St. Per.

ISSN 2658-1736

Studia Periegetica

3(43)/2023

Uniwersytet WSB Merito
w Poznaniu

Studia Periegetica
3(43)/2023

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3(43)/2023

volume editors
Christian Myles Rogerson and Marek Nowacki

WSB Merito University in Poznań
Poznań 2023

Studia Periegetica
3(43)/2023

redaktorzy naukowi
Christian Myles Rogerson i Marek Nowacki

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Poznań 2023

Czasopismo znajduje się w wykazie czasopism naukowych Ministerstwa Edukacji i Nauki — **40 punktów** (komunikat z 1 grudnia 2021).
Czasopismo indeksowane w bazach: Index Copernicus, BazEkon, PBN, BILGINDEX, Google Scholar, DOAJ, CrossRef, ERIH Plus, EBSCO, CEON.
Czasopismo recenzowane według standardów Ministerstwa Edukacji i Nauki oraz Committee on Publication Ethics (COPE).
Lista recenzentów na stronie www.studia-periegetica.com oraz w ostatnim numerze czasopisma z danego roku.

The journal included in the list of ranked scientific journals published by the Ministry of Education and Science — **40 points** (December, 1st 2021).
The journal indexed in: Index Copernicus, BazEkon, PBN, BILGINDEX, Google Scholar, DOAJ, CrossRef, ERIH Plus, EBSCO, CEON.
The journal reviewed in compliance with the standards set forth by the Ministry of Education and Science and Committee on Publication Ethics (COPE).
A list of referees is available at studia-periegetica.com and published in the last issue of the journal each year.

Procedura recenzowania / Review procedure
https://studia-periegetica.com/resources/html/cms/FORAUTHORS

Redaktorzy naukowi (tematyczni) numeru / The volume's managing editors
Marek Nowacki (WSB University in Poznań, Poland)

Weryfikacja tekstów w języku angielskim / English texts revised by
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Redakcja i korekta tekstów w języku polskim / Copyedited by
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Skład / Typeset by
Teodor Jeske-Choiński / gniazdo.pl

Projekt okładki / Cover design by
Martyna Dawidziak

Wersja pierwotna — publikacja elektroniczna / Source version — electronic publication

ISSN 2658-1736

Uniwersytet WSB Merito w Poznaniu
ul. Powstańców Wielkopolskich 5, 61-895 Poznań
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https://www.studia-periegetica.com

Spis treści / Contents

Studia
Periegetica
3(43)/2023

ISSN 2658-1736, https://journals.wsb.poznan.pl/index.php/sp
s. 7–24, https://doi.org/10.58683/sp.599

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Tourism Gentrification in Urban Africa: Towards a Research Agenda

Abstract. Gentrification and the processes underlying its origin and evolution have been the subject of extensive much research, which has suggested various explanatory mechanisms or triggers of gentrification, including the impact of tourism. The study considers the relevance of tourism-induced gentrification in urban Africa and its possible consequences for tourism development and neighbourhood change in urban areas. According to the authors, tourism-induced gentrification occurs in a small number of African urban areas and is characterised by exclusionary practices that are similar to those that can often be observed in cities of the global North. A number of research avenues are proposed that consider the role of tourism-based development in urban Africa.

Keywords: Airbnb, digital nomads, gentrification, tourism, Africa, urban redevelopment, southern urbanism

Article history. Submited 2023-08-07. Accepted 2023-08-28. Published 2023-10-10.

1. Introduction

Gentrification and the processes underlying its origin and evolution have been the subject of extensive much research (Hamnett, 2021; Lees & Phillips, 2018; Lees, Slater & Wyly, 2023; Slater, 2021 as summative references). Gentrification has been recognised in various geographical contexts (Lees, Slater & Wyly, 2008; Smith, 2002) and is associated with physical, economic, social and symbolic transformations of urban spaces (Hamnett, 2021). A number of production and consumption explanations of gentrification have been proposed in the literature, including "mutations" of gentrification (Lees, Slater & Wyly, 2008). It has been pointed out recently (Hamnett, 2021; Slater, 2021) that the meaning of gentrification has expanded significantly, and in many cases now incorporates an impractically broad

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set of parameters (Lees, Slater & Wyly, 2008). The relevance of gentrification, however, remains firm, and is likely to be explored and experienced increasingly in Africa and the rest of the world. Some authors question the relevance of gentrification as a global phenomenon, suggesting that the "gentrification theory fails in much of the world" (Ghertner, 2015, p. 552). Indeed, "it is time to lay the concept to bed, to file it away among those 20th-century concepts we once used to anticipate globalized urbanisation" (Ghertner, 2015, p. 552). Attempts have been made to identify different stages of gentrification, each one associated with a different explanatory mechanism or trigger of its emergence (Hackworth & Smith, 2002; Aalbers, 2018)[1]. These mechanisms are reflected in various levels of state policy changes, where triggers of gentrification are mostly identified as central driving forces (Cocola-Gant, 2018) often resulting in various forms of exclusion.

The purpose of this article is to consider the relevance of tourism gentrification in urban Africa and its possible future consequences for tourism development and neighbourhood change in urban areas. The article consists of three parts. The first one positions tourism gentrification within larger gentrification discourses. The authors note that after a period of overlooking the link between tourism, treated as a development strategy by various levels of state government, and gentrification, much research has been done to investigate this relationship. The second part identifies examples of urban areas in Africa which have been studied in the context of tourism gentrification, including reports of physical outcomes of gentrification, not only intentional but also those that can be regarded as by-products of urban improvement interventions. The third part is devoted to issues arising from tourism gentrification. In contrast to Ghertner's view (2015, p. 552) that "gentrification theory fails in much of the world", the authors argue that gentrification is certainly a relevant problem in several African cities, and most likely, in many other urban areas in the Global South. The main contribution of this study is to indicate potential areas for future research on tourism gentrification in urban Africa.

[1] The first wave of gentrification was sporadic and highly localised, whereas the second wave was more geographically widespread and extended into cultural spheres. This approach is associated with Marxist explanations concerning the oscillation of capital investment. Third-wave gentrification often involves state structures, be they local, regional or national, where gentrification occurs outside the inner-city core and spills into the periphery of the city and, in some cases, to rural areas. The fourth and fifth waves are described as more intensive and more general forms of third-wave gentrification.

2. A Brief Review of Tourism Gentrification Debates

Gentrification, as a process of urban change, has for many decades been on the policy and research agenda in urban areas of the Northern Hemisphere. The argument is that the concept of gentrification has been associated with a number of interwoven discourses, somewhat removed from the more mundane analysis of urban spatial evolution (Hamnett, 2021; Lees & Phillips, 2018; Slater, 2021). Various changes taking place in urban contexts (Lees, Slater & Wyly, 2008; Smith, 2002) have illustrated the impact of gentrification on physical, economic, social and symbolic transformations of urban spaces in particular (Hamnett, 2021). Research conducted in recent years has identified a number of factors that contribute to the spread of gentrification.

Some of this research has focused on the role of tourism in gentrification, resulting in what Ghertner (2015) and Sigler and Wachsmuth (2020, p. 3190) describe as instances of "tourism-led, state-led and lifestyle-led urban transformation". Gentrification resulting from tourism, the confluence of private capital and state intervention, has affected various places around the world (Betancur, 2014; Cocola-Gant, 2018; Gotham, 2005; Gravari-Barbas & Guinand, 2017; Jover & Diaz-Parra, 2020; Lees & Phillips, 2018). Significant tourism gentrification has been registered in many diverse urban settings in both developed and developing contexts (Bobic & Akhaven, 2022; Novy, 2018; Pinkster & Boterman, 2017).

Evidence of tourism gentrification has especially been observed in large urban areas (Blanco-Romero, Blázques-Salom & Cánoves, 2018; Colomb & Novy, 2016; Gonzaléz-Peréz, 2020; Lopéz-Gay, Cocola-Gant & Russo, 2020; Navarrete Escobedo, 2020; Sigler & Wachsmuth, 2016). In the Global North, the expansion of urban tourism in historic districts of European cities has generated more residential pressure in those areas (Bobic & Akhaven, 2022; Cocola-Gant & Gago, 2021; Colomb & Novy, 2016; Novy, 2018). In Amsterdam, for example, an ever-growing number of tourists visit the famous canal district, an area that has, for a long time, been inhabited by many upper-middle-class residents (Pinkster & Boterman, 2017). While such residents are generally depicted as initiators of urban transformation, they are, in this case, on the receiving end of tourism-induced neighbourhood change. They argue that, owing to tourism and gentrification, the relationship between established residents and their neighbourhood has changed and, as a result, they have been experiencing a growing sense of discontent and powerlessness in the face of neighbourhood change. These processes and changes not only influence urban spaces; they also affect previously undeveloped spaces such as coastal areas (Jover & Diaz-Parra, 2020). Other increasingly recurring themes include touristification, transnational gentrification and urban change caused by transnational real estate

investment (Ezema, Opoko & Oluwatayo, 2016; Sigler & Wachsmuth, 2016). Collectively, Cocola-Gant (2018, p. 10) refers to tourism gentrification as "the new gentrification battlefront".

However, it should be acknowledged that the Global North is not uniform in this respect and there are differences even between European countries. Moreover, research on gentrification has been geographically uneven. Kowalczyk-Anioł (2023, p. 104), for example, argues that "even though research on tourism-oriented urban change is growing in number, little attention is paid to policy drivers, urban change and lived-experience nexus, especially in the context of Central and Eastern Europe". The author suggests that there is a lack of knowledge about how such change, urban regeneration and urban entrepreneurial policies promoting tourism-oriented urban change and gentrification are differentially expressed (physically, socially, etc.) and negotiated. A similar view, though not directly linked to tourism, is expressed by Janoschka, Sequera and Salinas (2014, p. 1234): "certain evidence suggests that the symbolic and material expression of gentrification in Spain … and scientific discourses relating to it, differ notably from those in the Anglophone world".

There have been fewer studies concerning gentrification and tourism-led gentrification in the Global South (Liang & Bao, 2015); however, as in the case of different parts of the Global North, they, too, provide conflicting evidence and different interpretations of the problem. Arguably, some of the most comprehensive investigations of tourism-led gentrification comes from China (He, 2010; He & Wu, 2009; Liang & Bao, 2015; Zhao, Chan & Sit, 2003). By analysing gentrification from a production-oriented perspective, literature on tourism-induced gentrification concludes that tourism-related investment increases property values and spills over into other related consumption spaces such as shopping malls, cultural centres and community facilities. By reorganising the local economy in these spaces, such investment eventually leads to demographic shifts in affected communities.

Irrespective of the gentrification phase or of its underlying processes, there are certain general markers associated with gentrification (Hackworth & Smith, 2001). These are physical, economic, and social changes and are often associated with some form of exclusion at different levels, usually centred on the class ascendance of those occupying these spaces. Spaces affected by gentrification have different levels of class and other forms of displacement in common, from lower to higher income groups, gay to straight, black to white, etc. Several positive and negative effects of gentrification have been documented (Lees, Slater & Wyly, 2008, 2023; Slater, 2021). Some key concerns relevant to this investigation are displacement, unsustainable lifestyle costs, racial segregation, black-on-black gentrification, and safety.

The debate on tourism-induced gentrification cannot be separated from the global increase of neoliberalisation in government and urban policies since the early 1980s (Sager, 2013). Over the past two decades urban development in the Northern — and Southern hemispheres have been increasingly influenced by neoliberal and market-friendly policies as public agencies, semi-independent public organisations, private companies and public private partnerships share the responsibilities and risks of pursuing decentralised goals through individualism and entrepreneurialism. The complexity of such diverse groups of role-players has accelerated the trends of entrepreneurialism, consumerism and property-led development, causing actors in the urban land and property market to be elevated to the position of key players in urban development (Tasan-Kok & Baeten, 2012). Decentralisation and deregulation of fiscal policies in most Western countries during the worldwide recession of this period was accompanied by an increased reliance on private sector capital to support urban regeneration and stimulation of local economies. A fairly attainable goal for many local governments was to increase the local competitiveness and attractiveness of cities to increase tourism. As a possibly unintentional consequence of market stimulation, many well-intentioned initiatives to increase economic growth in cities may have directly contributed to gentrification and displacement (Cocola-Gant & Lopez-Gay, 2020).

Although Smith (2002) argued that gentrification had spread globally, this may be perceived differently depending on the scope of investigation. Compared to studies focused on the Global North and some parts of the Global South, little has been said about gentrification on the African continent. This may be due to processes of urban change that have to date been less prevalent in Africa. In addition, research on gentrification has been fairly limited in terms of its geographical scope.

3. Tourism-led Gentrification in Africa

Although Anglophone analyses of gentrification can be categorised into state-led and tourism-led gentrification, contemporary case studies reveal that these categorisations are often interrelated and far more complex, as evidenced by studies from cities in China, Eastern Europe and Latin America. By way of introducing case study research, the following section provides an overview of the literature on African gentrification.

Much research on gentrification in Africa has focused on Southern African (Visser, 2002; Visser & Kotze, 2008) and is mainly concerned with coastal settings. Other regions that have received less attention include Egypt (Eldaidamony

& Shetawy, 2016; Elsorady, 2018; Mahmoud, 2017), Ethiopia (Nunzio, 2022), Ghana (Twumasi & Oppong, 2016); (Cobbinah, Amoako & Osei Asibey, 2019; Nimo-Boakye & Badu-Nuamah, 2022), Kenya (Dok, 2020), Mozambique (Roque, Mucavele & Noronha, 2016; 2020), Nigeria (Ajayi & Soyinka-Airewele, 2020; Godswill & Ukachukwu, 2018), Rwanda (Shearer, 2020), Tanzania (John et al., 2020) and Tunisia (Ben Salem, 2018). Studies conducted outside Tanzania and South Africa have mostly focused on state-led gentrification often involving urban regeneration projects accompanied by large-scale capital investment, with little attention paid to tourism-led gentrification.

State-led gentrification in Africa has been predominantly associated with the establishment of new or satellite towns at the periphery of historical areas characterised by an excessive level of urban density. In Africa, many projects to develop new satellite towns are in the planning stage. The purpose of these towns is to reduce overcrowding and promote entrepreneurship (Abubakar & Doan, 2017). This renewed interest in the development of new towns is motivated by the process of rapid urbanisation in Africa and the frustration with land development conditions and land speculation, leading to a "desire to leapfrog over overcrowding and dilapidated housing conditions onto new greenfield land" (Watson, 2014, p. 6). As a result, several new towns have been designed as satellites by international planning and architectural consultants in agreement with state authorities, using a modernist master planning approach to relieve population pressures in some major African cities and so escape their urban decay. Examples of such towns include Eko Atlantic City in Lagos, Appolonia and Hope City in Accra, Tatu City and Konza Techno City in Kenya, Roma Park in Zambia, Kilamba in Angola, Kigamboni in Tanzania, and 15 new towns planned for Nairobi. Promoters of these projects promise some impressive amenities and functioning systems that will enable the urban lifestyle most Western cities provide (Abubakar & Doan, 2017). According to Watson (2014), the current new towns being built in Africa are not only "urban fantasies" that are not only beyond the reach of most citizens, who are extremely poor and live informally, but often lead to the "eviction and relocation of vulnerable low-income residents" (Watson 2014, p. 12). In addition, the proposed new towns increase the risk of inequality and marginalisation.

Other forms of state-led gentrification are observed within historical urban centres. In Cairo, urban renewal and the displacement of poorer communities were part of master plans leading to "social polarization (sic) and loss of identity" through the "upgrading of historic medinas" (Mahmoud, 2017: 427). This is a recurring theme in the literature. Similarly, in Kumasi (Ghana), low-income residents were displaced to the city's periphery and traditional buildings completely demolished rather than refurbished or remodelled (Twumasi & Oppong, 2016; Cobbinah,

Amoako & Osei Asibey, 2019). This trend could also be observed in Maputo, with the municipality's plan for modernisation, partly enabled by private real estate investment and partly by large infrastructure and housing projects promoted by the Mozambican state (Roque, Mucavele & Noronha, 2020). This has also been the case in the capital of Ethiopia, Addis Ababa (Nunzio, 2022) and Kigali in Rwanda (Shearer, 2020). It must be noted, however, that these examples of gentrification were state-led in conjunction with private capital, and that tourism played a subsidiary role in subsequent urban transformations.

Gentrification in South Africa in many ways resembles various stages of gentrification that can be observed in the countries of the Global North, although it has taken place within the context of the urban history of apartheid planning. An important characteristic of the South African gentrification research is the fact it is conducted by a very limited number of scholars. In addition, urban contexts analysed in these studies are not always comparable to other urban areas in South Africa and Africa in general. The process of gentrification in South Africa has a unique starting point. It was not, as in other case studies, led by white middle class but was associated with a coloured community in Woodstock, adjacent to the Cape Town Central Business District (CBD). However, the mechanisms or triggers were typical of first-wave gentrification processes and subsequent residential changes that took place in the area during the 1980s were tracked by Jayne Garside (1993). The significance of Woodstock stems from its multiracial character that survived the deliberate race-based removal of non-whites from South African cities during the apartheid era. Garside's (1993) study analysed a major threat to the longstanding multi-racial composition of Woodstock, posed by the state's attempt to designate part of the suburb exclusively for coloured residents under the Group Areas Act of 1950. Nonetheless, while community resistance in the form of the 'Open Woodstock' campaign was successful in halting enforced residential change, processes of gentrification have shaped a new class composition in this inner-city suburb.

Another investigation of gentrification in other neighbourhoods close to Cape Town's CBD was carried out by Kotze, Kotze and Van der Merwe (2000) and later confirmed by Visser (2002) in former "white group areas" and "coloured areas", such as the Bo-Kaap (Donaldson, Kotze & Visser, 2013). These instances of gentrification were reminiscent of first and second-wave manifestations of gentrification seen in the Northern Hemisphere. It is important to note that there is no real evidence of any mechanisms or elements that distinguish tourism gentrification in the African context from that described in the mainstream Northern literature. Studies on urban Africa do not, for example, provide the kind of fine-grained analysis that Kowalczyk-Anioł (2023) conducted in the Central and Eastern European context

or comparable to the work of Janoschka, Sequera and Salinas (2014) with respect to Latin America. That, said, this might be owing to the fact that the examples are few and not well-reported in the Anglophone academic press.

It is noteworthy that the neoliberalisation of government policies in Africa occurred much later than in Western countries (Robinson & Parnell, 2012). It is therefore to be expected that the effects of private capital and the entrenchment of investment-driven regeneration and tourism opportunities have to date not been fully recognised in the literature.

4. Effects of Tourism-led Gentrification

A number of studies conducted in the global North and South address the displacement of the working class as a result of gentrification (Hamnett, 2021; Lees, Slater & Wyly, 2008, 2023). Different authors have defined gentrification in various ways, but most agree that the process involves the displacement of long-term residents, often of lower social status, and changes in the local infrastructure, housing costs and availability. According to Smith (2002), the displacement of original residents is the most damaging and controversial effect of gentrification, irrespective of its geographical manifestation. Gentrification often leads to unsustainable increases in lifestyle costs, resulting in the social exclusion of residents of lower socioeconomic levels. Sutton (2020) points out that gentrification can be treated as a spatial manifestation of economic inequality and that social exclusion resulting from expensive pricing can lead to the exclusion of vulnerable segments of society, such as the elderly; moreover, the process of gentrification varies from one neighbourhood to another.

One example of mainly *tourism-led gentrification* can be found in Zanzibar, which is part of Tanzania. The problem of gentrification has existed in Tanzania since the mid-1990s. According to Marks (1996), restoration programmes aimed at preserving individual notable buildings destroyed many of the town's fragile social and cultural networks and much of the urban fabric that was inhabited. It was observed that while a tourism-driven conservation approach was interpreted as a means to the economic and cultural revitalisation of Stone Town, it resulted in the marginalisation of poorer communities. Since then this problem has got worse (Jasiński, 2021). Heritage protection has had similar impacts in medina cores of North African cities such as Algiers in Algeria (Marks, 1996) and Tunis in Tunisia (Sutton & Fahmi, 2002), as a result of government policies incapable of addressing the challenges of urbanisation and impoverishment, leading to fragmentation and

a tendency to favour tourist-oriented projects. According to Horn (2019), the local population's attitudes and potential participation remain largely ignored in most African redevelopment projects (Horn, 2019).

Another common challenge is that African states often do not have the tools or are not capable of managing gentrification processes once they start. Possible reasons include the state's desire for external investment or developer-driven initiatives seeking profitable opportunities. In addition, municipal authorities in many African countries struggle to cater to the needs of a growing urban population due to a lack of financial resources. Neoliberalised state policies continue to support developer and market-driven processes of urban land development, which involve the occupation of conveniently-located and well-serviced spaces, which are in demand from both poor communities and private-sector developers (Watson, 2012, p. 90, also see Janoschka, Sequera & Salina, 2014 in this regard). Added to this are aspirations of some cities to achieve world-class status, which means they tend to support urban projects and urban forms compatible with elite tastes and consumption. Such processes are frequently at the root of growing social and spatial exclusion and reflect and promote socioeconomic inequalities that seem to accompany processes of globalisation and democratisation (Watson, 2012).

Visser (2003a, 2003b) investigated tourism-led gentrification in De Waterkant and later in the CBD of Cape Town (Visser & Kotze, 2008). More recently, Visser (2016, 2019a, 2019b) reported how leisure and tourism development nodes developed, and how, over time, these nodes consolidated into leisure and tourism urban redevelopment frontiers that radically reworked Cape Town's CBD along with the city's adjacent neighbourhoods. In the 2016 study, he demonstrated that urban redevelopment was spilling over to ever larger parts of central Cape Town, a situation that could potentially lead to vast areas of central Cape Town becoming accessible only to higher-end earners. The same study revealed that the roles of local government and corporate capital had become increasingly evident.

Follow-up investigations relating to the role played by Airbnb in urban change, reinforced the concerns that tourism-led investment could lead to the exclusion of poorer residents (Visser, Erasmus & Miller, 2017). These concerns have been repeated in later investigations concerning the City of Cape Town (Visser, 2019a, 2019b, 2020; Visser & Horn, 2021). Another potential contributor to tourism-led gentrification in the Woodstock area is the Heritage Protection Overlay Zone proposed by the City of Cape Town Metropolitan Municipality as part of its municipal by-law. It is proposed that many historical buildings and public spaces within this heritage overlay zone should be preserved in their current state, and that alterations or changes in land use should be considered as part of a consultative process with the City's Heritage Committee. This may lead to parts of Woodstock being

preserved as cultural and tourist attractions, whilst the remainder of the suburb is subjected to tourism-related neighbourhood change.

5. Future Prospects

It is important to understand where and by whom the majority of research on African gentrification is produced. The limited number of authors cited in this brief review are conducted within disciplines as African studies, archology, cultural studies, sociology, tourism studies and various geography and urban studies. Consequently, results of these studies related to gentrification are not "naturally" aligned since they are presented in the context of specific debates conducted within different disciplines, which are not necessarily directly focused on gentrification from an urban spatial change perspective. This disconnect is exacerbated by the fact that most of the studies cited in this review represent anglophone scientific community (cf. Janoschka, Sequera & Salina, 2014; Kowalczyk-Anioł, 2023). More attention should therefore be paid to franco — and lusophone contributors, outlets, and publishing practices that could potentially reveal different results and experiences.

Gentrification is a process of urban change and its presence in some African cities — sometimes because of tourism-related processes — has been recognised. The phenomenon of gentrification may appear to be in conflict with the general developmental narrative of urban Africa, which is so severely critiqued by a number of Southern urban researchers (Parnell & Oldfield, 2014), who do not embrace Northern urban theory and its key concepts. However, gentrification also challenges aspects raised by these critics, who argue that standard Northern urban change processes, such as gentrification, are not particularly relevant to Southern urban contexts. We argue that gentrification in general, but tourism-led gentrification in particular, is, in fact, relevant to urban Africa. What is perhaps more interesting is that those who advocate Southern-specific urban analyses mostly fail to acknowledge the role of tourism in generating an alternative urban development narrative. It is ironic that two very standard Northern discourses about gentrification and tourism are registered in urban Africa, yet they receive limited acknowledgement in the research on Southern urbanism. In general, urban tourism research has been dominated by a silo approach, which ignores results of studies which indicate aspects tourism that should be treated as agents of change in Africa. This oversight has led to a range of debates involving tourism researchers in the global South, perhaps most rigorously articulated in studies concerning South Africa demon-

strating the relevance of various Northern debates in the Global South (Rogerson & Rogerson, 2021).

Much of what is emerging in new African urban development practices in relation to tourism-led gentrification can be described as "demonstration effects" (Sharpley & Telfer, 2014). In the context of tourism studies, this term generally refers to residents imitating the behaviour and consumption practices of mostly Western tourists. We argue that the same practices can be observed not only in the regeneration of De Waterkant in Cape Town or in Stone Town in Zanzibar but also in new-build developments in and beyond those areas. This phenomenon should also be monitored in relatively recent practices of poverty tourism and tourism activities in informal settlements (Rogerson & Mthombeni, 2015). The unintended consequences of neoliberalised urban policies to generate local economic development and regeneration should form a significant focus of studies on tourism-led gentrification in Africa, a continent severely affected by urban poverty.

Beyond these concerns, there is the increasing impact of new tourist accommodation providers that cross the line between the development of residential redevelopment or new developments, and tourist accommodation. In this regard, the emergence of Airbnb cannot be overlooked. Even the most casual searches of such accommodation, particularly in places like Cape Town (South Africa), Maputo (Mozambique), or Dar Salaam (Zanzibar), point towards potential gentrification risks. Residential and mixed land use developments can and are likely to lead to tourism-led or tourism-oriented property investments for foreigners or wealthy local residents. In places like Cape Town, the potential of Airbnb is often directly presented as a motivation for investors considering new developments in desirable areas. Indeed, in the absence of policy mechanisms designed to regulate such tourism instruments, many neighbourhoods could suffer from the effects of investor-driven tourism gentrification. A practical example is Zanzibar Island, where the Fumba development actively markets properties that are aimed at foreign investors. A range of truly Northern themes, such as mixed land use, walkable cities and digital nomads, are introduced in these developments, which are very much analytically akin to third-wave gentrification from an Anglo-American and European perspective (cf. Liang & Bao, 2015 — on similar issues). Another possible avenue of investigation is brownfield development in African cities, which can be analysed in reference to similar experiences in Northern countries. This is easily noticeable in the way tourist destinations try to create their image to have international appeal, copying design ideas that are very clearly influenced by perceptions of wealthy investors, especially if marketing materials are priced in US dollars.

These developments are further related to the relatively new phenomenon of digital nomads and their role in driving urban developments in a range of locations

through interventions such as Airbnb. The blend of investment in tourism, both local and global, and the practices of digital nomads, is certainly not unique to Africa or the global South (Hayes, 2015, 2018, 2020), but can also be found in debates around urban development and tourism in the Northern Hemisphere. There is limited empirical evidence on the role of digital nomads as consumers or producers of (tourism) space(s) (urban or rural) in re-enforcing or contributing to tourism-led gentrification in Africa. However, the presence of digital nomads can be observed in areas such as Central Cape Town, Green Point, Camps Bay and Newlands, but this phenomenon and its impacts will require detailed empirical investigation. It is related to the more basic question about the distinction between and defining characteristics of tourists and residents and the types of urban environments each of these groups seek and create. This topic should be analysed in relation to issues such as cultural appropriation, citizenship and communicative planning.

6. Conclusion

Conceptual and empirical studies of gentrification have been conducted for some time, as indicated by Liang and Bao (2015, p. 477) and Beauregard's (1990) discussion on the "chaos and complexity of gentrification". The authors of this article have considered the relevance of tourism-led gentrification in urban Africa and its implications for tourism and urban development. It was argued that tourism-led gentrification, even though still limited, is a legitimate concern in several African urban areas, causing exclusionary outcomes that can be observed in cities of the global North. The authors have identified a range of topics for future research.

The main conclusion is that only few gentrification processes in Africa, as documented in the English academic literature, are directly linked to tourism and that the scale of tourism-led gentrification is still limited. Yet, where tourism-led gentrification has begun, it has been extensive and has been accompanied by a range of worrying effects. It is clear, however, that by supporting activities that trigger gentrification, authorities are attempting to make cities more "attractive" to foreign investors and/or tourists. This means that tourism-led gentrification can potentially increase in many African cities, exacerbating the situation of the most vulnerable informal communities, where poverty tourism activities are being promoted. In this regard the City of Cape Town can serve as a cautionary example of what can happen when a city is willing to direct development to sustain its appeal to international tourists and tourism infrastructure investors, all in the name of tourism.

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Acknowledgements

The authors thank Chris Rogerson for inviting us to participate in this project. They also extend their appreciation to the two reviews for their mindful and constructive suggestions to improve the paper. The usual disclaimers apply.

Gentryfikacja turystyczna na obszarach miejskich Afryki: perspektywy przyszłych badań

Streszczenie. Gentryfikacja oraz procesy leżące u podstaw tego procesu i wpływające na jego ewolucję od wielu lat są przedmiotem szeroko zakrojonych badań, których autorzy wskazują różne mechanizmy wyjaśniające lub przyczyny, w tym wpływ turystyki. W artykule omówiono znaczenie gentryfikacji turystycznej na obszarach miejskich Afryki i jej możliwe konsekwencje dla rozwoju turystyki oraz związane z nią zmiany w niektórych dzielnicach miast. Zdaniem autorów gentryfikacja spowodowana rozwojem turystyki to zjawisko występujące w niewielu obszarach miejskich Afryki i wiąże się z różnymi formami wykluczenia, podobnymi do tych, które często można zaobserwować w miastach globalnej Północy. Autorzy wskazują szereg kierunków badawczych, które uwzględniają rolę rozwoju opartego na turystyce na obszarach miejskich w Afryce.

Słowa kluczowe: Airbnb, cyfrowi nomadzi, gentryfikacja, turystyka, Afryka, przebudowa miast, urbanistyka globalnego Południa

Studia
Periegetica
3(43)/2023

ISSN 2658-1736, https://journals.wsb.poznan.pl/index.php/sp
s. 25–48, https://doi.org/10.58683/sp.596

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Business Tourism in an African city: Evidence from Harare, Zimbabwe

Abstract. There are many studies on business tourism conducted by authors from the Global North. Research on business tourism in the Global South remains underdeveloped despite its significance for many leading urban tourism destinations. Arguably, the need for more research on business tourism is particularly evident in major cities of sub-Saharan Africa, where this sector is frequently more significant than leisure tourism. This article contributes to addressing the knowledge gap on business tourism in urban Africa, by focusing on tourism connected with meetings, incentives, conferences and exhibitions (MICE) in Harare, Zimbabwe's capital city. The study is based on data collected during qualitative interviews with respondents from all hotels in Harare that have facilities to accommodate business events. The focus was on the competitiveness of the city's business tourism economy, the nature of business events in the city, and local impacts for the impoverished population.

Keywords: business tourism, MICE tourism, urban tourism, competitiveness, pro-poor impacts poor

Article history. Submited 2023-07-28. Accepted 2023-08-17. Published 2023-09-26.

1. Introduction

As disclosed by the review of recent literature authored by Page & Duignan (2023), scholarship on urban tourism is massively dominated by research which is undertaken in cities of the Global North. Urban tourism is, however, a critical component in many destinations of the Global South (Rogerson & Rogerson, 2021a). One vital dimension of the 'other half of urban tourism', namely tourism in cities of the Global South, is business tourism (Rogerson & Rogerson, 2021b). As observed by Marques & Santos (2016, p. 4), international debates around business tour-

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ism "are characterised by a heterogeneity of concepts and a lack of standardised terminology". Although scholars do not agree on what business tourism is (Lau, 2004), the most widely used definition is that mainstream business tourism applies to mobilities for independent business trips and travelling to participate in meetings, conferences and exhibitions (MICE tourism) (Davidson, 1994; Rogers, 2013).

This article investigates the state of MICE tourism in one African city drawing on results of a study conducted during the period of recovery from the most extreme impacts of the COVID-19 pandemic. In the international context, research on business tourism in African cities is of particular interest because sub-Saharan Africa represents a distinctive region in the global tourism economy, where business tourism accounts for a higher proportion of total tourism receipts than in the case of other global regions (Rogerson, 2014, 2015a; Rogerson & Rogerson, 2021c). A ranking of countries according to the share of business travel in their overall tourism portfolio revealed that 18 of the top 20 countries in the world are from sub-Saharan Africa (Daly, 2017). Business travel tends to concentrate in cities, especially large economic centres and/or capital cities which are the locus of economic and political power (Rogerson, 2015a, 2015b; Tichaawa, 2017; Rogerson & Rogerson, 2021c, 2021d). African cities such as Accra, Addis Ababa, Douala, Johannesburg, Nairobi, Maputo and Pretoria are examples of destinations which host domestic and international business events as well as meetings with government officials, NGOs and international development agencies. There is a growing body of literature on business tourism in sub-Saharan Africa, most of which concerns South Africa. The historical evolution and the contemporary significance of business tourism in South African cities has been highlighted in several studies (Rogerson, 2005; Donaldson, 2013; Rogerson, 2014; Rogerson & Rogerson, 2014; Rogerson, 2015b; Rogerson & Rogerson, 2017; Rogerson, 2019).

The aim of this article is to expand the body of research on African business tourism by examining the characteristics, competitiveness and impacts of MICE tourism in Harare, the capital city of Zimbabwe. While the study represents the formal part of the business tourism landscape in an African city, one should be aware that there is also an economy of informal business tourism, mainly driven by cross-border traders, which constitutes another critical (and often unrecognized) segment of the tourism business economy in urban Africa (Rogerson, 2015a). Our findings on the formal economy of MICE tourism are based on a set of qualitative interviews which were conducted with stakeholder representatives from all the hotels in Harare that have facilities to host MICE events. The following section contains a review of the literature on business tourism and a discussion of Harare as an African business tourism destination.

