their enterprise marketing, elements of environmental protection and community development (Massyn and Koch, 2004). Many lodges are marketed now as more ‘authentic’ by using responsible tourism best practice as their unique selling point, often linked to their membership of new certification schemes such as Fair Trade in Tourism. A final influence upon the changing nature and practice of South African safari lodges has been national government policies for responsible tourism which stress increasing job and entrepreneurial opportunities and in particular encouraging the meaningful participation of previously disadvantaged individuals (Department of Tourism, 2011).

In the western parts of South Africa, in particular Western Cape province, the form of nature tourism 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 a different character and lodging accommodation includes forest lodges, eco-lodges, tented camps and nature lodges such as Grootbos. The audit and analysis of nature tourism which is presented below incorporates both the classic African safari lodge and the nature tourism accommodation offerings in the Western Cape.

Table 20: 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 20 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 is in small-scale forms of accommodation in terms of 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 a growth of nature tourism linked accommodation establishments in Gauteng. Of all nine provinces nature tourism is of least significance in Free State province.

Table 21: 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 are clustered within or close to the country's major protected areas. Table 21 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 Esatern 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 22: Leading Nature-based Clusters by Province

Province	Cluster	Nature-based accommodation
Eastern Cape	Addo	21
	Shamwari	6
Free State	Golden Gate Highlands	6
KwaZulu-Natal	iSimangaliso Wetlands Park	81
	Hluhluwe	30
	Nambiti Reserve	7
Gauteng	Dinokeng	10
Limpopo	Hoedspruit	20
	Mapungubwe	20
	Balule Reserve	17
	Waterberg	17
	Timbavati Game Reserve	16
Mpumalanga	Thornybush Reserve	15
	Kruger National Park	88
	Sabi Sands Reserve	37
Northern Cape	Marloth Park	21
	Kgalagadi National Park	12
North West	Namaqua National Park	11
	Magaliesburg	23
Western Cape	Madikwe Game Reserve	22
	Pilanesberg Reserve	13
	De Hoop Nature Reserve	19

	Swartberg Nature Reserve	17
	West Coast National Park	17
	Agulhas National Park	15

Finally, in Table 22 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.

5. Understanding Rural-Urban Linkages: The Tourism-Agriculture Nexus

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 is the principal source of income, its local economic impact is disappointing. Tourism impacts are reduced by high levels of external leakage which refers to “the failure of tourist spending to remain in the destination economy” (Sandbrook, 2010: 125). Actual levels of leakage are associated with 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 are usually “unable to supply the tourism industry with the goods it needs to sustain itself at a competitive price” (Lacher and Nepal, 2010: 82).

Across the international experience the food supply chain to the tourism sector is acknowledged as one important potential source of linkages, local multiplier impacts and , in the developing world, of pro-poor impacts (Torres and Momsen, 2004; Meyer, 2007; Mitchell and Ashley, 2010). Some studies suggest that food and beverages can account for approximately one-third of tourist expenditure (Meyer, 2006: 20). Thus, the promotion of local food production for tourism consumption can “affect significantly the economic and social impact of tourism” (Belisle, 1983: 498). According to Torres (2003: 562) the failure to stimulate local supplies represents “both a lost opportunity for local agriculture and a hemorrhaging of tourism benefits”. Overall, the food supply chain to tourism enterprises is especially significant because it can disperse the benefits of tourism spatially well beyond that of the destination; in such a manner farmers “need never meet a tourist to benefit from the sector” (Mitchell *et al.*, 2007: 3). Research on tourism-agriculture linkages and food supply chains is well-established in the global North with many studies in the USA and Europe. By contrast, the literature relating to the global South is limited. Indeed, since the early 1980s when Belisle (1983: 509) bemoaned “the paucity of research into the

relationships between tourism and food production” only a small number of investigations have appeared in the developing world. Of note is that the majority of existing scholarship centres upon detailed case studies which have been conducted in the Caribbean (Belisle, 1983; Timms, 2006), Mexico (Torres, 2002, 2003; Torres and Momsen, 2004) or Indonesia (Telfer and Wall, 1996, 2000). The largest amount of research focuses upon tourism-agriculture linkages in the circumstances of enclave mass tourism resorts such as Cancun or of beach tourism in small island tourism economies (eg Lombok or St Lucia).

Table 23: 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' fear of illness from food	
Tourists' desire for cheap products	
Seasonal variation in demand	
Chefs' desire for more sanitary products	
Market-related factors	Chefs' inexperience with local food
	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

Source: Adapted from Lacher and Nepal, 2010, 82.

