RURAL TOURISM DEVELOPMENT STRATEGY WITH SPECIAL EMPHASIS ON THE LIMPOPO PROVINCE OF SOUTH AFRICA

Mafunzwaini Aluoneswi Elvis

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Supervisor: Prof. ML Hugo

University of Pretoria

Geography Programme

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DECLARATION

I declare that the dissertation Rural Tourism Development Strategy with special emphasis on the Limpopo Province of South Africa is my original work and that all the sources which have been quoted and used have been indicated and acknowledged by means of complete references. This dissertation has not been submitted to any other university.

Signature:

Date:

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ABSTRACT

TITLE OF DISSERTATION: Rural Tourism Development Strategy with special emphasis on the Limpopo Province of South Africa

By Mafunzwaini Aluoneswi Elvis

STUDY SUPEEVISOR: Prof. ML Hugo

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This study is about the Rural Tourism Development Strategy as a means to a co-ordinated, integrated and sustainable tourism in rural areas for the enhancement of the quality of life and tourists satisfaction. The empirical domain includes a critical analysis of the South African Tourism Strategy from a Rural Tourism perspective in comparison with International Renowned Rural Tourism Strategies. The research therefore adopts a comparative approach and is structured by pre-determined objectives.

Theoretical discussions and research survey have been employed to achieve the research aim and to answer the research question. The research examines the potential of Rural Tourism in the Limpopo Province, presents National and Provincial Tourism Strategies, the Australian Rural Tourism Strategy, rural tourism participants and key issues that are crucial for Rural Tourism success. The conceptual analysis concludes that Rural Tourism is an internationally recognised unique tourism brand and that the Limpopo Province is rich in rural tourism resources. However, the Province lacks a co-ordinated and integrated Rural Tourism Development Strategy.

Key issues and participants in rural tourism have been suggested. These issues form the guidelines for a Rural Tourism Development Strategy. The issues are: 1) Rural Product and Enterprise Development, 2) Accreditation and Industry standards, 3) Education and Training, 4) Marketing and Marketing Analysis, 5) Industry and Community leadership, 6) Transport and Infrastructure, 7) Provincial and Local government, 8) Policy and Support strategies. The

proposed guidelines for a rural tourism development strategy are seen as a universal framework dependent on, and influenced by the context and environment in which the framework is applied. The proposed guidelines can contribute to tourism development in rural areas and enrich the personal rural tourists' satisfaction, contribute to the protection of both the cultural and natural tourism resources on which rural tourism depends, integrate nature-based and cultural tourism activities, stimulate sustainable resource use and spread tourism economic, social and environmental benefits to rural areas where it matters most.

CHAPTER ONE: INTRODUCTION

1.1 Rationale

Tourism is the world's largest industry in terms of the numbers of people participating, the amount of resources generated, and its employment capacity. International tourists arrivals have been increasing steadily from 362 million people in 1987 to 458 million in 1990 to 518 million in 1993 and 594 million in 1996 (Reid, 1999). For most countries such as South Africa, tourism is becoming an increasingly attractive source of income and a means of financing other developments. According to Bennett (2000: 7) tourism in South Africa is seen as a major job creation force and a source of wealth.

According to McIntosh et al (1990) tourism is a multi-faceted economic activity, which interacts with the environment in the framework of a two-way process. Tourism has both economic opportunities and social and environmental by-products. Environmental resources provide, on one hand, one of the basic "ingredients", a critical production factor, for the production of the tourist product, the natural and/or manmade setting for the tourist to enjoy, live in, and relax. On the other hand, it produces a variety of unwanted by-products, which are disposed of, either intentionally or unintentionally in to the environment.

There are many forms of tourism, amongst others are mass tourism, sports tourism, urban tourism, nature-based tourism, heritage/cultural tourism, farm tourism, community tourism, eco-tourism, rural tourism, and adventure tourism. This study focuses on rural tourism as a unique tourism product that has a potential for both environmental conservation and rural development in the Limpopo Province of South Africa (see appendix A). Most sources attest to the fact that rural

tourism is yet to be fully explored, although it already has the potential to significantly contribute towards sustainable rural development in most of the developing countries. In the context of this study, rural tourism is viewed as the combination of cultural heritage and nature based tourism. Most tourists, particularly the aged, prefer relatively undisturbed environments. According to Business Day (2001) more and more tourists are asking for an authentic African experience. The Limpopo Province is one of the few places that gives one a greater feeling of being in Africa (Northern Province Tourism Board, 2001).

The Limpopo Province offers a mosaic of exceptional scenic landscape, a fascinating cultural heritage, an abundance of wildlife species and many nature-based tourist opportunities. It is a land of legends and myths and of ancient civilizations. (http://www.tourismboard. org.za, 2000). Those in search of history will find many places of archaeological significance dating back millions of years. It is against this background that the potential of rural tourism could be predicted as a fundamental contributing factor towards rural development through resource conservation and the provision of economic and job opportunities for the rural population.

According to Linkorish (1994) the appreciation of rural areas and the wilderness, a concern for conservation and the environment, become much more important over the next decade. Lickorish (1994) further argues that there is much new interest in rural tourism, farm tourism and special interest tourism. Outdoor activities are growing in popularity and demand for rural holidays and farm holidays is increasing. It is also due to this new international trend of interest in products such as rural tourism that a thorough look should be considered for this product.

Rural tourism, as indicated by Page and Getz (1997), is truly global, and yet little is known about it in developing countries. It is ironic that most developed countries have taken rural tourism enterprises very seriously, while most rural areas (developing countries) are yet to exploit it.

According to Page and Getz (1997) in some regions and countries, notably Europe, North America, Australia and New Zealand, rural tourism is well established and a big business. During the rural tourism seminar organised jointly by the World Tourism Organisation in 1997, the Government of Israel and the European Travel Commission, together with nine countries, delegates shared their experiences with regard to rural tourism. These countries were Australia, Italy, France, Switzerland, China, Netherlands, Spain, Turkey and Romania (World Tourism Organisation, 1997).

Many countries are now beginning to realise that rural tourism has the potential, not only of combating overdevelopment in cities or coasts, but is rather an essential means of achieving a balanced development and maintaining, protecting, and often enhancing natural and cultural heritage (World Tourism Organisation, 1997). Robinson (1990) argues that tourist ventures are some of the few development options available for many rural areas seeking to develop their local economy. These areas are often geographically remote but possess great scenic beauty and are very attractive propositions for tourists. It is in this context that the Limpopo Province as a rural area with beautiful natural and cultural heritage possesses a competitive advantage when it comes to rural tourism.

Rural tourism is a multi-faceted activity, which takes place in an environment outside heavily urbanised areas. It is an industry sector characterised by small-scale tourism businesses set in areas where agricultural activities and forestry dominate land use. Rural tourism can represent to the traveler, an essence of country life (Australia's Commonwealth Department of Tourism, 1994).

Most forms of development initiatives in rural areas run against conservation and sustainability principles. O'Riordan (1995) argues that the global environment debate is a mixture of worry for

the planet Earth as a whole, and a concern for billions of less fortunate humans whose children face a possible future of desperate choices - between dying and staying alive by destroying the fabric of existence that will keep their children alive in 10 - 20 years time. Hugo et al (1997) argues that the whole environmental crisis simply boils down to a question of supply and demand. An assumption is made that rural tourism could play a fundamental role towards rural development since tourism prospects are high in rural areas.

The Limpopo Province, where this study is conducted, is predominantly rural (see chapter 3, 3.4). Comparatively speaking it is also one of the poorest provinces in South Africa. It seems that through a well-planned development and targeted marketing of the diverse range of rural tourism products available in the Limpopo Province, country towns; local communities and individuals can benefit from this emerging segment of the tourism industry. However, for the above-mentioned benefits to be realised, a coherent, comprehensive, clear and co-ordinated rural tourism strategy should be developed. The rural tourism development strategy will lay down the principles that will guide and provide direction for tourism development in the province.

Inciting tourists to venture beyond South Africa's capital cities will not only benefit rural areas, but will demonstrate a greater diversity of tourism product that can only make South Africa more competitive and a global tourism player. The province offers great potential for rural tourism enterprise development. Rural tourism, if well planned, can assist in reducing poverty, which Hugo et al (1997) argues is a cause for environmental degradation. South African Integrated Rural Development Strategy (1999) rarely mentions, if at all, anything concerning tourism or rural tourism. It should be noted that rural development is more than just agriculture, and encompasses all forms of development aimed at poverty eradication, job creation, food security and ultimately a better life for all.

1.2 The importance of Rural Tourism

Tourism's potential contribution to development has become especially important because of Sub-Saharah Africa's declining performance. Many African countries initially tried to develop economically by expanding and increasing the range of primary exports from agriculture and mining. When this did not provide satisfactory economic growth, Africa turned to industrialisation as a road to a quick and sustainable economic growth. Contemporary Africa's endemic economic stagnation and poverty suggest that these strategies have not worked for the continent. It is in this context that attention has focused on tourism's contribution to development, especially in rural areas (Reid, 1999).

One contribution that tourism can make to sustainable development, particularly in rural areas, is to enable more villagers to make a living out of tourism related activities rather than by exploiting resources through woodcutting and marginal lands cultivation. Rural areas have long been seen and used as appropriate locations for recreation and tourism activities (Butler, et al, 1998). It is in this context that a carefully, planned rural tourism enterprise could provide rural economic transformation in tune with the aspirations of the people.

There is another important way in which rural tourism can contribute to rural development. It can provide a source of money for the community, so that local people can afford to let the natural and cultural resource bases recover. There is a "window of opportunities" in the Limpopo Province because of its richness in natural and cultural resources. Awareness of the need to conserve environmental resources is increasing rapidly as the ecosystems themselves deteriorate, but short term imperatives of food and survival is a hindering action. Rural tourism could prove to be a valuable form of development that is compatible with environmental resources, thus ensuring long term benefits for both the industry and rural people.

The Limpopo Province has severe economic problems, but also has opportunities to put rural tourism on the right track. According to the Sunday Times (1999) tourism is the road to job creation and prosperity. If given a priority status, it has the potential to start a boom in the SADC countries. Relatively undisturbed areas offer great chances for tourism and in particular, rural tourism. According to the Northern Province Tourism Board the Limpopo Province portrays the quintessence of untamed Africa (www.tourismboard.org.za, 2000). As a result of its natural and cultural resource abundance, the province is well positioned for rural tourism prosperity.

Rural tourism should promote local participation, the conservation of resources and economic opportunities for the rural communities, provided it is well planned and implemented. However, experience has shown that tourism around the globe, and particularly in the developing world, suffers from uneven development, ensuring poor returns and disproportionate incomes due to poor planning and management (Sindinga, 1996). Tourism in South Africa has a poor history of involving local communities and previously neglected groups in tourist related activities. The essence of South Africa's conservation policies under the apartheid government was largely a programme to select interesting biological complexes and bestow on them a distinct status. Although conservation in South Africa was perceived to be successful, there was a large element of failure because rural communities have been bypassed and alienated from the conservation effort (World Bank, 1995).

People had been forcibly removed from their land to make way for conservation areas and as a result, there was much anger and a feeling that animals were thought to be more important than people. Rural communities had, in the past, regarded themselves as playing no part in tourism and considered themselves merely as objects for tourists to view. The history of community resistance to conservation in these areas has coloured perceptions of both tourism and conservation, which are both often perceived as threats (Handley, 1996).

As indicated above, the Limpopo Province is not only rich in natural resource, but in cultural heritage as well. But the two have been separated to an extent that rural people feel disenfranchised from tourism and conservation activities. In the context of this study the combination of both the natural and cultural resources could benefit rural communities. The challenge facing the province is to develop strategies to rectify the imbalances of the past and open up the tourism industry for participation of the hitherto disadvantaged citizens for the benefit of both tourism and conservation and the rural community. The tourism competitive advantage of the province lies in its rural nature. The Limpopo province is 89% rural (Statistics SA, Census, 1996). It is against this background that developing a rural tourism development strategy could place the province on the national and international tourism map.

1.3 Research design and procedure

1.3.1 Problem statement

The challenge facing tourism is to create new alternative tourism products that will meet the need for a new form of tourism demand such as rural tourism. Few areas can compare with the Limpopo Province in terms of African culture and natural beauty. The concept of rural tourism in South Africa is still in its infancy. The rules of the game, with respect to rural tourism development have never been written. Equally, new tourism activities (e.g. the cultural/African village) which have been started have been poorly planned due to lack of a proper development framework. In essence, there is a lack of a coherent, comprehensive, integrated and co-ordinated strategy for rural tourism development for the Limpopo Province of South Africa. The main research problem therefore is to critically review the current national and international tourism strategies, in literature and in practice, against the theoretical principles underlying rural tourism, and to suggest guidelines for rural tourism development in the province.

1.3.2 Aim of the study

The primary aim of the study is to formulate a strategy for rural tourism development for the Limpopo Province of South Africa that would succeed in arousing sensitivity towards the environment, and to provide opportunities for enjoyable, authentic rural experiences for tourists and benefits for local communities.

1.3.3 Objectives

To realise the above primary aim, the following objective have been set:

- To promote a broader understanding of rural tourism product in South Africa, especially in rural areas.

- To analyse foreign tourism development strategies, and in particular, the Australian National Rural Tourism Strategy of 1994.

- To review the tourism policy and strategy in South Africa: White Paper on Tourism Promotion and Development 1996 and Tourism Development Strategy 1998-2000: Tourism in Gear as well as to assess the Limpopo Province rural tourism potential.

- To conduct empirical research with relevant stakeholders.

- To formulate rural tourism development guidelines/principles (strategy).

- To apply the set guidelines or strategy (research results) to the situation in the Limpopo Province.

1.3.4 Identified data source

This study was conducted in the Limpopo Province. The study area or data source has been gathered by engaging stakeholder groups. Stakeholders that were consulted are government departments of tourism at Provincial and National levels, tourism industry bodies at Regional, Provincial and National levels, tour operators (including the cultural/African village operators,

private nature reserves and government-run nature and game reserves), academic institutions, tourists (both local and international) and traditional leaders.

For the purpose of this study, data source were categorised into the following respondent groups:

- Policy makers and administrators (government departments of tourism, tourism boards, tourism associations)
- Tour operators (cultural/African village tour operators, private and government run nature and game reserves)
- Academics (Universities)
- Tourists themselves (local and international)
- Traditional leaders

A total of forty respondents were interviewed individually and in groups in order to get their views and opinions with regard to their involvement in tourism activities. The respondents are regarded as highly knowledgeable in this matter and their inputs are considered a fair reflection of their stakeholder's viewpoint. The sample distribution per respondent groups is as follows: Policy makers and administrators: 7 (four managers, two from the National and two from the Provincial Government, three administrators from the Northern Tourism Board), Tour operators: 14 (four tour operators/guides from Luvhola Cultural village, three tour operators from Tshakuma Cultural tours, two managers from Guvhukuvhu Water Falls, three managers and two staff from Manyeleti Game Reserve), Academics: 4 (one Lecturer from Vista University, two from University of Venda, and one from Madzivhandila College of Agriculture), Tourists: 12 (six from Australia, four from Germany, two locals, and two Traditional leaders.

1.3.5 Research methodology

The choice of methodological approach for this study was guided by concerns as to how best to address the research problem and specific objectives. Unstructured interviews were the primary methodology utilised, and yielded data about rural tourism products perceptions of tourism operators and managers. The suitability of this method for this research is outlined in chapter four. Participant observation techniques and literature review yielded important information in terms of tourism practices in and outside the country. In other words, a qualitative rather that quantitative approach was used for this study.

1.4 Terminologies

Rural tourism in this study refers to multi-faceted activities that take place in an environment outside highly urbanised areas. It is an industry sector characterised by small-scale and scattered tourism businesses, set in areas where agricultural pursuits and forestry dominates land use. The range of tourism products includes rural attractions, rural adventure and nature-based tours, country towns, rural resorts, farm stays and other styles of rural and village accommodation, cultural festivals and events, arts and heritage, and agricultural education. Rural tourism, in its purest form should be:

- Located in rural areas.
- Functionally rural (small scale enterprise, open space, contact with nature and the natural environment, and traditional societies.
- Rural in scale (settlement).
- Traditional in character.

Source: Butler et al, 1998

According to Reid et al (1995) rural tourism is distinguishable by its projection of (authentic or unauthentic) rural life into the attractions which constitute its core. It is generally constructed around the built or natural environment, and includes programmes such as cultural festivals and traditional activities that often re-enact or provide a flavour of the traditional local or rural culture and history. Rural tourism, in this case, brings together the natural and cultural tourism products. Rural tourism differs from nature-based tourism in the sense that it includes cultural or traditional heritage as part of tourism, as well as local people themselves.

Another argument often raised against rural tourism development is that ecotourism already advocates for sustainable utilisation of both natural and cultural resource for the benefit of the industry and community. While this is true, ecotourism is viewed, in the context of this study as an approach rather than a product itself. Ecotourism as an approach to tourism can be applied to a diverse spectrum of activities like trails, mountaineering, skiing, hotels, cruises and game viewing (Hattingh, 1994a: 5; Cater, 1995:21; Schaller, 2001). Ecotourism is seen as an approach that can be applied to many types of tourism. In other words ecotourism is not, in the context of this study regarded as a product.

Ecotourism principles can be practiced in different types of tourism products such as adventure tourism, rural tourism, urban tourism and beach tourism. We therefore we can have eco-adventure tourism or eco-urban tourism, etc. Rural tourism is not the opposite of eco-tourism. We can have rural tourism that is planned around the principles of eco-tourism for sustainability reasons. In other words, we can have eco-rural tourism. Although there are overlaps in different forms of tourism, such overlaps do not imply that rural tourism cannot stand on its own. It appears that rural tourism can be found only in rural areas. This highlights the dependency of rural tourism businesses on the rural resource base. This is what makes it distinctive.