2. Literature Review

In the pre-COVID-19 period, business tourism represented one of the fastest expanding segments of the global tourism economy. Since the 1980s, with accelerating trends of globalization, MICE-related travel has been recognised as a critical dimension of international tourism (Oppermann, 1996; Davidson & Rogers, 2006; Ladkin, 2006; Willis et al., 2017). Among others, Ladkin (2006, p. 56) pointed out that during the 2000s the MICE sector was "extensive and rapidly growing" and Marques (2020, p. 7) and that "business tourism is a fast growing lucrative segment" of tourism. The COVID-19 pandemic, however, severely impacted the global activity in the field of business tourism as in-person business events were replaced with video-conferencing or hybrid events (Litvinova-Kulikova, Aliyeva & David, 2023; Müller & Wittner, 2023).

According to Williams (2009), the burgeoning growth of business tourism is inseparable from several key characteristics that are considered beneficial for urban destinations: it is a high quality/high yield sector, it is associated with a year-around activity, it complements leisure tourism by using much of its infrastructure and can be a significant driver for urban regeneration. It is argued that this form of tourism provides significant economic benefits for destinations because daily expenditures of business visitors tend to be higher than those of leisure tourists (Seebaluck, Naidoo & Ramseook-Munhurran, 2015). Law (1987) and Lau (2004) stress that national and local governments have been increasingly becoming aware of the potential of MICE tourism because it is associated with relatively high daily expenditures and can be a lucrative source of revenue. MICE tourism can bring other benefits to destinations, such as image enhancement. The policy relevance of developing business tourism is underscored by several investigations undertaken in Portugal (Marques & Santos, 2016, 2017a, 2017b; Marques, 2020). Regarding the city of Porto, Marques & Pinho (2021) emphasise that business tourism is a strategic tourism product, which complements leisure tourism and facilitates entrepreneurship and serves as a catalyst of local and regional development. Lau (2004, p. 12) highlights that MICE activities "can result in associated social and cultural benefits to a destination, enhance the exchange of ideas, foster business connections, provide forums for continuing education and training, and facilitate technology transfer". MICE tourism often incorporates an element of leisure tourism as conference attendees extend their stay in destinations for leisure purposes, which blurs the distinction between business and leisure tourism (Ladkin, 2006; Davidson, 2019). Willis et al. (2017, p. 49) mention certain other advantages "such as the spread of knowledge and professional practices and the building of better understanding and relationships between different regions and cultures".

Business tourism as a whole and MICE tourism in particular develops around urban centres (Marques & Santos, 2016; Pinho & Marques, 2021; Rogerson & Rogerson, 2021a, 2021b). Indeed, for Law (1993, p. 39), MICE tourism emerged as one of "the staples of city tourism". For Marques (2020, p. 8), "business tourism represents an important weight in the local and regional economy and corresponds to a tourist segment with great potential of development". Davidson (2019, 2020) reiterates the point that most studies on urban tourism identify business tourism as a core segment of tourism in cities and stresses that a significant share of urban tourism is associated with business tourists who attend MICE events. Critical factors influencing where MICE events occur are the existence of high standards of conference and accommodation facilities, which are usually found in capital cities (Law, 1987, 1993). Wan (2011) discusses the role of premium hotels which are often chosen as venues for conferences or other business events. Rogers and Davidson (2016) observe that in response to a surge in demand for business tourism, many cities in the Global North, recognising the benefits from hosting conferences, have encouraged the establishment of purpose-built conference centres. Dedicated MICE properties such as convention centres and exhibition halls can serve as vital assets in city development strategies and are supported by significant amounts of public funds. There is evidence that such facilities attract investors into cities and generate "substantial returns to local economies in the form of spending on local accommodation, local transportation and other tourism products" (Lau, 2004, p. 1). Marques and Santos (2016) point out that given the potential of business tourism, European urban destinations try to provide excellent service to visitors in order to ensure high levels of satisfaction during their stay in the city.

Notwithstanding the economic importance of MICE tourism and its high profile in urban economic development programming, it has occupied only a minor role in the broad agenda of tourism scholarship (Weber & Chon, 2002; Lau, 2004). According to Pinho and Marques (2021), until 2000 the literature on business tourism was sparse. Celuch and Davidson (2009) noted that despite business tourism accounting for (at least) a quarter of visitors to some destinations, the sector was under-represented in comparison to studies on leisure tourism. Similarly, Willis et al. (2017, p. 49) argue that in spite of its importance, "research on business travel is relatively limited within the tourism literature". While recognising this disproportion, Davidson (2019, p. 117) claims that interest in business tourism has been growing in recent years. According to Pinho and Marques (2021), the latest literature includes several country studies on determinants of business tourism, market development. Among key themes are the economic impacts of business tourism, location factors considered by meeting planners, changes taking place in the MICE sector, the role of destination image, the marketing of destinations for

business events and, increasingly, sustainability issues and environmental impacts of events (Borodako et al., 2011; Borodako et al., 2019; Celuch, 2019; Bik, Poreda & Matczak, 2020; Arcodia, 2023; Celuch, 2023). After the COVID-19 pandemic, research topics also include the role of technology in transforming business events, the growing popularity of hybrid business events as part of the new normal (Lekgau & Tichaawa, 2022a; Litvinova-Kulikova, Aliyeva & David, 2023; Müller & Wittner, 2023). Strategies for the recovery and revitalization of business tourism in Europe have also been studied (Carvalho, 2023).

In the Global South, the essential drivers of the expansion of MICE tourism exhibit close parallels with those in the Global North (Rogerson, 2015a; Rogerson & Rogerson, 2021b). This sector revolves around an infrastructure of (mainly upmarket) business hotels, convention centres and competition between countries and cities to host business events. Across Africa, the growth of business events and business travel, mostly involving regional (African) or domestic travellers as well as a (lesser) flow of international business tourists, has been facilitated by the construction of convention centres in large cities or national capitals. One manifestation of this trend is the recent boom in upmarket hotel accommodation operated by (or branded by) leading North-based hotel chains (such as Marriott or Hilton) and by South African-based hotel chains, which have expanded their operations to other countries of southern Africa (Rogerson, 2016). Beyond the business hotel, South Africa and Cameroon have seen the emergence of a range of other types of accommodation establishments directed at business traveller, such as the all-suite hotel (Rogerson, 2011) and serviced apartment (Greenberg & Rogerson, 2015; Tichaawa, 2017; Greenberg & Rogerson, 2018, 2019). A recent study by Rogerson & Rogerson (2022) indicates that the COVID-19 pandemic caused a downturn in business tourism in major cities across Africa, which the sector tried to overcome by switching to virtual and hybrid events (Lekgau & Tichaawa, 2022a, 2022b, 2022c).

The next section turns to Harare as a MICE destination and the results of research on the state of the economy of MICE tourism in Zimbabwe's leading urban centre. It is acknowledged that this is one dimension of business tourism in the African city, for alongside it, there is the economy of informal business tourism, mainly driven by cross-border traders, and constitutes another critical (and often unrecognised) segment of the tourism business economy in urban Africa.

3. Harare — an African Business City

The city of Harare, which used to be called Salisbury from 1890 to 1982, is the capital and largest city of Zimbabwe. It is the most populous urban area in Zimbabwe, the centre of the national government as well as the country's major commercial location and the main international gateway (Toriro, 2018). Given its central political and economic role, it is home to many government agencies and foreign embassies, and to the headquarters of the country's largest business enterprises. The role of Harare as a business tourism destination cannot be fully understood without the broader context of tourism development and of its drivers in Zimbabwe. The tourism sector in Zimbabwe has experienced major shifts since its independence in 1980. Chingarande (2014) notes that Zimbabwe recorded its largest growth in tourism arrivals and receipts during the first two decades (1980–2000) of the post-colonial era. The highest growth (35%) occurred in 1995, when the country hosted the All Africa Games (Zimbabwe Tourism Authority, 2014). With a rise in both leisure and business travel, the country was referred to as the 'wanderlust destination' (Zengeni & Zengeni, 2012). From 2000, however, there was a drastic downturn in tourism flows, as a result of political upheavals following the chaotic land grabs of Mugabe and the accompanying negative media publicity (Woyo & Slabbert, 2023). Travel bans and warnings regarding Zimbabwe were issued by the USA, the UK, Canada, and Australia. In the following decade, little attention was paid to the country's leisure tourism offerings because of a severe economic downturn (Mirimi et al., 2013). Since 2010 the tourism economy of Zimbabwe has shown small signs of a revival (Shereni, Saarinen & Rogerson, 2022; Woyo & Slabbert, 2023).

One area where that revival has been evident is business tourism. As in the case of many sub-Saharan countries, business tourism is a key driver of tourism in Zimbabwe. Before the COVID-19 pandemic, the country was viewed as one of the top business tourism destinations in Africa, especially as regards MICE tourism (Makoni & Tichaawa, 2021). Following the successful hosting of the Africa Tourism Association Congress in 2012 at Victoria Falls and the co-hosting with Zambia of the UNWTO General Assembly in 2013, the country's business tourism sector was significantly strengthened (Zhou, 2013).

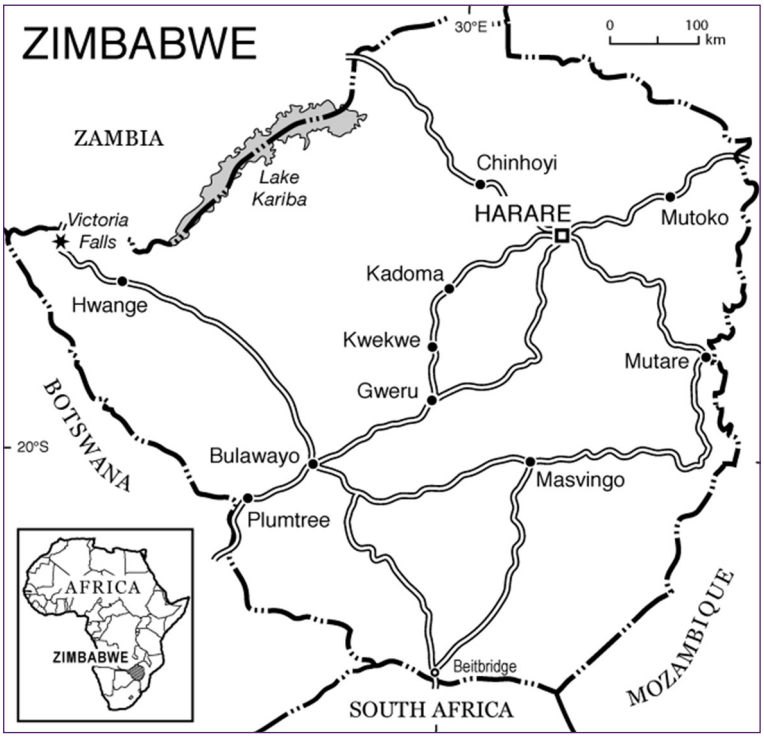

Figure 1. Location of Harare in Zimbabwe
Source: Authors

Table 1. Hotel and conference establishments in Harare

Hotels	29
Hotels with conference facilities	10
International convention centres	1
Hotels with facilities to host international conferences	4
3-star to 5-star hotels	3
Accommodation establishments	152

Source: Zimbabwe Tourism Authority, an unpublished database

Harare is a major cluster of accommodation services for business travellers, most importantly, a network of business hotels with conference facilities. As can be seen in Table 1, the city has over 80 accommodation establishments, including 29 hotels. The International Convention Centre (ICC) in Harare is the only such facility in Zimbabwe (Figure 2). Of the 29 hotels, 10 have conference facilities, but only three offer conference facilities of an international standard (Table 1). The leading city hotels include Simba Harare Guest Lodge, Cresta Lodge, Holiday Inn

Harare, the (historic) Meikles Hotel, New Ambassador, The N1, Cresta Jameson, The Monomotapa Hotel, and the Rainbow Towers and Conference Centre Hotel, all of which host business events of both domestic and international significance. The city's accommodation sector has a small number of foreign-owned hospitality enterprises such as Rainbow Tourism Group, Cresta Hospitality Group, and African Sun Limited; the majority of the hotel stock in Harare is domestically owned.

Figure 2. The leading business tourism facility in Harare — Rainbow Towers (left) and the International Conference Centre (right).
Source: Rainbow Tourism Group (2023)

4. The Case Study and the Research Method

The study focused on 10 Harare hotels with conference facilities. Table 2 provides details of 10 respondents who were interviewed during the period April–November 2022.

Table 2. Information about respondents and types of establishments they represented

Type of establishment	Nationality	Sex/Age	Position	No. of years in the position	Code
Hotel and ICC	Zimbabwean	Male 45	Deputy General Manager	4	KI 1
Hotel and conference facility	Zimbabwean	Female 50	Events and conference manager	12	KI 2
Hotel and conference facility	Zimbabwean	Male 51	Conference manager	20	KI 3
Hotel and conference facility	Zimbabwean	Male 43	Guest Relations Manager	7	KI 4

Type of establishment	Nationality	Sex/Age	Position	No. of years in the position	Code
Hotel and resort	Zimbabwean	Male 42	Conferencing and Events Manager	3	KI 5
Hotel	Zimbabwean	Female 40	Hotel and conferencing manager	5	KI 6
Hotel	Zimbabwean	Female 38	Conference Manager	4	KI 7
Hotel and lodge	Zimbabwean	Female 56	General manager	15	KI 8
Hotel	Zimbabwean	Male 55	General manager	17	KI 9
Hotel	Zimbabwean	Male 41	Sales and marketing manager	11	KI 10

Source: Authors

The qualitative interviews were designed to capture opinions of key stakeholders representing all hotels in Harare which have conference facilities to host MICE events. Only four establishments offer facilities that are of international standard and therefore have an infrastructure to accommodate international as well as domestic MICE events. The other six hotels have conference venues that are only sufficient to host domestic business events. While all the hotels can and do occasionally accommodate guests other than participants of business events, the interviews focused on their role as venues for business tourism or MICE tourism. Questions concerned the following topics (1) the competitiveness of the local MICE sector; (2) the types of business events (both international and domestic) which occur in Harare, and (3) local impacts of the business tourism economy.

5. Results

5.1. The Competitiveness of Harare's Business Tourism Sector

Given the small number of hotels with conference facilities in Harare, the infrastructure that can support business tourism in Harare is relatively small compared to that of competing regional destinations such as Johannesburg, Cape Town or Nairobi (Rogerson, 2015a, 2015b; Rogerson & Rogerson, 2021c). In addition, in Zimbabwe, Harare, as a venue for business events and conferences, often is

in competition with Victoria Falls, the iconic leisure tourist resort. This broad picture of the competitiveness of Harare as a business tourism destination is extended now by an analysis of the viewpoints of the ten key stakeholders who were interviewed.

From the interviews, the stakeholders offered a positive perspective on the competitiveness of Harare as a business destination but, at the same time, flagged a number of critical challenges that impacted the city's business tourism economy. Although the limited base of international standard convention facilities was acknowledged informants expressed positive sentiments about the state of the local MICE sector, often by comparison of the health of Zimbabwe's business tourism economy relative to other African contexts.

> I think Harare is one of the best conference destinations in Africa (KI 1).

> If you trace back to check the conferences we have hosted in the past five years, we are not doing badly; I think in Southern Africa, we are just behind South Africa in that. The only thing is that there is only one International Convention Centre in Zimbabwe, and they have a lot of them in South Africa. Put aside the fact that there are not many; we don't need many of them to be competitive (KI 2).

> There is a general perception that Zimbabwe is struggling and the economy is down. Yes, this is true, but that needs to be weighed when looking at our industry. The hotel industry here in Harare and in Victoria Falls is not struggling. We just have a few glitches, but it is not worse than neighbouring countries (KI 3).

Key challenges mentioned by the respondents concerned insufficient basic infrastructure:

> The problem we currently face is development problems like infrastructure, electricity and water. I honestly think these are just administrative issues, just like any other typical African city (KI 1).

Other informants suggested that the business economy of Harare was in reasonable health, albeit re-iterated fundamental issues of infrastructural shortcomings in terms of electricity and water. A strong theme in the responses was that it was the conditions in the national environment that were negatively impacting the functionality of Harare as a business tourism destination. Several responses were given by the informants expressing such concerns.

> The business and meetings industry of Zimbabwe in general is doing quite well. Yes, we do have constraints economically and also we have a lot of developmental and infrastructural problems. Our facilities are of good quality but the surroundings are very bad. The worse situation is when we have no electricity or water during the conference, and the backups are not really reliable (KI 3).

> Our country is obviously poor, but which African country isn't? South Africa? They are also poor there. Now they even have power cuts like us and generally the citizens are poor as well, just like Zimbabweans. I would say that our country's situation especially the politics slows down business generally, but we are not the worst in Africa. Our conference industry, especially here in Harare and also Victoria Falls are competing with the like of South Africa to host big international events, and we have been hosting a lot of these events. My only worry is the politics here and media too. Above all, our infrastructure may need to be redeveloped to attract more business conferences (KI 1).

One respondent provided a historical perspective on the situation of the city's business tourism linking its fluctuating fortunes to the unstable political conditions in the country.

> Harare has a good history of hosting international conventions. This city was once an events centre, especially in the late 1990s and early 2000s. Then politics happened and everything went down to the drain. It is only from around 2010 that our industry started to grow again (KI 1).

The emergence of the Government of National Union (GNU) in 2009 was a brief turning point in the history of MICE tourism in Harare. It boosted the confidence of international organizations and encouraged them to host business conferences in Zimbabwe. Thanks to its improved image, Zimbabwe was awarded the title of World's Best Tourist Destination in 2014, mainly as a result of its success in hosting the UNWTO General Assembly in 2013. In 2013, the UNWTO endorsed Zimbabwe as one of the best conference destinations in Africa. However, following the collapse of the GNU in 2013, the resulting changes in the political landscape considerably limited the city's ability to host domestic and international business events.

As the condition of the national economy started to deteriorate from 2000, the economic landscape in Harare became more informal (Rogerson, 2016). Informality and poverty are defining characteristics of the Zimbabwean economy (Moyo & Gumbo 2021). The main reason being the political and economic crises of the decade after 2000 that resulted in the collapse of the formal economy and its almost complete replacement by the informal economy across virtually all sec-

tors. Harare has been a city in economic distress, increasingly informalizing with estimates that 90 percent of the city's residents have been enduring poverty for at least the past two decades (Moyo & Gumbo, 2021). The advance of informalization negatively impacted the competitiveness of the city's business tourism economy as was pointed out by one informant:

> We are affected by the poverty and we host less business conferences than we expect. If you visit our facilities, you will be amazed with what you see inside, but you cannot enjoy taking a walk around outside during the busy days in Harare. Informality is becoming more and more. For those who bring business to us, they see it as unattractive for business, but that is our reality what can we do (KI 5).

The respondents also pointed out that unfavourable international media reports on Harare had a negative effect on the city's image as a MICE destination.

> Things are not as good as before, our infrastructure is generally dilapidating, prices are rising and we have a currency issue to resolve. In terms of politics, I will not comment but all I can say is that it is also a major challenge. Our major enemy in Zimbabwe is the international media because what they say about our country is not as worse as they portray (KI 1).

5.2. Business Events Hosted in Harare

It was disclosed in the interviews that the actual nature of business events that occur in Harare has been influenced by the political situation in Zimbabwe and further that changes occurred in business events as a consequence of the country's political landscape.

> In the early 1990s we were more flexible with hosting any conferences, but now it's a bit challenging because of the politics here. It is worse when we host the national conference. We have to check who wants to utilize our venues and what exactly the purpose of their meetings is. Anything political here is not to play with around here, it is easy to lose your job here, or even the whole conference shut down (KI 4)

Arguably, according to informants, the period between 2009 and 2013 was critical for changes in the MICE events industry in Zimbabwe. It was stated as follows:

> Harare used to host all types of conferences and the administration of it was very easy. But the political violence of 2008 somehow changed everything. Since then we have to

> be very particular with the conferences we host. I think it's better with big hotels because they have a different kind of influence than us. During the period between 2009 and 2013 Zimbabwe was under the national union government and a lot of conferences were hosted because of that, but when that union ended, we are just striving through. We still have conferences here and there, but not as much (KI 8).

As regards the hosting of international business events, competition that exists with other Zimbabwean cities is mediated by the government:

> So how it works is that the ministry does the bidding to host especially the major international organizations. Once Zimbabwe wins the bidding, the ministry will then assign a city based on capacity and the tourism around the area. That is why we are always in competition with Victoria Falls because of the falls and the national parks there (KI 1).

Some international events are co-organised with other centres, the most important one being Victoria Falls:

> We shared with Victoria Falls in hosting the SADC conference. Of course the conference was hosted in Victoria Falls, but all the procurement was done in Harare, and we hosted the delegates for more days than in Victoria Falls. Because we are under one hotel chain, it's easier to work together and in most cases we are the service providers of conferences hosted in Victoria Falls (KI 4).

When it comes to domestic business events, political events play a key and dominant role. The respondents pointed out that it is always safer to host political meetings aligned with the ruling party:

> We have a lot of political conferences. But they are mostly ministerial planning sessions and ZANU PF's conference only. We cannot host any other political conference that is not in line with the ruling party (KI 10).

Such political influence impacts the manner in which the business events sector operates. Stakeholders indicated that the political conferences they host are highly profitable. One informant indicated that:

> We are always hosting political conferences. We recently hosted the ZANU PF youth conference that took four days. There are a lot of Ministries strategy sessions, we share with conference centres at Victoria Falls (KI 3).

The role played by travel organizers was disclosed as significant for the organization of these domestic business events. It was stated that:

> Our services are to host the meetings and conferences, not to organize them. We simply offer the service and facility for the success of the conferences. The tour operators and the travel agents do the organization and they are our clients while the conference delegates are just our guests. This makes our business easier (KI 3).

In addition to political events the city's business events sector regularly attracts private sector and organizational meetings, conferences that are not politically based.

> The conferences we host at domestic level are generally political, religious and organizational conferences. In Zimbabwe generally, those are the three main conferences you will see being hosted in big hotels and conference centres. Apart from those, you can have music concerts (KI 1).

> We always host many of the domestic organizations at least once or twice in a month. We don't have too much competition because there are few hotels in Harare with bigger conference facilities to host such conferences. Sometimes even the University of Zimbabwe hosts some international conferences (KI 2).

> Religious conferences bring a lot of profits because our hotel operates to full capacity when they happen. When we host big religious names like Pastor Makandiwa and Prophet Magaya, our hotel will have a 100% occupancy rate. Religious conferences are such a big thing in our operations. Then we have political conferences, these come in different forms from youth leagues to ministerial conferences, and the good thing about these is that we have a yearly calendar of political events that we host (KI 4).

In summary, hotels in Harare host a variety of events, including political, religious and business events as well as health conferences. As a venue for domestic events, Harare often competes with other urban centres in Zimbabwe, most importantly, with Victoria Falls. Arguably, the character of the city's business tourism sector is strongly affected by the country's political environment.

5.3. Local Development Impacts

The interviews provide evidence of important local impacts resulting from the growth and operations of Harare as a destination for MICE business tourism. As has been observed in African tourism research, existing studies on impacts that

reduce the level of poverty are mainly conducted in relation to leisure tourism. Only recently has there been a growing interest in how business tourism in African cities can achieve the same goals (Coles & Mitchell, 2009; Rogerson, 2014). Given the distressed character of Zimbabwean economy and the high levels of poverty and unemployment in Harare, the following subsection focuses on the pro-poor impacts of the MICE tourism sector in Harare.

The most direct impact is the provision of formal employment opportunities in the city whose manufacturing sector has experienced a major decline. The hospitality sector in Harare is one of the few formal sectors offering employment for job seekers in the city.

> Employment is a big problem in Zimbabwe because industry is no longer as effective as before. But ours [hospitality] offers job opportunities every time, from low to high skills (KI 10).

> Zimbabwe is typically a country without jobs. Our industry only employs just about 8–10% of the entire Zimbabwean workforce. The root to this unemployment issues can be anything from political to economic. The hospitality industry is doing its best to address this employment gap, but it's not enough (KI 5).

The respondents were also asked to express their opinions about unemployment in Harare and how the hospitality industry was addressing it:

> The hotel industry in Zimbabwe is the highest employer, and we employ people from low skills level which makes us the top in balancing the employment equity in the country (KI 2).

> It is not a secret that productivity of many industries in Zimbabwe is down and jobs are scarce. When we speak of unemployment levels, they keep rising every day and there are many unemployed graduates who have turned to informal business practices to fight poverty in their families. Our industry is only one of the few industries in the country that is absorbing the graduates (KI 5).

As follows from the above, the hotels and convention centres in Harare play a vital role as employers on the local labour market, though they are not able to absorb the growing number of unemployed graduates in the city.

> Altogether we have 234 Zimbabwean employees in the hotel. 134 are permanently employed, and 100 are on short term contracts… All senior positions are 100% held by Zimbabwean citizens, including the hotel senior manager (KI 1).

> The Zimbabwean citizens employed in this hotel are 300. There are 198 male employees and 102 females. 7 of them are living with disability. We have 15 Zimbabweans who are working as interns and they are not part of the 300. All the senior positions in the hotel are occupied by Zimbabweans, with 5 women senior managers and only one senior manager living with a disability (K1 6).

The respondents were also asked if they had employment strategies or policies with guidelines on the employment of women, youth and other vulnerable population groups in Zimbabwe. Responses indicate that women and vulnerable populations are prioritized. There are women and people with disabilities in high positions and employment rates for local residents are high. The MICE sector is also an important employer of people with low skills.

> Our employment strategy dovetails those of the country's labour laws. We do promote the empowerment of the vulnerable groups, but obviously they have to be qualified or have some experience in the job they apply (KI 2).

However, the low wages in Harare's hospitality sector are in many cases insufficient to combat the phenomenon of poverty-in-employment:

> Poverty is getting worse every day in our country, it's affecting even our employees because the salaries are not enough. Sometimes we give the employees food stuffs and materials to support their families. Our company policy and the safety and security act forbids us to let employees take left overs home due to related health issues. But we are aware the employees break that law. I do understand their actions because of poverty because I am living here and experiencing everyday just like them (KI 4).

> We do not have a direct plan or strategy for dealing with poverty, remember we are a business. But our social programs involve our commitment to help reduce poverty in Zimbabwe (KI 10).

Overall there is evidence of strategies and policies that exist in Harare hotels and conference centers that promote the employment of vulnerable population groups. In addition to the pro-poor local impacts of hospitality employment in Harare, including for vulnerable groups, another set of positive impacts from the formal business tourism economy relate to corporate social responsibility (CSR) projects. In that regard, the sector was found to be involved in a number of community engagement programmes directed towards improving the livelihoods of vulnerable populations in the city. A typical response about CSR programmes was as follows:

> Our hotel has a food programme in which we feed six old aged homes across Zimbabwe on a monthly basis. We also sponsor food to boarding schools and to orphanages in Harare, Also, we have quite a few public schools where we have feeding schemes for underprivileged school children (KI 1).

> Poverty is an immediate challenge in Zimbabwe and it keeps getting worse. In our initiatives, we are always having briefings with the senior management and major shareholders on how we can help fight the poverty not in the city but in the entire country. This is not just about Harare, and we are aware of it. Generally everyone in Zimbabwe who is not a politician is poor and it is worse in the rural areas. On a monthly basis, we deliver groceries to 25 foster families and orphanages around the country, only three of them are in Harare (KI 3).

Besides CSR programmes and projects related to the SDGs, hotels and convention centres in Harare are involved in other pro-poor initiatives that are part of their social commitment.

> Our biggest social responsibility I think is that we offer employment opportunities for Zimbabweans. Besides this, our hotel is committed to working with communities, for example we normally buy horticultural products from some of the community members in many areas around the Manicaland Province. Dealing with local farmers for us is our strategy to include them in the supply and value chain of the hospitality sector in Zimbabwe (KI 4).

> We are involved in recreational activities also where we sponsor schools sport activities and providing recreational facilities for sporting activities. For example, we help in the maintenance of the Harare Sports Club (KI 5).

Regarding the contribution made by the business tourism sector to poverty alleviation in Harare, the respondents mentioned several regulatory problems and raised concerns about the repression of the informal sector in Harare (see Rogerson, 2016).

> One of the major challenges we are facing here is the treatment of the informal traders who come to sell art works and other souvenirs around our facilities during conferences and exhibitions. These people used to help in making the conference experience of our guests more exciting, but now the police raid them and they have taken away that pleasure from our guest (KI 1).

The above responses signal that the regulatory environment which affects the operations of the business tourism economy in Harare reduces the capacity of the business tourism sector to have a more positive impact on reducing poverty in the city.

6. Conclusion

Research on business tourism continues to attract attention from tourism scholars in the Global North (Borodako et al., 2019; Celuch, 2019; Davidson, 2019; Bik, Poreda & Matczak, 2020; Arcodia, 2023; Carvalho, 2023; Celuch, 2023). In the Global South, however, it remains a somewhat neglected theme despite its significance in many leading urban tourism destinations (Rogerson & Rogerson, 2021b). The need for an extended scholarship on business tourism is particularly acute in major cities of sub-Saharan Africa, where business tourism is frequently of greater significance than leisure tourism (Rogerson & Rogerson, 2021c). This article contributes to addressing the knowledge gap on business tourism in urban Africa with its focus on MICE tourism in Harare, Zimbabwe's capital city.

The findings were based on qualitative interviews which were conducted with stakeholders at the convention centre and all hotels in the city that have conference facilities. It was shown that Harare has a MICE infrastructure which can accommodate both international and domestic business events. The competitiveness of Harare for such business tourism is constrained by infrastructural shortcomings relating to unreliable supplies of electricity and water. Despite the economic and political turmoil experienced in Zimbabwe since 2000, there is observed resilience in the hotels and conference centres that are the heart of this business tourism economy. It was evident, however, that political circumstances in Zimbabwe have constrained the city's capacity to host international business events. Arguably, politics have also influenced aspects of the nature of domestic business events in the city. It was shown that politics plays a major role in the decisions made by the conference centres in Harare to host particular domestic business events associated with the ruling party. Beyond political events linked to the government, Harare has also been the focus of other events, most notably of large religious gatherings. These domestic and international events in the city have been a core support for the hotel economy of Harare, including of those accommodation service establishments that do not have conference facilities.

In the final analysis the local impacts of the formal business sector must be viewed as highly significant in the Harare economy and, most especially, in light

of the drastic hollowing out of formal employment opportunities in other economic sectors. Of importance is the observed pro-poor impacts of the economy of MICE tourism through its employment prospects as well as the impact of CSR programmes which are directed assistance to vulnerable groups in the city. These pro-poor impacts of business tourism in this African city are particularly important given the weak state of Harare's formal economy and the existence of high levels of poverty amongst the urban population as a whole. More research needs to be conducted in the future to quantify the impact of MICE tourism in African cities.

Acknowledgements

Thanks to journal reviewers for useful comments and also for the helpful inputs from Lulu White as well as Robbie and Skye Norfolk.

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Turystyka biznesowa w miastach afrykańskich na przykładzie Harare w Zimbabwe

Streszczenie. Zagadnienia turystyki biznesowej cieszą się coraz większym zainteresowaniem badaczy z globalnej Północy. Ciągle jednak prowadzi się zbyt mało podobnych badań w krajach globalnego Południa pomimo tego, że turystyka biznesowa odgrywa ważną rolę w wielu wiodących ośrodkach turystyki miejskiej. Potrzeba takich badań jest szczególnie widoczna w odniesieniu do dużych miast Afryki Subsaharyjskiej, gdzie sektor turystyki biznesowej ma często większe znacze-

nie niż turystyka wypoczynkowa. Artykuł jest próbą uzupełnienia luki w wiedzy na temat turystyki biznesowej (MICE) na terenie ośrodków miejskich w Afryce, na przykładzie Harare, stolicy Zimbabwe. Badanie opiera się na danych zabranych podczas wywiadów jakościowych z respondentami reprezentującymi wszystkie hotele w Harare, które posiadają zaplecze umożliwiające organizację wydarzeń biznesowych. Badanie koncentruje się na konkurencyjności gospodarki turystyki biznesowej w stolicy, charakterze organizowanych w mieście wydarzeń biznesowych i wpływie turystyki biznesowej na sytuację osób dotkniętych ubóstwem.

Słowa kluczowe: turystyka biznesowa, sektor MICE, turystyka miejska, konkurencyjność, korzyści dla biednych

Studia
Periegetica
3(43)/2023

ISSN 2658-1736, https://journals.wsb.poznan.pl/index.php/sp
s. 49–64, https://doi.org/10.58683/sp.579

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The Relationship Between the Agenda of Conservation Authorities and Community Development in Rural Areas of South Africa

Abstract. This paper explores the relationship between the mandate of conservation authorities and the agenda of community development in rural areas and provides recommendations on how to improve the status quo. The analysis is based on qualitative data collected during five interviews with uKhahlamba Drakensberg Park's (UDP) community liaison officers and traditional leaders of the communities surrounding the UDP. The results reveal disjointed coordination between the conservation authority and the surrounding communities regarding development. Problems include funding constraints, extreme poverty levels, poor communication, and communities' overreliance on the UDP for material benefits. The authors provide recommendations on how to promote community-based tourism that relies on sustainability practices and argue that development activities cannot be effective without close cooperation between conservation authorities and communities.