From a range of international studies a profile has been built up of the key factors that can result in limited local linkages and multiplier impacts from tourism accommodation establishments in rural spaces (Table 23). Despite the several benefits from strengthening tourism-agriculture linkages and 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 and Wall 1996, 2000; Torres 2003; Rogerson 2011). Across international research a number of important factors have been identified as impediments to the development of local agriculture-tourism linkages. The important works of Meyer (2007) and Torres and Momsen (2004, 2011) isolate a range of restrictive factors that result in low levels of local linkage occurring between agriculture and tourism. The critical limiting factors are summarized on Table 23. As revealed by existing international investigations several demand-related, supply-side and marketing and intermediary factors can limit the extent and density of linkages between the tourism and agriculture sectors. Other constraints on the development of linkages between local agriculture and tourism relate to shortcomings with respect to policy oversight by national and local governments of potential linkage opportunities (Meyer, 2007; Rogerson, 2012a, 2012b).

Research on tourism-agriculture linkages isolates several critical factors that constrain the involvement of local producers in tourism supply chains (Rogerson, 2012a). Existing scholarship draws attention to a suite of different influences that impact upon food supply procurement patterns and backward linkage development. The characteristics and strength of linkages are considered to be associated with several demand-related, supply- or production related and marketing or intermediary factors (Torres, 2003). Meyer (2007: 569) asserts that in order both to support the procurement of local inputs for accommodation establishments and maintain sustainable linkages between tourism and agriculture, "the demand, supply and marketing and intermediary related factors as well as government policy need to be taken into account". In terms of production-related issues, critical factors of significance are environmental considerations, 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 and Nepal, 2010). One critical demand-related factor is the nature of tourism development with foreign-owned or managed enterprises and expatriate chefs reliant upon imports and evolving only weak links to local producers (Torres, 2003; Meyer, 2006). In addition, larger and higher-end hotels exhibit a trend towards using imported foods rather than locally grown produce (Telfer and Wall, 2000). Importantly, the existing research suggests that the opportunities for “creating demand for local foods is greatest among certain nationalities and with more adventurous non-mass tourists” (Torres, 2003: 548).

Torres (2003) stresses 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. In addition, Meyer (2006: 31) highlights 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”. Although the available scholarship paints an uneven picture, it does point to the general conclusion that most tourism establishments in the global South source their food (and other services) from wherever is cheapest, most reliable, most easily accessible, and of assured quality (Torres, 2003; Meyer *et al.* 2004). 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 and Momsen, 2004). The implications of sourcing food products from distant large-scale suppliers for local economies and for local economic development are to reduce severely the pro-poor impacts of tourism projects.

South Africa provides a compelling research environment for the examination of local procurement because of the policy commitments which have been made by national government (and certain local governments) towards ‘responsible tourism’ on the one hand and local economic development on the other. The evolution of thinking around responsible tourism and local procurement can be traced in a series of government policy documents issued since 2000. In 2002 the Department of Environmental Affairs and Tourism produced a set of national responsible guidelines (DEAT, 2002a). Herein of particular significance was national government’s encouragement of expanded local procurement by the tourism industry. Indeed, the 2002 national Responsible Tourism Guidelines called upon private sector tourism businesses in South Africa to “buy locally-made goods and use locally-provided services from locally-owned businesses wherever quality, quantity and consistency permits” (DEAT, 2002a: 3). Sourcing local was to be monitored, according to these guidelines within a 50 km distance from businesses. The associated Responsible Tourism Manual for South Africa reiterated the importance of local procurement and identified potential opportunities for local business linkages, including the supply of food (DEAT, 2002b: 33).

In 2009 the National Department of Tourism launched a process of developing National Minimum Standards for Responsible Tourism as part of its strategic objective of forging a sustainable tourism industry. The draft standards were finalised in 2010 and issued formerly on 28 March 2011 as the South African National Minimum Standard for Responsible Tourism (SANMSRT). Monitoring of the standard, SANS 1162, is in the mandate of the national South African Bureau of Standards (SABS). The SANMSRT consists of 41 criteria which cover the central dimensions of sustainability across four categories, namely, sustainable operations and management, economic, environmental, and social and cultural.

Its stated goals include establishing “a common understanding of the minimum criteria for responsible tourism” and of promoting “responsible tourism in the tourism sector”, including for accommodation establishments (SABS, 2011: 1). In respect of procurement the SANMSRT suggest that organizations should both buy local which is defined as the local area within which the establishment is situated. More specifically, it is made clear that for tourism enterprises located with urban areas, the term ‘local area’ refers to the local municipal area whereas for those tourism enterprises in rural areas the term local area refers more widely to the district municipal area (SABS, 2011: 5). For the National Department of Tourism, the NMSRT criteria represent baseline standards that tourism businesses should aspire to attain and establish the foundation for accreditation by tourism certification agencies (Republic of South Africa, 2012).