Rural areas are traditionally associated with specific rural functions – agriculture, sparsely populated areas, geographically dispersed settlement patterns, and rurality have been conceptualised in terms of peripherality, remoteness and dependence on rural economic activities (Butler et al, 1998). At times the concept of an urban-rural continuum is used as a means to establish differing degrees of rurality and the essential characteristics of ruralness.

Sustainable tourism refers to tourism development and management which optimise the economic and social benefits in the present without jeopardising the potential for similar benefits in the future (South Africa, White Paper, 1996).

Ecotourism refers to environmentally and socially responsible travelling to natural areas that promote conservation, have low visitor impact and provide for beneficially active socio-economic involvement of local people (South Africa, White Paper, 1996).

Tourism refers to travelling for whatever purpose that results in one or more nights being spent away from home, except for work purpose (South Africa, White Paper, 1996).

Strategy refers to a total plan and actions that position the organisation in its environment and also defines the mission and objectives to be achieved. A strategy could also be seen as a set of roles, objectives and activities of each part of the operation so that they contribute to and support the vision of an organisation.

NB: Please note changes of names in the province

The Limpopo Province was previously known as the Northern Province, Polokwane was known as Pietersburg, Makhado was formerly known as Louis Trichardt, Bela-bela was called Warmbaths, and Musina was known as Mesina.

1.5 Outline of the report

This report will be divided into the following chapters:

- Chapter one: introduction and background

- Chapter two: literature review: an international perspective

- Chapter three: literature review: South African tourism policies and the Limpopo province tourism situational analysis

- Chapter four: research methodology and findings

- Chapter five: proposed guidelines for rural tourism development strategy (research results)

- Chapter six: application of the research results to provincial situation

1.6 Conclusion

It appears as if rural tourism, if well planned, developed and promoted, can contribute tremendously towards job creation and rural development as well as conservation and tourism development. This study is about reviewing tourism strategies in and outside the country from a rural tourism perspective with the aim of formulating a coherent, comprehensive, integrated and co-ordinated strategy for rural tourism development in the Limpopo Province of South Africa, that could also be adopted in other provinces.

CHAPTER TWO: LITERATURE REVIEW: AN INTERNATIONAL PERSPECTIVE

2.1 Background Information

The recent years have witnessed a change from the passive, low key use of rural areas for recreation to the explosion of tourism as a highly active and dominant agent of change and control in the countryside and rural communities (Butler, et al, 1998). The trend, whereby countries develop rural areas and their countryside as an integral part of the tourism industry is already set. One example of such countries is Australia, where rural tourism provides an opportunity for the country to share in the nation's spectacular tourism growth (Australia's Commonwealth Department of Tourism, 1994). Other countries that have taken rural tourism seriously have been mentioned in the first chapter.

According to Butler et al (1998) there has been major changes within tourism activities in rural areas. Until the last decades or so, tourist activities in rural areas were mostly related to the rural character of the setting. They could be characterised, at the risk of generalisation, by the following terms: relaxing, passive, nostalgic, traditional, low technological, and mostly non-competitive. The lists of activities include walking/rambling, picnicking, fishing, sightseeing, boating, visiting historical and cultural sites and festivals, horse-riding and nature and farm based visits. Butler et al goes on to say that in the past two decades, while the above activities were still common and frequently practised in rural areas, there are many other activities now engaged in which are quite different. These could be characterised as active, competitive, prestigious or fashionable, individual and fast. They include trail biking, orienteering, survival games, para-sailing, adventure tourism and eco-tourism.

There is therefore, a far wider range of tourist activities being engaged in within rural areas in many parts of the world. Many rural areas are now changing their image and aggressively marketing aspects of their rural heritage, authentic or otherwise, to would-be urban purchasers (Hopkins, 1998). Increasingly rural areas and the governments, which control and serve them, have come to realise the economic benefits, which can accrue to rural areas from tourism development. It is ironic that after so many years of neglect, tourism has come to be seen as a major agent for economic redevelopment for rural areas. Government policies at all levels have begun to appear in recent years in efforts to increase access to rural areas (Butler et al, 1998).

According to Hall and Jenkins (1995) tourism offers many prospects for rural areas. They are geographically widespread, offering employment and income opportunities, often repeatedly utilising the same resources, and possessing the potential to conserve rather that destroy assets. In addition, other industries such as aviation and transport, entertainment, construction, agriculture, horticulture and manufacturing benefit from tourism. Nevertheless, there are, and there will continue to be contested opinions on what is desirable in tourism development in specific rural areas (Bramwell, 1994).

Given the downturns in rural economies over the past three decades, it is perhaps understandable that much government attention has been given to the economic benefits of tourism, particularly in those rural areas which are struggling to keep pace with, and adapt to the vagaries of a globalised economy. Tourism development therefore has received an increasing recognition as a regional and national economic development tool over this period. In Japan, long been held as a model economy for many of the developed nations of the west, the countryside has suffered from rural outmigration. As a result, 'It is the policy of the national and regional governments as well as business to hold the line on population loss by replacing the declining industries (e.g., forestry, farming and fishing) with rural tourism (Graburn, 1995; Hall and Jenkins, 1995). Government

intervention in tourism is widespread. Tourism is in particular, being promoted as a source of rural economic growth and employment generation at all levels of government in developed nations (e.g., Australia, Canada, the European Union, New Zealand, the United Kingdom and the United States (Cabinet Office, 1985; Williams and Shaw, 1988; Hall and Jenkins, 1995; LEADER, 1995), the former state socialist countries of Eastern Europe (Hall, 1991), less developed countries (e.g., Kenya, Cuba, and Sri Lanka) (Harrison, 1992), and the Pacific region generally (Hall, 1994b; Hall and Page, 1996). With the decline in many traditional industries in rural areas, tourism offers an opportunity to revitalise the rural areas through the diversification of economic activities. There is considerable evidence that more and more people are visiting and appreciating rural areas (Hall and Jenkins, 1995).

While the goals of rural tourism development, e.g., economic growth and diversification, employment generation, increased investment, population retention, infrastructure and facility provision and conservation are fairly standard policy goals; the actual strategy process by which they can be achieved is not. Little attention has been given to the objective setting process as well as strategy formulation. Despite the focus on tourism as a tool for regional development, there is rarely a clear concept in strategy or planning terms of rural tourism or of the role of tourism in rural regions or local communities. It is in this context that the study of this nature (to formulate a strategy for rural tourism development) becomes not only important, but also necessary. Perhaps what makes this study even more important is the observation made by Butler and Clark (1992) that the literature on rural tourism is sparse and conceptual models and theories are lacking. Many of the references in tourism are case studies with little theoretical foundation and they focus on specific problems. There is, therefore, a lack of theory and models placing rural tourism in a conceptual framework.

2.1.1 A Concept of Rural Tourism

Keane et al. 's (1992) innovative, but little known study on rural tourism offers a number of insights into the definition of rural tourism, acknowledging that there are a variety of terms used to describe tourism activity in rural areas: agritourism, farm tourism, rural tourism, soft tourism, alternative tourism and many others, which have different meanings from one country to another. Keane also points out that it is difficult to avoid some of this confusion in relation to labels and definitions because the term 'rural tourism' has been adapted by the European Community to refer to the entire tourism activity in a rural area (Keane et al, 1992; Page and Getz, 1997).

But such definitions do little to convey the true meaning of tourism in rural areas because of the difficulty in establishing what is 'rural'. Robinson's (1990) invaluable synthesis of rural change illustrates that the term 'rural' has remained an elusive one and difficult to define in academic research, even though popular conceptions of rural areas are based on images of rusticity and the idyllic village life. However, Robinson argues that:

> *Defining rural ... in the past has tended to ignore common economic, social and political structures in both urban and rural areas ... In simple terms, ... 'rural' areas define themselves with respect to the presence of particular types of problems. A selective list of examples could include depopulation and deprivation in areas remote from major metropolitan centres; and a reliance upon primary activity; conflicts between presentation of certain landscapes and development of a variety of economic activities; and conflicts between local needs and legislation emanating from activities from urban-based legislators. Key characteristics of 'rural' are taken to be extensive land uses, including large open spaces of underdeveloped land, and small settlements at the base of the settlement hierarchy, but including settlement thought of to be rural.*

> (Robinson, 1990)

Therefore any definition of rural tourism needs to recognise the essential qualities of what is 'rural'. While national governments use specific criteria to define 'rural', often based on the population density of settlements; there is no universal agreement on the critical population threshold that distinguishes between urban and rural populations. What is important is the diversity of approaches used by many researchers, who emphasise the concept of an urban-rural continuum as a means of establishing differing degrees of rurality and the essential characteristics of ruralness (Page and Getz, 1997).

According to Cloke (1992), rural places have traditionally been associated with specific rural functions- agriculture, sparsely populated areas, geographically dispersed settlement patterns and rurality has been conceptualized in terms of peripherality, remoteness and dependence on rural economic activity. However, new approaches in social theory have argued that rural areas are inextricably linked to the national and international political economy. As Cloke (1992) rightly argues, "changes in the way society and non-urban places are organised and function have rendered traditional definitions of rurality less meaning due to the following:

- increased mobility of people, goods and massages;

- delocalisation of economic activity;

- new specialised uses of rural spaces (as tourists sites and parks)"

(Cloke, 1992)

Poon (1989) illustrates the practical implications of such changes for the tourism industry. Poon interprets these changes in terms of a shift from an 'old tourism' (e.g. the regimented and standardised holiday package) to a 'new tourism' which is segmented, customised and flexible in both time and space. In fact, recent research on services has analysed the change in society as one from a 'Fordist' to 'post Fordist' stage, which has involved a 'shift in the form of demand for tourist services from a former patterns, with greater differentiation and volatility of consumer

preferences and a heightened need for producers to be consumer-driven and to segment markets more systematically (Urry, 1991).

Hummelbrunner and Miglbauer (1994) support both Poon's (1989) and Urry's (1991) assessments, arguing that these changes to the demand for, and supply of tourism services have contributed to the emergence of a 'new rural tourism'. From a supply perspective, this has manifested itself in terms of ' an increasing interest in rural tourism among a better-off clientele, and also among some holidaymakers as a growing environmental awareness and a desire to be integrated with the residents in the areas they visit' (Bramwell, 1994:3).

Now the question is, do the special characteristics of rural areas help shape the pattern of tourism so that there is a particular rural tourism? The following paragraph attempts to answer this question.

2.1.2 What makes Rural Tourism Distinctive?

Lane (1994) discusses the historical continuity in the development of rural tourism and examines some of the key issues that combine to make rural tourism distinctive. Bramwell (1994:3) suggests that, despite the problems of defining the concept of 'rural', 'it would be a mistake to deny our commonsense thoughts that rural areas can have distinctive characteristics, or that these can have consequences for social and economic interactions in rural areas. The views and perceptions people hold of rural areas is different from the ones they have of urban areas, an important starting-point for establishing the distinctiveness of rural tourism'. On the other hand, if people recognise urban tourism as a product, why can't rural tourism be given the same recognition?

According to Lane (1994:14), supported by Butler (1998) rural tourism in its purest form should be:

- Located in rural areas;

- Functionally rural - built upon the rural world's special features of small-scale enterprise, open space, contact with nature and the natural world, heritage, traditional societies and traditional practices;

- Rural in scale - both in terms of buildings and settlements - and, therefore, usually small-scale;

- Traditional in character, growing slowly and organically, and connected with local families;

- Of many different kinds, representing the complex pattern of rural environment, economy, history and location

Lane (1994:16) further argues that the following factors also have to be considered in defining rural tourism:

- holiday type;

- intensity;

- style of management;

- degree of integration with the community.

By using the continuum concept, one can distinguish between those tourist visits, which are specifically rural or urban, or those, which fall in the intermediate category. Both Butler et al (1994) and Lane (1994) seem to agree that there is a theoretical basis for the development of rural tourism as an enterprise of its own. Countries such as Australia have a rural tourism strategy, something, which is still missing in South Africa and the Limpopo Province in particular. In fact, in 1998 the World Travel and Tourism Organisation suggested that the government of South

Africa should particularly take note of the existing highly successful Travel and Tourism Promotional models developed by the Australian and the Canadian governments (World Travel and Tourism Organisation, 1998). It is against this background that the Australian Rural Tourism Strategy will now be critically reviewed with the aim of identifying principles and key issues that may be relevant and appropriate for the situation in the Limpopo Province.

2.2 An Australian National Rural Tourism Development Strategy (1994): A Review

2.2.1 Introduction

The main aim of this study is to compare the South African tourism strategy with other countries' rural tourism strategies in terms of product development and promotion. The idea is to learn from the highly successful tourism models in the world. South Africa is competing with other attractive destinations. It is therefore important to understand how other countries develop and market themselves, how they spend their tourism budgets and how they undertake tourism research. Australia has strong similarities with South Africa and a competing market. A comparison between the tourism industries of South Africa and Australia is therefore relevant (Human Science Research Council, 2001).

Although Australia has a population of 19 million people in comparison to South Africa's 41 million; the relative strengths of their respective economies present the opposite picture. The size of the 1994 economy in Australia was $287 billion and that of South Africa was a mere $90 billion. This translated into an Australian GNP per capita of $16352 in relation to South Africa's $2520. In addition, the rate of unemployment in the same year was 10% in Australia and 30% in South Africa (Castello-Cortes, World Reference Atlas, 1994; Human Science Research Council, 2001). Consequently, therefore, the tourism marketing budget of Australia was R600 million in 1998, while the budget for South Africa in the same year was in the region of R50 million

(Muller, 1998). Australia undertakes three major tourism surveys annually, while South Africa has since 1992 undertaken only four national domestic tourism surveys (Human Science Research Council, 2001).

The importance of rural tourism in Australia can hardly be over-emphasised. The fact that by 1994 the Federal Ministry for Tourism published a National Rural Tourism Strategy shows how serious the ministry takes rural tourism product. According to Micheal Lee M.P. (1994) Federal Minister for Tourism, the National Rural Tourism Strategy provides the framework required for government and industry to successfully advance the rural tourism industry into a prosperous and sustainable future. Rural tourism provides an opportunity for a countryside (rural) Australia to share in the nation's spectacular tourism growth. Australia seems to be much further advanced in terms of rural tourism development than South Africa.

Through planned development and targeted marketing of the diverse range of rural tourism products available, country towns, local communities and individuals can benefit from this emerging segment of the tourism industry. Enciting tourists to venture beyond Australia's capital cities will not only benefit rural areas, but will demonstrate a greater diversity of tourism product that can make Australia more competitive as an international tourism destination (Australia's Commonwealth Department of Tourism, 1994). To realise the potential of rural tourism, it is necessary to develop and package new and better tourism products that are responsive to the current demands of visitors, both domestic and international. Travelers are seeking environments in rural Australia that combine recreational, cultural, educational and social experiences with country living. To capitalise on this demand for a 'country experience', a number of key issues must be addressed (Australia's Commonwealth Department of Tourism, 1994).

The National Rural Tourism Strategy of Australia examines the importance of rural tourism as an industry and looks at how industry and government can contribute to its growth through considered planning, development and management. Tourism can have a significant impact on the economic and social well-being of rural communities, and affect the environment, there is a need to consider fully the variety of changes tourism can bring and to seek outcomes that are sustainable over medium and longer term (Australia' Commonwealth Department of Tourism, 1994). This calls for a clear strategy to guide the development of any project.

2.2.2 Rural tourism as a distinctive product

In Australia, as in many countries, the value of tourism for rural development is increasingly being recognised (Australia's Commonwealth Department of Tourism, 1994). The National Rural Development Strategy (1994) of Australia indicates that local communities can gain significant benefits from rural tourism, provided it is properly planned and managed. Benefits include:

- increased non-agricultural income;

- diversification of the region's economic base; and

- Improved employment opportunities in rural areas from associated activities.

There are also social and environmental advantages such as:

- the use of visitor facilities for community purposes;

- greater community cohesion with fewer young people drifting to the cities to find work;

- opportunities for interaction with people from different socioe-conomic and cultural backgrounds;

- Recognition of the need to preserve the 'natural' landscapes for both tourists and others. Indeed, tourism can promote more interest in repairing environments through

such activities as tree planting, sustainable farming practices, repairing coastal sand, etc; and the enhancement of the built environment;

- Preservation and enhancement of cultural attributes, arts and crafts, etc.

However, one must always guard against the negative impact of any form of development and try to avoid or minimise the impact. According to Australia's Commonwealth Department of Tourism (1994) unwanted effects of rural tourism could include:

- disruption of daily life owing to the invasion of privacy, invasion of traditional community events and activities causing loss of heritage, traffic congestion and overcrowding;

- site use conflict where tourism developments compete with other land uses;

- environmental degradation as a result of exceeding carrying capacity;

- increased prices of facilities, food and services;

- The perception of increased crime rates due to the presence of tourism.

(Australia's Commonwealth Department of Tourism, 1994)

The National Rural Tourism Strategy (1994) of Australia further goes on to highlight that many of these negative effects can be minimised or even avoided if, in the initial stages of planning tourism development, a community consultation process is put in place and community perspectives are obtained. Tourism's advantages to an area can greatly outweigh its disadvantages. Tourism management policies, which place a high priority on integrated strategic planning and community participation at local and regional level, can successfully alleviate potential environmental and social problems. The need for a deliberate and thorough assessment of an area's potential as tourism destination is pivotal as a first step.