Keywords: community development, rural tourism, community-based tourism, sustainable tourism development, uKhahlamba Drakensberg Park

Article history. Submited 2023-06-28. Accepted 2023-07-29. Published 2023-09-13.

1. Introduction

Conservancies worldwide play a crucial role in protecting natural heritage and promoting biodiversity. In South Africa, conservancies, which take the form of national parks, are managed by the South African National Parks (SANParks), a public entity responsible for conserving the country's protected areas and natural resources (SANParks, 2016). The focus of conservancies has been to preserve wildlife within their boundaries. Unfortunately, national parks have repeatedly

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failed to attain their objectives by following this one-sided approach. Recently, parks have started to build positive and equitable relationships with neighbouring communities as a means of improving the effectiveness of their conservation efforts and foster community development (Anthony, 2007; Saayman and Saayman, 2010). Nonetheless, communities surrounding South African national parks remain underdeveloped and impoverished, lack access to basic services like running water, electricity, health care and education, despite their proximity to parks that generate revenues from tourism (Mnisi and Ramoroka, 2020).

Little research has focused on how conservation authorities and communities can partner to facilitate community development. This study aims to contribute to the literature on sustainable practices that conservation authorities can pursue to develop communities surrounding national parks and on the role communities can play in their own development. The objectives of this article are to (1) provide insights into existing links between national parks and surrounding communities; (2) identify roles that conservancies and communities could play in community development; (3) analyse the shortcomings of present strategies and provide recommendations on how existing approaches could be improved. The article reports results of a qualitative study involving five interviews: two with community liaison officers of the uKhahlamba Drakensberg Park (UDP) and 3 with traditional leaders of selected communities.

2. Literature Review

National parks are the largest category of protected areas, both globally and in Africa (Muhumuza and Balkwill, 2013). National parks in South Africa, established through the 1926 National Parks Act, were created to (1) protect the ecological integrity of one or more ecosystems for present and future generations; (2) exclude exploitation or occupation detrimental to the purposes of designation of the area; and (3) provide a foundation for spiritual, scientific, educational, recreational, and visitor opportunities, all of which must be environmentally and culturally compatible (Chape et al., 2003). Whereas over 50% of global protected areas and national parks are located on indigenous land, over 85% of national parks in Africa have been established on rural land previously collectively owned by local communities (Zeppel, 2009). Consequently, African national parks are surrounded by communities whose wellbeing is often overlooked and whose development is seldom on a par with developments taking place in national parks.

National parks play a vital role in community development in South Africa

(Zeppel, 2012). 21 national parks and a diverse range of ecosystems in South Africa provide numerous opportunities for economic development, environmental education, cultural preservation, health and well-being, community engagement, conservation of biodiversity, and scientific research (Saayman and Saayman, 2010; Strickland-Munro, Moore & Freitag-Ronaldson, 2010; Rogerson and Rogerson, 2014). The tourism industry associated with these parks generates considerable revenues for local businesses, which provide domestic and international tourists with lodging, food, and other tourism-related services, in addition to creating employment opportunities for members of local communities.

In 2018, tourism in South Africa accounted for 1.5 million jobs and contributed USD 24.1 billion to the country's economy, i.e. 8.6% of the GDP (WTTC, 2019). It should be emphasised that most of this contribution, as is the case in other African countries, is generated by wildlife and nature-based tourism (Buckley and Mossaz, 2018; Duim, Lamers & Wijk, 2014; Odeniran, Ademola & Jegede, 2018) in national parks located in rural areas inhabited by local communities.

Through educational programs for visitors, schools, and local communities, by promoting environmental awareness, sustainable practices, and conservation of natural resources, these parks help to support conservation efforts to foster community development (Novelli and Scarth, 2007; Gilg, 2010; Muhumuza and Balkwill, 2013). National parks also provide opportunities for outdoor recreation, enabling visitors to connect with nature by hiking, bird watching, and game viewing, offering opportunities for physical activity and stress reduction (Li et al., 2021).

National parks in South Africa also play a vital role in the preservation of culture as they protect cultural resources, such as rock art sites, historic buildings, and cultural landscapes that are significant to the identity of local communities (Chikodzi et al., 2022). Additionally, visitors can learn about the history and culture of the communities around the parks. Revenues generated by the parks can be used to finance public facilities and infrastructure in local communities. Finally, parks can foster civic pride and involvement, and facilitate cultural exchange between guests and hosts (such as learning of new languages) (Gursoy and Nunkoo, 2019; Tovar and Lockwood, 2008).

The conservation of biodiversity is also beneficial for community development. As Novelli and Scarth (2007) point out, the protection of natural resources, such as wildlife, plants, and ecosystems, is critical for the provision of ecosystem services such as water purification and climate regulation. Ecosystems with more biodiversity are more resilient, which is essential for the provision of goods and services that support human well-being. Finally, by maintaining biodiversity it is easier to preserve cultural resources that are dependent on natural resources, such as traditional medicines and spiritual beliefs.

Referring to the problematic link between national parks and their surrounding communities, Yang et al. (2021) argue that it is only through effective and successful community management that national parks can achieve their conservation goals. According to Muhumuza and Balkwill (2013), national parks have taken two approaches in their conservation efforts. One is the preservation approach and the other is community-based approach to conservation. The preservation approach, also known as the 'fines and fences' approach, was dominant until the 1980s. It prohibits the use of natural resources other than tourism within the park. The community-based approach to conservation, which has been recognised as a better alternative at the regional and international level, consists in allowing neighbouring communities to benefit substantially from the parks (Muhumuza and Balkwill, 2013).

In recent years the latter approach has been more prevalent as part of efforts to overcome the problems caused by the exclusion of human activity from the parks (King, 2010; Reindrawati, Rhama & Hisan, 2022; Shackleton et al., 2007). Since livelihoods of communities depend on natural resources such as forests, land, and water, Imanishimwe (2022) believes communities and park stakeholders need to collaborate in order to develop a joint approach that combines biodiversity conservation with human wellbeing.

Despite the implementation of various strategies and efforts to protect biodiversity and use it responsibly, challenges such as habitat loss, climate change, pollution, unsustainable resource use, and invasive alien species have exacerbated (Butchart et al., 2010; Vodouhê et al., 2010; Reindrawati, Rhama & Hisan, 2022). In addition, many authors have stressed that local communities surrounding conservation areas continue to derive comparatively few benefits from tourism (Giampiccoli and Saayman (2018), Giampiccoli, Saayman & Jugmohan (2015), Mowforth and Munt (2016), Palmer and Chuamuangphan (2018)). This situation is often perpetuated by conflicts between communities and conservation authorities.

According to Yang et al. (2021), these conflicts can be attributed to four main causes: land issues, ecological conservation policy, development and utilisation, and poor mechanisms of revenue distribution. Land conflicts arise when communities are denied access to land which originally was theirs to use. Some ecological conservation policies restrict subsistence agricultural practices, such as hunting, fishing, herb harvesting, and firewood collection. The development and utilisation of a national park can lead to conflict when community members experience various negative impacts because of increased tourism, such lifestyles and ideas brought by visiting tourists (such as use of drugs and excessive alcohol consumption), growing crime and social ills, loss of traditional values and culture, and increased cost of living as a result of prices driven up by tourism (Gursoy and Nunkoo, 2019; Tovar

and Lockwood, 2008). Finally, conflicts arise when communities do not receive meaningful and tangible benefits from tourism, yet they bear the costs of conservation (mostly when their crops and livestock are destroyed by wildlife).

In order to enable the development of communities located around conservation it is necessary to taken into account several critical factors (Rogerson and Rogerson, 2014; Zeppel, 2012). These factors include attitudes, the level of trust, and activity interference. Communities' attitudes towards conservation areas and authorities are influenced by ecological benefits, the legality of the park's existence and governance, social influence, and the park management's dealings with the community (Abukari and Mwalyosi, 2018). When these attitudes are positive, communities are more likely to support park activities and there are fewer conflicts. When attitudes are generally negative, trust is at its minimum and conflicts prevail. Availability of resources, interactions between the park management and communities, employment opportunities plus education and awareness campaigns have been found to have a positive effect on community attitudes (Belkayali and Kesimoğlu, 2015).

Since the success of conservation efforts largely depends on the level of trust in relations between the park management and communities, transparency and effective communication are critical to foster confidence among parties involved (Abukari and Mwalyosi, 2018; Yang et al., 2021). Belkayali and Kesimoğlu (2015) also emphasise the importance of efficient communication between communities and national park authorities, especially regarding interference factors. These refer to changes in the environment caused by human activities, such as poaching, logging, unsustainable agricultural practices, and collection of non-forest products either by residents or tourists (Abukari and Mwalyosi, 2018; Reindrawati, Rhama & Hisan, 2022). It is therefore necessary to create zones where particular human activities and land use patterns are allowed and prohibited so that community development can be aligned with ecological conservation (Yang et al., 2021; Imanishimwe, 2022).

3. Method

This study concerns communities surrounding the uKhahlamba Drakensberg Park (UDP) (formerly Natal National Park, Royal Natal National Park, and Natal Drakensberg Park), in the KwaZulu-Natal (KZN) province of South Africa. Figure 1 below shows a map of the park. The UDP was chosen for its status as a UNESCO world heritage site and its prominence in attracting tourism in the area. The study focuses on communities surrounding the northern and central sections of the

UDP, which offer the most accommodation possibilities in the UDP. Much of the rural land surrounding the UDP is owned by the Zulu king through the Ingonyama Trust, whose mandate is to hold the land on behalf of the Zulu Kingdom for the "benefit, material welfare, and social well-being of the members of the tribes and communities living on the land" (Ingonyama-Trust, 2019).

Figure 1: A map of uKhahlamba Drakensberg Park
Source: Ezemvelo-KZN-Wildlife (2018)

The main rest camps in the vicinity are Royal Natal, Cathedral Peak, and Injisuthi. The focus on the northern and central parts of the park is deliberate as they

receive the most tourism activity. At 3,482 metres above sea level and measuring 243 thousand hectares, the Drakensberg, "the Dragon Mountains" in Afrikaans and Dutch, is the highest mountain range in Southern Africa (DAC, 2020; UNESCO, 2020). While the UDP itself is a world heritage site, rural communities that surround it are not dissimilar to other rural areas in South Africa and the results of the study are likely to be applicable to other areas in Southern Africa.

Data for analysis were collected in December 2021 during 5 in-depth interviews: two with UDP community liaison officers (CLOs) for the selected parks and three with community traditional leaders (CTLs) of the selected communities (who are custodians of the land on behalf of the King of the Zulu Kingdom). The purpose of the interviews was to collect information about the role played by the respondents (CLOs and CTLs) in supporting the communities' development and to identify their challenges and aspirations. All interviews were recorded and in a few cases the researchers used the help of an interpreter. The recordings were transcribed, organised and coded to enable thematic analysis.

4. Results

4.1. Respondents' Roles, Mandate, and Challenges

The purpose of the study was to investigate the relationship between the UDP and the selected communities. The CLOs were asked to explain their mandate and roles within their communities and share their views on whether the communities were satisfied with their activities. According to one CLO, the UDP has 15 management units (camps), which are divided into three areas of jurisdiction (Northern, Central, and Southern) that CLOs are supposed to oversee.

Both CLOs had been with KZN Wildlife for 13 years. Their tasks mainly include managing the wildlife area located outside the park, which is in direct contact with the communities. Their mandate involves engaging with the community and its various stakeholders (such as the CTLs, schools, different municipalities, commercial farmers, other conservation agencies and NGOs like the World Wildlife Fund (WWF)) in order to manage nature outside of the park.

CLOs are also tasked with managing and facilitating the Community Levy Fund, a fund established by the UDP for the purpose of distributing some of the revenue from tourism to the communities. CLOs inform the communities of the Fund's availability, requirements, and the application process. Below are excerpts of the interviews concerning questions asked in this regard.

> I have been a CLO for three years, but I have been with KZN Wildlife for a total of 13 years. I used to be a Reserve Manager for 10 years before assuming this role. My main duty is to ensure that the relationship between the communities adjacent to the reserve is good. My duty is to engage with the communities through environmental education and awareness. If there are maybe issues where the communities are not happy, for example, when the communities have got a problem of damage-causing animals, they do consult me, and I consult the relevant District Conservation Officers to go and do an inspection. Sometimes I also go with them and advise the community accordingly of what they should do to try and stop the problem.
>
> I have been into this job since 2007 [13 years]. My job entails environmental awareness, engaging with different stakeholders like traditional chiefs, schools, commercial farmers, different district municipalities, other departments who are doing the same job as mine, other NGOs like WWF and so on. We work together to manage nature, especially outside the park. The aim of KZN Wildlife is also to manage the outside of the park because what happen there affects what happens inside the park. I also facilitate the Community Levy Fund in terms of application access to the communities.

As can be seen from the above quotes, the UDP views the communities as an important part of the park, which needs to be taken into consideration for the benefit of conservation. Initiatives such as the Community Levy Fund are an attempt to distribute tourism revenues in the community.

CTLs are custodians of the land and creators and enforcers of their customary laws. As such, they work directly with various government departments and employees, such as the police, social workers, the local municipality, and magistrates. They are also responsible for community development initiatives that empower their people. They also resolve conflicts (such as land and marital disputes) in their communities. The following extracts provide additional details:

> We assist people to resolve conflicts. We make sure that we communicate with the police, assist the police with information if we have information. If there is a minor dispute like dispute of land and marriages, we assist people customarily in terms of customary law. We also participate in the municipality. We also hold Imbizos, which are community meetings where we make by-laws. We are social workers, we are magistrates, we are just everything.
>
> We play a vital role in the community. We play the role of SAPS [South African Police Service] in ensuring peace and apprehending crime perpetrators. We are also responsible for land allocation to our people. We are also the face of government in the communities.

> I make sure that there are projects to empower the community, like projects to make the road and build a lodge, for example, so that people will have something on their tables.

The CTLs were also asked about challenges they encountered in the execution of their mandate. All of them mentioned the lack of support from the government (administrative and financial). Another challenge was people's discontentment, particularly those fined with stiff penalties for violating traditional laws. The following excerpts provide more details:

> The government is not recognising us as Traditional Leaders and do not support us financially. For example, the traditional council of 25 people which I lead does not get anything or even a stipend from government. They don't really assist us. That is the main challenge that we have.
> Perpetrators of crime do not like us especially when we are impartial in resolving conflicts. Most of them expect us to take side which we do not. In one case an Induna[1] was killed when the aggrieved parties didn't agree with his verdict.

It follows from the above that the mandates of CLOs and CTLs are to serve the communities they represent. CLOs are the face of the UDP among the communities they serve and act as the bridge between the park and the communities. While CLOs are employees of the UDP, they represent interests of the communities in the UDP and try to win the communities' support for the park's conservation efforts As custodians of the land and the culture, CTLs influence community members with their lifestyles. It can therefore be concluded that both CTLs and CLOs are instrumental in the development of tourism.

4.2. Engagement Channels Between the Park and the Communities

The UDP contacts the communities through the CTLs and their *Indunas*[1] and individual community members do not have direct access to the UDP management or CLOs unless they go through the Indunas and the CTLs. Below is an extract of the interview which illustrates this point.

> The Chiefs are our main contacts in terms of the community because the Chiefs are the leaders. We also work directly with the Indunas who are Chief's assistants in charge of

[1] Indunas, also known as a chief's assistants, are responsible for sub-communities that fall under the leadership of the CTL and are respected and valued elders from the community that form part of the traditional council.

> valleys that fall under the Chief's territory. If we go to the Chiefs and tell them whatever we need to do, it goes to the Indunas to reach the whole community. The Indunas also have access to contact the UDP management even without my consent if there is an issue, but the community cannot just go and contact the reserve manager without having the support of the Induna or the Chief.

From the above it follows that the existing communication channels are bureaucratic and may not be always effective. The failure of communities to experience more benefits from the UDP and tourism could therefore result from the fact that opportunities associated with the existence of UDP and tourism are poorly communicated.

4.3. Satisfaction Levels with the Role of the UDP in Community Development

The CLOs were not satisfied with the UDP's support for neighbourhood community development. While they believed that although the UDP was doing everything it could to support the communities, they perceived their efforts as ineffective owing to the lack of resources, the size of villages, and the high rates of poverty. One example of a development initiative mentioned by the CLOs was employment of locals, particularly with regard to occupations in the park that do not require special skills.

> There is not that much the Park is doing for the community.
> I wouldn't say that I am satisfied but what I can say is that Ezemvelo KZN Wildlife is doing all that they can do to support the community … It's just that because the community is so huge and the neighbouring communities are such a poor community, you'll find that whatever role that we will try to play it becomes a drop in the ocean because of the state of poverty in the area.

Given that the communities under study are exposed to extremely high levels of poverty, from the perspectives of the CLOs, the UDP's efforts to foster community development were less likely to be evident. This view is shared by many community members, who consider the park's influence on their socioeconomic situation to be minimal.

All CTLs were critical of the limited UDP's contribution to the growth of their communities, believing that the UDP was capable of doing much more. For example, the Royal Natal Hotel[2], which used to employ 250 members of the com-

[2] In 1947 the Hotel hosted the British Royal Family during a State visit, which earned the Park and the Hotel the right to be called the Royal Natal National Park and Royal Natal National Park Hotel. The hotel is owned by the Natal Parks Board, who leased it to private operators.

munity, was shut down in 2002. According to the interviewed CTLs, the UDP largely prefers to hire people from other towns and provinces rather than similarly qualified locals. One of the reasons for their dissatisfaction with the UDP's involvement in the development of communities is structural: most development levies raised by the UDP and intended to be used directly by the communities are transferred to the Ingonyama Trust, which governs the UDP, but owing to the lack of transparency, this money seldom reaches the intended recipients. The following comments illustrate the problem.

> There are some problems. As far as I can say, nothing is happening in terms of assistance from the UDP.
> We are not satisfied with how UDP operates… they closed the Royal Natal Hotel that used to employ 250 people from our community…now there are a lot of young people who have matric and diplomas but are unemployed. Most of these young people are now resorting to substance abuse.
> No. When there are job opportunities at the park, people from around here in the community are not involved. Its people from outside the community… who get those opportunities. Some of them are managers today but they are not from our community.

As can be seen, the UDP's efforts fall short of what is required to improve the communities' situation. The fact that management activities are conducted by the Trust makes it more difficult for the UDP to communicate with the community directly.

5. Discussion

Insights from the interviews indicate that the communities seldom benefit from the existence of the national park in their vicinity. While some authors like Saayman and Saayman (2010), Strickland-Munro, Moore & Freitag-Ronaldson (2010) and Rogerson and Rogerson (2014) argue that national parks provide a number of benefits to local communities, such additional revenue and opportunities for employment, there is little evidence of this happening in the communities analysed in the study. Employment opportunities are limited and when they do appear, members of the local communities are often overlooked in favour of candidates from other cities and provinces. While it can be argued that other benefits such as environmental education, cultural preservation, community engagement, and

conservation of biodiversity exist, they are all intangible. As long as the revenues from the park are not fairly shared with the communities, their livelihoods cannot really be improved.

Since the UDP mostly follows the so called preservation or 'fines and fences' approach (cf. Muhumuza and Balkwill, 2013), the locals' use of natural resources within the park is largely restricted. This means that members of the local community are not allowed to undertake any activities unrelated to tourism in the park and their traditional conservation ideas are not taken into account. This approach differs greatly from the idea of multi-disciplinary collaboration between communities and stakeholders suggested by Imanishimwe (2022), which aims to combine conservation activities with efforts to improve the communities' wellbeing.

This situation gives rise to conflicts between the conservation authority and the communities. In addition to restrictions on the use of park resources, the communities derive few financial benefits from tourism in the park (Yang et al., 2021); it is therefore not surprising that they are disappointed with the status quo and feel that the national park could do more. It is worth noting at this point that according to park authorities, their efforts are only perceived as insignificant because of extreme levels of poverty in the communities. However, as the interviews indicated, the situation was, to a large extent, due to ineffective and bureaucratic communication between the national park and the communities, which takes place via community leaders. The result is a lack of transparency, which Yang et al. (2021) considers crucial for building trust and getting the communities more concerned about the conservation areas.

6. Recommendations

The authors recommend setting up community-based tourism structures within these rural communities, which will enable them not only to lobby for their welfare but also negotiate a meaningful stake, participate in tourism activities within the park and have a greater share in revenues from tourism. This change of approach to conservation should enable the communities to obtain controlled access to the park's natural resources, which they have long relied on to engage in their traditional activities such as fishing, hunting, wood collection, and herb harvesting. Given that national parks are located on land that communities used to collectively own, land tenure rights on the current land communities occupy could be guaranteed or improved upon.

Another recommendation concerns communication between parks and communities, which should become more open and direct to ensure transparency and trust building. In addition, conservation authorities ought to prioritise local communities when it comes to employment, business, product or service supply opportunities that arise in national parks. Finally, conservation authorities should enact policies that encourage greater involvement of local communities in conservation by implementing some of their traditional mechanisms that have proved effective.

7. Conclusion

This study has revealed the roles, aspirations, challenges, and shortcomings of national parks in their conservation mandate with regard to the development of surrounding communities. While there are other studies that have highlighted this problem, this particular study focuses on poor rural communities surrounding national parks and provides perspectives of the conservation authorities on the hand and the communities as represented by their leaders on the other. While national parks in general contribute to the socio-economic situation of countries at large and regions in particular, their contribution is hardly felt by the impoverished rural communities closest to them. This generates frequent conflicts over restrictive conservation policies and poor benefit sharing mechanisms; moreover, because of poor communication strategies the communities are not aware of development and empowerment schemes that might be available.

The study fills a knowledge gap left by previous studies on the relationship between the conservation mandate and community development, particularly in rural impoverished communities surrounding national parks. The article also contributes to the literature on different perspectives that conservation authorities and community leaders have regarding roles, mandates, aspirations, and challenges associated with biodiversity conservation and community development. The authors argue that these two perspective are not necessarily mutually exclusive provided that the recommendations made in this article are taken into account by all stakeholders.

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Związek między polityką parków narodowych a rozwojem sąsiadujących z parkami społeczności lokalnych w Republice Południowej Afryki

Streszczenie. Artykuł analizuje związki między działaniami na rzecz ochrony przyrody prowadzonymi przez parki narodowe a rozwojem sąsiadujących z parkami wiejskich społeczności lokalnych. Analiza opiera się na danych jakościowych zebranych podczas pięciu wywiadów z osobami pełniącymi funkcję łączników między władzami parku uKhahlamba Drakensberg (UDP) a społecznościami lokalnymi oraz z tradycyjnymi liderami społeczności żyjących na terenach wokół parku. Wypowiedzi respondentów świadczą o braku koordynacji działań w zakresie rozwoju między organami odpowiedzialnymi za ochronę przyrody a społecznościami. Problemy te wynikają z ograniczeń finansowych, skrajnego ubóstwa, które dotyka wiele społeczności, niedostatecznej komunikacji i zbytniego uzależnienia społeczności od administracji UDP, jeżeli chodzi o podział dochodów z turystyki. Autorzy sugerują zmianę podejścia w kierunku turystyki opartej na większym udziale społeczności lokalnych, która wykorzystuje praktyki zrównoważonego rozwoju, i argumentują, że działania rozwojowe nie mogą być skuteczne bez ścisłej współpracy między władzami parków a społecznościami.

Słowa kluczowe: rozwój społeczności, turystyka wiejska, turystyka środowiskowa, zrównoważony rozwój turystyki, uKhahlamba Drakensberg Park

Studia
Periegetica
3(43)/2023

ISSN 2658-1736, https://journals.wsb.poznan.pl/index.php/sp
s. 65–86, https://doi.org/10.58683/sp.574

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Tourism and Recreation in Protected Areas: An Exploration of Community Based Tourism and Local Participation in Zimbabwe

Abstract. This paper explores the role and value of community-based tourism (CBT) for tourism and recreation in protected areas in Zimbabwe in terms of the level and nature of local community participation. The goal was to understand the management system and perceptions of different stakeholders of community conservancies in Zimbabwe. The study is based on a thematic analysis of qualitative data collected during in-depth interviews with key informants. The findings provide insights into the current management system of community-based tourism enterprises (CBTEs) and the challenges identified by the respondents. These include an over-dependence on private safari operators, the need for further development of CBTEs, and the fact that proceeds from tourism are not being channelled back to tourism but to the development of other projects and administration. Moreover, local communities do not have sufficient capabilities to manage and develop CBTEs. As a result, the offering of tourism products is limited, which has a negative effect on local participation and the sustainability of tourism.

Keywords: community-based tourism; protected areas; conservation; sustainable development; local community involvement

Article history. Submited 2023-06-20. Accepted 2023-07-20. Published 2023-08-30.

1. Introduction

Protected Areas (PAs) have been the mainstay of international conservation strategies since the start of the 20th century (Adams et al., 2004). The PA system was replicated globally from the American Yellowstone model, popularly known as the 'fortress conservation' or the 'fences and fines approach'. The fortress conservation paradigm is based on the premise that wild species must be preserved by reserving areas and barring people from living within and using the resources from these

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natural areas (Matseketsa et al., 2019). This philosophy was a departure from the African methods of living in harmony with nature. Over the past years, several natural resource management policies have been adopted that are exclusionary and repressive. This has affected livelihood strategies, food security, and resilience of rural communities (Matseketsa et al., 2019; Phiri et al., 2012).

Following the establishment of protected areas and conservancies in Zimbabwe, some local communities have developed negative attitudes towards conservation efforts and the enforcement of conservation-related regulations, which has resulted in conflicts (Chiutsi & Mudzengi, 2012; Phiri et al., 2012). In addition to the alienation from their land, adjacent communities tend to suffer from several human-wildlife conflicts (Matseketsa et al., 2019). To address inequalities in wildlife management, the Communal Areas Management Programme for Indigenous Resources (CAMPFIRE) project was introduced in Zimbabwe, whereby communities take part in the management of their natural resources, also known as Community Based Natural Resources Management (CBNRM) (Taylor, 2009; Ntuli & Muchapondwa, 2017). Under the CAMPFIRE project, communities have been assisted in creating community conservancies that they protect and manage collectively (Gandiwa et al., 2014).

The intended purpose of these community conservancies is to encourage communities to participate in the conservation of wildlife, natural resources, and heritage, as well as earn income from the use of natural resources (Ntuli & Muchapondwa, 2017). In order to be able to protect their conservancies continuously, communities have opened up these areas for tourism. However, studies show that the participation of local people is still minimal, and communities are not reaping the intended benefits (Chiutsi & Mudzengi, 2012; Mbaiwa, 2015). This paper explores the perceptions of different stakeholders regarding the management of wildlife-based community-based tourism enterprises (CBTE) in Zimbabwe. It also proposes ways in which CBTEs can ensure economic and environmental sustainability as well as active community participation in the tourism industry post-COVID-19. A growing number of studies on tourism and recreation in protected areas has focused on the perceptions of local communities regarding protected areas and tourism activities and the participation of local people (Gohori & van der Merwe, 2022; Nugroho, Numata & Aprilianto, 2020; Chiutsi & Saarinen, 2017; Gandiwa et al., 2014). However, there is not much research on the perceptions of other stakeholders involved in managing community conservancies, related challenges, and possible measures aimed at improving the current management system of community conservancies. This paper intends to fill this gap.

2. Literature Review

2.1. Community-based Tourism

Community-based tourism (CBT) is a growing niche in tourism across the world. CBT in Zimbabwe became popular in the 1990s when the CAMPFIRE Association set up a few pilot projects which focused on the provision of accommodation. This was to ensure that local communities generate direct income by hosting tourists (Dressler et al., 2010). In addition to ensuring social and economic justice, the programme also sought to encourage local communities to conserve and preserve their natural resources and heritage (Shereni & Saarinen, 2021). The CAMPFIRE Association, in collaboration with Zimbabwe Parks and Wildlife Authority, University Institutions, and Rural District Councils, initiated several CBT projects, which offered different kinds of products, such as accommodation, wildlife, heritage tourism, and many other natural attractions. It turned out that after donor funding was discontinued, most CAMPFIRE projects collapsed (DeGeorges & Reilly, 2009). CBTs which relied on consumptive tourism (hunting), managed to continue operating, while CBTs based on non-consumptive tourism struggled to survive. The collapse of CAMPFIRE projects also showed that besides funding, not much had been done in terms of capacity building to ensure the project was sustainable (Ministry of Tourism and Hospitality Industry (MOTHI), 2016).

According to Runyowa (2017) and Matura (2022), CBT is a broad and complex concept. Several definitions of CBT have been put forward (Zimbabwe National Tourism Policy, 2014; ASEAN, 2016; MOTHI, 2016). According to the Association of Southeast Asian Nations (ASEAN, 2016), CBT is a form of sustainable tourism that is community-owned, operated and managed or coordinated at the community level, which contributes to the well-being of communities by supporting sustainable livelihoods and protecting valued socio-cultural traditions and natural and cultural heritage resources. However, most existing definitions do not quantify or indicate whether CBT is always created to benefit the whole community, part of the community or can be owned by a homogenous group in the community. According to the MOTHI (2016) definition, CBT projects can benefit all or part of the community. According to Fan, Ng & Bayrak (2023), the term 'community' is used to identify a group with a fixed or geographic boundary, which is assumed to be homogeneous, though in reality, communities can be highly heterogeneous (Taylor & Timothy, 2003).

2.2. Community-based Tourism and the Community

It is believed that CBT is a worthwhile option for stimulating the development of rural economies through economic benefits to local communities (van der Merwe, 2016), better promotion of the destination, and a higher quality of tourist experience thanks to environmental awareness. CBT projects should empower local people (Fan, Ng & Bayrak, 2023), contribute to the preservation of the environment, encourage interaction between locals and tourists, contribute to the social welfare of locals and ensure a quality tourism experience (Wardani et al., 2023; Febrriandhika et al., 2019). CBT projects, if managed properly, have the potential to increase household income and alleviate poverty (Wardani et al., 2023; Kusworo, 2015). However, as noted by Chiutsi & Saarinen (2017), communities living in areas that are rich in wildlife and natural resources are still living in poverty. According to the World Tourism Organization (2018), local communities are deprived of most economic benefits from tourism. Revenue generated from the commercialisation of natural resources through tourism (consumptive and non-consumptive) tends to flow into the central treasury, and local people who bear the costs of living with wildlife are not discernibly rewarded for their conservation efforts (Shereni & Saarinen, 2021). People who benefit the most from conservation are not those who bear the cost or the negative consequences of living with wildlife. Failure to address the issue can prolong human-wildlife conflicts, poaching, and non-compliance. When benefits are few, and there is no incentive for local communities to be good stewards of natural resources, to conserve or at least use these natural resources sustainably (Mtapuri, 2022).

The tourism sector was hit hard by the COVID-19 pandemic, which affected conservation efforts in community conservancies (United Nations, 2020; Fletcher et al., 2020a). The pandemic also had a negative effect on the livelihoods of people depending on tourism. This led to poaching to make up for decreased food availability and the loss of jobs, including those responsible for protecting wildlife (Greenfield & Muiruri, 2020; Fletcher et al., 2020b). Conservation became highly dependent on local people's intrinsic sense of care for biodiversity. This situation requires more emphasis on community involvement, empowerment, and participation in CBT projects to ensure their sustainability in case of future pandemics. Local community members need to have a sense of project ownership so that they are motivated to conserve biodiversity even when there is no financial motivation (Serhadli, 2020) since people tend to maximise their wealth and choose social outcomes with the highest economic or social reward (Hechter, 2017).

2.3. Community-based Tourism Management and Local Participation

Community-based tourism is about community management, involvement participation and decision-making. Giampiccoli and Mtapuri (2015) argue that the level of participation is determined by the CBT management model. The National Department of Tourism (2016) identified four types of CBT ventures, which are community-owned partnerships with the state, lease agreements between communities and the private sector, and joint ventures between communities and the private sector. The last two models have the potential to promote the active participation of locals and maximise returns. Partnerships between the state and communities can result in passive participation owing to unequal, top-down power relations and, in some cases, leave no room for community participation (Zapata et al., 2011; Giampiccoli & Mtapuri, 2015). Gohori & van der Merwe (2022) found that management models involving the state and communities tend to exclude communities in decision-making. Communities are usually silenced and side-lined in tourism development matters and excluded from associated benefits (Chiutsi & Saarinen, 2017).

Participation is a challenging aspect of CBT. People can "either possess the power to influence decisions or are just spectators of the process" (Yanes et al., 2019, p. 2). "Participation can augment or impair a community's contribution" (Giampiccoli & Mtapuri, 2015 p. 39). Hung, Sirakaya-Turk & Ingram (2011) note that the lack of the necessary knowledge and skills on the part of community stakeholders hinders spontaneous participation. The community's ability to participate in conservation programs and tourism development depends on factors such as knowledge, skills, coordination among stakeholders, policy framework, homogeneity of participating groups and financial resources (Gohori & van der Merwe, 2022; Jaafar et al., 2014; Marzuki, Hay & James, 2012; Timothy & Tosun, 2003). Results of a study by Rasoolimanesh and Jaafar (2016), who studied factors influencing community participation, indicate the importance of the ability and motivation to encourage rural residents to get involved in economic activities that are comparable to participating in executive-level decision-making (Rasoolimanesh & Jaafar, 2016). It is, therefore, necessary for the government to come up with strong frameworks that could facilitate community participation and develop people-centric governance models that empower and motivate local people (Chiutsi & Saarinen, 2019).