The drive by national government for greater local procurement and its take-up by certain local governments dovetails into programmes and interventions in order to support local economic development. The promotion of local procurement became one element of local development initiatives undertaken by South African local governments. In most cases this focus on local procurement has been catalysed by 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 have gone further, however, in terms of pursuing active initiatives for encouraging or supporting local content initiatives in the private sector. As is shown below, the potential need for such types of interventions, emerges as one theme from South African research which has been conducted on local procurement and more especially on tourism-agriculture linkages.

It is against the promising policy environment of responsible tourism and LED promotion that the results are situated from research work on the food sourcing patterns of rural safari lodges. A synopsis is given of the key national findings on procurement linkages from rural investigations conducted at different locations across South Africa by Hunt (2010) and Rogerson (2012b, 2013). In the 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, 2012b). In terms of local food sourcing, however, the survey tried to calculate the proportion of food supplies that were obtained from sources within a 40 km radius of the lodge. It revealed the extent of local procurement of goods and services was limited as safari lodges secured the largest amount of their required supplies from distant urban markets rather than from local sources. A critical set of results from the national audit relate to the 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 safari lodges the extent of imported foods is negligible, mostly confined to small luxury items such as caviar or salmon. In terms of local food sourcing, the survey determined, however, that only 38 percent of lodges sourced the bulk of fresh vegetables from within a 40 km radius of the lodge location. The majority of lodges preferred to source their supplies through an intermediary supplier enterprise rather than purchase supplies directly from local producers. In effect, the general outcome was that intermediary suppliers purchased fresh vegetables and fruit supplies from the Johannesburg Fresh Produce Market, the largest national wholesale market, with these supplies delivered by refrigerated truck directly to the lodges. Local supply sourcing of fresh food from rural areas was limited with the greatest volume of fresh food sourced from urban markets.

The patterns of sourcing were found to vary between the different spatial clusters as well as between different kinds of food products. 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. Overall, in terms of tourism-agriculture linkages the most significant indicator related to supplier relationships around fresh vegetables. A striking finding was that the overwhelming majority of safari lodges do not source the bulk of their fresh vegetable requirements from proximate 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 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. Typically, the qualitative interviews showed that the decision by accommodation establishments to use an intermediary supplier was made on grounds of convenience because of the difficulties of sourcing small amounts of goods and supplies from local enterprises. Illustratively all lodges surveyed in the Sabi Sand Private Game Reserve sourced their fresh produce goods from one distributor; the respondent at Thornybush lodge stressed that "We do no direct buying ourselves - it is all done by our suppliers". The results of the national survey revealed that only in isolated areas of rural South Africa, such as Madikwe and areas surrounding the southern Kruger National Park, has the safari lodge industry successfully stimulated groups of small local producers to service the food supply chain of lodges and thereby to maximise local benefits from tourism development. More generally, there are issues of mistrust by the tourism accommodation establishments concerning the reliability of local suppliers on the one hand and lack of information or knowledge about the requirements of the safari lodge sector from producers.

The qualitative material confirmed that the most significant constraints on the establishment or strengthening of local linkages were revealed to concern the lack of capacity of local producers to offer the quality, consistency and volume of fresh produce as required by these accommodation providers. For policy intervention of greatest significance are the findings that there exists a need to overcome the existing poor levels of communication and deep mistrust between food supply decision-makers and local producers. Other policy considerations relate to the essential challenges around capacity building and support for small scale producers to enter food supply chains. These are challenges that must be addressed in order that the goals be met of responsible tourism as a whole in South Africa and in particular for the economic criteria as laid down in the NMSRT. Arguably, the empirical research on safari lodges shows that at present 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 relating to developing local supply chains. The re-configuring of the established pattern of food sourcing and the nurturing of a greater depth of tourism-agriculture linkages, including of local sourcing, necessitates at the outset that national governments and the tourism private sector together must recognize the significance of encouraging backward linkages. More specifically, a crafted and coordinated set of integrated actions will be needed in order to

address the group of demand, supply and intermediary factors which presently constrain the formation of local supply linkages in rural spaces.

6. Conclusion and Policy Recommendations

This study has demonstrated through the lens of the tourism sector the complex of issues around urban and rural spaces. The tourism sector study shows the linkages and connectivities between urban and rural environments through both spatial and sectoral flows. The spatial flows are evidenced in movements of tourists across urban and rural spaces and the sectoral flows have been illustrated through the examination of linkages between tourism and agriculture. This concluding section of the report seeks to summarise and tease out the key policy-related issues that have emerged out of this investigation.