Of equal importance is to note that tourism is not necessarily for every rural community. It should not be seen as a quick fix for all economic ills. Factors such as long distance from major getaways, poor scenic attractions and lack of tourism infrastructure can mean that rural tourism may not be appropriate for a particular region. Sometimes even communities that have the physical assets may rightly choose not to develop tourism if they perceive the costs to outweigh the potential benefits. Tourism is but only one option for economic diversification.

2.2.3 Why develop a rural tourism strategy?

For rural tourism to prosper and meets its target, it is important to plan and package the tourism product in such a way that it becomes:

- Environmentally sustainable

- Economically sustainable/viable

- Socially and culturally compatible

In order to ensure that the above principles are met, it is vital to formulate a framework in the form of the strategy through which tourism destination should be developed, marketed and promoted (Australia's Commonwealth Department of Tourism, 1994).

According to Page and Getz (1997) in many parts of the world, tourism organisations and their promotion focus on urban areas and resorts. Rural areas have often been marginalised as sightseeing territories, or have been viewed as space in which development might occur, rather than as a distinct and important tourism product or market segment. Pigram (1993) observes that rural tourism often constitutes a disjointed and reactive policy field, while Long and Nuckolls (1994) conclude that support for local and regional tourism in the United States is fragmented or non-existent. Page and Getz (1997) argued that the development of specific approaches to tourism planning and their application in a rural context have attracted comparatively little attention.

As agricultural employment declined with changes in the economic structure of rural areas, Australia adopted a more positive strategy towards rural tourism. This was an attempt to generate employment and to offset out-migration and a declining population base, and to sustain threshold for service provision (Page and Getz, 1997). In this context, tourism has been perceived as one activity that could assist in rural development in declining areas. A strategy has to ensure both a facilitating and a controlling role for rural tourism to develop, protect and enhance the quality of rural environments (both natural and cultural).

2.2.4 Rural tourism in Australia

Rural tourism was not regarded as tourism market in Australia, yet estimates of domestic and international visitations to rural areas are substantial. In 1992-93, rural tourism was estimated to have accounted for nearly 60% of the total domestic tourism market. It was estimated to be worth $11.2 billion to the Australian economy (Australia's Commonwealth Department of Tourism, 1994).

The Federal Government believes that an overall policy framework for planning, development and management of rural tourism is fundamental in optimising the benefits tourism offers. The National Rural Tourism Strategy provides the basis for rural tourism policy formulation and planning for both government and industry. By acting as a catalyst in developing rural tourism as part of wider regional development initiatives, the Federal Government intends to provide a focus and direction for rural tourism development that will achieve economic, environmental and social gains nationally (Australia's Commonwealth Department of Tourism, 1994). If there were a model that South Africa could adopt in developing and marketing its own rural tourism destinations, the Australian model would be an obvious choice

2.2.5 Rural tourism participants

Long and Nuckolls (1994) argue that 'developing a sustainable industry will only be possible if a rural community has the necessary leadership, is effective in its planning efforts, and can access technical assistance to supplement local expertise and eliminate the information and resource gaps'. In support of Long and Nuckolls, the National Rural Tourism Strategy for Australia indicates that community participation is the core of the rural tourism enterprise. People need to have a sense of ownership for the development of the project. In this way, the level of success and sustainability could be high. Chances of success for development projects are low in cases where people were not involved from the beginning. The support of the host communities can be essential to the successful development of rural tourism (Australia's Commonwealth Department of Tourism, 1994).

The Australian National Rural Tourism Strategy (Australia's Commonwealth Department of Tourism, 1994:13) examined the stakeholder organisations and their roles, and noted that they were 'many and varied.' Specifically, the strategy discussed private operators, host communities; tourism industry bodies, non-industry bodies (e.g. agriculture and automobile clubs), and transports operators, educational institutions and financial institutions. Although development is primarily an industry function, government is involved in research and planning, development assistance schemes, facilitation, infrastructure supply, regulation and accreditation, attractions and services, and marketing. Various strategies arising from the Australian review of rural tourism are indicative of the kinds of role government and industry partnership can pursue, as illustrated in Table 1.

Table 1 the Australian National Rural Tourism Strategy 1994: strategic actions

- encourage the sustainable development of high-quality tourism products and product variety in rural areas

- support accreditation and introduction/recognition of standards for rural tourism ventures

- ensure that educational and training needs are known and are met

- promote coordinated and cooperative marketing of rural tourism opportunities

- encourage the provision of reliable regional data and research on rural tourism supply/demand functions

- encourage and support industry and community leadership as a means of developing tourism in rural areas and contributing to regional growth

- encourage improvements in rural transport and infrastructure

- further enhance local-government understanding of the benefits and requirements of tourism, and the value of integrated industry and government planning.

Source: Australia's Commonwealth Department of Tourism, 1994

The strategic actions as highlighted in table 1 set clearly what need to be done in order to develop and promote rural tourism businesses in Australia.

2.3 Conclusion

The contextual framework for rural tourism as a special and unique product together with the specific rural tourism strategies have been highlighted in the beginning of this chapter. Rural tourism is clearly very important throughout most of the world, and is likely to become more important as countries and destinations compete for niche markets (Page and Getz, 1997).

Business opportunities, both small and large, will therefore continue to expand for rural residents and those preferring to set up businesses in rural areas. Without sharing experiences, many mistakes will be repeated and successful strategies missed. It is in this context that a comparative approach was adopted for this study.

While defining rural tourism has proven difficult, most authors agree that rural tourism is a special product, which require special attention. It has been shown that tourists are seeking specific opportunities that might satisfy their needs and preferences. Many forms of rural tourism are unique and can be experienced in rural areas. Rural tourism activities can benefit both conservation and tourism development and most importantly, the host communities.

In the final analysis of the National Rural Tourism Strategy of Australia, it became clear that the Australian Government takes tourism and rural tourism in particular very seriously, something that South Africa does not do. Rural tourism in Australia has contributed substantially to the economy of the country. The key issues that emerged strongly from the literature review, and in particular, the Australian National Rural Tourism Strategy are:

- product and enterprise development;
- accreditation and industry standards;
- education and training;
- marketing and image making;
- market analysis or research;
- industry and community leadership;
- transport and infrastructure;
- the role of provincial and local government;
- lack of policy and supporting strategies.

CHAPTER THREE: SOUTH AFRICAN TOURISM POLICY AND THE TOURISM DEVELOPMENT STRATEGY 1998-2000 (TOURISM IN GEAR): A REVIEW FROM A RURAL TOURISM PERSPECTIVE

3.1 Introduction

According to the Institute for Future Research, vol. 1 (1996) South Africa has a potential to become one of the world's primary tourists' destinations. To ensure that South Africa realises its potential, its sustainable growth in the tourism industry, and for the tourism industry to act as an engine for economic growth, the government published its White Paper called: the Development and Promotion of Tourism in South Africa in 1996.

Cabinet approved the White Paper on Tourism in June 1996. The Department of Environmental Affairs and Tourism launched various initiatives to work and consult around the consolidation of a strategy through which the White Paper could be implemented. The consultation process resulted in the formulation of the tourism strategy, better known as the Tourism Development Strategy 1998-2000: Tourism in Gear. Other documents published by the department of Environmental Affairs and Tourism includes, (1) Investing in Tourism (1997) and (2) The Institutional Guidelines for Public Sector Tourism Development and Promotion in South Africa (May 1999).

The main aim of this study is to critically analyse the tourism strategy of South Africa from a rural tourism perspective and to compare it with other international tourism strategies such as the Australian National Rural Tourism Strategy. Once the analysis has been done, key issues and gaps will then be identified for further discussions and will, together with the empirical research

results, serve as the basis for the envisaged rural tourism development strategy for the Limpopo Province.

3.2 Tourism White Paper: The Development and Promotion of Tourism in South Africa, 1996: A Review

In October 1994, the Ministry of Environmental Affairs and Tourism appointed the Interim Tourism Task Team (ITTT) with the mandate of drafting a tourism discussion paper as the basis for the future National Tourism Policy. The Interim Tourism Task Team (ITTT) produced a Tourism Green Paper in September 1995, which was widely distributed for comment. It was acknowledged that the process of arriving at a White Paper for Tourism is as important as the White Paper itself (South Africa, 1996). Cabinet approved the Tourism White Paper on the Development and Promotion of Tourism in South Africa in June 1996. The Tourism White Paper provides for a policy framework and guidelines for tourism development in South Africa (South Africa, 1996).

For decades South Africa has been relatively isolated from the rest of the world as a results of its apartheid policies. With the dawn of the "new South Africa", which came as a result of the democratically elected government, it became clear that tourism potential should be unlocked to the benefit of both the tourists and the host country. It was clear that with a population of approximately 41 million and a land area of 1.27 million square kilometer (nearly five times the size of UK), South Africa's resource base for tourism is phenomenal. The country's tourism attractiveness lies in its diversity: diversity in wildlife, in its people, urban life and rural life (South Africa, 1996). Despite the appreciation of rural life, the White Paper does not mentioned rural tourism as a distinct product that can be developed.

The Tourism White Paper (South Africa, 1996) describes the development of tourism in South Africa as essentially a missed opportunity. According to the White Paper, the tourism industry in South Africa had been protected from foreign competition (limited international investment in tourism facilities), from demanding long-stay tourists (limited international visitors), and from itself (suppliers cater for a largely homogenous and predictable clientele, i.e. the easily identifiable needs of the privileged class). As a result, the potential of the tourism industry to spawn entrepreneurship, create new services, drive other sectors of the economy, strengthen rural communities, generate foreign exchange and create employment has not been realised (Human Science Research Council, 2001).

According to the Human Science Research Council (2001) the importance of tourism in South Africa is slowly being realised since 1996; and more efforts and financial resources are put into tourism. However, Naguran (1999) argues, as stated earlier that tourism in South Africa has a poor history of involving local communities and previously neglected groups in tourists related activities. People had been forcibly relocated from their land to make way for conservation areas and, as a result, there was much anger and a feeling that animals were thought to be more important that people. Naguran's argument supports the Human Science Research Council observation.

Perhaps the most distinguishing feature of the Tourism White Paper (South Africa, 1996) is the absence of any specific section that focuses solely on rural tourism. Actually, no National or Provincial government in South Africa has a direct policy which deals exclusively with rural tourism development or even an exclusive section focusing on rural tourism issues. In other words, the Tourism White Paper of South Africa does not make specific provisions for Rural Tourism Development. Rural Tourism is not recognised as a special product as it is the case in Australia. This is in spite of the fact that South Africa has some of the best rural areas in the

world. The Limpopo Province is one of the most predominantly rural provinces. As much as there are many good things about the Tourism White Paper, it should be stated that it appears to be silent on rural tourism product and its potential in the country. Although the White Paper on Tourism regards South Africa, as a global leader in ecotourism, a lot has to be done in order to involve rural people in tourism activities. Even though the White Paper acknowledges that tourism brings development in rural areas, rural tourism as a product is yet to be appreciated.

It is the conviction of the researcher that South Africa and the Limpopo Province in particular, should follow the route the Australian government took several years ago and develop and package rural tourism products for the reasons highlighted in chapter two. According to the former Minister of Environmental Affairs and Tourism, Dr Pallo Jordan (1997) South Africa is gearing up for a sustained growth phase in international tourism arrivals- a growth that will energise both the tourism industry and create the momentum for the African Renaissance. If, indeed tourism is to contribute towards the African Renaissance, its products should therefore be reflective of the Africaness. It is against this understanding that rural tourism should be seriously considered for the poor rural Limpopo Province.

According to the Institute for Future Research (1996), the White Paper on the Development and Promotion of Tourism in South Africa provides valuable objectives, policy guidelines, and principles concerning the full potential of tourism in South Africa. However, the Institute for Future Research has failed to realise that the Tourism White Paper of South Africa is rather silent about rural tourism product potential in a country that is more rural in many more ways than one. There is therefore a gap in terms of Rural Tourism Development. The following South African provinces are generally considered rural: The Limpopo Province, Kwazulu-Natal and The Eastern Cape Province. On the other hand, the White Paper on the Development and Promotion of Tourism in South Africa does not make any reference about this emerging tourism product; i.e.

rural tourism. The full potential of the tourism industry in this country may not be realised if rural tourism product is not explored.

Many rural areas around the globe are now changing their image and aggressively marketing aspects of their rural heritage, authentic or otherwise, to would-be urban purchasers. Increasingly, rural areas have come to realise the economic benefits, which can accrue to rural areas from tourism and recreation development. It is ironic that after years of neglect, tourism and recreation have quickly came to be seen as major agents of economic redevelopment for rural and other areas. Government policies at all levels have begun to appear in recent years in efforts to increase access to rural areas for urban and rural residents, coupled with the realisation that some reallocation of wealth can also occur through such an activity (Butler et al, 1998).

The observation highlighted above by Butler and his co-writers is not applicable to South Africa where, as stated earlier, tourism policies are generally silent about rural tourism. It is indeed against this background that a Rural Tourism Development Strategy for the Limpopo Province in particular is not only important but urgent as well. It can therefore be argued that in terms of Rural Tourism Development, South Africa is far behind other countries (e.g. Australia). The potential for rural tourism in South Africa in general, and in the Limpopo Province in particular, is promising, provided it is well planned, developed and marketed.

3.3 The Tourism Development Strategy 1998-2000: Special focus on the South African Tourism in Gear Strategy

3.3.1 An overview

After the approval of the Tourism White Paper of South Africa by cabinet in June 1996, the Department of Environmental Affairs and Tourism launched various consultative initiatives to consolidate ideas and formulate a strategy through which the Tourism White Paper could be implemented and realised. The consultation process resulted in the formulation of the strategy called Tourism Development Strategy 1998-2000 (also known as Tourism in Gear). This section is about a critical analysis of the Tourism Development Strategy, mainly from a rural tourism perspective. Put differently, this section seeks to find out if the Tourism Development Strategy 1998-200 (Tourism in Gear) considers rural tourism product potential in its endeavor to develop tourism.

The idea is to analyse the Tourism Development Strategy of South Africa and also to compare it with other similar strategies around the world. In more specific terms, the idea is to compare it with the National Rural Tourism Strategy of the Commonwealth of Australia (1994). Key issues and principles which are considered relevant to the situation in the Limpopo Province, as well as research findings will form the basis of the strategy for rural tourism development in South Africa and in particular, for the Limpopo Province. However, it should be unintelligent to assume that a strategy for another country will squarely fit in another country. That is why according to this school of thought, only those aspects which are relevant and appropriate to conditions and situations in the Limpopo Province will be considered for the purposes of developing a Strategy for Rural Tourism Development for the area in question.

3.3.2 The Current status of tourism in South Africa

The tourism sector has been in an expansion phase for the past 9 years, and has grown beyond expectations since the 1994 general elections. The total tourist expenditure in 1996 was approximately R26.8 billion. Domestic and international tourists contributed approximately R14.8 billion and R12 billion respectively. Exceptional growth occurred in 1995, when

international tourism grew by 22% in 1994. The overseas component of the international market, which is the most lucrative, grew by 44% from 704 000 visitors in 1994 to 1 015 000 in 1995. Arrivals from the rest of the continent grew by 12%. This accounted for an increase of more than R3 billion in foreign exchange earnings for the year, from approximately R7 billion to almost R11 billion (South Africa, 1997).

The South African's Travel and Tourism (1998) believes that by 2010 more than 174,000 new jobs could be created directly by the Travel and Tourism industry, and 516,000 jobs (see figure 1) could be created, directly or indirectly across the boarders of the South African Economy.

According to the latest Tourism Survey results (2000) the popularity of South Africa as a tourist destination increased by 24%- from 115 891 foreign air visitors in August 1998 to 144 097 in August 1999. The country's revenue from foreign visitors in August 1999 is estimated to have grown to over R2 billion – a substantial increase of 23% as compared to the previous August (http://satour. com. News/2000). The cumulative visitor arrivals during the first eight months of 1999 grew by 2.5% to 3.7 million (http://satour.com/news/2000).

The Tourism Development Strategy 1998-2000: Tourism in Gear further points out that in spite of the healthy growth experienced during the period following 1994 the elections, the country has not been able to optimise its tourism potential. It is mainly because of this reason that this study is conducted, in order to unlock some of the tourism products yet to be acknowledged. Rural tourism is one such a product. The Tourism in Gear strategy is also silent about the potential of rural tourism in this country. The potential of Rural Tourism Development appears to be and overlooked despite the international trends of focusing on rural areas as tourist destinations.