3. Methodology

3.1. Study Area

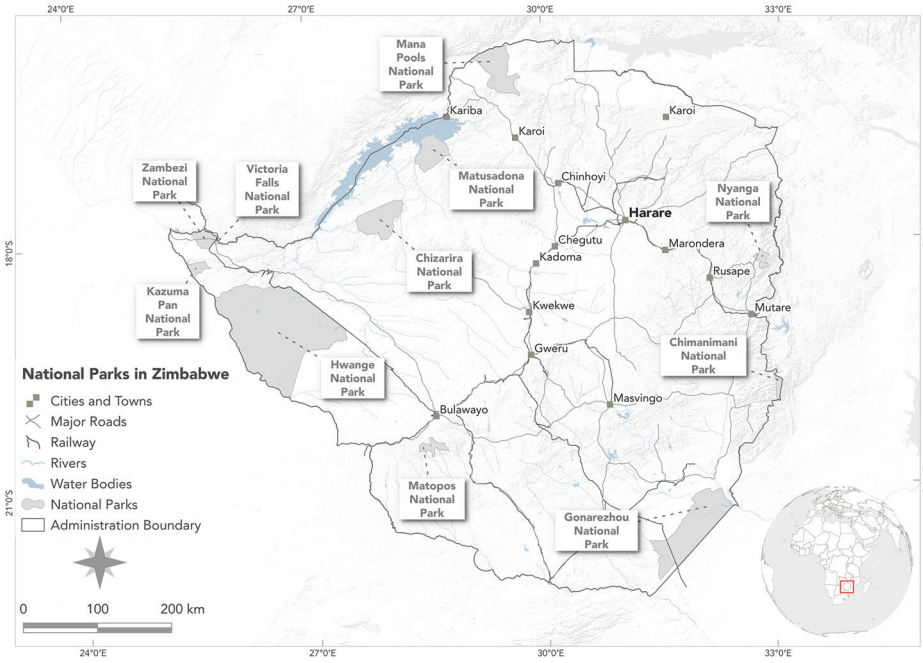

Figure 1. A map of Zimbabwe showing National Parks
Source: Author's Map

The following study was conducted in Zimbabwe, a country that boasts eleven national parks, ten recreational parks, six trans-frontier conservation areas (TFCA), and several community conservancies. Figure 1 shows a map of Zimbabwe with the location of eleven national parks. Community conservancies have been established around these National Parks. Wildlife is one of the major attractions of Zimbabwe, attracting several thousands of tourists each year, and wildlife tourism generates a significant contribution to the country's GDP. As such, it has the potential to enhance the lives of people who live next to protected areas (Zvikonyaukwa, Musengi & Mudzengi, 2023).

3.2. Methods

The purpose of the study was to understand the management system and the perceptions of different stakeholders on community conservancies in Zimbabwe. Consequently, a qualitative methodology involving the case study approach was used.

Relevant data were collected during in-depth interviews with key informants from three different groups: 1) key organisations involved in community-based natural resource management (CBNRM) and tourism, 2) the Rural District Council (RDC), and 3) tourism educators. Key organisations included the CAMPFIRE Association, Zimbabwe Parks and Wildlife Management Authority (ZIMPARKS), and Zimbabwe Tourism Authority (ZTA). They were selected because of their involvement in the management, marketing, and capacity-building of wildlife-based conservancies. Each organisation chose one expert in the area of CBT to participate in the interview. The study focused on RDCs with functional CBT projects in their districts. RDCs were included in the study to understand their perceptions of CBT since they are involved in the management of CBTES. The group of tourism educators included lecturers from state universities in Zimbabwe offering tourism and hospitality-related degrees in Tourism and Hospitality departments, teaching courses related to tourism and the environment, conservation and sustainability.

Data were collected between November 2022 to February 2023. First, open-ended questionnaires were prepared with a different set of questions for each group of respondents. These questionnaires were used during semi-structured interviews conducted with ten representatives from different Rural District Councils (RDC) with functional CBT projects and five representatives from Zimbabwe Tourism Authority, Zimbabwe Parks and Wildlife Authority, CAMPFIRE Association, and university lecturers.

Thematic analysis was applied to recorded and transcribed interview data to identify the main themes. Interview fragments were coded to repeat themes briefly. The final set of themes was established on the basis of the data and the literature. To ensure respondents' anonymity, each interviewee was given a generic name of its group with a numeral (e.g. Lecturer 1; RDC 2), while organisation names identified respondents from key organisations, e.g. ZIMPARKS.

4. Results

4.1. CBT Management

Key informants said that the CAMPFIRE initiative was launched to benefit local communities. Respondents from Rural District Councils (RDC) indicated that they were given the mandate to manage the projects on behalf of communities. All respondents confirmed that when CAMPFIRE started, it was a donor-funded initiative. Thanks to the availability of donor funding, RDCs decided to take part in

the CAMPFIRE programme. ZIMPARKS said that out of 59 districts that exist in the country, the CAMPFIRE status was granted to all but two: Bikita and Zvishavane. In other words, nearly all districts in Zimbabwe were found to have the potential for CBT. However, when the funding stopped, some districts that did not have viable wildlife projects failed to maintain CAMPFIRE projects, which 'died a natural death'.

The interviews revealed that most wildlife CBTEs are managed through private-public partnerships. RDCs facilitate the signing of lease agreements between private operators and communities. RDCs work with villages and ward committees elected by communities, which are replaced after two or five years. In other words, after every election, new people come in and need to be trained. RDC 1 gave a detailed account of how the RDC and communities interact with key organisations:

> The CAMPFIRE is very active in the district; all 17 wards are in the CAMPFIRE project. Out of the 17, we have 9 wards which benefits nearly every year out of those 9 wards, 5 are very active. They receive taxes and social funds. The roles of the community members are anti-poaching problems, animal control, or human-wildlife conflict mitigation. We have 3 hunting concessions, and we also have a non-hunting concession which is mainly for photographing and game viewing. These wards are managed by what we call environmental sub-committees at the ward level. At the District level, we have the environment committee. At the concession level, we have what we call the community trust, which consists of individuals selected from the wards within than concession. The RDC manages all the committees at the concession or ward level. We have a Safari operator in each of the concessions who is engaged by the RDC in consultation with the respective communities in that concession area. The Safari operator is in partnership with the RDC and communities. ZIMPARKS monitors the issues to do with best practices in terms of hunting in the district. The marketing of the concessions is done by ZTA and the Safari operator. CAMPFIRE Association offer technical support and training to the committees.

The RDC respondents said that given the limited resources, training and re-training committee members is always a challenge. Community conservancies are manned by trained scouts or rangers who patrol the park to protect wildlife. However, due to low financial benefits, there is a high turnover of these rangers. As a result, more scout training needs to be organised.

RDCs, as the administrators of community land, are involved in the running of community reserves. However, the interviews pointed out that there is no uniformity in RDC structures. In some districts, the area of natural resources management is a standalone department, but in some RDCs, it falls under administration and social amenities. As a result, the management and development of CBT usually depend on the interests of the district head. The natural resource officer may be

reporting to the engineer, who has different interests, and they also report to different ministries. Consequently, some districts fail to get the necessary support from RDCs because there are no standalone departments that are concerned about the issues of tourism. The lack of uniform structures and appropriate departments to house the CBT poses a great challenge to the development and management of CBT.

4.2. Participation of Local Communities

According to the RDC representatives, CBT enterprises are being run by Safari operators who have been contracted by the RDC and report to the RDC. A respondent from ZIMPARKS indicated that RDCs are running CBT enterprises on their own without the involvement of communities. This is because RDCs have personnel capable of negotiating and entering into partnerships with private operators. There is not much evidence of active community participation in the management and running of these CBTEs. As a result, in some districts, decisions are made by RDCs. The same respondent also mentioned one conservancy which was started by the community. Its members agreed to relocate to another area that had wildlife and decided to establish a wildlife conservancy. As the community did not have the capacity and the know-how to register the conservancy, they sought help from the RDC, which managed to register the conservancy and then partnered with a private operator. However, there is now a conflict between the community and the RDC, which has taken over control and is now managing the conservancy without the community's involvement and is not remitting any proceeds to the community.

By contrast, respondents from the RDCs and CAMPFIRE association indicated that community members were participating in CBT projects. According to them, community members scout the conservancy areas, conserve natural resources, guide tours as well as have a say in how the proceeds from tourism can be utilised in their respective wards. A representative from ZTA had a different view on community participation and pointed out challenges associated with local participation in community projects. He said that community-based projects are not sustainable because there is a lack of unity in communities. He said:

> A business is sustainable when it is managed by the initiator; if one initiates, they can sustain it. But where you have communities, there are problems of cohesion and leadership, the constitution is opaque, they may have challenges in raising funds, and if they get a funding partner, they may feel they are being short-changed, and sometimes this leads to disagreements and conflicts. This then sometimes leads to mismanagement, vandalism and sabotage by communities. If it is community-led, everyone feels that they have a share and that I have to be heard, but it is very difficult to reach a consensus.

> Another challenge is the lack of business-to-business linkages, customer-to-business linkages, and positioning in the whole tourism value chain, so there is a need for experts to run CBT projects.

Interviews with the RDCs and CAMPFIRE association suggest that communities do not have the necessary skills to run these enterprises. As a result, they rely on private-public partnerships with safari operators. It is these operators that are responsible for the day-to-day management of the business and marketing. Consequently, partnerships between the RDCs and private operators have limited the participation of local communities in the management of CBT.

One of the problems with a negative effect on community participation was the lack of transparency. A respondent from ZIMPARKS said:

> We had a situation whereby a Safari operator was only paying licenses to the RDC and not remitting to the community, claiming that there is no business. When the Safari operator started operating in the area, he fired all locals who were working on the conservancy and replaced them with his staff and disturbed some of the projects that the community was doing. The previous management had embarked on a project of growing buffalo grass so that it would make hay bales to supplement the shortage of grazing grass; however, when the new operator took over, all projects were put on hold. Progress reports from the operator indicated nothing was happening on the ground, but when a representative from ZIMPARKS visited the establishment on the ground, they discovered that it was functioning very well, but communities were not benefiting anything and were being short-changed. This resulted in conflict between the operator and the community as the locals felt that they were being side-lined and short-changed. Locals then resorted to poaching and illegal mining within the park because they were not seeing any benefits from tourism.

Poaching, human-wildlife conflict, and the destruction of livestock and crops are common challenges that community conservancies across all districts are faced with. When the locals feel side-lined and are not deriving any benefits, they lack the motivation to preserve natural resources. According to RDC 3:

> The challenge is poaching which is done by people who come with cattle for grazing, they poach game, and fish, they also bring dogs into the concession area because dogs are for security reasons. Because of the high levels of poaching, we have little species to see, so we can only see big game like lions, buffalos and elephants. It is now difficult to come across small games like Kudus, Impala, and Eland because of poaching.

4.3. Benefits Sharing

Under the initial agreement, revenues were to be divided as follows: 50% to the community, 20% to the RDC for administration, 26% to RDC for management, and 4% to the CAMPFIRE association. The respondents from the RDCs, ZIMPARKS, and CAMPFIRE confirmed that this arrangement is still the same. RDC 2 said that because of the large number of households in the participating wards, revenues are not shared among households but among wards. According to RDC representatives, several development projects have been completed using proceeds from tourism. These included the construction of clinics, schools, roads, boreholes, and shops and the payment of school fees. Elected members work with other members of the community to decide how the proceeds are to be utilised. Each ward is given its allocated share, and they decide how to utilise it. Communities have also invested in several income-generating projects within their respective wards. However, in some districts, this was not working very well; the communities claimed that they were not receiving anything and tried to come up with a direct payment system where the operators would pay directly to the community account. A respondent from ZIMPARKS indicated that in some areas, most of the proceeds were going to the RDC to cover management costs, leaving nothing for the community. RDC respondents pointed out that where the system was working well, there was evidence of community development within the district. However, there was no evidence of re-investment in tourism. Instead, proceeds were used to finance other projects. Failure to re-invest some of the funds back into tourism and the conservation of natural resources is a threat to the sustainably of CBTEs.

Commenting on the use of proceeds from CBTE, Lecturer 1 said:

> The major challenge is policy formulation; the current legislation gives power to the local authority and not the host community. So, at the end of the day, you find out that the council channel proceeds from CBT to infrastructure development. It is the responsibility of the council to construct roads, clinics etc. and not use proceeds from CBT for that. Proceeds from CBT should benefit communities directly or for tourism development.

He suggested that these proceeds should be used to develop tourism or livelihood diversification projects that benefit individual households. In cases where proceeds are distributed to each household, they do not get many benefits from the enterprises. Lecturer 2 said:

> When you look at some community-based tourism initiatives in Zimbabwe, there is little income that is coming for example, community members are receiving 1 bag of fertiliser and 10kg mealie meal yearly from a certain CBTE.

4.4. Capacity

According to some interviewees, the lack of capacity within communities has affected their participation. Lecturer 2 said that communities are not benefitting more because they are not managing CBT enterprises on their own. Instead, it is the operator that gets the bigger chunk because of its involvement in the day-to-day running of CBTEs and their marketing. In the process of negotiating the lease agreement, the RDC negotiates on behalf of the community. As a result, communities are not aware of some contract details. Elected committee members have been trained in accounting, project planning, financial management, communication skills, and record-keeping, and how they should keep the resources they have. They also have leadership skills. In contrast, community members only have basic skills enabling them to manage livelihoods project but not CBTEs, which require expert knowledge. As a result, communities have to rely on private operators. A respondent from CAMPFIRE Association said that the training received by communities is not adequate to enable them to run their enterprises.

> Some of the enterprises that have been operating have failed, most probably because there were not enough experts to sustain the operations. Remember, when community members are engaged, we can capacity-build a manager for a week but remember, and there is more to that. Communities just learn the basics. I think currently, the way to go would be the Private-Public Partnerships. If you go to any community project which they are implementing in partnership with a private player, they are thriving because most of the private players are bringing in expertise to run these enterprises.

A representative of the CAMPFIRE Association added that RDCs, as the lowest arm of the government at the district level, do not have enough capacity to develop CBT enterprises and assist communities in running them. He said that more needs to be done in terms of tourism product development and marketing to derive maximum benefits from tourism. RDC respondents pointed out that the main tourism product offered by CBT enterprises is hunting and game viewing. Hunting brings in more income than any other tourism activity. However, there is not enough marketing expertise and capacity within the districts, which is why they continue to rely on safari operators for marketing and enterprise management. RDC 3 said:

> Our biggest challenge in Southern Africa is that it is very difficult to get black people to successfully do international marketing for hunting. It is like a closed market, and the whites have their links and clients. We have tried to engage black professional hunters to do marketing, but you find out that at the end of the day, they have to be behind their white counterparts. It is a challenge in Southern Africa. For example, our elephant is currently going for $12 000, but when the safari operator sells the elephants, they might sell it for 18 000 or more, and they get more money.

Discussions with interviewees revealed that tourism marketing in Zimbabwe is done by Zimbabwe Tourism Authority (ZTA) since all tourism establishments are associated with ZTA. ZTA has the general mandate to conduct marketing activities for the whole country. However, for wildlife-based CBTEs, marketing is done by safari operators who are in partnership with communities. The challenge with centralised marketing is its generality and scope of coverage. ZTA can market Zimbabwe as a whole but is not in a position to do justice to specific sites, which are expected to market their tourism products on their own.

4.5. Devolution

A representative from ZIMPARKS talked about efforts to ensure the devolution of power to communities. Following a review of the management of CAMPFIRE projects, ZIMPARKS now has a CAMPFIRE office that works with communities. The office is advocating for a statutory instrument that ensures the devolution of power from RDCs to the grassroots level. Wildlife CBTs have proved to be profitable and beneficial to host communities. So far, however, a greater chunk of the proceeds has been going to RDCs and used to cover administration costs. ZIMPARKS also added that:

> The challenge we are facing is that the elite people get a large share, and there is an issue of transparency. We are supporting devolution of power so that everyone in the community takes ownership; some community members feel that they are being short-changed and sidelined. Therefore, devolution of power to the local level is what is needed. There is also a need to help communities to establish community-based organisations or community trust. Locals also need to be capacitated so that they may be able to participate in the running of CBT.

Two different viewpoints concerning devolution were brought up by the respondents. Some of them believe that if RDCs give up some of the control, communities can reap more benefits. Another group of respondents are convinced that communities cannot work alone without the help of RDCs; they need their support

and expertise. A representative of ZTA indicated that complete devolution of power causes problems if communities lack the necessary capacity. Therefore, a lot needs to be done in terms of capacity building to ensure that community members can manage their conservancies on their own.

5. Discussion

The interviews revealed that the most common model used in wildlife-based conservancies in Zimbabwe is a lease agreement between the community (represented by the RDC) and private investors. The current management model is characterised by a high dependence of local communities on private operators for resources and markets, which increases their vulnerability. Our results are consistent with Bello, Lovelock & Carr (2017), who argue that private operators tend to be opportunistic to maximise their returns while marginalising the economic participation of local communities. This dependence on private operators threatens sustainability and undermines the active participation of locals, and reduces the share of proceeds that go to communities. If communities were better organised and had more expertise, community-owned ventures would be ideal because they would guarantee community participation and maximum returns. Interviews indicate that locals do not have economic and social capital and lack the skills necessary to run CBT enterprises. However, community members could employ managers who report directly to them and help them manage and develop CBTs. Giampiccoli & Glassom (2020) also highlighted the importance of external support from financing institutions, other organisations, and universities. External support could help communities to come up with conservation models blended with a business approach to ensure CBT enterprises are sustainable. The government should establish active tourism departments within districts since tourism has proven to be a great vehicle for community development. To ensure CBTEs are sustainable and competitive, RDC structures need to include tourism departments responsible for product innovation, development, and management (Bello, Carr & Lovelock, 2016).

Village and ward committees are selected periodically; the problem with the election system is that committee members are selected based on their personalities rather than their expertise. It is, therefore, necessary to introduce procedures that will help to select committee members that meet certain criteria or have certain traits, such as individual interests, talents, expertise, and abilities, which will enable them to push the tourism agenda within their committees.

The interviews have shown that there is low or no local community participation in CBT, which has been reported by previous studies by Bhatasara, Nyamwanza & Kujinga (2013); Chiutsi & Saarinen (2017). Siakwah, Musavengane & Leonard (2020) pointed out that unequal power relations within communities inhibited greater participation. In the same vein, Giampiccoli & Saayman (2018) noted that top-down relationships between communities and other stakeholders leave no room for community participation. According to some interviewees, while local people are participating in other livelihood projects that are being funded by proceeds from tourism, they are not involved in the actual management, day-to-day running and development of CBT enterprises.

Community participation is also affected by the narrow range of tourism products. Most CBTEs only offer accommodation, hunting, and game viewing. What is needed are experts who would work with locals on developing more tourism products in arts, crafts, agro-tourism, heritage and culture. Community members have much they can offer in the tourism value chain, which can be attractive to both international and local tourists. A wider range of tourism products could also help to create more jobs in CBTEs for community members and thus reduce negative phenomena such as poaching, high employee turnover, and community resistance (Bello, Lovelock & Carr, 2017). Ginting et al. (2023) highlighted the need for more creativity in CBT to ensure its competitiveness and offer distinctive tourism experiences.

It is worth noting that many Zimbabweans do not have a travelling culture, but if tourism products are well marketed, they might increase domestic tourism. It is important to note that the tourism business is highly dependent on customer satisfaction (Ginting et al., 2023). The challenge of community-based models is the lack of business orientation. It is, therefore, necessary to focus on business development, innovation, and marketing expertise. Unfortunately, the absence of a tourism department within RDCs limits tourism development. As a result, decisions made by RDCs may not be beneficial to tourism but rather to other departments.

According to some interviewees, communities are benefiting at the ward level. Income from CBTEs is used to finance community development and other livelihood projects. Other respondents, however, questioned the viability of CBTEs, which, in their opinion, provide no or few benefits to local communities (Shereni & Saarinen, 2021). The reason why individual households do not benefit directly but rather indirectly through their wards is that wards are highly populated populations. It is, however, important to note that benefits from CBTEs could be derived more directly through other economic activities such as employment within CBT enterprises and establishing cultural centres where communities showcase their talents and lifestyles in the form of art, dance, culinary, traditional medicine, and herbs.

RDCs should also consider re-investing some of the proceeds from hunting back into tourism development to ensure their projects are sustainable and profitable in the long run, for example, by allocating a fixed percentage to this end. Currently, as much as 46% of the proceeds go to cover the cost of RDC administration. RDCs should consider revising their sharing ratio to ensure that the ones who live with wildlife benefit more. The models that include communities, RDCs and the private sector tend to be less beneficial to communities at large, with the elite getting a larger piece of the cake. However, eliminating RDCs from the management of community conservancies might not be the best solution.

CBT, if well governed, has the potential to alleviate poverty (Siakwah, Musavengane & Leonard, 2020; Mtapuri, 2022). It is important, however, to reflect on the number of members that take part in the projects. Using the MOTHI (2016) definition of CBT, it is acceptable that only some community members participate in CBT projects. Interview data collected in the study have shown that a business is more sustainable when it is managed by its initiator rather than the whole community. For CBT to be more sustainable, communities need to organise themselves based on their interests and abilities and decide who can participate in a particular CBT project. In every tourism value chain, some people benefit directly while others do so indirectly. According to information provided by the interviewees, in some CBT projects, community members receive 1 bag of fertilizer and 10 kg of mealie meal yearly. This is not insufficient to alleviate poverty and ensure sustainable development. CBT should also be supported and financed by proceeds from consumptive tourism to support non-consumptive tourism, such as accommodation, events, cultural tourism, and culinary.

The study has revealed that tourism activities in community reserves are undertaken according to the CAMPFIRE management model. In as much as CBT projects were introduced under the CAMPFIRE programme, there should be a clear distinction between community-based natural resources management (CBNRM) and CBT. CBNRM supports several natural resources-based livelihood options, such as non-timber forest products, craft work, basketry, weaving, fishing, and consumptive and non-consumptive tourism (Paudel, Filipski & Minten, 2022). Not everyone should be involved in all available and potential livelihood options, but they should be able to choose the best option that suits them. If CBT is to be treated as any other livelihood diversification project, one can expect groups of interested community members (not all community members) will want to take part in CBT development, planning and management. Besides consumptive tourism, there are several non-consumptive tourism activities that communities could take part in to reap more direct benefits. These include cultural tourism, accommodation, art and crafts, and culinary.

Respondents also said that skills training offered within communities is not adequate to enable them to run CBT enterprises on their own. Capacity building takes two weeks or less, and this is not enough to prepare staff capable of running CBT enterprises. Community members are just given basic training. As a result, they continue to rely on expert knowledge from private operators. If devolution is to be successful, communities will need to employ experts who report directly to them.

Poaching has been highlighted as one of the challenges that community conservancies are facing. People tend to protect what they benefit from; if communities start receiving more benefits from the conservation of wildlife, they will be less inclined to poach. While poaching cannot be eradicated completely, it can be reduced if the root cause is addressed. Mataruse, Nyikahadzoi & Fallot (2022) indicated that conservation is very difficult when locals are in need, and therefore the natural and contextual drivers of such behaviours should be addressed. Poaching could be an indication of genuine food insecurity, given that livestock and crops are often destroyed by wildlife. RDCs and ward committees should try to implement livelihood projects that also address food security needs of communities rather than focusing on development projects.

6. Conclusion

This article provides insights into the current management system of CBTEs and the challenges of the management system perceived by its stakeholders. Interview data indicate the existence of over-dependence on private safari operators, which is affecting the growth and further development of CBTEs. It is important to remember that CBT initiatives are supposed to help communities and, therefore, should be managed and run by them. The level of community participation was found to depend on the type of CBT venture largely. To ensure the participation of locals in CBT, communities should organise themselves and develop tourism products and services based on their strengths, knowledge and abilities with the help of experts. As suggested by Ginting et al. (2023), there is a need for more creative approaches to CBT that go beyond wildlife tourism, e.g. cultural, craftwork, agro-tourism, accommodation and culinary tourism.

Another conclusion is that the current benefit-sharing ratio needs to be adjusted so that a greater part of the proceeds is used to finance community livelihood projects. Also, more benefits should be shared at the household level rather than just at the ward level. To maximise benefits, members need to organise themselves into smaller homogeneous groups and get involved in CBT based on their strengths,

talents and skills. We recommend that policymakers create a framework for CBT management that ensures the maximum participation of locals in the tourism value chain. To ensure tourism innovation and development at district levels, the government should consider establishing a tourism office in all districts with the task of monitoring tourism development activities and policy implementation. Further studies are needed on CBT education and how educational institutions may be involved in the development and success of CBT.

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Turystyka i rekreacja na obszarach chronionych: badanie działalności turystycznej opartej na udziale społeczności lokalnych w Zimbabwe

Streszczenie. Tematem artykułu jest rola i wartość działalności turystycznej opartej na udziale społeczności lokalnych na obszarach chronionych w Zimbabwe oraz określenie poziomu i charakteru tego zaangażowania. Celem badania było zrozumienie systemu zarządzania i poznanie opinii różnych interesariuszy zaangażowanych w prowadzenie rezerwatów przyrody na terenach społeczności lokalnych w Zimbabwe. Badanie opiera się na analizie tematycznej danych jakościowych zebranych podczas wywiadów pogłębionych z przedstawicielami interesariuszy. Wyniki dają wgląd w obecny system zarządzania przedsiębiorstwami turystycznymi funkcjonującymi z udziałem społeczności lokalnych (CBTE) oraz wyzwania związane z ich funkcjonowaniem. Należą do nich przede wszystkim nadmierna zależność od prywatnych organizatorów safari, potrzeba dalszego rozwoju przedsiębiorstw turystycznych oraz fakt, że wpływy z turystyki nie są inwestowane w dalszy rozwój turystyki, ale na finansowanie innych projektów i utrzymanie administracji. Ponadto społeczności lokalne nie posiadają wystarczających umiejętności zarządzania i rozwijania przedsiębiorstw turystycznych. W rezultacie oferta produktów turystycznych jest ograniczona, co ma negatywny wpływ na udział lokalnych społeczności i zrównoważony rozwój turystyki.

Słowa kluczowe: turystyka oparta na udziale społeczności lokalnych, obszary chronione, ochrona przyrody, zrównoważony rozwój, zaangażowanie społeczności lokalnych

Studia
Periegetica
3(43)/2023

ISSN 2658-1736, https://journals.wsb.poznan.pl/index.php/sp
s. 87–106, https://doi.org/10.58683/sp.595

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Sustainability Practices in the Hospitality Sector of Zimbabwe: a Spatial View

Abstract. The article offers a spatial analysis of sustainability practices and drivers in the Zimbabwean hospitality sector. Although differences in this regard can be observed between the Global North and the Global South, there are few studies on geographical variations in sustainability practices within particular countries. The main goal of the following study is to compare sustainability practices in Victoria Falls, a destination which attracts mainly international tourists, with other destinations, which mainly cater to domestic tourists. A questionnaire was used to collect data from 125 respondents selected through stratified random sampling. The results reveal that hospitality enterprises in Victoria Falls exhibit a higher sustainability awareness than those in other destinations. Hospitality establishments in destinations which cater mostly to domestic tourists were found to mainly implement sustainable practices required by government regulation.

Keywords: sustainable tourism, spatial view, sustainable practices, hospitality sector, Zimbabwe

Article history. Submited 2023-07-20. Accepted 2023-09-03. Published 2023-10-11.

1. Introduction

As pointed out by Saarinen (2021, p. 1) since the early 1990s "sustainability has formed a development paradigm for tourism". The concept of sustainable development has attracted much attention as a basis for mitigating the negative consequences of human activities and in the context of the dramatic escalation of global tourism over recent decades (Boluk, Cavaliere & Higgins-Desbiolles, 2019). Further, the tourism industry adopted a neo-liberal growth model to maximise economic gain causing notable sustainability challenges (Hall, 2019; Rastegar, 2022; Saarinen, Rogerson & Hall, 2017). Although the COVID-19 pandemic affected international tourist arrivals, there is growing evidence that the tourism sector has

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been recovering (Shereni, 2022). The World Tourism and Travel Council (WTTC, 2022) predict a decade of strong tourism growth at an average rate of 5.8% per annum between 2022–2032, with significant implications for the achievement of sustainable tourism (Dube & Nhamo, 2021a).

Not surprisingly, sustainable tourism has become a dominant research theme in tourism scholarship (Bramwell et al., 2017; Hall, 2019; Islam & Zhang, 2019; Saarinen, 2014, 2021; Saarinen & Rogerson, 2021). This is out of the realisation that tourism can be both a vehicle to promote social justice and at the same time, if not properly managed, can propel various injustices (Rastegar, 2022). The hospitality industry is one of the leading segments of the tourism industry and is central to sustainability debates because of its huge ecological footprint and impact on the social and economic conditions of various stakeholders (Ismail & Rogerson, 2016; Shereni, 2022). The accommodation services sector contributes significantly to tourism carbon emissions, energy and water consumption, waste generation, social exclusion, cultural erosion as well as unfair labour practices (Abdou, Hassan & El-Dief, 2020; Bello, Banda & Kamanga, 2017; Dube, 2021; Jasmim, Sampaio & Costa, 2020; Mensah & Blankson, 2014; Shereni, Saarinen & Rogerson, 2022a). Accordingly, this has made sustainability issues a critical area of interest for policymakers, tourism scholars and hospitality practitioners (Peng & Chen, 2019; Shereni, Saarinen & Rogerson, 2022b). In June 2023 the critical importance of tourism as a vehicle for achieving the United Nations Sustainable Development Goals (SDGs) was affirmed during the meeting of G20 member countries in Goa, India and the launch of the Goa Roadmap for accelerating the achievement of the SDGs (Tourism Working Group India G20 Presidency, 2023; UNWTO, 2023).

There are variations in the way sustainability has been understood and adopted by the tourism and hospitality industry in different global contexts (Brazytė, Weber & Schaffner, 2017; Sharpley, 2000). In addition to variation at the level of individual businesses, there are marked differences in the way sustainability in the tourism industry is viewed by tourism policymakers and tourism enterprises in the Global North as opposed to the Global South (Khonje & Leonard, 2019; Melissen, Mzembe & Novakovic, 2018). It has been pointed out that the degree to which sustainability practices have been adopted often depends on the target market. From the perspective of the Global South, destinations where hospitality enterprises are targeting international tourists are considered to exhibit a different understanding of sustainable tourism compared to those that operate in areas which cater mainly to domestic tourists (Bello, Banda & Kamanga, 2017; van der Merwe & Wocke, 2007; Shereni, 2022).

Nevertheless, the tourism literature includes few studies on spatial variations in sustainability practices in the hospitality sector. Saarinen (2020, p. 1) notes that

tourism geographers have a long-standing interest in sustainability issues and have "contributed substantially to this emerging and highly policy-relevant research field". It is against this backdrop that this study aims to investigate geographical variations in the adoption of sustainability through a case study of the hospitality sector in Zimbabwe. The study provides a comparison of sustainable practices and factors that motivate decisions about sustainability in the hospitality sector in Victoria Falls, which attracts many international tourists, with several other destinations in Zimbabwe which mainly cater to domestic tourism. This paper provides insight into critical sustainability issues in the hospitality sector of a Global South country from a spatial perspective. With growing international concerns about the socio-economic and environmental impacts of hospitality businesses, it is essential to have an in-depth understanding of how sustainability is implemented in the hospitality sector in different geographical contexts. This study is an attempt to fill the knowledge gap in research concerning financially constrained environments of the Global South.

2. Literature Review

Sustainability has become a critical issue recently in the business operations of hospitality enterprises (Su & Chen, 2020; Le et al., 2023). According to Dube (2021) the way sustainable tourism is understood to a large extent depends on geographical location. Consequently, the application of sustainability principles in tourism has been undertaken at different planning scales and in different spatial contexts (Saarinen, 2018). Across the Global South (and specifically in sub-Saharan Africa) the adoption of sustainability practices is observed to be slow and far less advanced than in countries of the Global North (Dube, 2020; Idahosa & Ebhuoma, 2020; Rogerson, 2020).

Although some notable progress has been recorded in the adoption of sustainability principles by the hospitality sector, a number of investigations indicate that progress in the African context is still quite sluggish (Dube, 2021; Melissen, Mzembe & Novakovic, 2018). The academic literature on sustainability practices in the hospitality sector is dominated by studies focusing on hospitality enterprises in destinations of the Global North, while few studies exist to address the same issues in regions such as sub-Saharan Africa (Chan, Okumus & Chan, 2018; Islam & Zhang, 2019). The limited body of Africa-focused research confirms the slow uptake of sustainability practices among hospitality enterprises across the region with the greatest progress recorded for accommodation enterprises in South Africa

(Ismail & Rogerson, 2016; Musavengane, 2019; Rogerson, 2014a, 2014b, 2023; Rogerson & Sims, 2012; Shereni, Saarinen & Rogerson, 2022b). It is not surprising that only a small proportion of hospitality establishments in Africa are eco-certified, which signals the lack of sustainable tourism mainstreaming in the African hospitality sector (Spenceley, 2019).

Over the past decade, sustainability debates in the tourism and hospitality industry have been framed broadly around the United Nations Sustainable Development Goals (SDGS) (Hall, 2019; Kandler Rodríguez, 2020; Musavengane, Siakwah & Leonard, 2020; Saarinen, 2014, 2018, 2021; Sharma, Chen & Liu, 2020). This is a result of the global appeal of the SDGs, which emanates from an agenda championed and agreed upon by a wide spectrum of stakeholders led by multilateral institutions (Raub & Martin-Rios, 2019; Shereni, 2022). Several scholars argue that the tourism industry in the Global South pays little serious attention to SDGs compared to the Global North, where leading hotel groups have widely adopted the SDGs and are making significant progress in implementing them. (Jones, 2019; Nwokorie & Obiora, 2018; Rasoolimanesh et al., 2020; Shereni, Saarinen & Rogerson, 2022b).