6.1 Understanding Tourism in Urban versus Rural Spaces

The analysis of understanding the different trajectories and forms of tourism development which is occurring in urban versus rural spaces has a number of policy implications. In particular the analysis of the differential performance of metropolitan areas, intermediate spaces and the deep rural spaces of priority districts shows clearly the need to avoid a one-size-fits all planning model for tourism-led local economic development.

In maximising the impacts of tourism expansion for local communities, a critical role must be assumed by South African local governments through the design of tourism plans, marketing, the provision of support infrastructure, and the management of tourism growth. The National Tourism Sector Strategy emphasizes the central role of local government as a partner or stakeholder in growing the tourism sector and achieving the desired outcomes of national tourism policy (Department of Tourism, 2011). Over the last five years national government has launched several important programmes and initiatives to strengthen the contribution of local governments in tourism planning. In particular, increasing attention is given to strengthen the capacity of local governments to intervene wisely to assist tourism development and in certain instances to kickstart local economies through tourism development. Among the most significant initiatives have been the preparation of a Tourism Planning Toolkit for South African Local Governments and launch of the Local Government Tourism Development and Growth Programme which is a partnership between national Government and the South African Local Government Association (Rogerson, 2013).

The results of this investigation of different trajectories of tourism development in different spaces point to a recommendation for widespread capacity building for local governments in tourism planning to encompass those local governments which are the leading destinations for tourism visits. In addition, the findings suggest the critical need for greater understanding at local level of the different forms of tourism which can be drivers of local economic development. It must be appreciated that LED planning for tourism must be cognisant of the range of different forms of tourism and the potential for leverage from leisure, business, VFR and other forms of tourism such as religious pilgrimage. This recommendation applies equally in urban and in rural areas

6.2. Understanding Rural-Urban Interactions through Tourism

The three case studies undertaken of VFR travel, agritourism and nature tourism reflect different issues in rural-urban linkages. Each raises different policy issues with respect to tourism as a driver for local development.

Arguably, the most common linkage is that which occurs through VFR tourism which directly connects urban and rural spaces. The VFR phenomenon is one of the least understood aspects of the tourism economy in South Africa and in particular concerning its impacts for host destinations. International evidence suggests that VFR tourism as a lever for local development should not be overlooked because of its perceived low visitor spend. For those many rural spaces where VFR travel actually is the leading component, if not the only form, of tourism development there is an urgent need to build local knowledge of its impacts and whether possibilities exist for leveraging other spinoffs from VFR visitors through for example new cultural or heritage products.

In respect of agritourism the record of international experience is clear. There is a case for building support for agritourism entrepreneurs. The international research suggests that entrepreneurs and especially farmers turning to agritourism as a means for income diversification do not always possess the essential business competencies required for success. This points a need for building business skills, entrepreneurship capabilities and enterprise networking. These issues need to be embedded in tourism training programmes and LED awareness for catalyzing policy initiatives that address skill deficiencies around product development and the running of small tourism business enterprises through effective training support programmes. The geography of agritourism activities shows that such forms of support programming are particularly relevant in the intermediate spaces or the areas of the non-priority districts.

In terms of nature tourism the analysis reveals once again the importance for small town LED programming of understanding the issues around this form of tourism product development. In many parts of South Africa, and most importantly in several of the priority areas which include former Homelands, the potential for LED linked to nature tourism must be understood and planned. Given the weak state of tourism planning in these areas, this points to the imperative for capacity building programmes in local government as well as engaging with the private sector enterprises engaged in nature tourism in local initiatives that can further galvanize tourism growth. Of central importance is the importance of understanding external leakages and of seeking 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, in particular for the high-end luxury safari lodges.

6.3. Tourism-Agriculture Linkages

The analysis of tourism-agriculture linkages and patterns of food sourcing raises a number of significant policy issues. 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 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 the making of 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.

More specific policy recommendations emerged from the empirical investigations of tourism-agriculture linkages. Support initiatives to build local linkages must address 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 in order that the goals of responsible tourism be achieved. Tourism-agriculture linkages are constrained by a host of demand- side, supply-side and market related issues which vary in different local areas. The particular barrier issues in local areas need to be understood to enhance local producer participation in food supply chains. The re-making of the established pattern of food sourcing and the nurturing of a greater depth of tourism-agriculture linkages, including of local sourcing, necessitates at the outset 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 militate the formation of local supply linkages in rural spaces.

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