Figure 1: South Africa travel and tourism employment pessimistic, baseline and optimistic 1998-2010

South Africa

Travel and Tourism Economic Employment

Pessimistic, Baseline And Optimistic 1988-2010

(thousands jobs)
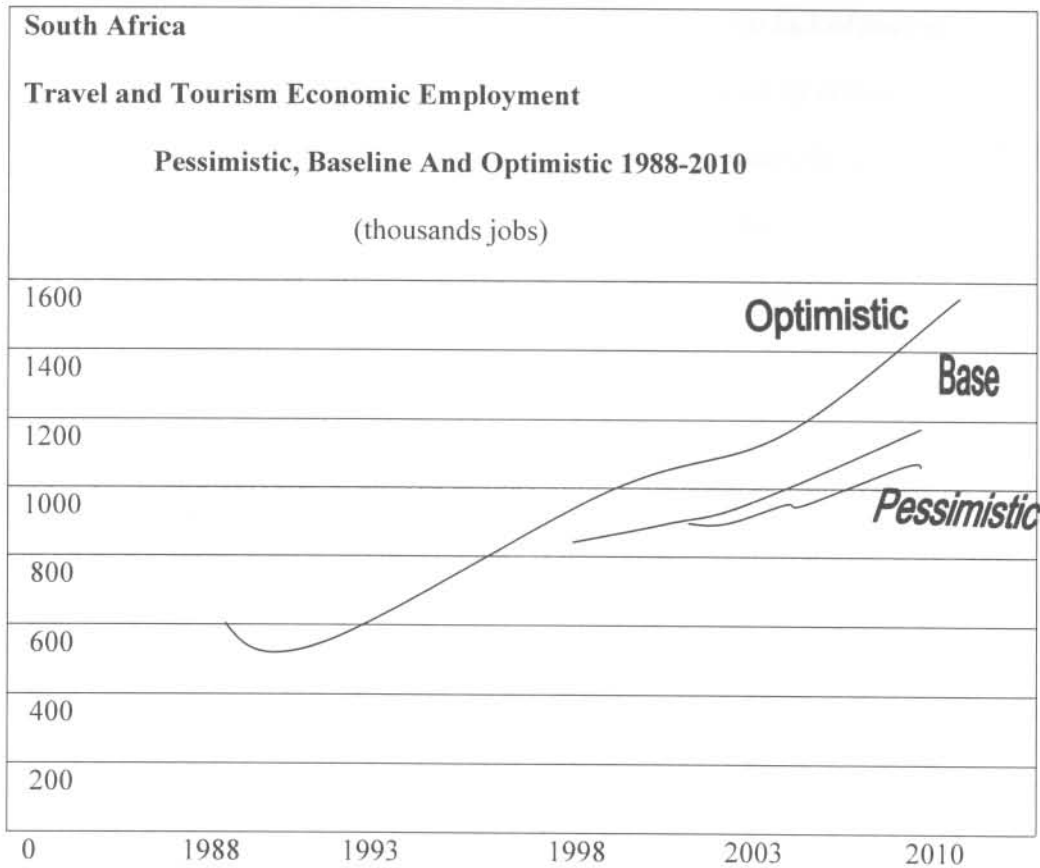
(Source: South Africa's Travel and Tourism, 1998)

3.3.3 An analysis of the tourism sector (SWOT analysis)

According to the Tourism Development Strategy 1998-2000 (1997) an analysis of the tourism sector reveals the following key findings:

- *Strengths: diversity of attractions and unique selling features; well-developed core tourism infrastructure that has been able to absorb and accommodate high growth; largely deregulated, privately operated; competitive airspace policy; offers good value for money due to a favourable currency.*

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- *Weaknesses: absence of a clear product branding and fresh marketing strategy; poor international promotion coverage due to major lack of marketing funds and a weakening currency; poor product diversification; lack of institutional capacity at all tiers; fragmentation and lack of partnership; lack of access and tourism activity in many areas due to past policies; lack of ownership and spread of benefits to disadvantaged communities; poor service ethic and culture; lack of skilled manpower; poor perception of safety; lack of sustainable management practices.*

- *Opportunities: growing world market to tap into; our product base compliments global trends and market needs; increasing freedom of airspace introduces competition and affordable access; availability of community resources (e.g. land) in many areas with tourism potential; many underdeveloped areas with tourism potential where economic growth is most needed; major new markets opening up after elections; tourism sector conducive to SMME development; major opportunities for human resource development.*

- *Threats: increasing incidence of crime against tourists may have a severely negative impact on the industry; danger of becoming unknown in the marketplace due to lack of marketing funds; potential irreparable damage and over- development of resource base; danger of overpricing by some industries; potential degradation of service and product quality.*

3.3.3.1   Strength

(a) Diversity of attractions:

While one of the strengths the tourism sectors in this country lies in its the diversity of attractions, it is clear that this feature is not yet fully exploited hence the absence of a clear product branding (e.g. rural tourism product branding). It may be said that until such time rural tourism product

development is looked at seriously, the advantage of diversity of attractions as pointed out in the Tourism Development Strategy 1998-2000 will only remain on paper.

3.3.3.2 Weaknesses

(a) Absence of a clear product branding:

By taking the advantage of the above-mentioned strength, we would have partly addressed one of the weaknesses pointed out in the Tourism Development Strategy: an absence of a clear product branding and fresh marketing strategy.

(b) Poor product diversification:

Another weakness indicated in the Tourism Development Strategy 1998-2000 (South Africa, 1997) is that of poor product diversification. Rural tourism product development would play a major role towards diversifying tourism products in the country, thereby affording tourists a true African experience. This, in turn, would give tourists a wide range of choice in terms of varied places of interests. It will not only spread the benefits of tourism to peripheral areas where such benefits are most needed, but would also lessen the pressure on the dominant destinations such as Durban Central, Cape Metropole, Garden Route, Gauteng Central and Kruger National Park.

(c) Fragmentation and lack of partnerships:

One of the major problems in South African Tourism sector, especially in rural areas, is the fragmentation and lack of partnerships (South Africa, 1997). Each tourist attraction is often by it's own (Butler *et al*, 1998). It is hereby envisaged that with the development of the Rural Tourism Development Strategy, tourism destinations could be better coordinated in such a way that a clear picture of regional tourism attractions could be drawn. In that way, partnerships could be reinforced. It is encouraging to note that there exist a partnership programme of the Department of Environmental Affairs and Tourism, the Business Trust, the Tourism Business Council of South Africa and South African Tourism (http://satour.com, 2000).

(d) Lack of access and tourism activity in many areas due to previous policies:

This is one weakness the study aims to address. It is true there is lack of access and tourism activity in many areas, particularly in rural areas. Tourism is mainly seen as an elite white man's activity. Most poor black people are left out and hardly benefit from the enterprise in spite of the fact that they are the inhabitants of the tourist's destinations. The strategy therefore aims at increasing access and tourism activities not only by branding the rural tourism product, but also by ensuring that communities are involved in the planning, management, monitoring and sharing of the benefits.

(e) Lack of ownership and the spread of benefits to local communities:

As highlighted in the above paragraph, the benefits of tourism are rarely shared amongst the most needy citizens. Because of that scenario, local people next to tourism destinations often see tourists as elite people and as a result, become hostile to tourists. There is less likelihood that destructive resource use practices can be stopped without changes in the social and economic situations facing communities. According to Carnea (1991) there is ample evidence that projects which focus on generating economic benefits without effectively encouraging local participation in the identification, design, implementation or evaluation of the development activities are less likely to provide widespread community benefits.

(f) Lack of skilled manpower and poor perception of safety:

Due to our history, many people were denied access to education and training; and this in turn, led to the prevailing lack of skilled manpower. It is predicted that, with the introduction of the rural tourism product, people will be trained in hospitality and the management of tourism enterprise. The Limpopo Province is generally perceived as a peaceful province, safety and security concerns are therefore not fully applicable in this area.

3.3.3.3 **Opportunities**

(a) Growing world tourism market to tap into:

Tourism is the largest industry in the world, and it continues to grow. By the year 2005, it will have doubled its present size if it continues to grow at current rates (World Travel and Tourism Council, 1992). Back home, South Africa is currently at the dawn of a new era. There are high expectations that the tourist industry will attract oversea investments and 'kick-start' the local economy. Whether the industry is capable of doing this, remains to be seen. However, with diversifying tourism products in the country, this seems possible.

(b) South Africa's product base complements global trends and market needs:

While it is true that South Africa's products complement global trends and market needs, our country has not yet developed all the products it has to offer the world. A clear example is the Rural Tourism Product, which is yet to be developed into a vibrant tourist attraction. Other countries like Australia are way ahead in terms of rural tourism development. According to Butler et al (1998) the recent years have witnessed a change from the passive, low key use of rural areas for recreation to the explosion of tourism as a highly active and dominant agent of change and control in the countryside and rural communities. In Australia, rural tourism provides an opportunity for the country to share in the nation's spectacular tourism growth (Australia's Commonwealth Department of Tourism, 1994).

(c) The availability of community resources (e.g. land) in many areas with tourism potential.

Most of the land in South Africa is rural and presents rural tourism potential as an added advantage. The Limpopo Province, as indicated earlier, is predominantly rural, with its economic centres self-contained and strategically located. The result is that large areas still remain untouched by human development and are well-preserved, unmistakably, African ecosystems are found here (http://www.tourismboard.org.za/wildlife/index.html, 1999). It is therefore likely that

rural tourism in the Limpopo Province could provide real African experiences for tourists, both domestic and international.

(d) Many underdeveloped areas with tourism potential where economic growth is most needed:

The magnificent scenery, untouched, almost endless display of nature, and prolific wildlife of the Limpopo Province offer endless opportunities for excitement and adventure (http://www.tourismboard.org.za/adventure/index.html, 1999). On the other hand, lack of alternative forms of development apart from agriculture in rural areas is a worrying factor. However, rural tourism enterprises could help in the emergence of new entrepreneurs in this area, where lack of alternative economic activities is a real concern.

(e) Major opportunities for human resource development:

Alternative forms of development also provide for human resource development because people will learn new skills to carry out the new tasks. Rural tourism development can therefore, be the right recipe for human resource development.

3.3 3.4 **Threats**

(a) Increasing incidents of crime against tourists may have a severely negative impact on the industry. Crime is indeed the biggest threat in South Africa for tourism development. However, comparatively speaking, the Limpopo Province is the least affected area by crime; hence the province is also known as the "home of peace" (http:/www.tourismboard.org.za, 1999).

Rural tourism development could help South Africa and the Limpopo Province in particular, to take advantage of the strengths and opportunities highlighted above for the benefit of the industry and the poor, while at the same time addressing the weaknesses and threats indicated. According to the World Travel and Tourism Council (1998) South Africa has tremendous advantages in the

global tourism market and some critical challenges. The future prosperity of the sector will be assured only if these advantages are consolidated and the weaknesses minimised. The envisaged Rural Tourism Development Strategy can play that role by encouraging the consolidation of the advantages and strengths, as well as minimise weaknesses and threats.

3.3.4   Tourism Vision

The tourism vision as stated in the Tourism Development Strategy of South Africa is to develop the tourism sector as a national priority in a sustainable and acceptable manner, so that it will significantly contribute to the improvement of the quality of life of every South African. As a lead sector within the national economy, a global competitive tourism industry will be a major force in the reconstruction and development efforts of the government (South Africa, 1997). For South Africa to realise this noble vision, it calls for the proper branding of tourism products. Rural tourism product branding could play a vital role towards the realisation of this ideal vision, and also in meeting the growth targets, such as the one to increase the contribution of the tourism sector from 4.7 to 8% of GDP by 2000 (South Africa, 1997). However, the contribution of the tourism sector has actually dropped to 3.75% of the GDP as by August 2000. Preliminary forecasts of 6.2 million tourist arrivals for 1999 did not materialise (http://satour.com, 2000). The actual arrivals were somewhat less than the advanced figures released earlier by Statistics South Africa (http://satour.com, 2000).

3.3.5   Underlying Principles

The underlying principles of Tourism in GEAR strategy are, according to the views of the researcher, correct and reasonable. These principles are that:

1. Government should lead tourism. Given our history past Government should really lead by means of providing efficient policies and appropriate funding to the sector in order to create an environment for private enterprise to flourish.

2. Tourism should be driven by private sector. Tourism should be directed, just like any other business by the principles of demand and supply, which make private sector a major partner.

3. Tourism should be community based. Without the support and participation by locals, tourism is likely to suffer.

4. Tourism should contribute to job creation.

3.4 The Limpopo Province Tourism Situational Analysis

3.4.1 Introduction

According to the Limpopo Provincial Government's Growth and Development Strategy (1999) the province covers an area of 123 910 square km, which is 10.2 % of the national land, and has a population of about five million people. The province is predominately rural (89%), see figure 2 below (Statistics SA, 1996).

Figure 2. Urban and rural population of South Africa

Urban and rural population of South Africa

	WC	EC	NC	KZN	FS	NW	GP	MP	LP	SA
Urban	88.9	36.6	70.1	43.1	68.6	34.9	97	39.1	11	53.7
Rural	11.1	63.4	29.9	56.9	31.4	65.1	3	60.9	89	46.7
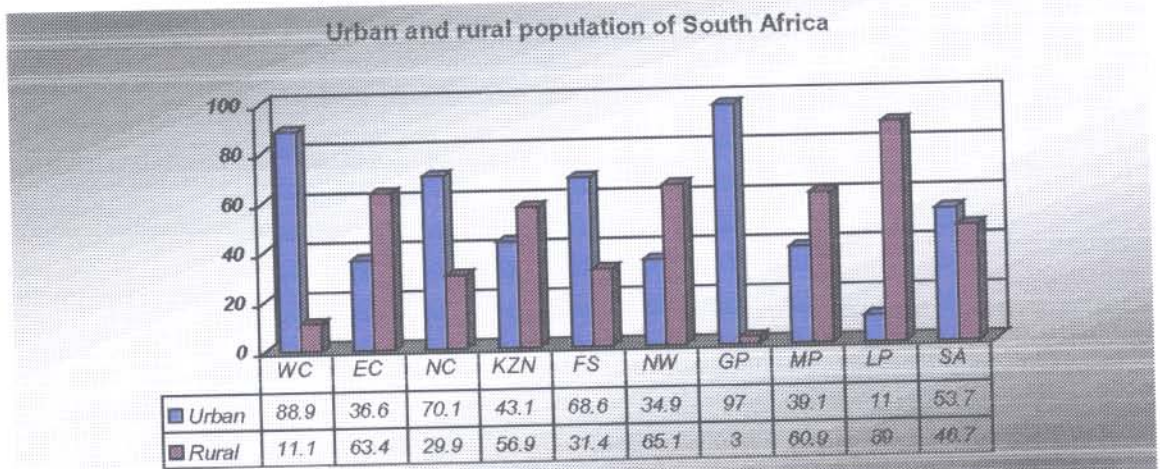
Source: Statistics South Africa, Census 1996

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The Province is strategically situated at the northern most tip of South Africa, and is ideally positioned for easy access to African markets (see appendix A). It shares borders with Zimbabwe, Botswana and Mozambique. The Limpopo Province has identified mining, agriculture and tourism as the three pillars of the Growth and Development Strategy. In terms of tourism, the province offers a mosaic of exceptional scenic landscape, a fascinating cultural heritage, an abundance of wildlife species and many nature-based tourism opportunities. It is the land of legends and myths and of ancient civilisations. Those in search of history will find many places of archaeological significance that yielded relics dating back millions of years (http://www.tourismboard.org.za, 2000). However, according to the website, people are probably the greatest assets of the province. People are warm and friendly, and ready to share the abundance of their province.

This populace consists of several ethnic groups distinguished by culture, language and race. There are the Northern Sotho, who speak Sepedi, and they make up the largest group (about 57%) of the population. The Tsonga, who speak Shangaan, constitute 23% with the Venda, who speak Tshivenda, comprising 12%. There are also a significant number of Ndebele speaking people, Afrikaans and English speaking people. The province offers the widest diversity of cultures, languages and traditions (Northern Province Department of Finance, Economic Affairs and Tourism, 1999). More information regarding the cultures and traditions of the above-mentioned ethnic groups is provided as part of the tourism resource package of the region they belong to (see page 57-61).

As stated earlier nature-based tourism is well established in the province. In the mean time, initiatives to commercialise or privatise all government-run nature and game reserve and parks (54) is underway. Eco-tourism has been identified as the preferred tourism brand for the province (Northern Province Department of Finance, Economic Affairs and Tourism, 1999).

As indicated in the previous chapter nature conservation has left people out of the equation of tourism and development in South Africa. Like it has been said already, cultural tourism is seen as a major factor in tourism development for the province. Cultural tourism is yet to be natured and integrated with nature-based tourism in order to offer tourists a complete tourism product. It is in this context that rural tourism, which combines nature-based activities and cultural activities could put the province on the tourism map.

In the past people or cultural tourism was not part of the nature conservation process; these were the times when nature and game reserves were government run. Obviously, the commercialisation and the privatisation of these provincial game and nature reserves can only push locals further away, because fees are likely to raise. Rural people are generally poor and can hardly afford high fees. It would appear as if eco-tourism and the commercialisation of nature reserves could not be compatible, given the poverty levels in the Province. The province is divided into four tourism regions. The four regions represent a microcosm of varied tourism activities.

3.4.2 Provincial tourism regions

The four provincial tourism regions are the Soutpansberg, the Capricorn, the Bushveld and the Olifants.

3.4.2.1 The Soutpansberg region

According to the Northern Province Tourism Board (2000) there are few places that give one a greater feeling of being in Africa, than the Soutpansberg-region. Endless expanses of undulating indigenous bush, marked by the grotesque forms of the baobab, wonderful wildlife, a profusion of birds and to top it all, fascinating history and cultures which truly make it "the Land of Legend". The area boasts one of the most varied natural, geological, archeological and cultural systems in the world and abounds with fascinating history dating back many centuries ago when the San roamed the veld and left us their artworks on the rocks and caves. These were the times when

Arabs and Indians sailed down the south and traded ceramics for gold and ivory of the ancient African kingdoms, which built their fortresses at Mapungubwe and Thulamela.

New cultural groups (e.g. Luvhola cultural village and Pfuxhanani youth centre; all part of the Ribolla Tourism Association) are gradually moving into the tourism picture. These new cultural villages bring with them the cultural and traditional elements, which have been overlooked for years in the tourism sector, especially in South Africa. The region boasts the histories and cultures of VhaVenda, Shangaans and Afrikaners. There are traces of colourful characters such as Popi, who united the Venda nation and later became known as Thohoyandou, and Joao Albasini, the Portuguese trader who became headman of the Shangaans.

According to the Northern Province Tourism Board website, Venda is truly the Land of Legends as there is so many beliefs and stories about the supernatural. The traditional deity of the vhaVenda is Raluvhimba, a bird-likebeing. He travels like a shooting star and his voice is heard in thunder, lightning, droughts, floods and earthquakes. There is also the Guvhukuvhu waterfall, which is a sacred place. However, the best known sacred place in Venda is the mysterious Lake Fundudzi in the Mutale River. It is said that Lake Fundudzi is the only lake in South Africa.