There are a number of factors that can explain these differences in the adoption of SDGs and sustainability practices between enterprises operating in the Global South and the more prosperous environments of countries in the Global North. According to Mzembe, Melissen & Novakovic (2019), the differences can be attributed to colonial legacies, different levels of development, and even different religious beliefs. Other factors, such as local context, political and business systems can also affect the way sustainability is understood and implemented from country to country (Melissen, Mzembe & Novakovic, 2018; Raub & Martin-Rios, 2019). According to Siakwah, Musavengane & Leonard (2019), sustainable tourism governance and misalignment of policies in the Global South constitute enduring challenges. Khonje and Leonard (2019) agree that the lack of a comprehensive legal and institutional policy framework in many countries of the Global South is a major obstacle to encouraging sustainable behaviours in the hospitality sector. The development of sustainable business practices by tourism enterprises in parts of southern Africa is also limited by the lack of knowledge, awareness and capacity (Dube & Nhamo, 2021b). Other studies have shown that certain sustainability practices which require large capital investments have a lower uptake in the financially constrained hospitality sector of the Global South (Agyeiwaah, 2019; Eshun & Appiah, 2018; Shereni et al., 2022b), which is an important difference in relation to the Global North.

Consumers are regarded as a critical driver in the adoption of sustainable tourism in the accommodation services sector (Abdou, Hassan & El-Dief, 2020; Idaho-

sa & Ebhuoma, 2020; Shereni, Saarinen & Rogerson, 2023). In recent years tourists have become more conscious about sustainability issues (Martínez & López, 2019; Shereni, Saarinen & Rogerson, 2022c). When choosing hospitality establishments, more and more tourists either prioritise or, at least, show evidence of a commitment to sustainability practices (Brazytė, Weber & Schaffner, 2017; Ijasan, Ajibola & Gaibee, 2016; Sharma, Yadav & Sharma, 2018). According to Kim, Tanford & Book (2020), tourists' attitudes toward sustainability can affect their travel behaviour and consequently, determine to what extent hospitality enterprises decide to adopt sustainability practices. This means that in destinations where customers have little interest in sustainability, hospitality establishments tend to keep their sustainable practices to a minimum.

Other factors that motivate tourism and hospitality establishments to take up sustainable practices have also been identified (Berezan, Millar & Raab, 2014; Kasim & Ismail, 2012; Leonidou et al., 2013). Hospitality establishments tend to adopt sustainable practices that can ensure business growth, improve their reputation and provide access to new markets (Hsieh, 2012; Mbasera et al., 2016). Studies have also revealed that hospitality establishments are motivated to adopt sustainable practices because of regulations (Campos, Hall & Backlund, 2018; Jose & Lee, 2007; Mzembe, 2021).

The adoption of sustainable practices can also be linked to the level of internationalisation of tourism and hospitality establishments (Jones, 2019). Chain hotels located in various countries are facing growing pressure from foreign stakeholders to adhere to sustainability principles and practices (Mensah, 2013). Research has shown that hospitality establishments in the Global South with a significant with a significant foreign ownership component are often under pressure to adhere to Corporate Social Responsibility (CSR) principles (Nguyen et al., 2020). This is because tourists, especially those from the Global North, are highly aware of sustainability issues and make purchase decisions based on the company's sustainability performance (Melissen, Mzembe & Novakovic, 2018). Accommodation establishments in the Global South that deal with international tourists are therefore more likely to adopt sustainable practices than those which cater mainly to domestic clientele (Bello, Banda & Kamanga, 2017; van der Merwe & Wocke, 2007; Shereni, 2022).

3. Zimbabwe — A Case Study

With tourist arrivals in Zimbabwe growing steadily from 1980 when the country gained independence, the tourism industry contributed an average of 8% to the GDP annually up to the year 2000 (Woyo & Woyo, 2019; Zhou, 2018). Between 1980 and 1990 the country was marketed to mostly first-time visitors with the slogan 'Discover Zimbabwe' (Kanokanga et al., 2019). As a result, the country's tourism industry became one of the key pillars of the economy. From the early 1990s to late 1999, Zimbabwe saw a significant growth in tourist arrivals with the highest growth rate recorded in 1995, when the country hosted the All Africa Games (Karambakuwa et al., 2011; Zhou, 2018). From 2000, the role of tourism started to wane owing to the unstable political and economic situation resulting from the chaotic 'fast-track' land reform programme undertaken by the Mugabe government (Mkono, 2012; Zhou, 2016). According to some studies (Woyo, Slabbert & Saayman, 2019; Woyo & Slabbert, 2021), the competitiveness of Zimbabwean tourism has been impacted by the political effects of those reforms for the past two decades.

When the Government of National Unity (GNU) came to power in 2009, Zimbabwe started its slow recovery as a destination for international tourism (Chibaya, 2013). However, even now, Zimbabwe is still described by certain observers as a 'distressed destination' (Musavengane, Woyo & Ndlovu, 2022; Woyo & Slabbert, 2023). As in the rest of the world, the COVID-19 pandemic further exacerbated the difficulties of the Zimbabwean tourism sector (Makoni & Tichaawa, 2021; Dube, Nhamo & Swart, 2023). International leisure tourism was the segment of tourism most impacted by political turmoil and economic disruption over the past two decades. Most international tourists are regional visitors from South Africa, Zambia, Malawi Mozambique and Botswana (Shereni, 2022). With the decline of international tourism, domestic tourism as a whole and the segment of business tourism, in particular, has come to play a greater role in the national tourism economy (Shereni, Musavengane & Woyo, 2023).

The Zimbabwean tourism industry is concentrated around a number of destinations and attractions featuring natural scenery, safari game viewing, nature tourism, and cultural and heritage experiences (Matura & Mapira, 2018). Figure 1 shows the location of the country's major destinations, tourist attractions and national parks, including the iconic waterfalls at the town of Victoria Falls, the prime attraction for international tourists, especially long-haul arrivals from Europe and North America. As documented by McGregor (2003, p. 717), the tourist resort around Victoria Falls, described as "one of Africa's most well-known geographical features", began to develop and attract growing numbers of tourist arrivals

from 1900. However, many visitors were drawn to the falls even earlier during the 19th century and thus helped to 'turn water into tourist gold' (Arrington, 2010; Arrington-Sirois, 2017).

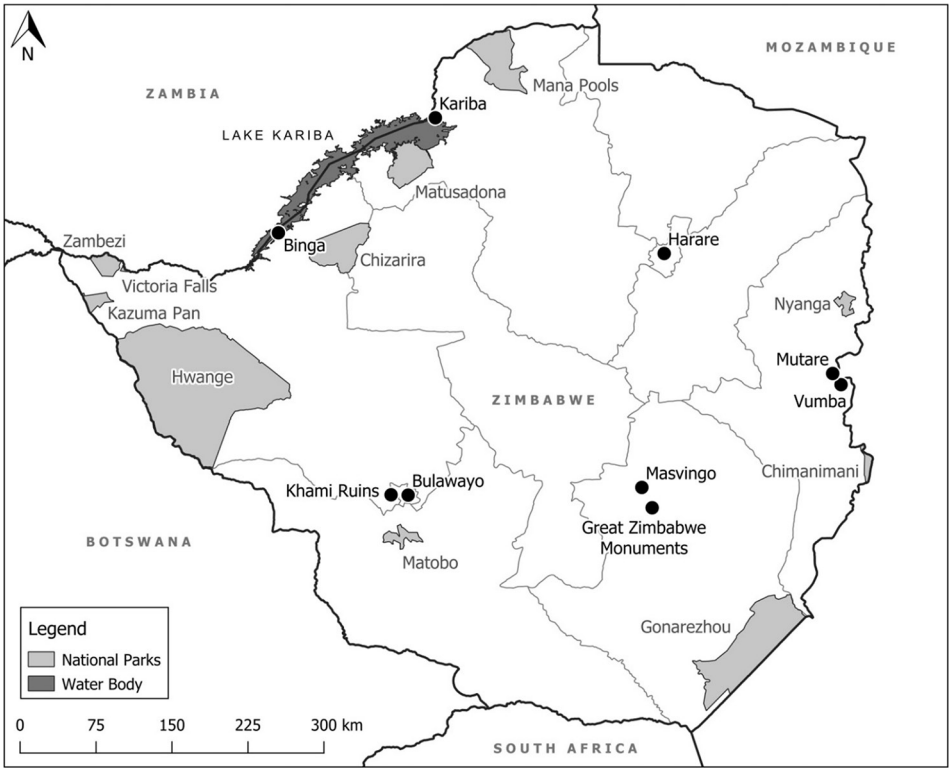

Figure 1. Tourism destinations in Zimbabwe
Source: Authors

In addition to Victoria Falls National Park, the Hwange National Park is an important destination for nature-based safari tourism. Leisure travellers also visit historical attractions such as the archaeological site of Great Zimbabwe, located close to Masvingo and Khami Ruins, and the Matobo Hills heritage sites, which are situated not far from Zimbabwe's second largest city, Bulawayo. The national capital, Harare, the centre of government and home to headquarters of leading commercial enterprises, is primarily a centre for domestic tourism and especially for business tourism (Makoni & Rogerson, 2023). Other tourist attractions that are mainly visited by domestic tourists include the Eastern Highlands (around Mutare and Vumba) and Kariba, a border resort town on the lake known as a great destination for sport fishing and nature tourism (Matanzima & Nhiwatiwa, 2023).

4. Research Method

Moswete and Darley (2012) point out that tourism survey research in sub-Saharan Africa is often faced with the absence or unreliability of official data that could be used to draw statistically representative samples. The target population for this study consisted of hospitality establishments situated in Zimbabwe's six major tourist destinations: Victoria Falls, Bulawayo, Eastern Highlands, Harare, Kariba and Masvingo. The study focused on hotels, lodges and guest houses which were formally registered with the Zimbabwe Tourism Authority (ZTA). No data is available to conduct an analysis of unregistered hospitality establishments in Zimbabwe. This is a typical sampling limitation in tourism research in the Global South (see Moswete & Darley, 2012). As stressed by Booyens (2018) and Booyens et al. (2022), the poor quality of official databases about the hospitality sector is an enduring problem for African scholars in conducting empirical research.

For this study, stratified random sampling was applied to select a representative sample from the population of registered hospitality establishments. Hotels, guest houses and lodges were treated as three different strata and in each destination a percentage share of the total population of establishments was computed for each stratum. A random sample of hospitality establishments in each stratum, equal to the percentage previously established for each destination, was selected. The final sample included 125 establishments. Table 1 shows the sample distribution across each stratum for each of the six destinations.

Table 1. Sample distribution by destination (n=125)

Strata	Victoria Falls	Bulawayo	Harare	Kariba	Eastern Highlands	Masvingo	n	%
Hotels	3	6	6	1	4	1	21	16.8
Lodges	8	13	12	8	3	5	49	39.2
Guest Houses	3	12	25	1	12	2	55	44.0
Total	**14**	**31**	**43**	**10**	**19**	**8**	**125**	

Source: Author survey

The questionnaire was administered to one respondent selected from members of senior management in each hospitality establishment. 52% of them were males and 48% were females; 62% of respondents were aged 32–40, 37% were at the supervisory level and most were holders of at least a diploma qualification; one-third were university graduates with Bachelor's degrees. As regards work experience, the respondents had worked for an average of 6.5 years in their current organisation and an average of 9 years in the hospitality sector.

The questionnaire contained a set of questions designed to identify sustainabil-

ity practices used in each business unit and factors that motivate decisions made in this regard. Descriptive and inferential statistics were generated using SPSS version 25. One-way ANOVA and Chi-square tests were conducted to compare differences in responses from hotels, guest houses and lodges across the six destinations. Full details of the survey and the questionnaire are available in Shereni (2022).

5. Findings

The findings are divided into two parts: the first relating to sustainable practices undertaken by hospitality establishments, and the second concerning motivations behind the sustainable practices in each of the destinations analysed in the study.

5.1. Sustainable Practices

Table 2 presents results concerning sustainable practices undertaken by hospitality establishments in the selected tourist destinations in Zimbabwe. As can be seen, Victoria Falls is the leader when it comes to the adoption of environmentally friendly practices, which include joining certification schemes, waste management practices, proper wastewater disposal, linen reuse policy and waste recycling. As already mentioned, such practices are important for environmentally-conscious international tourists, who treat them as an important criterion when selecting hospitality establishments.

By contrast, the most common sustainable practices at other tourist destinations, which target mostly local tourists, include those required to ensure compliance with regulations introduced by the national government, such as the use of energy-saving light bulbs, proper waste disposal, fair pricing and paying salaries in accordance with National Employment Council (NEC) grades. Linen reuse policy is also a common practice in all areas (outside Victoria Falls) probably because of its ease of implementation. In the cities of Harare and Bulawayo, which cater mainly to domestic tourists, including a significant segment of MICE business travellers, in addition to practices that ensure compliance with regulations, less-costly sustainability practices are also in use. These include the use of local products to prepare meals offered on the menu and the employment of locals. The fact that less costly sustainability practices and those required by government regulations are implemented mainly by hospitality establishments outside Victoria Falls means that business tourists and domestic tourists in general do not have such high expectations in this regard as international leisure tourists. As a result, hospitality organisa-

tions in those areas (outside Victoria Falls) are less motivated to adopt additional practices other than those required by law or those that are relatively inexpensive.

Table 2. Sustainable practices by geographical location (n=125)

Sustainable practices	Victoria Falls		Eastern Highlands		Bulawayo		Harare		Kariba		Masvingo		P value
	N	%	N	%	N	%	N	%	N	%	N	%	
Use of energy saving bulbs	13	92.9	18	94.7	29	93.5	40	93.0	9	90	7	87.5	.988
Wastewater management practices	13	92.9	16	84.2	20	64.5	28	65.1	2	20	4	50.0	.003*
Joining certification standards	12	85.7	12	63.2	8	25.8	18	41.9	2	20	2	25.0	.001*
Enforcing linen reuse policy	12	85.7	14	73.7	27	87.1	29	67.4	5	50	6	75.0	.168
Proper waste disposal practices	12	85.7	16	84.2	25	80.6	31	72.1	7	70	5	62.5	.672
Adhering to fair pricing	12	85.7	13	68.4	30	96.8	33	76.7	7	70	4	50.0	.031*
Recycling of waste	11	78.6	9	47.4	15	48.4	23	53.5	1	10	1	12.5	.008*
Pay salaries according to the National Employment Council (NEC) grades	11	78.6	14	73.7	19	61.3	34	79.1	7	70	6	75.0	.665
Use of local products in menu design	11	78.6	11	57.9	21	67.7	30	69.8	7	70	5	62.5	.876
Promotion of local arts (gift shop with local products)	11	78.6	8	42.1	14	45.2	7	16.3	4	40	1	12.5	.001*
Employing a significant number of locals	11	78.6	14	73.7	22	71.0	27	62.8	7	70	7	87.5	.720
Use of low flow shower systems in bathrooms	10	71.4	11	57.9	22	71.0	23	53.5	1	10	4	50.0	.023*
Use of solar energy	10	71.4	9	47.4	19	61.3	20	46.5	3	30	1	12.5	.062
Organisational policies that provide for growth of employees	10	71.4	12	63.2	17	54.8	30	69.8	3	30	2	25.0	.059
Employee benefits such as health insurance, funeral cover & pension funds	10	71.4	10	52.6	17	54.8	35	81.4	5	50	4	50.0	.082
Installation of refillable soap dispensers	10	71.4	9	47.4	12	38.7	8	18.6	3	30	1	12.5	.005*
Use of local themes in building designs and names	9	64.3	9	47.4	8	25.8	21	48.8	3	30	2	25.0	.117
Prioritize local companies in the hotel supply chain	9	64.3	14	73.7	16	51.6	28	65.1	7	70	4	50.0	.624
Installation of Energy Management Systems	6	42.9	7	36.8	10	32.3	4	9.3	2	20	2	25.0	.062*

Note: *chi-square significant at p<0.05
Source: Authors survey

The chi-square test results indicate that there is a significant relationship (P<0.05) between geographical location and the following sustainable practices: the installation of energy management systems, use of refillable soap dispensers, wastewater management practices, joining certification standards, fair pricing, the

promotion of local arts, recycling of waste and use of low flow shower systems in bathrooms. As can be seen in Table 2, most hospitality establishments in Victoria Falls implement the majority of these environmentally-friendly measures. The range of implemented practices decreases for other destinations such as Masvingo, Eastern Highlands and Kariba, which largely cater to domestic tourists.

5.2. Factors that Motivate the Implementation of Sustainability Practices

The second part of this analysis concerns factors that motivate hospitality establishments at different destinations in Zimbabwe to implement sustainability practices. Results relating to this aspect are presented in Table 3. As can be seen, respondents from all six destinations stress that sustainability practices are implemented mainly in order to improve the establishment's reputation, create new market opportunities, observe professional ethics, and comply with regulations. The effect of these motivating factors is most evident in Victoria Falls, which, as already pointed out, can be attributed to the stronger pressure to adopt sustainable practices in an effort to satisfy the expectations of mostly international tourists. The second major factor, observed in all destinations, is regulatory compliance.

Table 3. Drivers of sustainability by destination (n=125)

Drivers of sustainability	n	Means						ANOVA	
		Victoria Falls	Eastern Highlands	Bulawayo	Harare	Kariba	Masvingo	F value	P value
To improve the reputation of the organization	115	4.43	4.26	3.87	4.14	4.44	4.13	1.290	.273
To create new market opportunities	116	4.36	4.00	3.81	4.00	3.90	4.13	.877	.499
To observe professional ethics	116	4.50	3.68	3.81	3.65	4.40	3.88	2.792	.020*
To comply with regulations	116	3.71	3.95	4.06	3.70	3.50	4.38	1.642	.154
Support from industrial associations	116	3.71	3.11	3.52	4.02	3.40	4.00	2.651	.026*
Availability of incentives	115	3.79	3.05	3.23	4.10	3.40	4.13	5.020	.000*
Pressure from customers	114	3.62	3.21	3.33	3.36	4.00	3.25	1.020	.409
Recommendations from pressure groups	115	3.46	3.26	3.13	3.33	3.10	3.88	.953	.450

NB: Responses based on a 5-point Likert scale range from 1 (strongly disagree) to 5 (strongly agree); One-way ANOVA results were significant at $p<0.05$
Source: Authors survey

One-way ANOVA results indicate a statistically significant difference in responses on professional ethics, support from industry associations, and availability of incentives. Tukey's HSD post hoc test was performed to identify if there were significant differences between destinations. A statistically significant difference with

respect to professional ethics was only found to exist between respondents from Harare and Victoria Falls (P<0.05 = 0.030). This means that the desire to comply with standards of professional ethics is significantly stronger for hospitality establishments in Victoria Falls (M = 4.50) than for those in Harare (M = 3.65).

Other significant differences were also observed between the destinations. For example, with regard to support from industry associations, Tukey's HSD post hoc results indicate a statistically significant difference was found between Harare and Eastern Highlands (P<0.05 = 0.017). Respondents from Harare (M = 4.02) agreed that they received support from industry associations to engage in sustainable practices, while the mean response regarding this factor in Eastern Highlands was only M=3.11. There was also a significant difference as to the availability of incentives (P<0.05 = 0.002) between Harare and Eastern Highlands as well as between Harare and Bulawayo (P<0.05 = 0.003).

6. Discussion

The study provides insights into spatial variation in the implementation of sustainability practices in the hospitality sector of Zimbabwe. The study focused on differences between destinations which cater mainly to international customers and those that mostly serve domestic customers. In Victoria Falls, which mainly caters to international tourists, the range of sustainability practices employed by hospitality establishments was found to be much larger than that observed in the other destinations analysed in the study. Environmental practices such as the use of energy saving bulbs, wastewater management, joining standards, linen reuse policy, proper waste disposal and waste recycling were widespread across accommodation establishments at Victoria Falls. By contrast, hospitality enterprises in the other destinations tended to restrict their practices to those required to ensure regulatory compliance and/or those that do not require much investment. In fact, it can be argued that establishments targeting mostly the local market are often engaged in what can be called 'greenwashing', in other words, strategies aimed at persuading customers that they are environmentally friendly. Such practices include fair pricing, proper waste disposal, paying salaries according to minimum set regulatory standards, linen reuse policy, recycling of waste, and the promotion of local arts.

Overall, the results from Zimbabwe to a large extent resemble those reported from studies conducted in neighbouring Malawi. Bello, Banda & Kamanga (2017) found that hotel companies with a significant component of foreign clients were more likely to engage in sustainable practices expected by their customers than

those that largely serve a domestic clientele. Melissen, Mzembe & Novakovic (2018) reported that many tourist destinations in Malawi had embraced sustainability because they cater to environmentally-conscious tourists from the Global North. Since establishments operating in Victoria Falls regard environmental practices as critical to their customer base, they have adopted them widely, following the example of establishments in the Global North (Mensah, 2020; Shereni, Saarinen & Rogerson, 2022a). In contrast, hospitality establishments in other tourist destinations, which mainly attract business and domestic tourists, operate on the premise that sustainability is not a criterion such guests use when selecting a place to stay and are therefore unwilling to pay a premium for more sustainable hospitality services (Shereni, 2022).

This study did not reveal any notable differences in the factors that motivate the implementation of sustainability practices between subsectors of the hospitality industry or the destinations. Establishments in all six destinations were motivated by the desire to comply with regulations, and to improve business prospects through new market opportunities. It should be stressed, however, that the importance of these factors was stronger in enterprises at Victoria Falls than in those at other destinations, which confirms the motivation in this regard is influenced by expectations from international customers.

7. Conclusions

Research on tourism geography continues to address critical issues of sustainability (Rogerson & Visser, 2020; Saarinen, 2020). Understanding the adoption of sustainability practices by accommodation establishments is part of the research agenda concerning tourism and change in the Global South (Saarinen & Rogerson, 2021). This study on Zimbabwe contributes to this body of scholarship by addressing a knowledge gap concerning intra-national spatial patterns and variations in sustainability practices and drivers in the registered hospitality sector. Owing to the lack of appropriate data, the sample did not include any representatives from unregistered hospitality establishments in Zimbabwe.

The spatial analysis has shown that sustainability practices vary greatly depending on location and are linked to the target market. Hospitality establishments in destinations such as Victoria Falls, which caters to international tourists, have started to implement sustainable practices in order to satisfy customer expectations. By contrast, in much of the rest of Zimbabwe, where formal (registered) accommodation establishments concentrate upon a domestic clientele, the range and type

of sustainability practices differ. Accommodation establishments in destinations which mainly attract domestic tourists tend to restrict their sustainable practices to only those required by government regulation. In the final analysis, sustainability practices in the formal hospitality industry exhibit geographical variation, a finding which has policy relevance in the financially constrained environments of the Global South and particularly in the Zimbabwean context.

Acknowledgements

Thanks to Arno Booyzen for preparing the map. Helpful inputs to the paper were given by journal referees as well as by Robbie Norfolk, Lulu White and Skye Norfolk.

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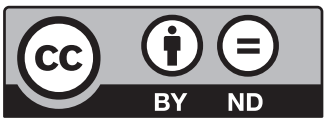
Praktyki zrównoważonego rozwoju w sektorze hotelarsko-gastronomicznym Zimbabwe: ujęcie przestrzenne

Streszczenie. Artykuł zawiera analizę przestrzenną działań w zakresie zrównoważonego rozwoju podejmowanych w sektorze hotelarsko-gastronomicznym Zimbabwe oraz czynników wpływających na tego typu działania. Choć w kwestii tej można zaobserwować różnice pomiędzy globalną Północą a globalnym Południem, istnieje niewiele badań dotyczących różnic w tego typu praktykach w różnych częściach poszczególnych krajów. Głównym celem badania opisanego w artykule jest porównanie działań w zakresie zrównoważonego rozwoju w okolicach Wodospadów Wiktorii, obszarze przyciągającym głównie turystów zagranicznych, z działaniami podejmowanymi w innych miejscach recepcji turystycznej nastawionych głównie na turystów krajowych. Analiza jest oparta na danych zebranych za pomocą badania ankietowego z udziałem 125 respondentów wylosowanych w drodze doboru warstwowego. Wyniki wskazują, że przedsiębiorstwa z branży hotelarsko-gastronomicznej w okolicach Wodospadów Wiktorii przywiązują większą wagę do praktyk zrównoważonego rozwoju niż przedsiębiorstwa w innych lokalizacjach. Stwierdzono, że obiekty hotelarskie w miejscowościach obsługujących przede wszystkim turystów krajowych wdrażają głównie działania, których wymagają przepisy.

Słowa kluczowe: zrównoważona turystyka, ujęcie przestrzenne, zrównoważone praktyki, sektor hotelarsko-gastronomiczny, Zimbabwe



Studia Periegetica
3(43)/2023

ISSN 2658-1736, https://journals.wsb.poznan.pl/index.php/sp
s. 107–128, https://doi.org/10.58683/sp.597

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Linking State-owned Nature-based Tourism Assets for Local Small Enterprise Development in South Africa

Abstract. Tourism is often discussed as a pathway to local economic development especially in the Global South. Although much discussion surrounds upliftment via job creation and the direct income generated from tourism enterprises, there is increasing focus on the benefits of tourism supply chains for local communities. Existing research demonstrates the potential role of tourism supply chains to uplift local businesses, particularly small medium and micro-enterprises (SMMEs). Nevertheless, there are many barriers which face local SMMEs in accessing tourism supply chains particularly in the Global South. This can create conflict between these assets and local communities. This paper seeks to investigate the relationship between a major state-owned tourism asset in South Africa, the Addo Elephant National Park, and SMME development in the surrounding communities. Using qualitative interviews with stakeholders within the Addo Elephant National Park, local tourism businesses as well as local SMMEs, the challenges faced by these enterprises in entering the tourism supply chain are highlighted as well as the tenuous linkages between local SMMEs and state-owned tourism assets. The data provides important insight into the disconnect between local small enterprise development and public procurement processes within the South African tourism sector.

Keywords: state assets; nature-based tourism, South Africa, supply chains, procurement, SMMEs

Article history. Submited 2023-07-31. Accepted 2023-09-29. Published 2023-10-11.

1. Introduction

Among others, Booyens (2022, p. 197) points out that since the 1990s "tourism has found wider recognition as an economic sector with development potential, particularly in relation to maximising the benefits of tourism for host communities". In the resource-constrained environments of the Global South tourism often

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is propagated as an opportunity for local community upliftment and enhancing the prospects for local economic development (Rogerson & Saarinen, 2018; Adu-Ampong & Kimbu, 2020; Rogerson, 2020; Saarinen & Rogerson, 2021). In addition, it can increase empowerment, broaden skills and develop an understanding and appreciation of tourism assets. This is especially the case in South Africa where many significant tourism assets are situated in poor rural areas, most especially of assets concerning nature-based tourism (Chidakel, Eb & Child, 2020; Giddy, Rogerson & Rogerson, 2022).

Although the tourism sector assumes an important role in the South African economy there are major challenges related to local economic development and a lack of significant upliftment of local communities surrounding large tourism assets (Giddy & Rogerson, 2021). The primary way by which tourism benefits local communities, particularly state-owned tourism assets, is in the form of job creation rather than through backward linkages for the provision of tourism products and services which can generate significant opportunities for business development within local communities as well as social upliftment and minizing conflicts between the tourism economy and local residents (Rogerson, 2014; Adiyia et al., 2017; Chidakel, Eb & Child, 2020; Booyens, 2022, Burton & Rogerson, 2023). This has precipitated disappointment and (sometimes) conflict between local communities and the large state-owned assets located in rural communities as communities do not feel that they significantly benefit from these assets (Spenceley & Goodwin, 2007; Strickland-Munro, Moore & Freitag-Ronaldson, 2010; Rylance & Spenceley, 2013). As highlighted by Abdullah, Lee & Carr (2023) the uneven benefits from tourism development between different actors in destinations relates to issues of marginalisation. In South Africa, one of the channels demonstrated to address marginality and promote improved economic development prospects within rural communities is support for the development of local small medium and micro enterprises (SMMEs) which emerged as a core policy focus of government in the post-apartheid period (Kirsten & Rogerson, 2002; Rogerson, 2004; Giddy, Idahosa & Rogerson, 2020; Sixaba & Rogerson, 2023).

The objective in this article is to examine SMME development linked to tourism and in this case specifically to a large, state-owned nature-based tourism asset in South Africa. The case of Addo Elephant National Park (AENP) makes an interesting and unique context within which to study these dynamics for a number of reasons. First, it is one of several protected areas which are under the authority of South African National Parks (SANParks), a large (state-run organization) parastatal organization for conservation and tourism development which oversees the management of national parks in the country. Second, the park is located within the Eastern Cape Province, South Africa's poorest province which has promoted

tourism as a significant economic sector for development (Giddy & Webb, 2016; Acha-Anyi, 2020). The research seeks to investigate two components of SMME development in relation to the AENP, namely maximising the state asset for the direct engagement of local SMMEs involved in tourism and the maximisation of the asset for the indirect engagement of local SMMEs through tourism supply chains. The leveraging of public procurement as a basis for catalysing SMME development is a central theme in this research as the South African state has sought to apply public procurement as a vehicle to achieve its broad objectives of addressing poverty and inherited inequalities from the apartheid period (Rogerson & Rogerson, 2019). It can also enhance understanding and appreciation of tourism assets, which is of particular importance in large nature-based tourism assets such as AENP, which are crucial for conservation initiatives. For the tourism sector the application of public procurement is viewed a tool for achieving government's objective of creating an inclusive tourism economy (Rogerson & Rogerson, 2019).

2. Wildlife and National Park Tourism in South Africa

Nature-based tourism is arguably the most significant leisure tourism sub-sector in South Africa (Spenceley, 2005; Saayman & Saayman, 2006a; Rylance & Spenceley, 2013). South Africa boasts dramatic and varied natural assets which lend themselves to the development of a wide range of nature-based activities (Saayman & Saayman, 2006b; Tichaawa & Lekgau, 2020). Two of the most visited attractions in South Africa are found within its National Parks system, namely Table Mountain National Park and Kruger National Park, the latter of which accounts for the vast majority of the SANParks budget (Saayman & Saayman, 2006a). Much of the tourism occurring within SANParks is linked to wildlife viewing, due to the wide variety of unique animals which make South Africa one of the most prominent destinations in the world for wildlife tourism (Rogerson & Rogerson, 2018).

A considerable amount of research has been undertaken on wildlife tourism in South Africa, albeit largely focused on the Kruger National Park. Most studies have been conducted by conservation scholars, tourism economists or tourism geographers. These studies have examined variously the motivations, experiences and perceptions of visitors to the Kruger National Park (Saayman & Slabbert, 2004; Saayman & Saayman, 2006b). It has been shown that the majority of visitors to the park are white South Africans or international tourists. As shown by Butler and Richardson (2013) historically only limited engagement has occurred by Black South Africans with nature-based tourism assets such as Kruger National

Park. Other research around nature-tourism assets shows a profile of visitors who are primarily motivated by wildlife experiences as well as domestic tourists motivated by nostalgic components of the experience and that they prefer to self-drive rather than go on guided game drives (van der Merwe & Saayman, 2008; Ferreira & Harmse, 2014).

Another vibrant focus of research has been on the impacts and linkages between nature-tourism assets and local communities (Tapela & Omara-Ojungu, 1999; Anthony, 2007; Tapela, Maluleke & Mavhunga, 2007; Strickland-Munro, Moore & Freitag-Ronaldson, 2010; Rylance & Spenceley, 2013; Tichaawa & Lekgau, 2020). This body of research has shown varied results, though the majority indicates that despite widely publicized community outreach programmes, most local residents have little connection to, knowledge of or positive association with the Kruger National Park (Anthony, 2007). Thus, despite the government rhetoric of 'transformation' and of the community initiatives propagated by park management, there is still a major gap between local communities and the park as a vital tourism asset (Anthony, 2007; Tapela & Omara-Ojungu, 1999). From studies conducted in several communities adjacent to Kruger National Park, it is disclosed that most do not feel there is any direct benefit of the park. This situation perpetuates apartheid-era perceptions of the park among local community members as 'white' recreational spaces with little to no benefit flowing to local communities (Strickland-Munro, Moore & Freitag-Ronaldson, 2010; Butler & Richardson, 2013). Accordingly, despite the significant revenue which is generated by wildlife tourism in South Africa, major shortfalls exist in the linkages between local communities adjacent to the parks and the parks themselves. Previous research has shown that the most significant economic benefit of the communities located adjacent to national parks is job creation (Anthony, 2007). One recent investigation examining the role of SMMEs surrounding Pilanesberg National Park demonstrated that there were few instances in which local businesses were able to feed into lucrative tourism supply chains, notwithstanding a range of local SMMEs in the area surrounding this park (Giddy, Idahosa & Rogerson, 2020). Thus, despite rhetoric from organizations and, particularly, government, which emphasizes the imperative to uplift local communities via these tourism assets, little has been achieved to facilitate utilizing local business goods and services in these parks. As a result, the economic benefits to local communities are minimal and often precarious (Giddy, Idahosa & Rogerson, 2020).

3. The Case Study Area and Research Methods

As documented by Reardon (2021) more than a century ago elephants in the Eastern Cape were systematically hunted almost to the point of extinction. Skotnes-Brown (2021) traces the origins of the Addo Elephant National Park (AENP) and the area's chequered history from the beginning of the twentieth century. This included initiatives in the 1910s for domesticating the elephants drawing upon the expertise of Indian mahouts, to campaigns in 1919 to eliminate the elephant population because farmers viewed them negatively for eating and destroying crops and finally towards fledgling initiatives for conservation and protection in the 1920s (Skotnes-Brown, 2021). Competition over land between local commercial farmers and the conservation of elephants continued until into the 1950s (Jones, 2020).

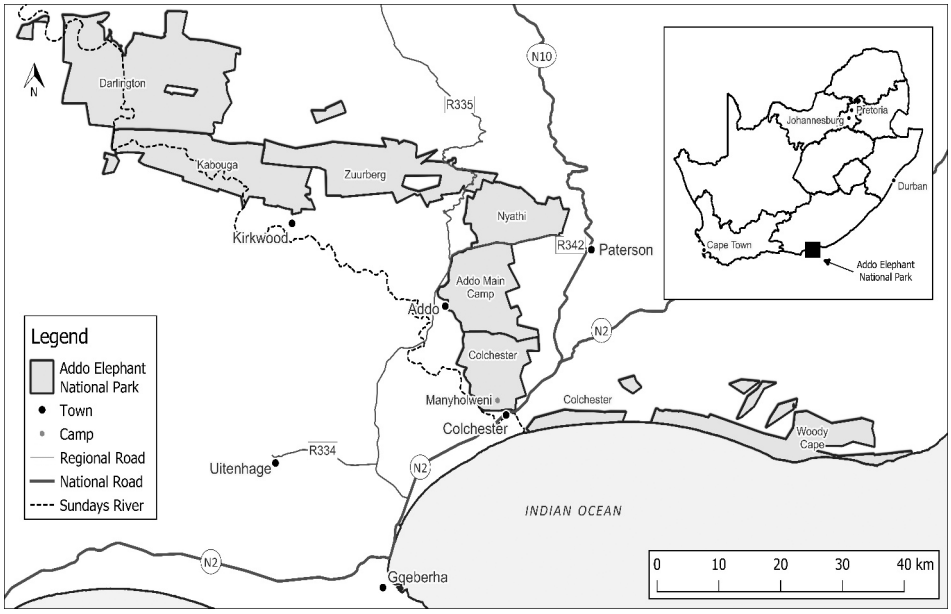

Figure 1: Location map of Addo Elephant National Park
Source: Authors

The National Park was first established in 1931 with humble beginnings when a small parcel of land (only some 2,237 ha) was set aside as a protected area for the rapidly declining African elephant population (Whitehouse & Hall-Martin, 2000). The park is situated near the Sundays River in the region of the Eastern Cape of South Africa (see Figure 1). Historically, it was created to protect the small herd of 11 elephants native to the area. The first visitors to AENP were not allowed

within the elephant enclosures and instead the elephants were lured to the fences where visitors could see them from dedicated viewing points outside of the fences (Brett, 2019). By 1954 the land was enclosed and Africa's first elephant-proof fence was erected in order to allow for more interaction with the elephants which significantly increased tourism opportunities within the park (Brett, 2019; Jones, 2020).

The park was expanded in 1961 and again in 1989, in part to accommodate the growing elephant populations (SANParks, 2015). The elephant population has since grown from only 11 to 650, the densest concentration of wild elephants anywhere on the planet, thus gaining worldwide recognition (Reardon, 2021). Although elephants remain undoubtedly the park's top tourism drawcard, the past few decades have seen the emphasis shift from protecting a single species to conserving five biomes and the many different wild animals that occupy them (Brett, 2019; Reardon, 2021). In 1997 it was proposed that the park be expanded to encompass other protected land in the region. This resulted in the incorporation of the Darlington, Zuurberg and Woody Cape sections of the park (SANParks, 2015). In 2008, the islands of St. Croix and Bird Island were also incorporated and established as a marine protected area (SANParks, 2015). Further, aside from animal introductions in the main section of the park, SANparks during the past 20 years has slowly introduced large game into other sections of the park (Brett, 2019). Other animal species in the park include a variety of antelope species and the unique flightless dung beetle which is found almost exclusively in Addo. The park is also home to a vast variety of bird species (SANparks, 2019)

The Addo Elephant National Park is unique as it is one of the few national parks in the world that offers the 'big 7' — elephant, rhino, black rhino, buffalo, leopard, the great white shark and seasonal southern right whales (Saayman & Saayman, 2009). In extent AENP currently is 1,640 sq. km making it the third largest national park in South Africa (SANParks, 2019). The AENP represents one of the most ecologically diverse protected spaces in South Africa (Reardon, 2021). Visitor numbers have increased significantly over the years, with a peak in the 2017/2018 fiscal year at 305,510 visitors (SANParks, 2018). This total represents a major increase in arrivals from early recorded visitor numbers of 37,512 in 1975 (Brett, 2019). During the COVID-19 pandemic there was a significant decrease in visitor numbers albeit numbers are slowly starting to increase again benefitting from changing consumer travel preferences in South Africa which include a search for open and natural spaces (Rogerson & Rogerson, 2021a, 2022a, 2022b).

Despite the growth of tourism research on National Parks in South Africa, only limited investigations have been conducted on AENP and few studies explore the tourism dynamics in the park. One previous investigation demonstrated that the primary purpose of visitors to the park, unsurprisingly, was wildlife-viewing

(Boshoff et al., 2007). The demographics of visitors were also found relatively homogenous with mostly a cohort of international tourists and white South African visitors (Kruger & Saayman, 2015). The only published study which has interrogated aspects of the park's local impacts is that by Fezeka and Stella (2020). This research highlighted the marginalisation and lack of benefits from the park for Black Africans resident in local rural communities neighbouring the park. Of note is that these authors signalled the limits for local entrepreneurs and that local communities "are still heavily marginalized in terms of business opportunities in the park" (Fezeka & Stella, 2020, p. 16). No previous research studies have been conducted, however, on the opportunities and challenges for local SMME development related to AENP, which is the central focus of this investigation.

A qualitative research approach was adopted for data collection in this study. Semi-structured interviews were used for all data collection with different interview guides developed and adapted based on the specifics of the interviewees. Data collection targeted those involved in and responsible for procurement within the park as well as owners or managers of local SMMEs in surrounding towns which could fit the tourism supply chain. Interviews with key stakeholders within the park included both SANParks employees, most notably the park director, the procurement manager, tourism and hospitality managers as well as managers of relevant concessions within the park. Interviews were conducted with tourism-related business owners as well as business owners who could potentially feed into the tourism supply chain. Finally, an interview was conducted with the chair of the Addo Tourism Association, a local tourism business chamber.

The interviews with AENP staff and facilities within the park sought to elicit information on their procurement policies, interactions with local SMMEs as well as the enterprises in their supply chains. Insight into why these companies are selected, the characteristics companies look for in suppliers and some of the challenges faced in the procurement process was also included. In the interviews with specific facilities, we sought to gain insight into the amount of flexibility and concessions given to these direct managers in terms of the procurement of the specific goods and services. In terms of interviews with local SMMEs, the focus was on their linkages with AENP, particularly the opportunities and challenges associated with engagement with SANParks and AENP. A total of 29 interviews were conducted in the surrounding towns to AENP, mostly at Kirkwood and the town of Addo, and targeted at tourism businesses and other enterprises related to the supply chain of the park.

The data collected through the interview process was analysed using a thematic content analysis. Relevant themes were extracted from the data, based on the questions and the various responses of participants. Some data was quantified

with relevant and quotations extracted where they provided unique insight and/or adequately summarized a series of responses. In the discussion below direct responses from interviewees are identified by their job function as park manager (PKM), procurement manager (PM), hospitality manager (HM) and camp duty manager (DM). In addition, responses are given from certain private sector interviews with accommodation providers (A) service providers (S) and an independent enterprise (E).

4. Results and Discussion

At the outset, in contextualising the research findings it is essential to recognise that the AENP is located in close proximity to Nelson Mandela Bay Metropolitan Area and the city of Gqeberha, formerly called Port Elizabeth (or PE abbreviated). The main park entrance, which is found at the Addo Main Camp, is approximately 70 kilometres from Gqeberha. Within the park SANParks offers a range of accommodation facilities to visitors at several rest camps as well as opportunities for camping, 4 x 4 tours, birding and hiking. In addition, within the park are several (white-run) concessionaires which operate or manage various facilities. In terms of local SMME development in neighbouring towns opportunities exist both for tourism businesses, especially those providing accommodation services or activities such as tour guiding, and for involvement in the supply chain of the park's activities and enterprises.

The findings are presented in terms of three themes. These relate to (1) the character of the SMME economy in the Greater Addo area; (2) understanding the limits of SANParks use of public procurement, its challenges and the agency's targeted initiatives to expand the engagement of local SMMEs, and, (3) the minimal opportunities for local SMME development in relation to supply chains of private sector businesses which operate in the park.

4.1. The SMME Economy of the Greater Addo Area

The economy of the neighbouring small-town localities surrounding AENP needs to be understood as it is in these localities where potential local SMMEs would be found. The area surrounding the park, known as the Greater Addo area, includes the four small towns of Addo, Kirkwood, Colchester and Paterson. Kirkwood is the largest and most developed of these small towns and a centre which serves the farming communities throughout this region. The town of Addo houses many

residents who work in the area's prosperous farming and tourism sectors. The small village of Colchester situated on the Sundays River, consists of middle-income residents, many second homes and a cluster of tourism accommodation facilities. The village of Paterson is very small and with few businesses (Fezeka & Stella, 2020).

Of the 29 interviews conducted in the Greater Addo area the majority were with accommodation service providers. Businesses had been operating for between 2 and 27 years with a range in terms of size with operations as small as two people (both owners) and one enterprise which had up to 80 employees. It was observed that overwhelmingly the accommodation service sector in small towns surrounding the park was dominated by white-owned businesses. This finding concerning the racial complexion of tourism enterprises confirms that of other studies undertaken of tourism in small towns and rural areas of South Africa which are situated in former apartheid designated 'white' space rather than in the former Black Homelands (Donaldson, 2018, 2021; Rogerson & Rogerson, 2021b; Rogerson & Sixaba, 2021). Addressing this historical legacy of apartheid upon structuring the patterns of contemporary tourism ownership in South Africa lies at the heart of national government policies for transformation and the promotion of initiatives for local SMME development and especially by Black-owned enterprises (Sixaba & Rogerson, 2023).

The white-owned accommodation and activities companies in the Greater Addo area form part of typical tourism product offerings in a destination. Local businesses in tourism were involved in accommodation supply in the form of small guest houses or bed and breakfasts. It was observed that relative to the situation which exists in other parts of South Africa with similar large state-owned tourism assets, such as Kruger National Park and Pilanesberg National Park, the number of businesses that offered activities was relatively low (Giddy, Idahosa & Rogerson, 2020; Giddy & Rogerson, 2021). Only a handful of such activities were identified mostly relating to provision of game drives into the AENP which are permitted as businesses have operating permits to take visitors on game drives into the park.

In terms of accommodation suppliers an important segment were small accommodation offerings which were operating on properties with other businesses. Most of these properties, it was determined, were functional and operating farms, in particular citrus farms. Several respondents mentioned statements such as "The only tourism establishment, have other non-tourism businesses in PE, have a citrus farm that is mainly for exports" (A4). Accordingly, for many of these accommodation businesses in the surrounds of AENP the tourism business was a side project and/or supplemental income to more lucrative large-scale farming operations. This means that the dynamics of local tourism businesses in the surrounds of Addo Elephant National Park is different to that of other rural tourism destinations sur-

rounding national parks in South Africa. The interviews conducted with tourism SMME owners and managers disclosed the role of the park as an asset which attracts visitors. Most stated that their primary purpose is to offer accommodation for those coming to the area to visit the park. The majority stated clearly that the only reason any tourism businesses have emerged in these surrounding towns of Greater Addo is because of the park: "It is the main reason for tourism businesses in the area. If there was no park, there would be no guesthouses in the area" (A14). This said, the linkages between these tourism SMMEs and the AENP were minimal. The owner of one of the activities companies highlighted the existence of a strained relationship with SANParks: "I have encountered communication challenges. We never get any response or reply from the park. They never avail themselves when there is a stakeholder meeting, which makes things difficult as the park is the lifeline of tourism in the area" (A1).

Beyond the accommodation providers several other businesses operating in the neighbouring towns of Addo, Kirkwood and Colchester are potential suppliers for services such as security, construction, transport, printing and auto repair/electrician. The interviews disclosed a variety of experiences in terms of their relationships with the park. Some of the white-owned businesses have provided services to the park and are registered on the park's supplier database. One business owner indicated policy changes had negatively impacted the business and that previous contracts with the park were not renewed: "I have worked, for a period of 12 years, unfortunately the contract ended as I am white and do not fall under the Black Economic Empowerment groups" (S4). Other businesses, however, considered they could not effectively offer services to the park stating: "I don't think my business is at that level" (S3) or that their business was unregistered and informal therefore could not qualify as a potential supplier. The park engages with the community of local SMMEs through the Addo Tourism Association, which is a local network of tourism businesses which operate in the Greater Addo area. This association conceded an improvement in communication and relationships with park management. It was disclosed that a major challenge of local SMMEs in engaging with SANParks relates to their procurement and payment processes.

4.2. Procurement Procedures within Addo Elephant National Park

The procurement procedures within the AENP must adhere to national SANParks policies which are restrictive. As a public entity SANParks operations are governed by the Public Finance Management Act of 1999 which is committed to support national government objectives for 'transformation' of South African society in the post-apartheid period. The procurement policy introduced a set of preferences that

must be considered in evaluating tender bids. The key preferences relate to government objectives for Black Economic Empowerment and upliftment of enterprises owned by Black South Africans. Another critical aspect of policy is the requirement that any potential business interested in supplying to SANParks must be registered on a national government central supplier data base (SANParks, 2022).

The park manager explained that SANParks has enacted policies recently in response to concerns about nepotism and corruption over the award of tenders through the public procurement system. As a consequence, the procedures for procurement have grown increasingly strict: "There is lots of paperwork. SANParks has made it stricter but not easier. Everything is more regulated, and there's even more paperwork as the cost increases" (PKM). This said, there is only one procurement manager to oversee processes for four different national parks, namely Camdeboo National Park, Mountain Zebra National Park, Karoo National Park and AENP. This sole manager is responsible for approval of all procurement needs for all departments. It was revealed that the procurement system has become decentralized whereas formerly procurement was sent to the SANParks head office for approval. This decentralization of procurement has meant that the entire weight of the procurement process falls on one individual for all four national parks in the region.

In terms of SANParks policy, according to the procurement manager, there is no specific policy mandate to prioritize local business or SMMEs. Nevertheless, it was pointed out there are few established providers because the procurement process is tedious and enterprises are negatively impacted by consistent late payment issues by government. The majority of their suppliers of goods and services for AENP come from the metropolitan centre of Gqeberha rather than local enterprises in the immediate environments of the park. Theoretically, the procurement procedure is to seek out local suppliers in the immediate area and only then move to source from Gqeberha. The issue was stressed of the lack of suppliers for the goods and services needed in the immediate area. In terms of the links with local tourism businesses, the AENP park manager noted that the park does not currently have a limit on the number of operators which are given traversing rights thus allowing access from a variety of operators. However, the park has strict regulations and relatively high fees for operators wishing to conduct game drives in open-air vehicles.

All SANParks managers interviewed for this research pinpointed numerous difficulties in terms of procurement. The park manager said "We're trying to overhaul the process. We need to study procurement process because this isn't working" (PKM). A critical issue was the lack of staffing within the finance and procurement office with just one individual responsible for procurement across four different national parks. In some cases, for larger procurement requirements this single manager is required also to source quotations which can create a major backlog

of procurement requests. As such a large operation, AENP has numerous daily procurement needs which means that the responsibility for sourcing quotations and completing essential paperwork related to procurement falls increasingly on the end-user: "End-users are not happy because this process is so difficult. The finalization of any procurement is increasingly difficult…It takes up way too much of their time. It keeps them from their actual job" (PKM). This creates the issue of many staff members spending the majority of their time completing paperwork related to procurement rather than fulfilling the primary duties of their position. Nearly everyone interviewed within the park noted this as a major problem. The procurement manager observed that the policies and procedures can become incapacitating to the end-user, preventing them from doing their jobs and running an effective conservation area and tourism product. In response to this issue, the park manager has moved to a solution of drawing up longer-term larger tenders for some of the contractors they require on a regular basis. This means for example that a single maintenance company would be awarded a three-year tender to service all the daily maintenance issues required by the park. Although the process takes longer, in the end it saves time when daily issues arise regarding specific goods and services required frequently by the park. This said, one important implication is that it reduces the ability for local SMMEs to feed into this supply chain which becomes even more difficult due to the requirements for obtaining long term tenders.

Another important challenge mentioned by the procurement manager of the park was the issue of the way that government contracts work. It was stated that "businesses don't want to work with government because of the bureaucracy involved" (PM). In addition, the challenge was flagged that government provides no upfront deposit and has a waiting period of 30–90 days to render payment once the service has been completed. It was highlighted that in many cases it takes even longer for payments to be made. One example was given of a construction project: "It's been four months since the services were rendered and they still haven't been paid" (PM). The particular limits on local small enterprise development were made clear: "There is an issue with locals not having supplies, locals don't have the capacity to take big tenders, they don't have the financial means" (PM). This has major implications for the ability of SMMEs to opt for contracts with AENP, as it would mean significant upfront capital is required to complete projects both for materials and for labour. Put simply: "A business needs upfront capital to be able to serve SANParks" (PM). Therefore, the procurement manager noted that many local businesses choose to work with other businesses in the private sector which is more efficient in making payments rather than work with agencies of national government.

The expansion of the involvement of local SMMEs was a critical theme that was under scrutiny. It was revealed that whilst many park managers flagged the need

to involve local SMMEs in the supply chain as a whole there is minimal involvement particularly from businesses in the surrounds of the AENP. As indicated this is largely explained by geography. The close proximity of a major metropolitan hub is such that the majority of the so-termed 'local goods' and services utilized by the park and its facilities are sourced from suppliers in Gqeberha. One of the primary difficulties mentioned by all managers was the lack of local SMMEs in the surrounding small towns which could directly serve the park supply chain. "There are hardly any established providers [in the local area]" (PM). Further, in marked contrast to the situation in other nature tourism assets managed by SANParks there is no local cluster of informal craft sellers or producers adjacent to or in the vicinity of the park. This means that the local procurement of small-scale craft goods for tourist souvenirs proves difficult. By contrast to the situation at AENP an informal economy of craft sellers and producers exists and is well-documented around several other National Parks, most notably in the surrounds of Kruger National Park (Wessels & Douglas, 2022).

The procurement manager revealed a suite of additional challenges for utilizing local SMMEs. It was stated that SANParks have attempted to distribute fliers or advertise services needed by AENP on social media but often with no response. In addition, the capacity and reliability of local service providers was highlighted as problematic. In cases where efforts had been made to source from a local service provider often the services either were not provided on time or failed to meet the necessary standard requirements: "Many of the businesses are non-compliant so they can't even be registered on our system. There is also an issue with the quality of products we have tried to source locally" (PM). The hospitality manager provided details of a specific example: "We actually had a contract with a local Black SMME to supply guest amenities. When they arrived the bottles of shampoo and stuff were empty or half empty. It turns out they had a fake address and changed their phone numbers so we couldn't even fix the situation" (HM). In such situations, the entire procurement process, already lengthy and tedious, becomes even more delayed. The camp duty manager from the local community provided additional insight around the lack of capacity and reliability of local suppliers. It was observed "There are issues with access with many of the communities. There are very few links between the Kirkwood community and the park because of lack of transportation routes" (DM). The procurement manager echoed this sentiment: "There is this mentality of starting small businesses but there are so many challenges. There is no urgency and a lack of capital in the first years, people need to be persistent" (PM).

SANParks at Addo have initiated small support programmes to assist the development of local SMMEs from communities disadvantaged under apartheid. The park has established two initiatives in which local SMMEs were developed to assist

with services for the park's tourism maintenance with claims that: "The project has been successful" (HM). The first is a contract given for laundry services; the second a contract for the cleaning and maintenance of ablutions. The hospitality manager at the park stated as follows: "The ablutions are now so clean. It's been really positive. We haven't had any major problems" (HM). The process involved the park purchasing supplies and equipment and therefore "We only source out manpower through a local contractor who brings labour into the park" (HM). It should be noted, however, that these are only one-year contracts with the hospitality manager reasoning "To provide new opportunities we try to contract out different businesses" (HM). Two issues emerge with this programme. The first is that, since the park is only contracting out the labour, once the contract expires, the business owners do not necessarily emerge with a stable business that can continue outside of the park since they are not left with any equipment. Furthermore, with contracts only lasting one year, it would be hard for a business to develop significantly to turn enough profit to continue the enterprise going forward.

Another local SMME support initiative is that the park established a unique offering called a "Hop-On Guide" service. This allows visitors to the park to hire a trained guide to guide visitors around the park in their own vehicles. The purpose of this project is both to offer an affordable option for visitors who would like more information while touring the park and a mechanism for economic upliftment for the local community. The park assisted in training a total of six "Hop-on" guides, all of whom were from the adjacent Addo community. Although initially successful, only one of the six trained guides continues to offer the service. The duty manager noted that the reason behind the other guides dropping out was a lack of sufficient business in the early stages of the programme. Although qualified, none of the other trained guides have remained in the tourism sector but the single guide who still offers the hop-on service is successful and often fully booked in advance. A leading channel for local SMME development through the AENP has been in the conservation sector. The park has assisted in the creation of SMMEs directly related to conservation. One of the most successful programmes concerns water quality management and trains members of the local communities in assist with water quality testing throughout the park.

4.3. Private Sector Supply Chains and Procurement in Addo Elephant National Park

Although the majority of facilities operating within AENP are managed by SANParks, there are private companies which manage certain facilities within the park and were given concession rights through a tender process. Concessions have been

given to two enterprises which operate luxury camps within the boundaries of the park. Other facilities include a curio shop and restaurant which have been outsourced and privately managed by large national corporations. These facilities were created entirely for the respective purposes by these private operators. As stressed by Fezeka and Stella (2020, p. 10) despite government commitments for the economic empowerment of disadvantaged communities almost all the concessions belong "to white owners from outside the area". This includes concessions for the restaurant, lodges, guided game drives and a craft shop. The supply chains of these private concessionaires offer a potential opportunity for local SMME development and were investigated.

Two private luxury game lodges are located within the boundaries of the Addo Elephant National Park. One interviewed lodge offers all-inclusive 5-star luxury accommodation in the AENP. It has been operating for 19 years, opening in 2000, it obtained a long-term lease (40 years) and the right to build and operate this facility within the park boundaries on a 5000 hectare property. The manager of the lodge stated they have a good working relationship with the park. The lodge is required to undergo a quarterly audit by government, must adhere to a SANParks code of conduct and divulge information on their suppliers to SANParks. However, since it is privately operated their actual procurement process is completely independent of AENP and SANParks which therefore have no influence on their selection of suppliers. The majority of their goods are obtained from a large national corporation, due to the price quality and effective delivery standards. The manager stated that they have tried to obtain locally sourced goods, particularly craft, but there is a significant lack of availability in the local area. The manager said "There is just a lack of suppliers in the immediate area. We mostly source from PE [Gqeberha]" (A6). As is the case with many remote nature tourism lodges the majority of their services are in-sourced (see Rylance & Spenceley, 2013) and use of local suppliers is limited to laundry and security which are to enterprises in the Greater Addo Area. In addition, the enterprise outsources the transport of guests to a company based in Gqeberha. For major construction projects the lodge tried to use local providers, including contracting local construction workers but like the park have struggled with non-availability.

The restaurant in the Addo Main Camp has been under the management of a national chain restaurant which operates restaurants in three national parks. According to the restaurant manager, they have a working relationship with the AENP, which includes the need to adhere to a certain code of conduct and provide a list of suppliers, as is the case with the private lodges. In addition, due to its location within the main camp, the restaurant must adhere to specific environmental regulations including the use of biodegradable materials for all containers and straws and

implementing water-saving and energy-saving measures. The restaurant must also source a minimum of 80% of its staff from the local area. Procurement, however, is primarily done in accordance with the procurement procedures for the chain, nationally. Due to the franchise standards, there is little flexibility on the behalf of the individual manager to select alternative suppliers. The only product which is supplied from the local area is bread from a local bakery. In addition, one of the staff members has begun supplying a laundry service to earn additional income. The souvenir shop and has some provisions for visitors staying in the Addo Main Camp and is managed by a large national corporation. The shop manager noted that the large corporation which manages the shop is responsible for the selection of suppliers. Of significance is the absence of a local creative economy of craft that might be a source of supplies for handcraft goods.

One novel privately owned business in the park is the spa facility. The woman owner realized that there was a gap in the market in terms of spa offerings in the area despite the relatively high visitor numbers. She thus put together a proposal to offer spa treatments to visitors in the Addo Main Camp and presented it to park management: "The park was very interested but they said it had to go through an official tender process. This took three years" (E3). Therefore, a formal tender was advertised to the public for the specific service/facility which had been proposed. She was then required to apply for the tender, though she was the only applicant so it was eventually obtained. The process was tedious and the enterprise's history provides insight into the tender process within SANParks. Although the owner is now operating a successful business this would not have been possible without supplemental income during the much delayed tender process. Part of her original initiative and motivation for starting the spa, aside from filling a gap in the market, was to train local women in providing spa services. The business now has five full time employees and has built a small facility where the services are offered and their product offerings have expanded since securing the tender in 2018. In addition, the company now offers mobile spa services to other local tourism businesses, most notably local accommodation. Questioned about the use of any local goods or services, the owner tried to source local products but as none are available the supplies are sourced online from South Africa's commercial heartland of Gauteng.

5. Conclusion

In African research the benefits of enhancing the participation of local communities in tourism supply chains has been demonstrated for several countries (Rogerson, 2014; Adiyia et al., 2017; Rogerson & Saarinen, 2018). In South Africa much policy attention surrounds the potential for building local SMMEs in relation to significant state-owned assets in rural areas. In addition to economic benefits, empowerment, skills development, social capital within communities and in the case of rural tourism assets, enhanced environmental awareness are all of significance. This study sought to investigate the relationship between one large, state-owned tourism asset and local SMMEs. The case study of Addo Elephant National Park reveals the limitations that can arise in programmes that seek to build SMME economies through the leveraging of supply chains.

Maximising the potential of public procurement as a development vehicle was shown to be restricted by time-consuming and tedious bureaucratic processes as well as delayed payments by government to suppliers. These issues severely reduced both the willingness and capacity of local SMMEs to participate in the supply chains of state assets. Further limiting the impact of supply chain development is the weakness of the local SMME economy to supply required goods and services to meet required standards of quality and reliable delivery. One significant cause for the lack of small business development in the area is the ability of AENP and other tourism assets to obtain goods from the major economic hub of Gqeberha which is in relative close proximity. Accordingly, whilst Addo Elephant National Park is considered a 'rural' destination the area's geographic proximity and easy access to Gqeberha allows SANParks and other enterprises adjacent to the park to obtain the majority of their required goods and services from this metropolitan hub. In the case of the rural areas surrounding the AENP a most significant gap relates to the absence of a local economy of creative craft that could supply the market for souvenirs popular by international tourists that visit nature-tourism attractions. This situation was observed as markedly different to that which has been recorded in rural areas neighbouring or proximate to other National Parks in South Africa (Giddy, Idahosa & Rogerson, 2020; Wessels & Douglas, 2022). The cause of this situation is unclear and merits further research particularly in view of the potential for an improved local supply of craft goods to contribute towards the goal of a more inclusive tourism economy.

There are a number of potential interventions which could be considered in order to increase the growth of SMMEs in the Greater Addo Area and also facilitate these SMMEs feeding into the tourism supply chain. One would be to review and overhaul the procurement processes within these assets. Local small business are

unable to even consider entering the supply chain because of issues of inefficiency within the system, the most significant of which is non-payment. Another intervention which could increase the potential for local SMMEs to offer goods and services to the park would be to create incentives. This could be in the form of incentivizing public procurement of goods and services to local SMMEs, especially for smaller projects. Finally, programmes could be more effectively implemented to facilitate the development of local SMMEs which can directly or indirectly serve the tourism sector including upskilling and providing start-up funding, similar to those which have been developed for conservation within these spaces.

Acknowledgements

Arno Booyzen is credited for preparing Figure 1. Thanks for helpful inputs are due to Lulu White as well as Sue Rose, Robbie and Skye Norfolk.

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Rola głównego parku narodowego RPA w rozwoju małych przedsiębiorstw położonych w jego sąsiedztwie

Streszczenie. Turystyka jest często postrzegana jako szansa rozwoju gospodarczego dla społeczności lokalnych, szczególnie w krajach globalnego Południa. Chociaż dużo uwagi zwraca się na kwestie takie jak tworzenie nowych miejsc pracy i dochody uzyskiwane przez przedsiębiorstwa turystyczne, coraz większy nacisk kładzie się na korzyści, jakie społeczności lokalne mogą czerpać z uczestnictwa w łańcuchach dostaw sektora turystycznego. Dotychczasowe badania wskazują, że uczestnictwo to może być korzystne dla lokalnych biznesów, zwłaszcza dla małych i średnich przedsiębiorstw (MŚP). Niemniej jednak istnieje wiele barier, jakie firmy z tego sektora napotykają w dostępie do łańcuchów dostaw w branży turystycznej, szczególnie w krajach globalnego Południa. Może to prowadzić do antagonistycznych postaw w społecznościach lokalnych wobec rozwoju turystyki na danym terenie. Celem artykułu jest analiza roli, jaką odgrywa Park Narodowy Addo Elephant, jeden z czołowych aktywów turystycznych w RPA, w rozwoju sektora MŚP w okolicznych społecznościach. Dane uzyskane w wywiadach jakościowych z udziałem przedstawicieli parku, lokalnych przedsiębiorstw turystycznych, a także miejscowych firm sektora MŚP ukazują wyzwania, przed jakimi stoją te firmy, próbując uzyskać dostęp do łańcuchów dostaw branży turystycznej, a także słabe powiązania między tymi firmami a parkiem. Wypowiedzi respondentów pozwalają lepiej zrozumieć rozdźwięk pomiędzy działalnością lokalnych małych przedsiębiorstw a procesami zamówień publicznych w sektorze turystycznym RPA.

Słowa kluczowe: państwowe aktywa turystyczne, turystyka przyrodnicza, RPA, łańcuchy dostaw, zamówienia publiczne, MŚP

Studia Periegetica
3(43)/2023

ISSN 2658-1736, https://journals.wsb.poznan.pl/index.php/sp
s. 129–148, https://doi.org/10.58683/sp.567

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Route Tourism Planning, Local Impacts and Challenges: Stakeholder Perspectives from the Panorama Route, South Africa

Abstract. The growth of route tourism initiatives is a worldwide phenomenon. South Africa is a major focus for route tourism planning as part of broader place-based development initiatives. This paper examines the perceptions of key route tourism stakeholders concerning the planning, local impacts and challenges of the Panorama Route, which is located in South Africa's Mpumalanga province. The analysis is based on insights from 63 qualitative interviews conducted in 2022 with representatives from the government and private sector. In addition to some common themes, differences between different categories of stakeholder could be observed. In many respects, government (both provincial and local) was viewed as the 'problem' rather than the provider of solutions. The uneven geographical impacts of the route were also highlighted. Different stakeholder perspectives revealed during the interviews show the complexities associated with route tourism planning.

Keywords: route tourism, planning tourism routes, local development impacts, stakeholder perspectives, Panorama Route, South Africa

Article history. Submited 2023-04-13. Accepted 2023-05-06. Published 2023-06-09.

1. Introduction

As a result of a broader global shift away from centrally-driven approaches to economic development led by national governments, post-apartheid South Africa has seen a growing number of local or 'place-based' development strategies initiated by sub-national tiers of government (Pike, Rodriguez-Pose & Tomaney, 2015; Rogerson, 2014). According to the South African National Constitution, all local authorities in the country are mandated to implement Local Economic Development (LED)

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strategies which, in the majority of cases, are characterised by a pro-poor agenda (Venter, 2020). Over the past 25 years, most South African local governments have tried, with different measures of success, to implement LED by promoting tourism as a form of strategic intervention, especially for small towns and remote rural areas (Butler & Rogerson, 2016; Donaldson, 2018, 2021; Nel & Rogerson, 2016; Rogerson & Rogerson, 2014, 2019, 2021). As demonstrated by Kokt and Hattingh (2019), the South African experience regarding local economic development and tourism has been influential beyond the country's borders with many of its planning concepts and frameworks monitored closely by other countries in the region of Southern Africa for the purpose of policy learning.

One theme that has attracted attention is the establishment and promotion of tourism routes as a vehicle for tourism-led local development. Within sub-Saharan Africa, South Africa has the largest number of route tourism initiatives (Donaldson, 2018; Rogerson, 2009). The country has the longest history of route tourism planning, which goes back to the early 1970s, when the private sector established the first wine routes in the Cape Winelands (Ferreira, 2020). After the democratic transition, followed by the growth of the tourism sector as a whole, several other routes have been consolidated or launched by the private sector (Lourens, 2007; Rogerson, 2007). The public sector has also become engaged in route tourism planning as part of LED strategies for many small towns and rural areas, which has triggered a burst of new route tourism initiatives (Donaldson, 2018). These route tourism initiatives have been focused on various themes such as arts and crafts, food and drink, culture and heritage, and most recently lighthouses and stargazing.