When trying to answer a question posed by one of the German tourists, as to how African people really live today, Dugmore (2002) says that the beauty of Venda is that traditional practices are still very much a part of everyday life, and age-old rituals like the *domba* or python dance are still regularly performed. Teenage Venda girls lead this dance as a rite of passage to womanhood, just as their great-grandmothers did. There are many more traditional dances and practices by VhaVenda and Shangaan people which could fascinate tourists.

With regard to archeological places, Mapungubwe is truly one of the most remarkable icons of the province, and is in the process of becoming a World Heritage site. The name means "the Hill of Jackals" and reflects the fact that the first kingdom in Southern Africa was actually situated here. After scientific study had been conducted, carbon dating tests revealed that Mapungubwe has been the forerunner to what is currently known as, the Great Zimbabwe ruins. People occupied this area since 850 AD, but the top of the hill was only occupied from 1000-1200 AD. This is about two and a half centuries before Great Zimbabwe (http://www.tourismboard.org.za, 2000).

The Soutpansberg is a unique wilderness area. It has over 500 tree species. There are 465 species of birds as well as numerous mammal, reptile and amphibian species. Game farming is more ideal in the mopani bushveld (Northern Province Tourism Board, 2000). Other places and practices of interests include (but not exhaustive to) Manyeleti Game Reserve, Dongola-Vhembe Park, Makuya Park, Kruger National Park, Baleni Park, Elim Nature Reserve, Messina Nature Reserve, Fundudzi Lake, Phiphidi Waterfalls, Beit Bridge, Louis Trichardt, Thohoyandou, Giyani towns, cultural villages (Tshakuma, Dzata, Luvhola, Pfuxhanani), academic institutions such as the University of Venda, Madzivhandila Agricultural college, and the Giyani Nursing Campus, and a variety of traditional dances and customs (see appendix B).

3.4.2.2 The Capricorn region

According to the Northern Province Tourism Board (2000) the Capricorn region is an area of extreme variations. From the grassy plains and hills of Pietersburg, to the pleasant bushveld of Potgietersrus to the misty mountains of Haenertsburg, it boasts a rich variety in geological formations, plant and animal species. Its historical and cultural attractions are significant, incorporating San rock art, legendary characters such as King Makgoba of the Ba-Tlou people, Voortrekker-histories, Anglo Boer War remnants, and many more.

The capital city of the province is Pietersburg, but is now known as Polokwane, and is situated in this region. It was founded in the 1880s. Another town in the Capricorn region is Potgietersrus, which is now known as Mokopane, and it is one of South Africa's richest agricultural areas. It boasts one of the biggest citrus farms in the southern hemisphere. One of the most notable sites near Potgietersrus is the Makapans Valley, currently in line for World Heritage Status. Nowhere else in the world exists such an extended and complete record of hominid occupation. There are bones of Ape-men, which are 3,3 million years old and extinct animals. The Cave of Hearths is presumably the earliest evidence of man's use of fire (Northern Province Tourism Board, 2000).

Other places of interest for tourists include the magical mountains of Haenertsburg, Magoebaskloof and Agatha, which are linked together by the spectacular Georges Valley, and are characterised by indigenous forests, cascading waterfalls and lakes. The tallest man-planted tree in the world is situated in this region. There are many more places of interest such as the Chuene Crocodile farm, Eersteling Monuments, Museums, Sekhukhuneland, Zebediela, Nature Reserves, cultural villages, Hiking trails and the University of the North (see appendix B).

3.4.2.3 The Bushveld region

To most people, the bushveld is the most typical and the most beautiful veld-type in South Africa. More recently, the histories of the Bapedi, Batswana and Basotho tribes are gradually being uncovered. The greatest draw-card however, remains the extraordinary natural attractions that are part of the bushveld: The Waterberg, a geological wonder supporting a biome covering approximately 14 500 km2 offering spectacular vistas and scenic valleys; the Nylsvley wetlands, where the greatest variety of waterbirds are concentrated; the Marakele National Park and the Lapalala Nature Reserve (Northern Province Tourism Board, 2000).

The Bushveld region boasts the following important towns: Warmbaths, Nylstroom, Naboomspruit, Vaalwater, Thabazimbi and Ellisras. Each town in itself is worth visiting, since each has a surprising number of historical, cultural and natural attractions and activities. Perhaps the most notable town of them all is Warmbaths. It is estimated that two million tourists visit this resort per annum. It is also known as a "paradise" in the bushveld. It is a modern and internationally renowned Spa. The hot mineral springs bubble out of the earth at about 22 000 litres per hour. This town is only an hour's drive from Gauteng province. Other places of interest around Warmbaths resort are the Carousel Entertainment World, Warmbaths Waterfront, and Thaba Kwena Crocodile Farm (see appendix B).

3.4.2.4 The Olifants region

As the name suggests, this region fall in the valley of the great Olifants River, which stretches, from Giyani through to the Kruger National Park (see appendix B). It includes towns such as Phalaborwa, Tzaneen, Hoedspruit and Bosbokrand. The Olifants Valley is rich in wildlife, scenery, mountains, rivers, dams, history and cultural and ethnic attractions. The Valley of the Olifants encompasses some of the largest remaining wilderness areas in the country. It harbours the heartland of the lowveld, unspoiled indigenous forests, the beautiful escarpment and mountain ranges of the Northern Drankensberg (Northern Province Tourism Board, 2000).

There are numerous private Game Parks, such as Timbavati and Tshukudu Reserves, as well as easy access to the northern section of the Kruger National Park. The Valley of the Olifants is also the home of the late Modjadji V, the legendary Rain Queen (also known as the Queen of Rain). Modjadji means "Ruler of the Day". It was on this legendary figure that Rider Haggard, over 100 years ago, based his famous novel SHE. Time has done little to erode her reputation. Her history can be traced back to Zimbabwe some 400 years ago. She was a princess that had to escape her father's wrath after having fallen pregnant by her half-brother. Her mother helped her to steal her

father's rain-making medicines. She then settled on the Lobedu mountains near Duiwelskloof and practiced her rainmaking powers. A trip to the Limpopo Province without a stay at Modjadji Cycad Nature Reserve is arguably incomplete (http://www.tourismboard.org.za, 2000). The region is also a meeting place for the vibrant diverse cultures of the Shangaan, Pedi and Venda people (Northern Province Tourism Board, 2000).

3.4.3   The Limpopo Province tourism icons

The Limpopo Province, also known as the Great North, boasts a number of icons. Icons are places of interest and experiences that are a " must see, do, or experience". These icons consist of living cultures, ancient places, Nature Reserves and National Parks, trees, myths and legends, things to do, and things to experience. These icons are the Makapansgat Valley, Mapungubwe, Modjadji, the Kruger National Park, The African Ivory Route, Baobab Trees, Domba Dance, Venda Myths and Legends, and the Anglo-Boer War (http://www.tourismboard.org.za, 2000).

Since these icons form part of the regions, most of them have been elaborated in the above item with the exception of the African Ivory Route and the Baobab trees. The African Ivory Route cut across all the regions and brings together major interesting places in one trip. With regard to the Boabab trees, it is argued that there is no tree in South Africa that embodies the spirit of Africa more than the boabab tree. *Adansonia digitata,* as the boabab tree is scientifically known, is one of the trees in Africa with the longest lifespan. Some of them that can be seen in the province are already 3,000 years old, but average ones in the northern part of the province are between 300 and 500 years old.

There is a baobab specimen near Sagole, a rural village in the North East of the province that can be visited. It is 3,000 years old and measures 43 metres in circumference at base (http://www.tourismboard.arg.za, 2000). These icons are but few of the interesting places in the

province. The following item is on the most visited areas in the province as supported by the previous surveys.

3.4.4 International and Domestic tourism patterns in the province

According to a survey of South Africa's International Tourism Market (2000), the Limpopo Province's shares in the international tourism market amount to only 5-6% as compared to Western Cape (58%), Gauteng (55%), Kwazulu-Natal (22-25%), Mpumalanga (19%) and Eastern Cape (14%). These statistics, as indicated in figure 3, show that the Limpopo Province receives the least number of foreign tourists.

Figure 3: South African Tourism International Market, South African Tourism

PROVINCES VISITED

	NC	FS	NW	NP	EC	MPU	KZN	GP	WC
Jan-00	3	3	5	5	14	14	22	55	58
Jan-99	3	4	5	6	14	19	25	53	58

% OF ALL FOREIGN VISITORS

PROVINCES
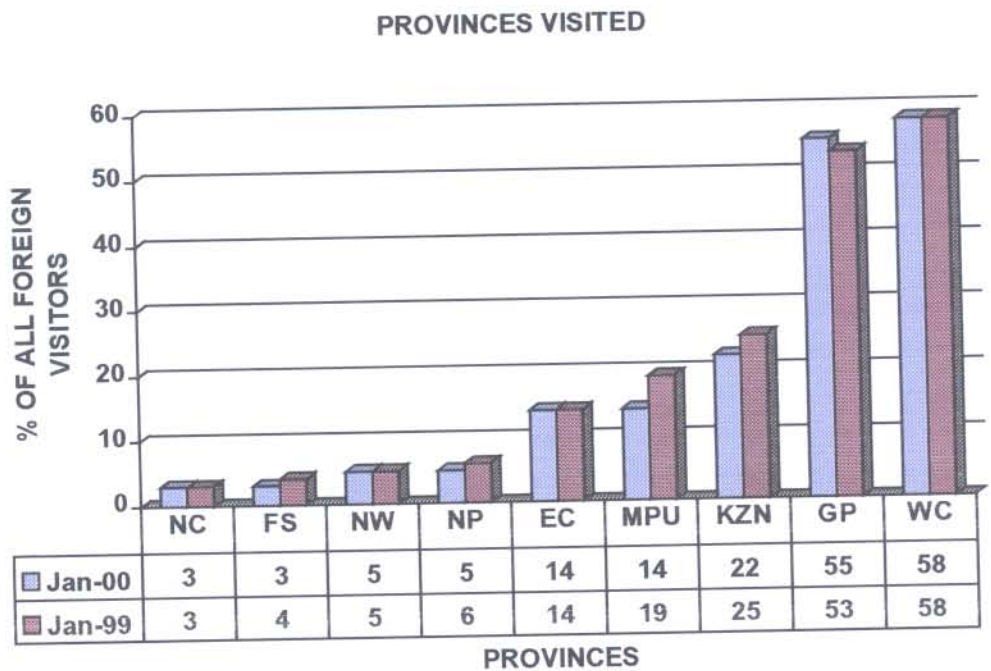
Source: South African International Tourism Market, South African Tourism, 2000

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With regard to the domestic tourism patterns, the HSRC (2001) reveals that of the total number of domestic tourism trips undertaken in South Africa, 12,9% of them (Table 2) were to destinations in the Limpopo Province. This figure is low as compared to other provinces such as Gauteng (19,6 %) and Kwazulu-Natal (19.0 %).

Table 2. Provincial destinations of domestic trips, May 2000 - April 2001

Province	Number of trips	%
EC	4296 765	12.8
FS	2429 088	6.7
GP	6579 421	19.6
KZN	6378 010	19.0
MPU	1913 403	5.7
NC	9063 48	2.7
NP	4330 333	12.9
NW	2651 910	7.9
WC	4196 059	12.5
Total	3350 1338	100.0

Source: South African Domestic Tourism Survey: HSRC 2001

Most travelers to the Limpopo Province destinations were residents of the province itself (53,7%), followed by Gauteng and North West residents (26,5% and & 7,3% respectively). The survey shows that there are different reasons for trips to the Limpopo Province. Recent travelers to the Limpopo Province destinations differed according to type of the trip. The tourism survey differentiated between leisure, business, visiting friends or relatives (VFR), health and religious trips.

Figure 4: The Limpopo Province trips types.

NORTHERN PROVINCE TRIP TYPES
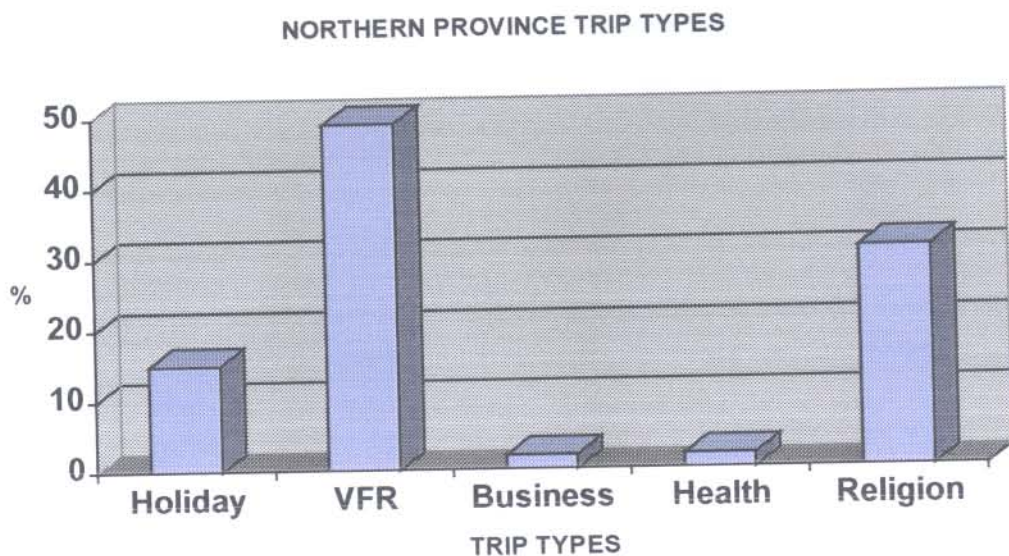
Source: South African Domestic Tourism Survey: HSRC 2001

Most trips (49%) to the Limpopo Province destinations in the last twelve months had been for the purposes of visiting friends or relatives (VFR). After VFR trips, the most popular trip types were the religious trips, which represented about 30,7% of all trips to the Limpopo Province. Trips for holiday and leisure purposes represented about 10% of all trips, while business and health accounted for 2% each (see figure 4 above).

Figure 5: The Limpopo Province tourists' trip destinations

Northern Province Tourism Trip Destinations
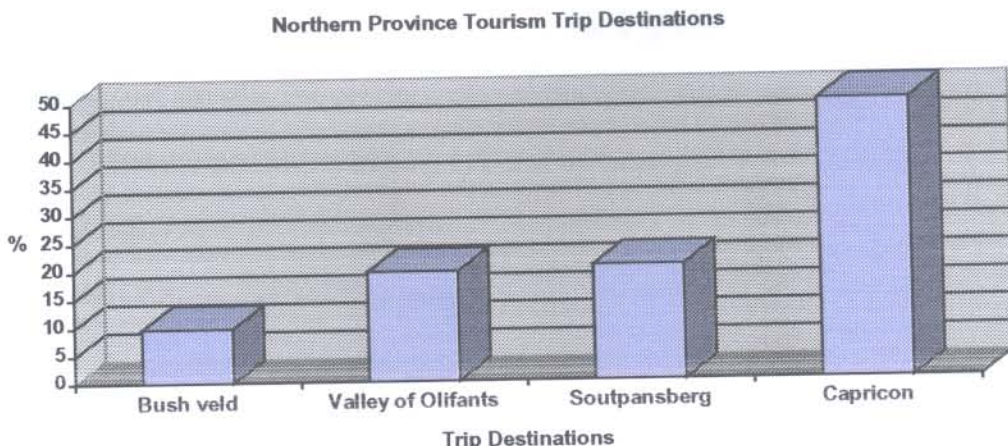
Source: South African Domestic Tourism Survey: HSRC 2001

Figure 5 shows that the most popular region is the Capricorn (49%), followed by the Soutspansberg region (20,6%). The Valley of the Olifants region is just below the Soutspansberg region with 19,7% while the Bushveld region accounts for 9.8%. Of all the trips, VFR trips were well spread across all the regions, but peaked up for the Valley of the Olifants. The location of Moria (the ZCC headquarters) made the Capricorn region a particularly important destination for religious trips. After the VFR trips, the most common reasons for visiting the Limpopo Province were leisure and religion (South African Domestic Survey, HSRC, 2001).

Asked about the sorts of activities they enjoyed, most travelers sited religious gatherings, visiting nature reserves, African cultural villages, shopping and soccer as reasons why they travelled to the Limpopo Province destinations. Peace and tranquility, and the availability of fresh produce (vegetables and fruit) were also mentioned as positive factors for tourist attraction. The least enjoyed activities were cricket, cycling, conferencing events and golf (South African Domestic Survey, HSRC, 2001). However, a concern was raised about the poor service (service standards and education and training) and facilities (roads and transport), as well as the lack of the African

culture and tradition as part of the tourist experience. These are issues that need to be addressed by tourism authorities in order to enhance the attractiveness of the Limpopo Province to potential tourists. Despite some of the challenges, the province still has a great potential to improve its domestic and international arrivals. The province can use the solar eclipse opportunity, coming December 2002, to improve and showcase its rural tourism opportunities.

3.4.5   The 2002 Solar Eclipse and The Limpopo Province

Every now and then, the universe conspires to give a place a shot at fame. And this time, it's the turn of the freshly renamed Limpopo Province to get the proverbial 90 seconds. On 4 December 2002, a total solar eclipse will be visible from the northern parts of the province, and up to 100 000 people are expected to descend upon the area in the hope of experiencing 90 seconds of total darkness during daytime. An eclipse is when the sun, earth and moon all line up, for people to experience total darkness during the day. The path followed by the 2002 eclipse will travel over parts of Zambia, Zimbabwe, Botswana and Mozambique, as well as the northern parts (Venda) of South Africa. The eclipse happens at 06:32 and there won't be another one until 2030 (Hilton-Barber, 2002).

There is nothing in nature to rival the glory of a total eclipse of the sun, says astronomer Patrick Moore. No written description, no photograph can do it justice. But since someone's got to give it a shot, the best description I found was the one by journalist Phillip Briggs: ' Totality itself is profoundly disorienting. The brightest stars and planets appear in a suddenly darkened sky. Diurnal birds go silent, nocturnal insects start to chatter, flowers close their petals for the night, and large mammals mill around in aimless confusion. Equally, a total eclipse is majestically beautiful ' (Hilton-Barber, 2002).

It is going to be a big moment. About 90% of the accommodation in the areas around the eclipse's path are already fully booked. And there's not a room left in the Kruger National Park. It is believed that tourists will also have a chance to explore other places of interests as explained above, such as African cultures and Maphungubwe (the first and greatest African civilisation). The Province will obviously be on the international tourism map. Hopefully, such an opportunity will bear better fruits for tourism development in the province.

3.5   Conclusion

The analysis of the Tourism in Gear Strategy reveals a number of opportunities and strengths the tourism industry in South Africa is blessed with. A gap however, exists in terms of exploiting these opportunities. The rural nature of our country and of the Limpopo Province in particular, calls for a special attention for this internationally recognised tourism emerging product: rural tourism. Branding a true African tourism product will not only benefit the rural poor population, but will also broaden our spectacular tourists attraction base. According to Mvuko (2001) more and more tourists are asking for an authentic African experience. They don't want to stay in accommodation facilities that make them feel as if they were still in Europe.

The Tourism Development Strategy 1998-2000 appears to be silent about the potential of rural tourism, and yet most of the weaknesses indicated in the strategy could be addressed partially by focusing on rural tourism. According to the Human Science Research Council (2001) survey, the Limpopo Province receives a relatively smaller number of domestic tourists as compared to other provinces. A Survey for South African International Tourism Market (2000) shows that in terms of international travel, the Limpopo Province received, for the period between January 1999 and January 2000, 5-6% visitors as compared to 58% of the Western Cape, 55% of Gauteng, 22% of Kwazulu -Natal, 14% of Mpumalanga, and 14% of the Eastern Cape. The Human Science

Research Council (2001) advised that rural and remote areas should be targeted for tourists who prefer such places. This would lessen the pressure on the dominant areas.

The branding of a special African experience in the form of rural tourism could perhaps therefore, help put the province on the tourism map. It seems advisable to look upon countries like Australia, which have taken the advantage of their rural areas by turning them into vibrant tourist destinations.

CHAPTER FOUR: RESEARCH METHODOLOGY AND FINDINGS

4.1   Research Methodology

4.1.1   Introduction

The main aim of this study was to critically analyse the Tourism Development Strategy in South Africa from a Rural Tourism perspective and compare it with international renewed tourism development strategies such as the National Rural Tourism Strategy of the Commonwealth of Australia. Once these strategies have been analysed and compared, and after having considered the empirical research findings, a guideline for the Rural Tourism Development Strategy will be formulated, taking into account aspects and issues relevant to the situation and conditions in the Limpopo Province. The strategy will then be tested against the situation in the Limpopo Province to determine its relevancy, appropriateness and effectiveness in the region.

4.1.2   Data collection methods

The primary method used to collect data was the unstructured interview technique. Participant-observation and literature review yielded background and more complementary data. The researcher collected data himself. He used several techniques of data collection ranging from orientation in the setting, participant-observation and finally, the unstructured interview. The only means the researcher used to record what he heard, observed, experienced and thought of throughout the application of the interviews was note taking. It should be noted that, the above-mentioned methods somehow overlap, and are alike in many ways.

4.1.3   The unstructured interview method

The assumption underlying the unstructured interview is that detailed information about individuals' constructions and perceptions of a given reality, phenomenon or object are best expressed by individuals in their own language, form and context (i.e. rather than being expressed in imposed terms and selected fragments). However, there is, as Jones (1985, p. 47) argues, " no such thing as presuppositionless research". The proceedings are inevitably directed by the preordained (however generally articulated) focus of the study and the lines of conversation deemed interesting or relevant by the researcher.

It is not the absence of direction, then, but the careful and restrained use of direction, which is to be desired in an unstructured interview situation. It is for this reason that a guided unstructured interview method was selected; interviews took the form of informal and open conversations, but the interviewer's participation was directed by the interview guide, which itemised important themes to be addressed in the exchange. Included in the guide were the following themes:

- Perceptions of the tourism industry in the province;
- The tourism industry strategic drivers/focus (e.g. nature-based, cultural, beach, sport, ecotourism, rural tourism, adventure tourism);
- Tourism growth/development impediments;
- The core business and years of service;
- Tourism products branding in the province (uniqueness, appeal, quality and range); and
- Perceptions about past, current and future relationships among tourism stakeholders/partners in the province (including relationships of conflict and tension).

A number of characteristics of the unstructured interview methods render it particularly appropriate in this research. Such characteristics include: adaptability to local and situational

contingencies, allowing for the clarification of information and the establishment of trust; the depth, extent and subtlety of data yielded; the minimisation of ambiguity in responses through the provision for elaboration on, and qualification of, what is said; and the explicitness of researcher intent and relative position. The logic behind conducting unstructured interviews was that interview methods are one of the most practical means people use to try to understand their fellow human beings.

4.1.4   Strategies and techniques employed to maximise the scientific validity of the research and its findings

The emphasis in this study falls on the 'internal validity', which is the production of accurate findings that agree with the subject's life world. Two paramount issues associated with internal validity are reliability and validity. Reliability concerns more consistency in collecting, analysing and interpreting data, while validity refers to the fact that a method used yielded accurate and true-to-life results about the phenomenon under question. It is also true that there is a close link between reliability and replicability. Hence, the argument that, should the researcher use reliable methods in a study, these methods, if repeated by another researcher, the results thereof will not differ substantially from those of the previous researcher. However, one should indicate that the above argument fits well in the quantitative research and is not necessarily applicable for qualitative approach. Qualitative research is extremely variable. The researcher continually takes decisions and steps as the study progresses, and not necessarily before it commences. In this regard, the process of inquiry directs the study, and not the preplanned format.

Although some of the decisions can be noted in the report, it is rather not possible to reproduce all the steps that have been followed in a particular investigation in such a way that a blueprint could be given to another researcher who wishes to replicate the same study. This however, does not mean that the results of a qualitative study like this one cannot be tested in further research.

Analytic induction emphasises the need to search for cases that contradict the findings, and encourage the verification of results without needing to repeat the original investigation. As such, it could be argued that the scientific reliability and validity of the qualitative research like this one should be judged in terms of "the degree it stimulates further research".

Studies indicate that replicability is problematic in qualitative research. Quantitative researchers tend to pay little attention to validity in relation to reliability, while qualitative researchers place great attention on the latter. Naturally, there are a number of sources of biases that could negatively affect the validity of the research results. Such sources of biases could be related to, (a) the researcher, (b) differences between the interviewer and interviewee, (c) those aspects associated with the research context and (d) biased sample group.

In tying to increase the validity of the study, the researcher has remained conscious of the sources of biases and has tried to reduce their effects. More than one method of data collection were used, namely- literature study, participant-observation, and unstructured interviews. An assumption can reasonably be made that the limitations entailed by using a single method were minimised in this way. All participants were told that the information gathered and personal profiles would be treated as confidential. This research was a complex process and several decisions had to be taken simultaneously. It is difficult to give a complete account of a qualitative research project; hence, no claim is being made about the completeness of the foregoing exposition of the most important decisions taken in the study. It is hoped that decisions and steps taken in this study have been sufficiently and explicitly stated to enable the reader to judge the scientific credibility thereof.

4.2   Research findings

4.2.1 Introduction

These findings are the results of the interview conducted with stakeholders and respondent groups indicated in the first chapter. This report rarely followed a fixed format because of its qualitative nature. The fact that the researcher was directly involved with the subjects studied renders this report personal. The researcher's feelings, decisions and experiences were part of the research process. All the findings, regardless of their source, are simultaneously presented. It is therefore, necessary to highlight the main research question and sub-questions so that a linkage could be created between the research question and the findings.

4.2.2 Problem statement/main question

There is a lack of coherent, comprehensive, clear and co-ordinated Rural Tourism Development Strategy for Limpopo Province of South Africa.

Sub-questions are:

- Perceptions of the tourism industry in the province?

- Core business and years of service?

- Tourism strategic drivers/focus?

- Tourism growth impediments? (key issues and challenges)

- Poor tourism products branding in the province?

- Lack of policy framework for rural tourism development?

- Perceptions about past, present and future relationships among tourism partners in the province?

These questions are important if the objectives indicated in the first chapter are to be met.

3.5.3   Research findings

Findings regarding the perceptions of tourism industry in the province, indicate that respondent groups perceive tourism resources (both natural and cultural) in the province as phenomenal, but noted that the province still attracts less tourists as compared to other provinces such as the Western Cape, Kwazulu-Natal, Gauteng, North West and Mpumalanga. Policymakers, tour operators, academics and traditional leaders are of the view that the Limpopo Province has a huge tourism potential. This is supported by the fact that the provincial government has identified tourism as one of the pillars of the 1999 Growth and Development Strategy. However, tour operators, particularly young and cultural village tour operators and academics lamented the fact that there seem to be a lack of a, (or insufficient) strategic framework for tourism development in the province.

With regard to the question on the tourism strategic drivers/focus for the province, all respondent groups agreed that the tourism strength for the province lies in its natural and cultural resources. Tour operators and tourists believe integrating natural and cultural tourism activities can bring much needed African experience. Most tour operators indicated that they take their tourists through a complete cycle of all tourist attraction places. Policymakers and administrators emphasised the fact that eco-tourism is recognised as an official tourism enterprise of the province. However, tour operators and traditional leaders are of the view that cultural and traditional tourism activities are not afforded the status and importance as nature-based tourism activities. When policymakers were asked if eco-tourism distinguishes the province from others, they conceded that eco-tourism may not be exclusive and unique to the province, but also noted that ecotourism is one of the fastest growing sectors. All respondent groups agreed that other provinces could adopt eco-tourism as their own product or approach, depending on how they see it. On the other hand, most tourists view the province as unique and different from other predominately urban provinces such as Gauteng and the Western Cape. All respondents

ultimately indicated that if given a chance, rural tourism, as defined in terms of the tourism product that combines nature-based tourism activities and cultural tourism activities, could make the province distinguishable from the rest. Perhaps the South African tourism economic and environmental benefits may spread even to the most rural areas of the country.

Regarding tourism growth impediments, respondent groups mentioned a number of issues that need to be addressed for tourism in rural areas to prosper. Issues which were mentioned by all respondent group are: poor transport and infrastructure, poor product and enterprise development, accreditation and industry standards, low levels of education and training, poor marketing skills, lack of industry and community leadership and poor or absence of conducive environment for tourism development (policy framework). Cultural and nature-based tour operators particularly mentioned that lack of funding is an impediment for their business to grow. Interestingly, issues that were raised by the research respondents confirm what literature review had highlighted as key issues and challenges in rural tourism enterprises.

On the question of tourism product branding, Policymakers and administrators argue that eco-tourism is the tourism brand of the province, whereas traditional leaders and cultural tour operators indicated that people have been left out of the equation. All respondents admitted that the province has highly developed nature-based tourism facilities, but cultural tourism is still at its infancy. Tourists indicated that they like to interact with people and experience their cultures and traditions. While eco-tourism is the official tourism brand for the province, except for policymakers, the rest of the respondent groups expressed dissatisfaction with eco-tourism as the provincial tourism brand. Cultural tour operators mentioned that the word "eco" is generally, associated with nature, and as such, cultural aspects of tourism are normally left out. Eco-tourism does not necessarily distinguish the Limpopo Province from the rest.

Regarding the question on tourism policies and strategies: policymakers felt that government has done enough to provide policy directives for the tourism industry to perform to its best. However, tour operators, particularly new cultural village operators, are of the view that not enough direction is being provided. While the provincial government has chosen eco-tourism as the main focus, there is no Tourism Development Strategy in the province. This constitutes a gap, and therefore renders studies of this nature necessary.

Regarding the perceptions about the past, current and future relationships among tourism partners: The perception of respondent groups differs. Policymakers and administrator argued that there is a healthy relationship amongst various role players in the industry. That relationship is explained by the presence of the Provincial Tourism Board and regional tourism associations, hence most of the tour operators have affiliated to these associations. Tour operators and traditional leaders however, describe the relationship as of a conflicting nature with no clear definitions of the roles and responsibilities of each participant. They also lament lack of leadership and funding from the government. Traditional leaders argued that nature-based tourism facilities view local people as threat to tourists and their business. However, the recent years saw a shift towards a cooperative willingness between various stakeholder groups and between tour operators themselves. All respondent groups agreed that the relationship is improving and once the roles and responsibilities of each participant are speltout, things can only get better. The research findings are in line with the literature review in terms of important issues that need attention in rural tourism development.

3.6   Conclusion

This study adopted a qualitative approach to research. An unstructured interview method was mainly used to collect data. The research findings confirm that the province is indeed rich in both

the natural and cultural tourism resources; however, the two do not complement one other for the benefits of the tourism industry and the province as a whole. Research findings show that the province has a potential for Rural Tourism Development, given its rural tourism resources, and also noted the importance of partnerships between various stakeholders. It can be argued that the competitive advantage of the province lies in its "second to none" rural character.

CHAPTER FIVE: GUIDELINES FOR A STRATEGY FOR RURAL TOURISM DEVELOPMENT FOR THE LIMPOPO PROVINCE

5.1 Introduction

After reviewing literature and conducting interviews, the following key issues were identified. These key issues form the basis of the proposed guidelines for a strategy for Rural Tourism Development. These guidelines suggest, whom the participants should be, what programmes and activities should be run, as well as what the vision and mission of the strategy should be. Key issues that require action by participants or stakeholders were not only identified through international and national literature review, but were also verified by the interviewees who emphasised that indeed these are real key issues as far as Rural Tourism Development in the province is concern.

On the other hand, impediments towards Rural Tourism Development are described and practical measures to address the impediments are suggested. The key issues are:

- product and enterprise development;
- accreditation and industry standards;
- education and training;
- image branding and marketing;
- market analysis and research;
- industry and community leadership;
- transport and infrastructure;
- effective provincial and local government; and
- policy and supporting strategies.

The proposed vision, mission, participants, programmes and activities as well as the impediments will be discussed in detail in this chapter.

5.2 Vision

A vibrant, sustainable Rural Tourism sector for the enhancement of the quality of life of rural communities and satisfaction of the tourists.

5.3 Mission

Thriving to develop, maintain and promote tourism resources (both natural and cultural heritage) in the province in a co-ordinated and integrated way for the benefit of all participants, namely: host communities, tour operators/industry and tourists in the Limpopo Province.

5.4 Rural Tourism Participants/Role Players

In formulating a strategy for Rural Tourism Development, it is imperative to note the various role-players and how they interact. The interests of the tourists, tourist operators and their host communities are undeniably interwoven with the interested and efforts of a larger number of other parties such as local and provincial government. Although the responsibility for developing rural tourism lies largely with industry, government, at all levels has a crucial role in Rural Tourism Development. The roles of various governments will be explained further in item 5.4.8.

The participants, or rather stakeholders in rural tourism are many and varied. The degree to which they participate in, and benefit from the industry reflects the extent and diversity of the product

itself. Today's tourists have greater spending power and are increasingly becoming travel literate, and are environmentally conscious. They want to identify with the people and culture of the country. In developing rural tourism, it is important to ensure that visitors, when making their travel decisions, are aware of the full range of rural tourism products and experiences available. Likewise, it is important for the industry to be aware of the factors that influence domestic and international tourists in their choice of a holiday destination and that rural tourism products are developed, packaged, managed and marketed to take account of these preferences.

5.4.1 Private operators

Private operators have a prime responsibility of supplying suitable tourism products. Operators range from the big inbound tourism businesses to the smaller specialist rural tour groups; the rural accommodation sector which includes farm host, bed and breakfast, sheeben owner, country motel, hotel, caravan park and rural resort operators; the rural tourism attraction and adventure tour operators; organisers of traditional and cultural event and festivals and African or cultural villages operators.

To succeed in the industry, operators and entrepreneurs need to consider factors such as the uniqueness of their products; their suitability for tourism purposes; their development, packaging, management and marketing; their prices; the markets (both domestic and international) that can be targeted most profitably and their needs; and the competitive advantages that can be achieved and maintained over other suppliers, including overseas operators. It is important that the tourism industry is co-ordinated, particularly at the provincial level to ensure adherence to a set of standards of structures and services. Operators fill that they need more business skills in order to run the business accordingly.

5.4.2 The host community

The support of host communities can be crucial to the successful development of rural tourism. Community involvement is seen as particularly important with the integration of tourism into local and provincial development programmes. Also important is the fact that the host community itself is indeed a vital part of the rural tourism 'product'. All respondents alluded to the fact that unless local communities are part and parcel of tourism development, its chances of success are very low. There was a feeling that some progress is being made in this regard, although not yet satisfactorily.

Community involvement in rural tourism should go beyond the sharing of economic benefits and actually empower locals. Through participatory approach, which empowers people rather than the beneficiary approach, the chances of rural tourism prosperity become high. Local community members should also be trained to take initiatives and grow into management positions and be empowered. Jobs such as cooks do not necessarily empower the locals.