A significant body of research has accumulated on themed tourism routes in South Africa, documenting various issues associated with route planning, the nature of visitors and segmentation, and the ramifications of various routes for small town and rural local development (Lourens, 2007; McLaren & Heath, 2013; Mutana & Mukwada, 2020; Rogerson, 2004; Rogerson & Visser, 2020; Van Wyk-Jacobs, 2018). The objective of this article is to contribute to this literature by analysing perceptions of key route tourism stakeholders concerning the recent planning and local impacts of the Panorama Route which is located in South Africa's Mpumalanga province. The article consists of three main parts: first the study is placed in the broader context of international scholarship on route tourism. This is followed by information about the region of interest and a description of the research method. The third part includes findings from 63 qualitative interviews conducted in 2022 with route tourism stakeholders about their views concerning the planning, workings and impacts of this major route tourism initiative.

2. Route Tourism — International Context

Tourism routes are circuits, corridors or spatial networks that connect a range of natural or cultural attractions (Meyer, 2004; Stoffelen, 2022). Such routes "have been indispensable to travel and tourism over the centuries, helping to form the basis of mobility patterns of the past and present" (Timothy & Boyd, 2015, p. 1). Indeed, for decades "routes have formed the basis of travel mobility patterns, contributing to recreational activities, a plethora of travel plans, and tourism progress worldwide" (Anuar & Marzuki, 2022, p. 320). According to Denstadli & Jacobsen (2011), the modern phase of route development dates from "the first decades of the twentieth century, with the growth of pleasure motoring and car-based tourism" (p. 781). MacLeod (2017, p. 423) notes that "routes are increasingly ubiquitous features in the tourism landscape", while Stoffelen (2022, p. 379) points out that routes have become "popular tourism products throughout the world".

A large part of the literature in this field is concerned with the planning and impacts of route tourism practices. The planning of a 'tourism route' has been defined as an initiative designed to bring together an array of activities and attractions under a unified theme and thereby to stimulate entrepreneurial opportunities in the form of ancillary products and services (Greffe, 1994). Route promotion, particularly, the establishment of themed routes as tourism attractions, has become an increasingly important economic or developmental goal. In several parts of the world, themed routes have been a particularly popular strategy of promoting small town and rural tourism (Olsen, 2003). Scenic routes are linear corridors designed to showcase a wide array of nature-based, scenic and cultural attractions to tourists (Anuar & Marzuki, 2022). Pedrosa, Martins and Breda (2022, p. 2) add that their design and structure corresponds to linear models, which go from one or several points towards an end point, and "network models based on an archipelago of points and connected by themes rather than territorial continuity". Routes provide a unique opportunity for rural operators to achieve 'economies of scale' by establishing networks of different service providers organised in such a way to maximise opportunities and offer a wide array of products and activities (Greffe, 1994).

"Routes appeal to a variety of users, such as international overnight visitors who use them as part of a special interest holiday, longer-staying visitors who use them (or parts of them) for day excursions, or urban domestic day visitors" (Lourens, 2007, p. 475). Although different definitions of route tourism exist in the literature, there is consensus that it is based on mobility, is geographically determined and aims to link different tourism attractions and products. Points of attraction are linked in a supply network such as to accord coherence of the destination and theme, which might be heritage, food and drink, religion, culture or arts and

crafts (Stoffelen, 2022). There is agreement that successful routes require a high level of pre-planning and organization in order to present a cohesive offering and plan for the spatial dispersion of tourists which potentially might spread local impacts for economic development (Vada, Dupre & Zhang, 2023). Destination route attractions must have varied offerings in order to foster visitor satisfaction and loyalty. Above all, the development of routes, and tourism in general, requires infrastructure, services and accessibility (Denstadli & Jacobsen, 2011). All Nthese accompanying aspects "should be of such a quality that the journey to the product is also enjoyed" (Van Wyk-Jacobs, 2018, p. 61).

Route tourism is primarily focused on tourists who travel by car and explore routes and their attractions at their own pace (McLaren & Heath, 2013). The establishment of tourism routes is considered an effective method of tourism distribution, especially for tourists travelling by road within a given geographical area (Van Wyk-Jacobs, 2018). According to Denstadli & Jacobsen (2011), the appeal of routes "as instruments of tourism development is not only related to large proportions of self-drive tourists in many areas but is also linked to tourism as wanderlust — an interest in being on the move" (p. 781). The success of a route depends on how well it is promoted (a unified marketing and branding strategy) and on the provision of the required infrastructure (roads and signage, area development, facilities) by the public sector (Van Wyk-Jacobs, 2018). The international experience confirms that well-designed and imaginative tourism routes are a great advantage for destinations (Lourens, 2007; Timothy & Boyd, 2015).

The creation of a tourism route can bring together a network of actors — municipalities, associations, and the local private sector — to work and cooperate in order to market a local destination. The evolution of such local partnerships is regarded as essential for the growth of small and medium-sized tourism enterprises (Yachin, 2020). Routes "allow each participating community along a route to benefit from being linked to the experiences, and the knowledge gained, of other participants" (Moulin & Boniface, 2001, p. 243). According to Vada, Dupre and Zhang (2023, p. 883), route tourism represents "an original model in terms of relationships with a variety of stakeholders", while Pedrosa, Martins & Breda (2022, p. 2) note routes require the existence of "a network where a group of stakeholders works together to achieve common goals". Tourism routes should be established in line with "firm guidelines to enhance local economic development" (Anuar & Marzuki, 2022, p. 331) by attracting more visitors and strengthening local community livelihoods. According to MacLeod (2017), while the role and usefulness of tourism routes as applied tourism products has now been well documented, the body of theoretical research on this topic is still relatively limited (MacLeod, 2017).

Although in one recent narrative literature review by Vada, Dupre and Zhang

(2023, p. 879) the claim was made that "route tourism has received little attention", it is evident from the above discussion that over the past 20 years a substantial body of writings has accumulated on the topic, covering several research aspects, such as consumer behaviour, route planning and development, local impacts, tourism development and COVID-19 route crisis management (Anuar & Marzuki, 2022; Pedrosa, Martins & Breda, 2022). Finally, there is a small number of studies that deal with stakeholder relationships. Different stakeholder perceptions of route planning and impacts of route tourism initiatives are also the focus of the following study.

3. Study Area and Research Method

The study concerns the Panorama Route, which winds through the eastern part of South Africa's Mpumalanga province, situated close to the Kruger National Park. Figure 1 shows that the major share of the route lies within the administrative

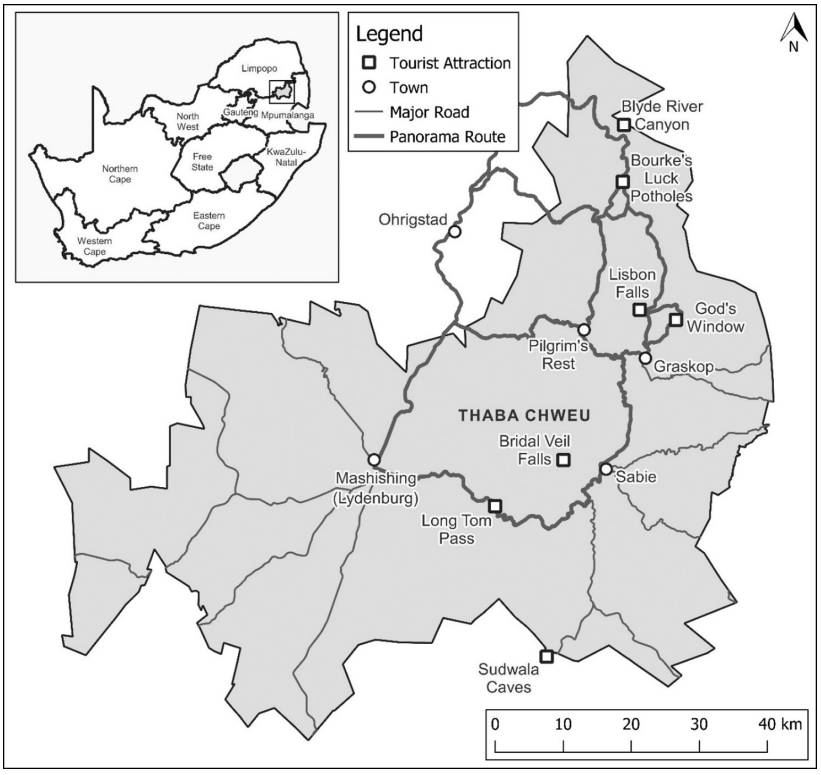

Figure 1: Location of the Panorama Route
Source: Authors

boundaries of Thaba Chweu Local Municipality, part of the Ehlanzeni District Municipality (centred at the adjoining Mbombela Municipality). The major urban settlements are the small towns of Sabie, Graskop and Lydenburg (also known as Mashishing) as well as the village of Pilgrim's Rest. The route features several natural scenic attractions including God's Window, Bourke's Luck Potholes, Blyde River Canyon, Sudwala Caves and a number of spectacular waterfalls (such as Lisbon Falls). In addition, the route includes the historic gold-mining settlement of Pilgrim's Rest, an important heritage site.

The study is based on qualitative data collected during 63 interviews with route tourism stakeholders: 6 representatives of the public (government) sector involved in the planning or implementation of the route, and a purposive sample of 57 interviewees from the private sector consisting of two groups. The first included representatives of formal, registered tourism businesses (mainly accommodation providers) and the second one — representatives of Black-owned, unregistered informal businesses, mostly those involved in the sale of handicraft goods. For the past 20 years the government policy has concentrated on 'transforming' and supporting emerging (Black-owned) businesses in the tourism sector (Sixaba & Rogerson, 2023). Interviewees from informal and emerging businesses were included to obtain perceptions of these critical small business stakeholders regarding the route and its local impacts. The interviewed government officials represented all major institutions involved in the planning of the Panorama Route. Tables 1, 2 and 3 present lists of interviewees from the public sector, the formal and informal businesses. Full details of the interviews are given in Mhlabane (2023).

Table 1. Government officials interviewed about the Panorama Route

	Location	Department name	Position
GO1	Nelspruit/Mbombela	Mbombela Local Municipality	Tourism Manager
GO2	Lydenburg/Mashishing	Thaba Chweu Local Municipality (TCLM)	LED Manager
GO3	Sabie	South African Forestry Company SOC Limited (SAFCOL)	Senior Administration
GO4	Nelspruit/Mbombela	Ehlanzeni District Municipality	Tourism Manager
GO5	Nelspruit/Mbombela	Department of Economic Development and Tourism (DEDT)	Deputy Director of Tourism
GO6	Nelspruit/Mbombela	Mpumalanga Tourism and Parks Agency (MTPA)	Tourism Safety Officer

Source: Authors

As shown on Table 2, most of the formal businesses are long-established operations, mostly engaged in hospitality services, accommodation or restaurants. In nearly all cases, the tourism business is the primary source of income for the

Table 2. Interviewees from formal businesses located along the Panorama Route.

	Location	Type of establishment	Years in operation	Number of permanent employees	Primary source of income	Operates all year
FB1	MWR	Attraction	50	50 FT/12 PT	Yes	Yes
FB2	MWR	Attraction	N/A	3 FT	Yes	Yes
FB3	MWR	Activity/Attraction	6 months	6 FT	Yes	Yes
FB4	MWR	Tour Operator	20	15 FT	Yes	Yes
FB5	MWR	Attraction	10	3 FT	No, the owner has a furniture shop	Yes
FB6	HS	Accommodation	N/A	115 FT/35 PT	Yes	Yes
FB7	HS	Accommodation	54	37 FT/ 3–12 PT	Yes	Yes
FB8	HS	Accommodation	2	7 FT/3 PT	No, the manager does real estate	Yes
FB9	HS	Accommodation	43	10 FT/2 PT	Yes	Yes
FB10	HS	Restaurant	9	9 FT/ 1 PT	No, the owner has a liquor store and a lodge	Yes
FB11	GPR	Accommodation	1	1 FT/ 3 PT	Yes	Yes
FB12	GPR	Restaurant	4 weeks	9 FT	Yes	Yes
FB13	GPR	Accommodation	over 50	35 FT	Yes	Yes
FB14	GPR	Tour Operator	10	5 FT	No, pensioner	Yes
FB15	GPR	Accommodation	10	7 FT/2 PT	No, the owner has other businesses	Yes
FB16	GPP	Attraction	60	15 FT/11 PT	Yes	Yes
FB17	GPR	Accommodation	N/A	53 FT	Yes	Yes
FB18	GPR	Accommodation	7	15 FT/4 PT	Yes	Yes
FB19	GPR	Activity/Attraction	5	3 FT/1 PT	Yes	Yes
FB20	LM	Attraction	43	4 FT	Yes	Yes
FB21	LM	Accommodation	9	5 FT	Yes	Yes
FB22	LM	Restaurant	17	20 FT/2 PT	Yes	Yes
FB23	LM	Restaurant	25	20 FT	Yes	Yes
FB24	LM	Tour Operator	9	4 FT/9 PT	Yes	Yes
FB25	LM	Tour Operator	2	3 FT/ 5 PT	Yes	Yes
FB26	LM	Restaurant	25	5 FT/1 PT	Yes	Yes
FB27	LM	Attraction	52	7 FT/ 6 PT	Yes	Yes

Legend: MWR — Mbombela/White River, HS — Hazyview/Sabie, GPR — Graskop/Pilgrims Rest, LM — Lydenburg/Mashishing, Staff reduced since COVID-19: FT — full time, PT — part-time; N/A — not available.

Source: Authors

owner. Interviewees were selected from registered businesses located in the major tourism nodes along the Panorama Route. As regards informal tourism businesses (Table 3), most of which are craft producers or sellers, are also long-established

Table 3. Interviewees from informal businesses located along the Panorama Route.

	Location	Type of establishment	Years in operation	Number of permanent employees	Primary source of income	Operates all year
IB1	BVW	Craft Seller	44	1 FT	Yes	Yes
IB2	BVW	Craft Seller	26	1 FT	Yes	Yes
IB3	LCW	Craft Seller	22	1 FT	Yes	Yes, sometimes on Sundays the owner goes to church
IB4	LCW	Craft Seller	30	1 FT	Yes	No, depends on whether the owner needs to rest
IB5	MMW	Craft Seller	7	1 FT	Yes	Yes
IB6	MMW	Craft maker & seller	31	1 FT	Yes	Yes
IB7	GR	Craft Seller	25	1 FT/1 PT	No, the owner has several craft shops	Yes
IB8	GR	Craft Seller	5	1 FT/1 PT	Yes	Yes
IB9	GR	Craft Seller	4	2 FT	Yes	Yes
IB10	GW	Craft Seller	29	1 FT/1 PT	Yes	Yes
IB11	GW	Craft Seller	24	1 FT	Yes	Yes
IB12	GW	Craft Seller	10	1 FT	Yes	Yes, depending on weather conditions
IB13	WV	Craft Seller	8	1 FT	Yes	Yes
IB14	BLP	Craft Seller	27	1 FT	Yes	Yes
IB15	BLP	Craft maker & seller	28	1 FT	No, pensioner	Yes
IB16	BLP	Retail	6	7 FT	Yes	Yes
IB17	BLP	Craft Seller	27	1 FT	No response	Yes
IB18	TR	Craft Seller	4 to 5	1 FT	No, also sell vegetables	Yes
IB19	TR	Craft Seller	11	1 FT	Yes	Yes
IB20	TR	Craft Seller	19	1 FT	Yes	Yes except when it is raining
IB21	TR	Craft Seller	25	1 FT	Yes	No, depends on health.
IB22	TR	Craft Seller	26	1 FT	Yes	Yes
IB23	TR	Craft Seller	30	1 FT	Yes	Yes
IB24	TR	Craft Seller	28	1 FT	No, pensioner	Yes
IB25	PR	Craft maker & seller	10	1 FT	Yes	Yes
IB26	PR	Craft Seller	15	1 FT	Yes	Yes
IB27	PR	Craft Seller	4	1 FT	Yes	Yes
IB28	PR	Retail	4	1 FT	Yes	Yes
IB29	PR	Craft Seller	5	1 FT	Yes	Yes but not operating on Sundays
IB30	WR	Craft Seller	8	5 FT/5–10 PT	Yes	Yes

Legend: GR — Graskop, WR — White River, PR — Pilgrims Rest, BVW — Bridal Valley Waterfalls, LCW — Lone Creek Waterfalls, MMW — Mac Mac Waterfalls, GW — God's Window, WV — Wonder View, BLP — Bourke's Luck Potholes, TR — Three Rondavels — TR, Staff reduced since COVID-19: FT — full time, PT — part-time.

Source: Authors

and many have been in operation for more than 20 years and are typically the main source of household income. Interviewees in this group were selected from different locations along the Panorama Route, representing the major attractions as well as others operating in clusters along the road. All interviews focused on route development, local impacts and challenges. Interviewees from the private sector were also asked about their views concerning the government's role in the development of the route. Thematic analysis was applied to identify topics discussed during the interviews.

4. Results

The results are organised into three sub-sections, each dedicated to perceptions of one of the three groups of stakeholders: the public (government) sector, formal businesses, and informal businesses.

4.1. Public Sector Stakeholders

As with other route tourism initiatives in different parts of South Africa, policy initiatives and activities of several provincial and local agencies impact the development of tourism linked to the Panorama Route. The Panorama Route itself has existed for a long time, albeit not called a route and without route branding. The interviewees confirmed its importance for the development of tourism in the province: according to GO1,"it is the main attraction after Kruger National Park". From the perspective of the public sector the Panorama route was viewed a successful initiative for tourism development. As interviewee GO4 pointed out, "when tourists travel along the route they support jobs, the economy, they bring money into the area". The benefits were recognised by formal businesses — local hotels, restaurants, and guest houses — as well as informal businesses. Community impacts were seen to result from development priorities within local integrated development plans, which include support systems for making business opportunities in tourism available to emerging (Black) entrepreneurs (GO4). The interviewee from the MTPA (GO5) indicated that small businesses benefited from the organisation's marketing initiatives. In general, according to the representatives of the public sector, there was involvement and collaboration with other stakeholders from the private sector and local communities regarding ways of spreading the benefits of the route to local communities, including alleged empowerment of women in the local tourism industry, which would be disputed by other stakeholders.

However, according to interviewee GO6, economic benefits generated by the route are mainly concentrated at Graskop and manifested by the expansion of local accommodation establishments and restaurants, the construction of the Graskop Gorge Lift and Skywalk. In contrast, the town and surroundings of Sabie did not benefit much because of poor destination management, the bad condition of roads and the lack of water and electricity. The town of Pilgrim's Rest was also considered to be deriving much fewer spillover benefits from the Panorama Route. According to GO5, the development of the Panorama Route is faced with a number of challenges. The first one is the lack of maintenance of roads and attractions along the route. Owing to inadequate investments by the Department of Public Works and failure to upgrade local roads by the Thaba Chweu Local Municipality (TCLM) had a negative impact on the towns of Sabie, Lydenburg, and Graskop. The majority of tourist attractions along the route are located within TCLM, which is has one of the worst records in the province as regards financial mismanagement (Giddy, Rogerson & Rogerson, 2022).

Another challenge is associated with crime and consequences of community protests. According to interviewee GO6, "crime that takes place along the route, that affects our international and national tourists…. We have heard recent incidents against tourists coming to visit the Panorama route… There was an elderly couple from Germany [who] were hijacked there". Interviewee GO5 said that "from time to time we have social unrest, people picketing". These protests are often accompanied by road blockades, which interrupt operations of local businesses and prevent them from being able to receive incoming tourists. The provincial government sought to combat crime along the route by organising different stakeholders into a safety forum and introducing tourism safety monitors.

The public sector stakeholders acknowledged that the expansion of the Panorama Route was also stifled by a skills shortage, which was likely to intensify as tourism demand grew. The lack of links between the tourism industry and training colleges was also perceived as a problem. Since not enough has been done to increase the pool of skilled employees and the services offered have often been substandard, the province's competitiveness in the field of tourism has suffered.

Another problem mentioned by the public sector stakeholders had to do with community land claims to several of the route's key attractions, most notably the Blyde River Canyon Nature Reserve, which has been claimed by several communities. Finally, certain attractions along the route undergo gradual deterioration (sometimes, as is the case with the waterfalls, because tourists ignore local regulations) and no new tourism products are being developed, which translates into fewer return visits: "the route is old now, everybody has seen God's Window, Bourke's Luck Potholes, so people returning to the area want to see new attractions

but in the last 10–15 years there has been no new development along the route… so it's become stagnant (GO4).

In summary, the public sector stakeholders identified a number of problems that had a negative impact on the development of the Panorama Route, including the poor condition of provincial and municipal roads, rising crime, community protests, unresolved land claims and a skills gap.

4.2. Formal Business Stakeholders

Most respondents in this group were fairly familiar with the Panorama Route and its geographical boundaries. The critical importance of the route for the provincial economy was recognised by one tour operator: "The GDP of Mpumalanga comes from the Lowveld and the Lowveld is Kruger National Park and the Panorama Route" (FB4). Formal businesses generally understood the complexities associated with the route's management, which involves different stakeholders: "Everyone is allowed to participate in the tourism industry, which means everyone is responsible for the management of the Panorama Route" (FB3). Practically all interviews in this group agreed that the development of the Panorama Route was beneficial to their businesses and to local communities across the region. The majority of formal businesses indicated that they benefited from the route as the second most visited attraction in the province after Kruger National Park. According to one accommodation provider (FB7), "When the Panorama Route is busy, it sustains a lot of local tourism entrepreneurs. They give people the opportunity to be creative and find ways to market and sell products. I believe that the busier the route is, the more sustainable it is for local tourism entrepreneurs".

The main benefit for local communities was income from employment opportunities in tourism along the Panorama Route. According to FB17, "People who stay here get employment opportunities, nothing more". There are also opportunities for informal businesses that sell craft products: "If you come to the Panorama Route, there are stores and roadside kiosks with people selling stuff" (FB4). The respondents also mentioned the reduction of local poverty as an outcome of tourism flows along the Panorama Route; providing opportunities for local employment was the most important contribution of formal businesses to local communities: "When it comes to employment opportunities, we prioritise local people" (FB1). Interviewee FB19 said: "We pay community dividends annually through the Communal Property Association. The dividends are paid to the community that we are operating on". Speaking about indirectly contributing to poverty reduction, a tour operator with over 20 years' experience (FB4) said: "we promote the region and more people come, more jobs are created, more beds and restaurants are filled". The stakehold-

ers in this group generally agreed that the route was important, continued to grow and they recognised benefits for their own businesses as well as positive spillover effects for local communities.

Respondents from formal businesses appreciated additional benefits associated with the maintenance of the route infrastructure and the cleaning of attraction sites, which offered additional employment opportunities for members of local community along the route and stressed that these attractions required appropriate conservation/preservation measures. One attraction owner (FB3) said: "Let's keep the attraction for future generations, because without them, there will be no Panorama route".

Representatives of the formal business sector also realised that the benefits of the route were not distributed equally along its course. Graskop was seen as a 'tourism hotspot' and derived most of the benefits: "Everything turns around tourists in Graskop, the entrance to the Panorama route" (FB14). In contrast, Lydenburg was regarded as the area benefitting the least from tourism along the route. The town's decline was believed to be the result of a high rate of local crime and of inadequate road maintenance. A Lydenburg restaurant owner (FB26) observed that "At the moment our town is getting passed by via Nelspruit; tourists don't come to this side anymore because the roads are very bad".

For the majority of respondents in this group, the role of provincial government was of central concern. Its performance was generally assessed negatively, with criticism levelled at several matters. An established tour operator (FB4) expressed opinions shared by many other respondents representing formal businesses: "The government's role is to create a conducive environment for people to come in and develop. A conducive environment means that basic services must be delivered. How can an investor go and build something in a place that does not have water? Roads are closed and people cannot travel on them … there is a high rate of unemployment so that will directly impact you, when they have blocked the roads how do people get to your attraction? The government has not played a big enough role in safeguarding and allowing investors into the area".

These negative perceptions of the provincial government are the consequence of its poor performance in dealing with the infrastructure, unemployment and crime and its concession policies, which have deterred private sector investors: "there is a high rate of crime and the roads are full of potholes" (FB24). Formal businesses mainly complained about the fact that the government did not maintain the roads in good condition, as a result of which customers/tourists found it difficult to reach them. There are also problems with the provision of basic utility services. According to a tour operator manager (FB24), the provincial government has been a "hindrance to business".

From the perspective of formal businesses, the main challenge inhibiting the development of the Panorama Route is the lack of proper road maintenance. A number of respondents criticised the local municipality of Thaba Chweu, which has neglected its upkeep efforts in recent years: "They could clean the town, clean the area along the road, and make this place beautiful again as it was 20 or 30 years ago" (FB21). An accommodation provider (FB26) said: "Fix the roads, tourists cannot travel here and the place is dirty, get things in place, Thaba Chweu must keep this place clean". The poor state of roads was not the only infrastructural shortcoming pinpointed by the formal business respondents. A restaurant owner in Sabie (FB10) mentioned issues with the provision of water and electricity in Sabie and Lydenburg: 'last year [2021] in December we stayed for 4 days without water and December is our peak season; the supply of electricity is unstable".

Another problem criticised by business owners was poor marketing of Mpumalanga as a whole and of the Panorama Route in particular. They were highly critical of insufficient destination marketing activities undertaken by the Mpumalanga Tourism and Parks Agency (MPTA). One accommodation provider based in Hazyview (FB7) compared the inadequate destination marketing of Mpumalanga with that of other South African provinces: "Mpumalanga no longer markets itself. They think that everyone knows what Mpumalanga has to offer. In the province of KwaZulu-Natal everywhere you will see signs along the roads, showing what you can see or do in and around it."

In summary, according to formal business stakeholders, the main challenges preventing the growth and development of the route include inadequate road and infrastructure maintenance and poor marketing, which constrain their ability to create new employment opportunities for local communities.

4.3. Informal Business Stakeholders

An immediate difference was observed between formal and informal business owners regarding their knowledge of the Panorama Route. Whereas interviewees in the first group were fairly familiar with the Panorama Route and its course, informal business respondents were less aware of the route as a whole and mostly referred to its attractions and were more concerned about the allocation of trading places enabling informal entrepreneurs to conduct their activities at particular locations. The majority of informal business owners had limited knowledge about which organisations were responsible for the management of the route. Asked about this aspect, a craft seller interviewed at Pilgrim's Rest (IB26) said: "I don't know. Maybe someone powerful and with experience concerning the road".

There are many informal businesses along the Panorama Route, including craft stores located next to local or provincial roads in towns like Graskop and Pilgrims Rest, or in the vicinity of tourist attractions such as parks or waterfalls. According to interviewee IB6, craft sellers relied mostly on international tourists interested in purchasing local souvenirs. Half of the respondents in this group said their businesses depended on local communities as sources of art and craft goods: "I get a lot of my curios from local sculptors and especially those who are coming from Zimbabwe to sell to us" (IB27). Others did not maintain links with local communities: "A lot of the things that I sell here I got from Johannesburg" (IB26). How much informal businesses contribute to poverty alleviation in their local communities depends on how well they perform: "When my business is doing very well, I manage to donate the poor in church." (IB3). The majority of self-employed informal business owners said they contributed to reducing poverty by taking care of their families and obtaining art and crafts products from local producers: "I don't make these craft products myself, I get them locally then I sell here" (IB1).

While recognising these benefits, the informal business owners realised that they were not distributed equally along the route. One specific problem was the negative role played by tour guides who often discourage tourists from purchasing goods from local craft sellers. A respondent interviewed at the Three Rondavels (IB24) said: "It does not benefit. As you have been sitting here you can see no one has come to get something from us. After viewing the mountain, tourists get on the bus and leave. To be honest… this is the fault of tour guides, who tell them not to get anything from us and instead buy in curio shops in town". Owners of these shops pay a commission to tour guides for bringing customers to their shops.

Critical opinions were also voiced about entrance fees for accessing attractions along the Panorama Route. According to craft sellers, increasing charges discourage tourists from purchasing their goods. Until 2009, all Panorama Route attractions could be accessed for free; charges introduced in 2009 have been regularly increased: "My business does not benefit — every 5 to 6 months they increase entrance fees, so rather than coming and supporting us, tourists already spend a lot at the gate" (IB15).

The informal business owners also complained that only small part of the benefits from the route actually reached local communities: One respondent (IB15)said: "even if the park can make money from what they collect at the gate, they don't do anything for the local community, it goes straight to their pockets. They do not even fix the road… there are no opportunities for locals to benefit from tourism".

Several issues and challenges identified by formal businesses were also mentioned in interviews with informal business entrepreneurs. For example, a respondent operating in Lydenburg (IB26) complained about the town's demise as a con-

sequence of inadequate infrastructure and road maintenance: "I used to have lot customers traveling by buses, but now buses don't even go through Lydenburg they just go to Kruger National Park" Several attractions, e.g. God's Window, had inadequate water supply, limiting the use of ablution facilities on site: "the restrooms are unclean and that this needs to be rectified right away" (IB13). What was particularly disappointing was the fact that entrance fees paid at God's Window's were to be used to pay for water delivery to the site, which did not happen.

The main infrastructural challenge identified by the informal entrepreneurs was the lack of appropriate physical facilities where they could run their businesses. A seller of souvenirs and curios at God's Window (IB15) said: "I believe that the current infrastructure needs to be improved". Critical comments were also made about structures provided by the provincial government: "The structure is not well built, it is cracking, and is too small to accommodate two people" (IB22). A craft seller (IB23) in a new building built by MTPA said: "when tourists come from viewing the Three Rondavels, they think this building is the bathroom". Structures located at the waterfalls are also in a poor condition: "This store is not well built. When it is cold, it is even worse inside the building and when it's raining the souvenirs and curios are also getting wet. The place is not safe and not protected, criminals often come and steal our souvenirs and curios' (IB6). To protect their goods from rain craft sellers have to use large plastic sheets making it difficult for tourists to see them.

Interestingly, compared to strongly negative views expressed by formal business owners, informal entrepreneurs assessed the role of the provincial government more positively. Many of them appreciated the provincial government for allowing them to operate and sell goods along the Panorama Route and in the parks: "They have played their role because without them we would not be here and the Panorama route" (IB26). They were also grateful for stores/shelters built next to different route attractions: "The provincial government has built this building here" (IB2). In contrast to formal business owners, several respondents from the informal business sector appreciated assistance offered during the COVID-19 crisis.

Nonetheless, several areas in which the involvement of the provincial and local government could be improved were identified. Suggestions included better maintenance of roads and tourist attractions so that tourists could reach local businesses more easily as well as renovation of shelters and structures for informal businesses: "Even the parking lot inside the park is not well built, and a person in a wheelchair cannot get from it to see the waterfall up there" (IB6). The general expectation, expressed by interviewees from the formal and informal business sector, was that the government should do what they are supposed to do in order to allow businesses to prosper: "They should change the way they operate, they need

to work hard and fulfil the purpose of their job descriptions as they work for the government, so that all our things can go well" (IB29).

As can be seen from the above analysis, formal and informal businesses differ in their assessment of the role played by the provincial and local government in the development of the route. The majority of formal business respondents highlighted were critical of the provincial and the local government (Thaba Chweu) and were failing to develop the Panorama Route. In contrast, informal business owners gave some credit to the provincial government for building structures where they can sell their crafts and allowing them to sell crafts next to the attractions along the Panorama Route. Both groups of respondents agreed that local government failed in its most basic task of providing and maintaining essential infrastructure and services.

5. Conclusions

The development of existing tourism routes and the creation of new ones in South Africa is increasingly becoming a central element of place-based development planning. Route tourism depends on local tourism assets and maximises their opportunities for local economies. One of the key lessons resulting from the experience of route tourism planning is the need for different stakeholders to collaborate. The study described in the article documents the complexity of the planning process and different perspectives that particular groups of stakeholders have in this regard. Views expressed by informal tourism business entrepreneurs are especially relevant in the context of national government initiatives geared towards a greater involvement of Black-owned businesses in the mainstream tourism economy.

As indicated above, in some respects the views of public and private sector stakeholders are similar, while in others they differ. Similarities and differences were also revealed between the groups of (nearly all white-owned) formal businesses and (Black-owned) informal tourism enterprises. Not surprisingly, government stakeholders had the most positive opinions about the route's development and of its local impacts, admitting that a number of challenges still need addressing, such as inadequate infrastructure and road maintenance, crime, lack of skilled employees, and the need for new product development to sustain the local tourism economy along the route. The views of private sector stakeholders diverged on many points from those of government stakeholders. According to formal sector businesses the route's development and its local impacts are not always supported by the provincial or local government. In many respects, the government was seen

as the 'problem' rather than the provider of solutions. Most critical comments concerned inadequate service provision, especially water and electricity, and the dismal state of road maintenance. All three groups recognised that benefits derived from the Panorama Route were not distributed equally. Interestingly, informal entrepreneurs proved to be less informed about the route and its development in comparison with formal business owners or government stakeholders. However, they appreciated the fact that thanks to some government support, they were able to operate their small businesses along the route. At the same time, they berated the government for the poor quality of the structures provided to them. Like the formal sector stakeholders, the informal business owners also are impacted negatively by the problem of water supply and inadequate road maintenance, which makes it difficult for tourists to reach their businesses.