5.4.3 Tourism industry bodies

Tourism industry bodies, which operate at local, regional, provincial and national spheres, are important players in the development and growth of the rural tourism sector. Issues such as industry leadership and organisation, product development, education and training, marketing, accreditation and standards are best managed and driven by the industry itself. The tourism industry bodies involved in tourism include: Tourism South Africa, The Business Trust, The Tourism Business Council of South Africa, the Limpopo Province Tourism Board, the Soutpansberg Tourism Association, Tzaneen Tourism, the Warmbath Tourism Board, as well as tour operators. It was encouraging to note that all tour operators are members of the Tourism Association of the area. Perhaps what is needed is a more effective and efficient tourism body through training.

5.4.4 Transport operators

All respondents indicated that there is a need to improve transportation facilities. Airlines, coaches, rails and road transportation facilities stand to gain from, and can assist the growth of rural tourism. The provision of an efficient and quality transport which gives easy access to rural tourism markets is therefore, essential to meet the high travel demands of tourists, particularly those from abroad.

5.4.5 Academic institutions

Academic institutions such as universities and technikons have an important role to play in developing rural tourism through both research and coursework. The province is blessed with two universities and much more satellite campuses of other institutions of higher learning. These institutions and other education and training service providers are crucial in the training of tourism role players. In fact, education and training was identified as one of the keys of success in rural tourism. Some tourists even suggest that academic institutions may offer training to tourism role players as part of their social responsibility and outreach programmes for their surrounding communities.

5.4.6 Financial institutions

Young entrepreneurs need financial assistance to kickstart businesses as rural tourism operators. Banks therefore, have a role to play in this regard. All tour operators lamented the fact that funding is one of the biggest problems and that it hinders tourism growth in rural areas. Financial institutions are not willing to finance businesses in remote areas.

5.4.7 The media

Although the media is not necessarily a stakeholder, it however, plays an important role in presenting the case for rural tourism and the opportunities it offers communities and tourists alike. There is a need for media to treat the tourism industry as a serious undertaking, which is on par with other industries.

5.4.8 Government

Although development is primarily an industry responsibility, all different levels of governments are involved in research and planning, assistance schemes, facilitation, infrastructure supply, regulation and accreditation, and awareness campaigns. Provincial governments should concentrate on implementing national policies and strategies appropriate to their conditions as well as develop, promote and market tourism products as unique in competition with other provinces. The role of local government role could mirror those of the provincial government, but should concentrate more on planning, development and management of many specific aspects of the tourism product. It is the role of the local government to ensure policy implementation, proper environmental and land-use planning, product development, marketing and promotion. However, local government should not provide services that can be provided by the private sector.

5.5 Key issues, strategies and actions

5.5.1 Rural products and enterprise development

"Product" refers to the actual attraction (or service) being offered. In the case of rural tourism, it refers to the total 'rural or countryside experience'. Product development is essential for a healthy, sustainable and vibrant industry in that it lifts industry standards, and increases the range of attractions available to visitors. Given the nature of the tourism industry, what the Limpopo Province offers tourists must be unique and different. Except for policymakers, all other

respondents agreed that tourism in the province could be branded along rural tourism enterprise. Only then would the province have capitalised on its competitive advantage. Good product and enterprise development could be achieved through measures such as:

- the identification of major and ancillary attractions and their inclusion in provincial packages by all stakeholders;

- the recognition of the expectations and needs of tourists and the appropriate creation and modification of products and;

- competitiveness

In addition, cooperative networks amongst operators with similar products or operators in the same geographic areas can results in access to larger markets. Interaction with other businesses in assembling suitable tour packages incorporating accommodation, attractions, transport, restaurants and retail outlets can provide a better product for inbound tour operators. It is in this spirit that tour operators in the province normally take tourists to all places of interests, regardless of whether they are nature-based or culturally focused.

The majority of operators in the rural tourism industry are small businesses. As a result, the concerns of, and constraints to small business are also relevant to the rural tourism industry. Macro-economic issues such as interest rates, inflation and taxation continue to be the areas of concern for all small operators. Advice on business matters is however, available from the departments of Trade and Industry and Environmental Affaiars and Tourism, the tourism boards, tourism associations and academic institutions. But there is a need to further broaden access by tour operator to the services of these organisations.

Strategy: *Encourage the sustainable development of high quality product and product variety in rural areas.*

Actions

- Support diversity and quality in rural tourism product development through measures such as developing and disseminating 'how to' information material and examples of best practice, and conducting enterprise best-practice workshops for all stakeholders (all spheres of government, industry associations, regional tourism associations, academic institutions, private companies, marketing organisation and tourism operators).

- Encourage individual operators to work cooperatively to develop multi-product packages.

- Encourage the adoption of ecologically sustainable development principles by rural tourism operators and tourism bodies.

- Encourage individual operators of small accommodation businesses to form cooperative networks to cater for bigger tourist groups.

- To ensure that small businesses in rural areas circumstances are taken into account when regulatory bodies formulate regulations.

- Encourage operators to join industry associations to access associated benefits such as networking, information dissemination and lobbying strength.

- Encourage tour operators to take part in competition such as 'Tourism Entrepreneur of the Year' events.

Source: Adapted from Getz and Page (1997) and Australia's Commonwealth Department of Tourism (1994)

5.5.2 Accreditation and industry standards

At a time when international competition for tourism is growing, and when many countries already have firmly established rural tourism industries, it is imperative that the Limpopo Province be able to compete effectively in attracting visitors to rural areas. This is the essence of this study. South African Tourism and Department of Environmental Affairs and Tourism are responsible for the accreditation and setting of the industry standards.

In working to improve the capacity of the rural Limpopo Province areas to attract international and domestic tourists, the development of service excellence and professionalism should be a priority. This, therefore calls for the establishment of an accreditation body specifically for the rural tourism sector that could help create the reputation of rural areas as high quality tourism destinations.

In establishing such an accreditation body, be it through the modification of established bodies or procedures to encompass the special requirements of rural tourism operations or through the introduction of the bodies or procedures, a number of factors need to be considered. These include:

- the need for procedures that assist operators to reach minimum standards and identify improvement opportunities in their business;

- the importance of consumer feedback as part of the quality assurance process and as a means of ensuring that operators respond to the changing demands of the market;

- the need to cater for increasing environmental awareness of rural tourism consumers through the introduction of environmental standards and conservation practices;

- to encourage the development and implementation of industry standards for rural tourism and examine options for developing provincial rural tourism accreditation body;

- to encourage the establishment of recognisable logos for use by accredited rural tourism operators. However, tour operators indicated that such practices should not be used to exclude new and young operators.

Source: Adapted from Getz and Page (1997) and Australia's Commonwealth Department of Tourism (1994)

5.5.3   Education and training

In terms of research findings, many small business tourism operators in rural areas have little or no experience in hospitality or small business operation. The majority of cultural village operators have less than five years of service. This calls for the education and training of those involved, if the vision to have a vibrant, sustainable rural tourism that could enhance the quality of life of the people is to be realised.

In planning for tourism training, the characteristics of the industry have to be taken into consideration. Small businesses often lack the staffing flexibility of larger operations. Insufficient time could be the main reason why owners and /or operators fail to attend training. Tour operators indicated that teaching materials such as radio cassettes, videos and self-study kits could help in overcoming some of the barriers to training. Such packages also recognise that small tourism businesses are seven-day-a-week operations and allow training to be self-paced and flexible. It is widely accepted that the current skill base in the rural tourism industry may not be sufficient for rural tourism to reach its maximum potential return. Education and training could help in turning things around. Academic institutions could provide such training, provided trainees are prepared to work and stay in these remote areas.

Strategy: *Ensure that the educational and training needs, with regard to tourism and the needs of tourists, rural tourism operators, rural communities, local government authorities, tourism associations and development organisations are known and met.*

Actions

- Encourage industry training for rural tourism operators. All respondents view education and training as crucial to Rural Tourism Development in the province.

- Establish education programmmes to increase the tourism skill base of local government and Economic Development Officers.

- Continue to work with academic institutions in developing relevant training materials and their effective utilisation.

- Develop appropriate training courses to encourage adherence to best practice principles.

- To make rural tourism operators more aware of benefits that could be gained through training.

- Encourage rural tourism operators to participate with industry groups so that they may benefit from sharing experiences and learn by attending organised seminars and conferences. Concerns that interpretations should be considered during seminars for the benefit all were raised.

- Develop and distribute a simple code of conduct for visitors to the rural tourism destinations.

Source: Adapted from Getz and Page (1997) and Australia's Commonwealth Department of Tourism (1994).

5.5.4   Marketing and marketing analysis

Marketing can be defined as analysing consumer's needs and desires, and developing and promoting products that will meet these needs at prices that are mutually acceptable to both the producer and the consumer. In the tourism industry, people are important role players. This is particularly relevant in the rural tourism sector where the enjoyment of a rural holiday can be strongly influenced by the nature of the personal contact between guests and hosts.

Global and regional competition for the tourism dollar is such that being able to target a potential consumer market skillfully, develop an interesting product that meets that market's expectations, and then promote widely and creatively to the specific market, will determine how successfully the province's tourism industry performs against others. This requires all stakeholders to work together.

Rural tourism is an industry segment that has the capacity to add to the variety of products and as such play an integral role in making the Limpopo Province more competitive in the world tourism market. However, rural tourism needs cooperative or joint marketing by the informal and often small groups of operators. It is through cooperative marketing that objectives could be met in a more efficient and cost-effective way. Cooperative marketing complement's individual marketing efforts of the rural tourism operators, which are usually less effective at a competitive level. As such, rural tourism operators who rely solely on individual marketing efforts and fail to take advantage of co-ordinated marketing strategies may deprive themselves of additional customers and therefore, profitability. Tour operators conceded to the fact that cooperative marketing is the way to go, particularly in the rural tourism business.

Regarding market analysis, where rural tourism enterprises have been developed on an *ad hoc* basis without reference to relevant data, research on market trends and related strategic issues,

there is a danger that the full potential of this industry segment cannot be realised. Planning for sustainable rural tourism should include market analysis. Reliable visitation data is essential for informed policy formulation, the planning of tourism strategies and product development.

Strategy: *Promote co-ordinated and cooperative marketing of rural tourism opportunities as well as marketing analysis.*

Actions

- Continue to support the development of a co-ordinated and cooperative marketing approach and encourage regional marketing cooperation. All respondents emphasised the need to work together in a complementary, rather than a competition fashion.

- Encourage the rural tourism industry to ascertain and focus on target markets, which are most likely to demand the product, and the services it has to offer.

- Encourage research on market trends and related strategic issues.

- Encourage visitation to rural areas for reliable data collection, which will be used for analysing market trends.

- Encourage the provision of reliable data to be used for Rural Tourism Development.

- Rural tourism operators should make themselves available for research purposes, hence they at least cooperated very well in this study.

Source: Adapted from Getz and Page (1997) and Australia's Commonwealth Department of Tourism (1994)

5.5.5   Industry and community leadership

Leadership, both for the industry and for the community, is crucial for the success of any project. Strong leadership, which consists of a group of committed people drawn from all parts of the community, can favourably influence the local rural business and investment environment, thus

generating growth and new jobs. Rural tourism fits well into this framework and while it has the potential to contribute to the diversification of both the tourism industry and economic activities, it can only do so if there are people in the industry and the host community who are willing and able to direct its growth and development.

Industry leadership, no matter how committed and progressive, cannot work effectively without community support and involvement. Community leaders working together with a strong-shared vision of what a region can become are essential to the successful development and management of tourism in rural areas. Without strong industry and community leadership, rural tourism may not develop to its full potential. The industry's decentralised nature, its small business-like and diversity of its product highlight the need for a cohesive leadership structure which can represent the interests of rural tourism operators as a distinct tourism industry sector. A strong leadership representative body could, on behalf of its members:

- market rural tourism products provincially, nationally and internationally;

- develop and monitor accreditation standards;

- communicate with government and liaise with tourism and non-tourism bodies on rural tourism issues;

- act as a contact point for rural tourism information; and

- assist with issues such as sponsorship, insurance, as well as education and training.

Strategy: *Encourage and support industry and community leadership as a means of developing tourism in rural areas and contributing to rural development.*

Actions

- Develop industry and community leadership as media for the progression of interests of rural tourism. Encourage tourism industry associations in their endeavors to make people aware of their existence.

- Support industry initiatives which focus on Rural Tourism Development

Source: Adapted from Getz and Page (1994) and Australia's Commonwealth Department of Tourism (1994)

5.5.6   Transport and infrastructure

Rural tourism products are often found in relatively remote regions with low population densities. The availability of reliable and competitively priced transport infrastructure is therefore important for the development and maintenance of rural tourism. Lack of transport facilities contributes to tourists' reluctance, particularly international visitors to travel on bad roads to reach rural attractions. The provision of proper and reliable transport facilities could therefore help in the full realisation of the rural tourism potential in rural areas. However, access to rural tourism regions is being enhanced in recent years in the Limpopo Province. The 1999 destructive floods had a negative effect on the transport infrastructure. Research findings show that transport infrastructure development is largely a government responsibility.

Strategy: *Encourage improvements in rural transport and infrastructure.*

Actions

- Examine the potential for increased transport demand to specific regions in the light of expanding tourism opportunities to convince local transport operators of the commercial opportunities available to them as a result of tourism growth.

- Liaison between government and relevant bodies concerning licensing laws pertaining to the transport of tourists.

- Ensure that the economic benefits of rural tourism gain appropriate attention in the consideration of road and infrastructure funding needs and planning.

- Provide funding for rural tourism infrastructure development.

Source: Adapted from Getz and Page (1997) and Australia's Commonwealth Department of Tourism (1994)

5.5.7 Provincial and local government

Provincial and local governments are significant players in influencing the development of tourism in any rural place. In many rural areas, like it is the case in Limpopo, local governments are the main providers of services and infrastructure essential for tourism and general economic development. Local government involvement in, and support for Rural Tourism Development can take many forms. They include:

- The flexible regulation of development and land use zoning controls such that tourism projects can be accommodated;

- The identification of the tourism potential of an area and capacity to cater for new and emerging markets;

- The extensive consultation with, and provision of advice to, the local community and operators on how best to plan, develop and promote tourism in the rural areas;

- Formulation of local area policies to facilitate the establishment of tourism businesses, infrastructure and effective signposting; and

- The promotion of tourism through support for local tourists associations and information centres.

Strategy: *Further enhancement of local government understanding of the benefits and requirements of tourism, and the value of integrated planning approach.*

Actions

- Encourage local councils and authorities to consider tourism as a viable income producing sector for rural areas, and as a means by which to raise the quality of life for all in these areas, and to integrate it into overall economic and rural development frameworks.

- Consult with local communities and the private sector on how, and to what extent should rural tourism development take place.

- Support and encourage up and coming rural tourism operators

Source: Adapted from Getz and Page (1997) and Australia's Commonwealth Department of Tourism (1994)

5.5.8   Policy and support strategies

The absence of the rural tourism policies in most countries has been highlighted. Australia seems to be one leading country in pursuing Rural Tourism Strategy. Developing countries, South Africa included will have to formulate Rural Tourism Strategies. However there will always be impediments that need to be looked at.

5.6 How to overcome impediments to Rural Tourism Development?

There are a number of impediments towards Rural Tourism Development that need to be addressed. According to the research findings, impediments range from community inexperience to the low level of education, lack of professionalism and business expertise amongst operators, industry fragmentation, distance, lack of infrastructure, and lack of proper research on rural tourism matters.

5.6.1 Host community participation

Community participation and support are important elements in considering the suitability of tourism as an industry for an area. Community members' involvement in any project is increasingly receiving more and more recognition. The participation of community members should indeed go beyond beneficiary levels, where participants become passive recipients of jobs that do not necessarily empower them. Community participation should mean not only low-level jobs for the host, but also managerial positions. The cultural village concept and its integration with nature-based tourism can further improve community participation.

In some areas, communities may not wish to pursue tourism development. Other communities, however, will wish to assess what their areas have to offer tourists and, in return what tourism has to offer their community. Once the community agrees to engage in a tourism business, then various participants' roles should be defined and adhered to. There is ample evidence to suggest that projects which focus on generating economic benefits without effectively encouraging local participation in the identification, design, implementation and monitoring of the development activities, are less likely to provide widespread community benefits, let alone to succeed.

It is necessary to compare an area's tourism appeal with that of other regions. Should a community decide to promote tourism, it must find ways to help itself establish and develop this industry. In developing rural tourism, communities should:

- take advantage of existing assets(scenery, historic features, arts);
- maintain any competitive advantages; and
- target suitable markets.

It is essential for communities to ensure the provision of suitable leadership for rural tourism to succeed.

5.6.2 Operators and the rural tourism industry

It is generally agreed that small business makes up to 70 to 80 per cent of businesses in the tourism industry, and more than 90 per cent in the rural tourism in particular (Butler *et al*, 1998). The majority of small businesses are scattered across the Limpopo Province, sometimes as members of an umbrella industry organisation. However, experience have shown that small businesses have a high failure rate: some 80 per cent of the new small businesses fail in their first two years of operation. In order to keep rural tourism operators in business, their overall business skills should be improved through training as well as proper financial support. Present financial institutions are not well suited to service rural tourism operators. Financial institutions are not willing to lend money for rural tourism ventures. If they do, loan repayment agreements are not compatible with the cash flow and payment ability of rural tourism operators (Butler et al, 1998).

On the other hand, the small, diverse, scattered nature of rural tourism operations makes it difficult to have a united industry presence. To overcome this fragmentation, there should be a strong cooperation and collaboration across all levels of government and industry sectors in forming and carrying out tourism plans. This type of study could help therefore bring these issues to the forefront of debate.

Whatever the impediments, it is important that a holistic approach be considered for Rural Tourism Development, and this should involve integrated planning. Essential to achieving the sustainable Rural Tourism Development is the 'bottom up' approaches, where communities participate in the planning process, implementation and monitoring stages. This ensures that development is not imposed from outside and that those who live in rural places are committed to, and participate in the development of rural tourism.

5.7 Conclusion

The information given in this study suggests that a number of opportunities exist for rural tourism, both in terms of tourism business potential and destination development. Key issues and impediments concerning Rural Tourism Development as well as actions to address them have been discussed. Rural tourism is indeed a special quality product, both from the supplier's perspective, and in the perceptions and desires of consumers.

CHAPTER SIX: THE APPLICATION OF THE PROPOSED RURAL TOURISM DEVELOPMENT GUIDELINES (RESEARCH RESULTS) TO THE LIMPOPO PROVINCE SITUATION

6.1 Introduction

Collectively, the literature reviewed both locally and internationally, and the respondents provide a clear overview of the important issues and opportunities facing Rural Tourism Development. In terms of natural and cultural tourism resources, the province is reasonably rich. This has been confirmed by the literature review and research findings. The province offers a mosaic of exceptional scenic landscape, a fascinating cultural heritage, an abundance of wildlife species and many nature-based tourism opportunities. It is described as a land of legends and myths and of ancient civilisations with warm and friendly people (chapter 3, 3.4). On the other hand, in terms of problems and challenges, rural tourism seems to be the most extreme.

Many rural communities and individuals in the Limpopo Province are getting into tourism for reasons of community and economic development, as well as for employment or personal profit, but the development of this sector can be especially difficult. Many rural communities lack the experience and training necessary to develop tourism businesses. Rural communities also face a number of unique challenges, including a desire to balance development and resource preservation, and the difficulty of fostering tourism development without losing control to outside investors or agencies.

Despite the fact that the province is rich in natural and cultural resources, its share in international and domestic tourist arrivals leaves much to be desired. The province lags behind provinces such as the Western Cape, Kwazulu-Natal, Gauteng, Mpumalanga and the Northwest (Chapter 3, 3.4).

It is evident that while other provinces took advantage of their competitive advantages, the Limpopo Province did not. It can therefore, be argued that the province's competitive advantage (rural tourism) can make it unique and different from the rest.

Developing the rural tourism product, which integrates both nature-based and cultural tourism activities is what this province needs. The province is ideally positioned to offer 'second to none' rural tourism experience, given its rural nature, natural resources, indigenous cultures, archaeological sites and people. Therefore, if the Limpopo Province tourism industry authority can accord adequate mileage to the cultural heritage and integrate it with nature-based tourism to form a complete rural tourism product, then the province could become sightseeing Mecca. According to Derwent (2002) the tourism Industry Authority barely accords adequate mileage to the cultural heritage, but focuses on the nature-based tourism that is otherwise common throughout the world, and do not necessarily set the province apart. It seems that only a few provinces or countries are quite as extraordinary as the Limpopo Province, or are populated by such diverse, ancient traditions and fascinating individuals as one finds in Limpopo Province.

In terms of the guidelines for Rural Tourism Development as highlighted in chapter four, two areas of greater importance came out. They can be catergorised as:

(1) Rural tourism participants or role players

(2) Key Issues or challenges

6.2 **Rural tourism participants**

The Limpopo Province, as it is the case elsewhere, has a number of tourism participants. They range from (but not exhaustive) accommodation operators, restaurant operators, tourism

operators, host community, transport operator tour guides, tourism industry bodies and associations, academic institutions, governments at different levels, the media and other interest groups. All role-players have a fundamental role to play as far as Rural Tourism Development is concerned. However, lack of coordination and integration of what role-players are doing seems to be a problem in the province. Clear guidelines on the roles and responsibilities of each participant should therefore, be provided.

It is on this basis that a clear, coherent, integrated and co-ordinated strategy for Rural Tourism Development is important. Of equal importance are clear roles and responsibilities as well as the benefits of the host communities.

6.3 Key issues and challenges

Key issues and challenges as identified in the previous chapters include the provision for education and training, branding of product or enterprise, accreditation and industry standards, leadership, infrastructure development and policy directives. It is crucial that these issues are addressed in order to ensure that rural tourism development can be realised. All these issues and challenges can best be addressed in a participatory approach, where role player are part of planning and design, implementation, management and monitoring of the development process.

It appears that the principles of rural tourism as outlined in chapter four can be applied to the situation in the Limpopo Province, provided the above-mentioned issues and challenges are addressed. Most importantly, the province is ideally situated to offer unparalleled rural tourism products.

6.4 **Summary of major findings and interpretation**

In the preceding chapters, in particular, the literature review chapters (two and three) confirmed that many countries around the world have already formulated their Rural Tourism Development policy guidelines and have indeed taken an advantage of this emerging tourism product. Countries such as Australia, Canada, Germany, New Zealand, Austria, China and the United States of America have all taken rural tourism quite seriously, to an extent that policy and strategic frameworks are in place to guide and monitor the development of this unique product.

If developed countries regard rural tourism as one of their pillars for rural and regional development, what then, for a developing country such as South Africa? Most provinces and the Limpopo Province in particular are relatively rural. It therefore makes sense that most rural places in South Africa (in particular the Limpopo Province), can learn from rural tourism pioneers of this world, such as Australia.

On the other hand, both the White Paper on the Development and Promotion of Tourism in South Africa (1996) and the Tourism Development Strategy 1998-2000 (1997) do acknowledge the importance of tourism. At the same time, both documents fall short of recognising rural tourism as a unique brand and follow international trends and encourage the development and promotion of rural tourism as an industry. It appears as if none of the above-mentioned countries could beat South Africa with regard to rural tourism as a tourism product, given the rural nature of our country. The Limpopo Province is very rural and should capitalise on this rare image.

The South African Tourism policy framework does not mention rural tourism in the country as a potential economic activity. This is in spite of the fact that of lately, there has been a shift towards

rural tourism as a preferred tourism product. In Australia, as it is the case in many countries, rural tourism policies and strategies were developed a long time ago, as early as 1994.

However, South Africa (the Limpopo Province in particular) lacks a coherent, comprehensive, clear and co-ordinated Rural Tourism Strategy; this constitutes a gap in terms of rural tourism development in the country. Another finding of the study was that there is a lack of interest, debate and research work with regard to Rural Tourism Development in South Africa. On the contrary, many international conferences on rural tourism have taken place in the last decade. Israel hosted one such conference in 1997 in conjunction with the World Tourism Organisation.

In the light of the above findings, which confirm that indeed the Limpopo Province has a potential for Rural Tourism Development, and the fact that rural tourism is now a recognised tourism industry by many countries including Australia, there is a need for a coherent, comprehensive, clear and co-ordinated Rural Tourism Strategy for the Limpopo Province of South Africa. Such a strategy could assist in the processes of Rural Tourism Development, not only in the Limpopo Province, but also throughout South Africa.

6.5 **Recommended further rural tourism research topics**

Given the scarcity of rural tourism literature, it goes without saying that there is a dire need for research work to be done if this emerging tourism industry is to thrive at local and international levels. According to Page and Getz (1997) rural tourism has continued to suffer from a neglect amongst tourism researchers, often being subsumed under, or confused with recreation and leisure activities, since many studies assume that rural tourism equates with simple concepts such as 'the countryside': therefore, the assumption is that users of 'the countryside' are predominantly

recreationalists and that tourists are not the main user group. While these assumptions are invalidated by research, such beliefs still affect the image of what constitutes rural tourism.

The neglect of tourism as a rural business activity has also been compounded by the absence of any theoretical research published in mainstream tourism journals. As a result, much of the research on rural tourism has, with a number of exceptions, failed to contribute to a growing awareness of its role, value and significance in the wider development of tourism studies and its importance as a mainstay of many rural economies. Butler and Clark's that:

> The literature on rural tourism is sparse and… conceptual models and theories are lacking… Many of the references in tourism are case studies with little theoretical foundation… or they focus on specific problems… Some take a broader perspective focusing on issues and process… There is, therefore, a lack of theory and models placing rural tourism in a conceptual framework, are in this context relevant.

> (Butler and Clark, 1992:167)

As a result, rural tourism has remained peripheral to the focus of tourism research. It also remains poorly defined. This shows the need for research in this field. The following are recommended rural tourism research topics for South Africa.

1. The business of rural tourism in South Africa: Its economic, social and environmental impact.

2. The management of rural tourism businesses: Planning, development, management and marketing.

3. Rural Tourism Development: An opportunity for emerging entrepreneurs.

4. Rural tourism for diversification of rural economies and core for rural development.

5. Policy framework: a platform for Rural Tourism Development.

6. Rural tourism: the role of traditional leaders versus the role of local government authorities.

6.6 Conclusion

In the preceding chapters literature on tourism and rural tourism studies has been reviewed. The South African Tourism Policy (White Paper on the Development and Promotion of Tourism in South Africa: June 1996) and Strategy (Tourism in GEAR: 1997), were analysed from the rural tourism perspective and compared with international tourism strategy (in particular, the Australian National Rural Tourism Strategy: 1994). It was found that the South African tourism policy and strategy are silent with regard to Rural Tourism Development. On the contrary, most developed countries, including Australia and Canada, have taken rural tourism as a developmental tool quite seriously.

Rural tourism is clearly an important tourism product throughout most of the world, and is likely to become very important as more countries and destinations compete for niche markets. Business opportunities continue to expand for rural residents, and for those who prefer to set up businesses in rural areas. Without the sharing of experiences, many mistakes will be repeated and successful strategies missed. It is because of this point that tourism strategies were analysed and compared in order to learn from others' experiences. On the other hand, without synthesis, the tourism field cannot be advanced. It has been found that more research work needs to be done with regard to rural tourism as an industry.

Chapter five concerns the proposed Rural Tourism Development Strategy with specific reference to the Limpopo Province of South Africa. The proposed Rural Tourism Development Strategy intends to fill the gap that exists in the South African tourism policy and strategic documents.

This strategy is modelled around the Commonwealth of the Australian National Rural Tourism Strategy. The strategy highlights the potential of, and opportunities rural tourism can bring to rural areas in terms of business development (diversification of rural economies), destination development, infrastructure development, training and the preservation of natural and cultural resources

Impediments and challenges of rural tourism development, together with ways and means of overcoming such obstacles are also highlighted. Such impediments includes, amongst others, community inexperience and the low level of education, lack of professionalism and business expertise among operators, lack of data and research, lack of policy and support strategies, industry fragmentation, distance, lack of infrastructure and lack of financial support. However, the advantages of rural tourism may outweigh the impediments if it is well planned and managed. Hence, this is the core finding of this study. Given the lack of Rural Tourism Development Strategy and rural tourism potential in the province, it may be argued that the proposed strategy is both necessary and urgent.

Finally, the major factors that give rural tourism its special appeal include:

- remoteness/isolation

- peace and quietness

- authentic culture (ethnic, traditional, native)

- heritage sites and buildings

- rural lifestyles, including food and beverages

- undisturbed nature

- hospitable citizens;

- exclusivity (not mass tourism);

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- located in rural areas

- rural functionality

- rural in scale and

- their traditional character.

Tourism destinations and businesses in their planning, development and marketing strategies can use these factors. These are the resources that form the basis of rural tourism and must therefore be nurtured, preserved and enhanced. The Limpopo Province does posses most of these tourism resources. It is on this basis that rural the Rural Tourism Development Strategy is proposed in order to achieve a better life for rural communities.

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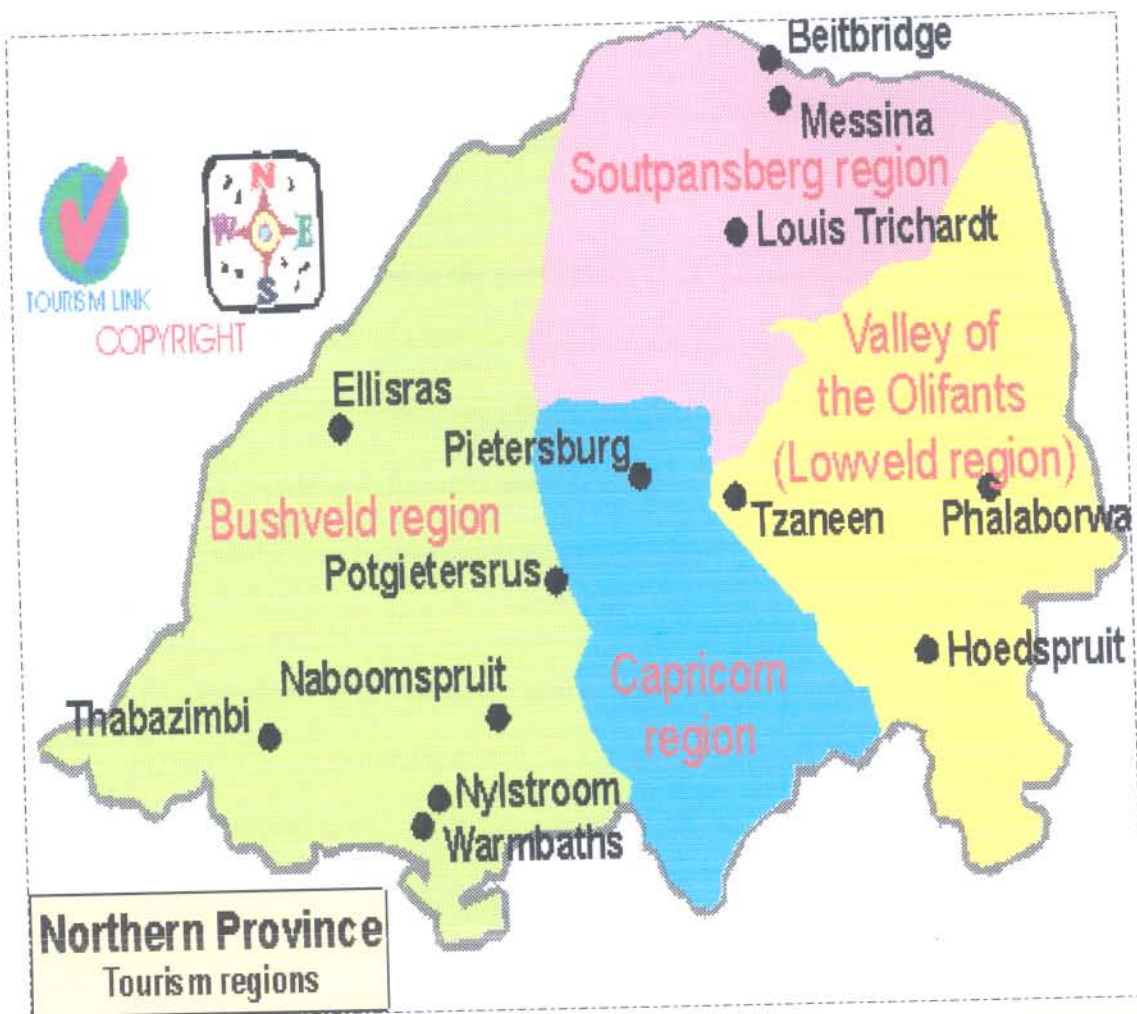
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Appendix A

Map of South Africa (Source: http://www.dns.net/www-za/, 2002)

Appendix B

Limpopo Province tourism regions (Source: www.adverta.co.za/MapNPregions.htm 2002)

Appendix C: Discussion and interview guide

The following are question and discussion guidelines

1. **Particulars (questions related to the particulars of the participants)**

   - What is your name, age, sex, religion, race and qualification?

   - What is the name of your institution/company/organisation?

   - What is the province/region/country you represent?

   - What is your core business and years of service?

2. **An overall assessment of the tourism/rural tourism industry in the Northern Province**

   2.1 How would you define the tourism industry's environment in the province? What are the characteristics?

   - Size?

   - Scope?

   - Strengths?

   - Weaknesses?

   - Opportunities

   - Threats

   2.2   What are the tourism industry's strategic drivers/focus? (e.g nature-based, cultural, historical, urban, rural, farm, adventure, sport, conference or beach tourism)

   2.3   How would you describe tourism industry in the area in terms of types? (e.g nature-based, cultural, historical, urban, rural, farm, adventure, sport, conference or beach tourism)

2.4   How would you describe tourism approach in the area? Is it ecotourism, mass tourism, sustainable or unsustainable?

2.5   What are the barriers/impediments of tourism development and growth?

2.6   Who providers training and how often?

2.7   How would you predict future evolution /direction?

3   How does the external environment impact on the tourism industry?

- Social factors?
- Economic and financial factors ?
- Political factors?
- Legislative factors?
- Technological factors?
- Suppliers?
- Global trends?

3.   What is your evaluation of the internal environment? (tourism destination place such as a resort) in terms of:

- Management style?
- Employee's capacity, ability, skill and moral?
- Tourism internal brands?
- Quality?
- Specialisation?
- Differentiation?
- Price/cost of products and services?
- Service?

- Customer (tourists perceptions/profile)

4. **What is your perception of the tourist's needs in terms of?**

- Rural/tourism products (range, quality, quantity, uniqueness and appeal)?

- Service?

- Trends?

- Sensitivity?

5. **What is the nature of existing research on rural tourism?**

6. **How do specific enterprises establish a rural tourism business?**

7. **What are the operational, management and business problems associated with rural/tourism enterprises?**

8. **Evaluate the impact of the competition according to:**

- Who do you deem to be your competition?

- What do you think their market share is?

- What do you think there is their competitive advantage?

- How does their rural/tourism product range in terms of quality, price, packaging and so on?

- What are their tactics/weapons?

9. **Any other comment or suggestion**