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Planowanie tras turystycznych, lokalne skutki i wyzwania: opinie interesariuszy zaangażowanych w funkcjonowanie trasy Panorama Route w RPA

Streszczenie. Na całym świecie można dostrzec rozwój inicjatyw związanych z tworzeniem tras turystycznych. Trend ten, będący częścią szerszych działań w ramach rozwoju turystyki wokół społeczności lokalnych, daje się zaobserwować także w RPA. W niniejszym artykule przeanalizowano opinie kluczowych interesariuszy związanych z trasą Panorama Route położoną w prowincji Mpumalanga w RPA. Dane na temat planowania trasy, jej wpływu na życie lokalnych społeczności oraz wyzwań z nią związanych zebrano podczas 63 wywiadów jakościowych przeprowadzonych w 2022 roku z przedstawicielami sektora rządowego i prywatnego. Oprócz wspólnych spostrzeżeń można było zaobserwować różnice w podejściu do pewnych kwestii przez poszczególne grupy respondentów. W wielu przypadkach przedstawiciele władz (zarówno regionalnych, jak i lokalnych) byli postrzegani jako problem, a nie ci, którzy zapewniają rozwiązania. Podkreślono również, że korzyści wynikające z istnienia trasy nie były rozłożone równomiernie na całym jej przebiegu. Różne perspektywy interesariuszy prezentowane podczas wywiadów świadczą o tym, jak złożony jest proces planowania tras turystycznych.

Słowa kluczowe: trasy turystyczne, planowanie tras turystycznych, wpływ na rozwój lokalny, perspektywy interesariuszy, Panorama Route, RPA

Studia
Periegetica
3(43)/2023

ISSN 2658-1736, https://journals.wsb.poznan.pl/index.php/sp
s. 149–168, https://doi.org/10.58683/sp.570

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Sustainability of Digital Marketing Strategies for Driving Consumer Behaviour in the Domestic Tourism Industry

Abstract. This study examines the effectiveness and sustainability of digital marketing strategies for driving consumer behaviour in the domestic tourism industry in South Africa. Using findings from 13 face-to-face interviews with tourism marketers and a questionnaire survey of 401 domestic tourists, the study analyses preferences of tourism marketers and tourists regarding digital marketing strategies and how they influence tourists' travel decisions and their use of digital platforms Furthermore, digital marketing was found to affect tourists' decisions to engage in domestic tourism. For this reason, tourism stakeholders must constantly adapt their digital marketing strategies to stay abreast of the changing trends in the use of technology, while strategies of tourism destinations should be geared towards greater competitiveness, sustainability and long-term recovery.

Keywords: consumer behaviour, digital marketing, domestic tourism, sustainability, South Africa

Article history. Submited 2023-05-13. Accepted 2023-06-02. Published 2023-07-27.

1. Introduction

Tourism is a major business and contributes significantly to the economic prosperity of many contemporary nations and destinations (Lekgau, Harilal & Feni, 2021; Lock, 2022). In South Africa, tourism has, over the years, been one of the key economic sectors. It has significantly contributed to the country's GDP, job creation, poverty alleviation (Stats SA, 2020; 2022), infrastructural development and heritage and culture preservation. International tourism in South Africa experienced a dramatic decline in 2020 due to the Covid-19 pandemic, with foreign tourist

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arrivals falling by 33.7% from 1,301,855 in March 2019 to 863,232 in March 2020 (Stats SA, 2020).

Like most African countries, before the Covid-19 pandemic, South Africa relied more on international tourism than domestic tourism. Given the decline in international arrivals, Chamboko-Mpotaringa and Tichaawa (2021a) and Mzobe, Makoni & Nyikana (2022) suggest that domestic tourism should be encouraged to offset losses caused by the decline in international tourism. The popularity of domestic tourism has increased in recent years (Bama & Nyikana, 2021; Opute, Irene & Iwu, 2020). Latest studies show that more and more people are choosing to travel domestically for leisure, vacation, to visit friends and relatives and to explore different places (Dube-Xaba, 2021; Matiza & Kruger, 2022). Many other countries nations have relied on domestic tourism to mitigate the significant decline in international tourism (OECD, 2020).

Despite South Africa's potential as a tourist destination, because of its overreliance on revenue from international tourists since it became a constitutional democracy in 1994, the country's domestic tourism has not been functioning at its best (Mzobe, Makoni & Nyikana, 2022). In order to change this situation, the National Tourism Sector Strategy (NTSS) was formulated to support a sustainable tourism economy, which sets out a strategy for domestic tourism growth (National Department of Tourism, 2021). As a result, South Africa has launched aggressive marketing strategies including campaigns like 'Sho't left', 'Buy now — travel later', 'Whatever you are looking for, it is here', 'We are open' and 'Live again' as strategies to promote its domestic tourism (Lekgau, Harilal & Feni, 2021; Mzobe, Makoni & Nyikana, 2022; National Department of Tourism, 2021). The campaigns encouraged all South Africans to participate in domestic tourism by stimulating local tourism activities (Lekgau, Harilal & Feni, 2021). In view of challenges facing domestic tourism, such as unemployment and inequality, the campaigns were designed to offer South Africans cheaper and more affordable travel options (Mzobe, Makoni & Nyikana, 2022). Additionally, tour operators offered flexible travel savings options like participation in travel stokvels[1] (Adinolfi, Harilal & Giddy, 2021).

Despite domestic tourism's contribution to the economy, environment and society, the industry has a long history of being overlooked compared to international tourism (Bama & Nyikana, 2021; Pratt et al., 2010). Previous studies on domestic tourism have been limited to investigating travel patterns, intentions and motivations (Bama & Nyikana, 2021; Matiza & Kruger, 2022; Mzobe, Makoni & Nyikana, 2022) and failed to address the critical issue of technology adoption and its related

[1] In South Africa, a stokvel is an invitation-only club of twelve or more people serving as a rotating credit union or saving scheme.

implications. In Woyo's discussion on the long-term viability of efforts to foster domestic tourism as a post-Covid-19 recovery strategy in a distressed destination, Woyo (2021) explored possibilities of implementing technology in tourism. Although some researchers have acknowledged the importance of technology in tourism, studies have focused on issues such as perceptions, intentions to adopt technology, trends and customer satisfaction (Briez, Ezzat & Abd Eljalil, 2022; Chamboko-Mpotaringa & Tichaawa, 2023; Garner & Kim, 2022; Vishwakarma, Mukherjee & Datta, 2020). Studies failed to explore the sustainability of using digital marketing strategies to influence consumer behaviour.

Global competition for consumers is a challenge for marketers in the tourism industry. Unless a destination has distinct features coupled with a strong image and brand positioning, it is unlikely to be successful in attracting visitors (Shi et al., 2022). Advances in digital technology and the growing accessibility of the internet globally have resulted in the emergence of digital platforms and new marketing avenues (Buhalis, O'Connor & Leung, 2023; Gupta, 2019), which have facilitated the development of digital marketing strategies that influence tourists' travel decisions. Additionally, digital marketing creates new dynamics between customers and marketers (Buhalis, O'Connor & Leung, 2023). Bozhenko, Polyakova & Dubinina (2023) emphasise the importance of customer experience and the creation of a value proposition when using digital marketing strategies.

However, promoting domestic tourism can be challenging. Many people may be unfamiliar with their country's diverse and unique tourism offerings and destinations. Despite studies reporting the growing use of digital marketing strategies in tourism (Kontis & Skoultsos, 2022; Pereira, 2019; Wahyuningsih et al., 2022), thorough research on the effectiveness and sustainability of using digital marketing strategies to influence consumer behaviour is lacking. Increased optimism about the future of domestic tourism may be attributed to a confluence of technological advancements and shifts in consumer behaviour. The following study examines the effectiveness and sustainability of digital marketing strategies in promoting domestic tourism. In particular, the author's goal was (1) to investigate how effective digital marketing strategies are in encouraging consumers to engage in domestic tourism; (2) to identify factors that motivate tourists to use digital marketing tools and platforms; and (3) to analyse how sustainable digital marketing strategies are for the purpose of long-term promotion of domestic tourism.

2. Literature review

2.1. Digital marketing

Technology has become a vital factor in every aspect of doing business, including marketing. A number of arguments have been presented in favour of a shift away from traditional methods (such as print media) to digital marketing strategies (such as the use of websites, social media, search engines, and travel applications) to promote products and services (Ababneh, 2022). Scholars such as Deb, Nafi & Valeri (2022) and Nyatsambo, Phiri & Mashingaidze (2022) argue that digital marketing strategies are more sustainable than traditional marketing.

From a supplier's perspective, digital marketing strategies are sustainable because they are usually cheaper and more environmentally friendly than traditional methods. Digital marketing reduces the need for physical materials such as brochures, newspapers, flyers and billboards. Digital marketing allows businesses and tourism destinations to reach a wider audience at a relatively cheaper cost and target specific consumer groups by taking advantage of demographic, geographic and behavioural data (Anwar et al., 2021; Salehi et al., 2012). Targeting specific consumers makes it easier for businesses and tourism destinations to tailor their campaigns and reach them at the right time, which results in higher conversion rates and return on investments (Magano & Cunha, 2020). Digital marketing allows businesses to communicate personally with customers (Pai et al., 2020), which can lead to increased engagement and sales (Garner & Kim, 2022). Another advantage of digital marketing is the fact that the effectiveness of digital marketing campaigns can be tracked and measured in real-time, allowing businesses to make data-driven decisions, improve the effectiveness of campaigns and optimise marketing efforts (Buhalis & Sinarta, 2019). Customers' ability to post online reviews can help build and boost the reputation of tourism destinations and businesses and attract new customers.

Customers can also benefit from digital marketing. For example, social networking sites help them to participate in online communities, like and comment about products, post reviews and share their personal experiences (Fodranová, Labudová & Antalová, 2022). Studies indicate that consumers are highly likely to engage, like, comment and share content compatible with their tastes and needs (Wengel et al., 2022). Hashtags make it easier for customers to filter content. Digital marketing strategies are available 24/7 and enable instant and two-way communication, thus fulfilling modern consumers' need for instant gratification (Lou & Xie, 2021). Tourism is a service-oriented industry. Unlike product consumers, who may not need to constantly communicate with suppliers as they can evaluate

the product's performance before purchase, service consumers are more likely to engage in close interactions with service providers in the production and consumption phases of the service (Wengel et al., 2022).

On the other hand, some digital marketing strategies can be expensive to implement, especially for new entrants into the market. Examples include search engine optimisation, pay-per-click advertising, development of websites and travel applications, all of which require skilled personnel and subscriptions. Since such strategies are technology-dependent, technical glitches, load-shedding[2] and power cuts can affect the efficiency and effectiveness of digital marketing strategies (Jansson, 2022). With rapid technological changes, current digital marketing strategies can become obsolete if not adequately developed.

2.2. Consumer behaviour

With the rise of the internet and increased use of mobile devices, consumers are increasingly turning to digital marketing tools and platforms to search, evaluate and purchase products and services (Febrianti et al., 2022). This has led to a shift in the way consumers make decisions, with digital marketing playing a crucial role at the consideration and evaluation stages (Nguyen Phuc & Bui Thanh, 2022). Tourists frequently use various digital marketing tools and platforms to choose tourism services. For example, when planning a vacation, they may ask co-workers, friends, relatives, or other travellers on social media to recommend affordable holiday destinations. Alternatively, they can use search engines like Google to reach destination websites or review sites such as Trip Advisor (Pereira, 2019). Previous experience of using digital technologies have made tourists more experienced, more demanding, more active and more willing to adopt new technologies (Gajdošík, 2022).

Marketing to modern tourists is much more challenging than marketing to traditional tourists because characteristics of modern tourists keep changing, which has implications for the effectiveness and sustainability of marketing strategies (Önder, Gunter & Gindl, 2020). Modern-day tourists contribute to creating information rather than being passive tourists. Thanks to digital platforms such as Facebook, WhatsApp and Twitter, tourists can easily interact with each other by gossiping, uploading, sharing, liking, commenting and following photographs, videos, blogs, audio and online reviews (Mariani, Ek Styven & Ayeh, 2019). Mar-

[2] Loadshedding, or a rolling blackout, is an intentionally engineered electrical power shutdown in which electricity delivery is stopped for non-overlapping periods of time over different parts of the distribution region. In South Africa, load shedding is done to prevent a failure of the entire system when the demand for electricity strains the capacity of the power generating system.

keting in tourism is challenging also because the decision-making process regarding tourism services is much more complex, given that tourism is an experiential activity involving complex emotions (Hosaini & Rojhe, 2020; Tseng & Wei, 2020). It is, therefore, crucial for marketers to choose the right marketing strategy when promoting tourism products and services.

The study of consumer behaviour in various tourism contexts has generated a lot of research attention (Ballantyne, Moutinho & Rate, 2018; Mathew & Soliman, 2021; Mpotaringa & Hattingh, 2019). The findings of Magano and Cunha (2020) and Mathew and Soliman (2021) suggest that digital content marketing influences consumer behaviour. Setiawan et al. (2018) agree that tourists make travel decisions after being stimulated by online marketing strategies. It is worth noting that consumer behaviour is not static and can change for different reasons. Therefore, needs and expectations of the same tourist can change at different stages of their decision-making process. If digital marketing managers could identify common factors influencing the use of digital marketing platforms and understand what motivates consumers and consumer purchase behaviour, they could reach a large customer base and convert users into purchasers (Wang, Japutra & Molinillo, 2021; Wang, 2017).

3. Methodology

3.1. Study design

The study examined the sustainability of digital marketing strategies for the purpose of encouraging consumers to engage in domestic tourism. The study adopted a mixed research methodology to achieve its objectives and answer the following research questions: how effective are digital marketing strategies in encouraging consumers to engage in domestic tourism?; what factors motivate tourists to use digital marketing tools and platforms? How sustainable are digital marketing strategies for the purpose of long-term promotion of domestic tourism? Data for the study were collected in two stages. During the first one, which took place between June and July 2021, thirteen in-depth semi-structured interviews were conducted with tourism marketers from the Free State province. The respondents had more than five years of experience as tourism marketers. Interview data were taken into account when designing the questionnaire to be used in the second stage of the study.

The second stage, which took place in September and October 2021, involved a questionnaire survey of domestic tourists visiting the Free State province. To qualify as domestic tourists, respondents had to be visiting the Free State province

for leisure and recreation purposes for a period not exceeding 60 nights (Stats SA, 2020). A stratified, non-probability, purposive sample was selected from five municipalities of the Free State province, each representing one stratum (Díaz-Meneses, 2019). The Free State province is famous for its Big Five game animals[3], geographically spread throughout its five municipalities: Mangaung — the district's metropolitan municipality, and four district municipalities — Fezile Dabi, Lejweleputswa, Xhariep and Thabo Mofutsanyana.

The choice of respondents for the interviews was determined by their availability, ease of access and willingness to participate. They were selected based on who they are, what they do and their expected ability to answer interview questions (Saunders & Lewis, 2012). The marketers were purposively selected because of their association with tourism marketing and marketing experience and to represent all municipalities of the Free State province. They had to be familiar with digital marketing tools and platforms used to influence consumer behaviour and have knowledge regarding their effectiveness. Domestic tourists for the questionnaire survey were approached at popular tourist attractions in each municipality. A screening question was used to ensure that only residents of South Africa travelling for leisure participated in the survey. According to official statistics, 410,000 domestic tourists arrived in the Free State province in 2019 (Stats SA, 2020). However, their distribution within the province is uneven, as can be seen in Table 1.

Table 1: Domestic tourist arrivals, interviews conducted and completed questionnaires by municipality

Municipality	Tourists arrivals (% of n=410000)	Conducted interviews (% of n=13)	Completed questionnaires (% of n=401)
Mangaung Metropolitan Municipality	168920 (41.2)	5 (38.5)	165 (41.2)
Thabo Mofutsanyana District Municipality	103730 (25.3)	3 (23.1)	102 (25.4)
Xhariep District Municipality	56580 (13.8)	2 (15.4)	55 (13.7)
Fezile Dabi District Municipality	45510 (11.1)	2 (15.4)	44 (11.0)
Lejweleputswa District Municipality	35260 (8.6)	1 (7.7)	35 (8.7)

Source: Authors based on fieldwork

The number of respondents from each municipality approximates the number of domestic tourist arrivals in 2019.

The interviews were based on a set of pre-determined open-ended questions created after analysing the relevant literature. Each interview lasted about 35 minutes. The survey questionnaire contained questions about the socio-demographic characteristics of respondents and those designed to measure the study variables.

[3] The lion, leopard, black rhinoceros, African bush elephant, and African buffalo.

The study variables and indicators are shown in Table 2. The data collection instruments were tested (three pilot interviews and a pilot survey involving 20 domestic leisure tourists) to check for appropriateness, ease of administering, reliability and validity. Respondents who participated in the pilot phase were excluded from the actual study. The interviews were transcribed using Otter.ai. For consistency, data were coded by a single researcher. SPSS V27 (Statistical Package for Social Sciences software, version 27) was used to analyse quantitative data with the aid of a statistician. Data analysis included the calculation of descriptive statistics and the application of inferential statistics to test the reliability of the constructs.

Table 2: Variables and indicators

Variables	Indicators
Domestic tourists' preferences regarding digital marketing strategies	Image-based marketing strategies, text-based marketing strategies, video-based marketing strategies
Platforms that influenced travel choices	Blogs, consumer review sites, destinations and tourism businesses websites, specialised search engines, online sharing economy platforms, social network sites, travel applications
Motivational factors affecting the use of digital marketing platforms	Benefits derived from using digital marketing platforms, the ease of use, information quality, the quality of the digital marketing platforms, service quality received

Source: Adapted from Dedeke (2016), Dyk, Slabbert & Tkaczynski (2020), Labanauskaitė, Fiore & Stašys (2020), Pai et al. (2020) and Singh and Srivastava (2019)

3.2. Sample description

The characteristics of the respondents are shown in Table 3 and Table 4.

Table 3: Demographic characterstics of the interviewees (n=13)

Characteristics	Category	Percentage of the total
Sex	Female	53.8
	Male	46.2
Age	31-40	53.8
	41-50	23.1
	51-60	23.1
Stakeholder	Provincial government	38.5
	Local government	23.0
	Private	38.5
Position	Marketing manager	46.2
	Marketing officer	53.8

Source: Authors based on fieldwork

Table 4: Demographic characteristics of survey respondents (n=401)

Characteristics	Category	Percentage of the total
Sex	Female	55.3
	Male	44.7
Age	18-30	35.9
	31-40	32.7
	41-50	16.7
	51-60	7.7
	Over 60	7.0
Monthly income	R1000 and below	23.3
	R1001-R5000	15.3
	R5001-R10000	10.7
	R10001-R15000	13.7
	R15001-R20000	12.9
	Above R20000	24.1
Province of permanent residence	Free State	33.2
	Gauteng	28.9
	Northern Cape	15.2
	Limpopo	6.2
	Eastern Cape	5.6
	North West	4.5
	Kwa-Zulu Natal	2.7
	Western Cape	2.7
	Mpumalanga	1.0

Source: Authors based on fieldwork

4. Findings and discussion

To determine the effectiveness and sustainability of digital marketing strategies, it is essential to determine domestic tourists' preferences with respect to digital marketing strategies at different stages of their decision-making process. The effectiveness of digital marketing strategies is determined by the content and format of messages (Molina et al., 2020). Key factors include marketers' use of images, text and videos to relay messages when promoting their products and services. A closed-ended question was used to determine the respondents' preferences regarding digital marketing strategies. Results are shown in Table 5.

Table 5: Preferences regarding digital marketing strategies (n=401)

Digital marketing strategies	%
Image-based marketing strategies	26.2
Text-based marketing strategies	45.8
Video-based marketing strategies	28.0

Source:

The biggest group of respondents (45.8%) indicated that they prefer text-based digital marketing strategies, which may be indicative of their previous exposure to traditional marketing strategies such as print media. Although the literature reports a growing use of videos and images by marketers to showcase tourism destinations (Arreza, 2021; Vishwakarma, Mukherjee & Datta, 2020), the percentage of those who indicated a preference for this kind of marketing was much lower (28% and 26.2%).

This creates an opportunity that can ensure sustainability in the long run. Videos and pictures are a way of presenting less popular tourist destinations (Bama & Nyikana, 2021). Marketers could adopt differentiated marketing strategies in order to cater to different preferences and ensure long-term survival. During the interviews, some marketers said they were aware of these different preferences and were trying to accommodate them:

> The youth are starting to communicate with us more and requesting more pictures. For our marketing, we use a few words, pictures, and sometimes videos as visuals to remain competitive (R7).

> Now we are better. We had to study the customers, learn the importance of the content created and add some pictures. Instead of only having text, we now have videos and even a comment section (R13).

Respondents were asked to indicate the extent to which they agreed or disagreed with statements describing how digital marketing tools and platforms influenced their travel choices. The aim was to investigate the perceived effectiveness of digital marketing strategies in encouraging consumers to engage in domestic tourism and to identify factors that affected their use of digital platforms. Respondents were further probed on what motivated them to use digital marketing platforms. Twelve items were measured on a five-point Likert scale, which consisted of 'strongly disagree' (1-SD), 'disagree' (2-D), 'neutral' (3-N), 'agree' (4-A) and 'strongly agree' (5-SA) under two identified constructs (platforms that influenced travel choices and motivational factors for using digital marketing platforms).

The measurement tools used in the study were validated to ensure that they measured the target constructs by checking factor loading of the indicators for all the variables (Zollo et al., 2022). Cronbach's Alpha, commonly used for studies with Likert scales, was used to test the reliability of the indicators to ensure the results were valid and the study objectives were achieved (Kim & Hall, 2020).

The validity and reliability results are shown in Table 6. The Cronbach's Alpha reliability results were equal to 0.846 and 0.929, indicating satisfactory internal consistency and reliability levels (Barween et al., 2022; Hair et al., 1998). All 12 items had reasonable factor loadings of 0.4 and above (Chen & Hsu, 2001), indicating convergent validity.

Table 6: Descriptive statistics, validity and reliability

Constructs	Items	Measurement scale results (% of n=401)					Mean	Std. Dev	FL	CA
		1 SD	2 D	3 N	4 A	5 SA				
Platforms that influenced travel choices	Destinations and tourism businesses websites	10.5	13.4	19.4	23.2	33.5	3.56	1.350	0.63	0.846
	Specialised search engines	9.6	11.8	12.6	21.4	44.6	3.80	1.367	0.40	
	Blogs	14.7	20.6	21.8	21.8	21.1	3.14	1.357	0.49	
	Consumer review sites	13.0	16.5	15.5	27.0	28.0	3.41	1.384	0.40	
	Online sharing economy platforms	17.9	18.4	18.3	23.2	22.2	3.13	1.416	0.63	
	Social network sites	8.7	8.2	13.8	26.5	42.8	3.86	1.291	0.57	
	Travel Applications	9.6	11.8	12.6	21.4	44.6	3.29	1.417	0.63	
Factors that motivate tourists to use digital marketing platforms	Benefits derived from using digital marketing platforms	4.8	6.5	13.0	26.5	49.3	4.09	1.142	0.77	0.929
	The ease of use	4.3	7.5	13.3	26.4	48.5	4.07	1.141	0.82	
	Information quality	4.8	8.0	13.0	31.8	42.5	3.99	1.143	0.83	
	The quality of the digital marketing platforms	5.0	9.5	15.5	29.3	40.6	3.91	1.178	0.75	
	Service quality received	6.3	9.6	14.9	22.9	46.3	3.93	1.250	0.80	

SD: Strongly disagree; **D:** Disagree; **N:** Neutral; **A:** Agree; **SA:** Strongly agree; **Std. Dev:** Standard deviation; **FL:** Factor loading, **CA:** Cronbach's Alpha
Source:

The highest mean values can be observed for social networking sites had ($\bar{x}$ = 3.86; σ = 1.291) specialised search engines ($\bar{x}$ = 3.80; σ = 1.367) and websites ($\bar{x}$ = 3.56; σ = 1.350) while the lowest — for blogs ($\bar{x}$ = 3.14; σ = 1.357). By summing up percentages of "agree" (A) and "strongly agree" (SA) answers, one can obtain the share of respondents who thought that social networking sites (69.3%), specialised

search engines (66%) and websites had the most effect on their travel choices. According to data reported by Chaffey (2023), the global number of social media users in 2023 stood at 4.76 billion, accounting for 59.4% of the world's population and search engines are usually the starting point for any plans and decisions regarding tourism and travel (Velelo & Matenda, 2023). Websites have become authoritative sources of travel information (Deb, Nafi & Valeri, 2022). Social networking sites, specialised search engines and websites are among the most-used digital marketing platforms. This view was closely supported by the interviewees, who felt that social media had gained popularity. As one marketer noted:

> On almost every phone nowadays, there is Facebook and WhatsApp. These are common because one can easily communicate and share audio and videos with friends, family, and even strangers (R12).

Furthermore, the interviewed marketers believe that social networking sites have gained popularity because they allow tourists to document their movements, hashtags (#), geotagging and mentions.

> For social media users, if one does not post, either they are not there or lying (R12).
> We use hashtags because it helps customers to sift through information quickly and, thus it helps to drive visitors to our digital platforms (R10).

R1 expressed a need for markets to research their audience to understand on which platforms to capitalise.

> We know people spend some of their free time on phones, right? However, as marketers, we must understand how and where people spend their time. We need to understand which platforms are popular.

On the other hand, one marketer noted that traditional maps and guides are being quickly replaced by interactive mobile applications (Chamboko-Mpotaringa & Tichaawa, 2021b; Zillinger, 2020):

> People are constantly downloading apps they find valuable (R5).

Research findings show that technology and the use of smartphones have caused a radical shift in marketing and access to marketing information (Shen, Fan & Buhalis, 2022). It is therefore necessary to consider tourists' preferences regarding digital marketing in order to ensure that destinations and marketers

adopt effective digital marketing strategies that help destinations remain competitive in the long run.

The decision to engage in tourism is no longer guided by tour operators' brochures, flyers and catalogues but by digital marketing platforms, such as websites and social networking sites filled with photos of ordinary tourists (Fodranová, Labudová & Antalová, 2022). Tourists are motivated to use digital marketing tools and platforms by factors, such as content, the ability to share experiences, communicate and obtain useful information (Ababneh, 2022; Mathew & Soliman, 2021). Content provided on digital marketing tools and platforms, in particular, can be beneficial for tourists (Şengel et al., 2022). Understanding factors that motivate tourists to use digital marketing platforms allows marketers to align their marketing strategies with tourists' needs and expectations to ensure long-term survival.

As shown in Table 6, factors that motivate tourists to use digital marketing platforms had relatively high mean scores: benefits derived from using digital marketing platforms ($\bar{x}$ = 4.09; σ = 1.142); the ease of use ($\bar{x}$ = 4.07; σ = 1.141), information quality ($\bar{x}$ = 3.99; σ =1.143); service quality received ($\bar{x}$ = 3.93; σ = 1.250) and the quality of the digital marketing platforms ($\bar{x}$ = 3.91; σ = 1.178). For 75.8% of respondents (combined percentages of A and SA answers), the main motivation was the benefits derived from using digital marketing platforms. Relatively the smallest percentage of respondents agreed that they were motivated to use digital marketing platforms because of service quality received (69.2%). These findings are consistent with those presented by Sigala, Dimitrovski & Joukes (2023) and Soehardi and Thamrin (2022). It is clear that digital marketing is no longer merely an option but a necessary strategy for influencing consumer behaviour (Briez, Ezzat & Abd Eljalil, 2022). The same sentiments were echoed by some of the interviewed marketers:

> We keep customers engaged by posting relevant content (R13).
>
> We make travel recommendations to them (tourists). When we make these recommendations, they (tourists) should realise that the recommendations we are giving them are the best choices. When we have done that and have motivated them to choose the suggested package and want to travel to the destination, it means we have achieved our goal (R5).

5. Conclusion and recommendations

For many countries, domestic tourism is an industry that can help to overcome excessive dependence on other traditional economic sectors and foster economic, environmental, and social growth. Therefore, domestic tourism needs to be strengthened (Mzobe, Makoni & Nyikana, 2022). With the growing popularity of digital marketing tools and platforms and the rising reliance of domestic tourists on technology in daily life, the use of technology in marketing will only grow. Technology in marketing has shown to be successful and efficient, opening up new avenues for organisations and consumers to connect and engage with one another. Findings confirm that the interactive nature of digital platforms provides tourists with easy access to information, usually created by marketers with content based on tourists' interests.

The tourism industry has been at the forefront of embracing digital technologies. Digital technologies such as e-commerce, travel automation, provision of travel information and digital marketing have revolutionalised and resulted in incremental changes in domestic tourism and require marketers to follow new trends in marketing (Devasia, 2022). The study findings confirm that domestic tourists have embraced digital marketing tools and platforms when making travel decisions, as digital platforms influence their travel choices. Online presence has become the new face of the tourism industry (Devasia, 2022). With technology continuously developing, stakeholders should strengthen their digital presence. Marketers must develop sustainable digital marketing strategies that drive consumer behaviour in the domestic tourism industry.

Digital marketing strategies can potentially encourage consumers to engage in domestic tourism in the long term. However, to ensure that the adoption of digital marketing strategies is effective and sustainable, it is essential to understand tourists' preferences in this respect in order to choose strategies that effectively promote domestic tourism. Firstly, in light of the findings, marketers must develop differentiated marketing strategies incorporating text, videos and images. This will allow businesses to cater to the different needs of domestic tourists.

Secondly, domestic tourists' decisions to engage in tourism are influenced by their interactions and exposure to different digital tools and platforms. While digital marketing tools and platforms provide opportunities to address customer needs and effectively encourage consumers to engage in domestic tourism, there are some challenges associated with technology in tourism. These include marketers' loss of total control of content available to tourists. Another challenge is the changing needs of consumers. It is, therefore, necessary for tourism destinations, businesses and marketers to keep abreast of changes in customer preferences and technology to be able to reach tourists effectively and influence their behaviour.

Thirdly, South African domestic tourists are motivated to use digital marketing platforms mainly by their usefulness, ease of use, quality of the information provided, quality of service rendered and the quality of the digital marketing platforms. Digital marketing strategies should be designed to help customers make their travel decisions and to satisfy their needs and wants. If these expectations are satisfied, tourists will continue to use them. This means that businesses should consider implementing sustainable digital marketing practices to maximize the long-term benefits of increased domestic tourism.

Since the study sample was selected from one province, the results are not representative of the population of all domestic tourists in South Africa. Moreover, although data were collected once COVID-19 restrictions had been eased, travelling for most people was still a concern. Though several studies have been done on digital marketing, this phenomenon continues to develop, so there is a need for new studies, focusing on larger geographical areas and the influence of artificial intelligence on consumer behaviour.

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Zrównoważony rozwój cyfrowych strategii marketingowych w celu kształtowania zachowań konsumentów na krajowym rynku turystycznym

Streszczenie. W artykule przedstawiono badanie mające na celu ocenę skuteczności i długoterminowej użyteczności strategii marketingu cyfrowego do kształtowania zachowań konsumentów na krajowym rynku usług turystycznych w RPA. Na podstawie danych uzyskanych w trakcie wywiadów z 13 osobami zajmującymi się marketingiem turystycznym oraz ankiety przeprowadzonej wśród 401 turystów krajowych, autorzy analizują, w jaki sposób różne cyfrowe strategie marketingowe wpływają na wybór miejsc wyjazdów wakacyjnych przez turystów oraz ich sposoby korzystania z platform cyfrowych. Autorzy podkreślają, że podmioty działające w branży turystycznej muszą stale dostosowywać cyfrowe strategie marketingowe, aby być na bieżąco ze zmieniającymi się sposobami korzystaniu z technologii, natomiast obszary recepcji turystycznej powinny tworzyć strategie ukierunkowane na większą konkurencyjność i długoterminowy rozwój.

Słowa kluczowe: zachowania konsumentów, marketing cyfrowy, turystyka krajowa, zrównoważony rozwój, RPA

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- każda rubryka wypełniona treścią
- skróty użyte w tabeli — objaśnione pod nią

2. **Ryciny, zdjęcia, schematy, wykresy itp.** (format .tif dla bitmap, .eps dla plików wektorowych i xls lub xlsx w przypadku wykresów)
- min. rozdzielczość bitmap to 300 dpi, długość podstawy min. 125 mm
- opatrzone numerem oraz źródłem (np. *opracowanie własne*)
- pozbawione napisów: półgrubych, wersalikami, białych na czarnym tle, czarnych wypełnień, dodatkowych ramek
- z odwołaniem w tekście (np. *zob. rys. 1*, a nie: *zob. rysunek poniżej/powyżej*)
- z objaśnieniem użytych skrótów

3. **Tekst główny**
- marginesy: 2,5 cm z każdej strony
- numeracja stron — ciągła, u dołu strony
- czcionka Times New Roman z polskimi znakami, 12 pkt
- odstęp między wierszami — 1,5 wiersza
- wyróżnienia — **pismem półgrubym**
- słowa obcojęzyczne — ***kursywą***
- nazwiska użyte po raz pierwszy — pełne imię i nazwisko, kolejne przywołanie — samo nazwisko
- skróty — za pierwszym razem pełny termin, a skrót w nawiasie; dalej — tylko skrót

IV. Przypisy bibliograficzne
Według stylu APA 7 (zob. reference guide APA, https://www.scribbr.com/apa-style/apa-seventh-edition-changes/)
- Umieszczone w tekście, zawierają nazwisko autora i rok publikacji: **Jafari (2003)** lub **(Jafari, 2010)**
- Cytowanie dokładne tekstów wziętych w cudzysłów: **Jafari (2003, p. 24)** lub **(Jafari, 2003, p. 24)**
- Cytowanie **dwóch i trzech autorów** — podajemy nazwiska wszystkich autorów, a przed ostatnim wstawiamy „and" lub „&": **Smith and White (2018)**… lub **(Smith & White, 2018)** **Beggs, Ross and Goodwin (2008)**… lub **(Beggs, Ross & Goodwin, 2008)**
- **Cytowanie więcej niż trzech autorów** — podajemy nazwisko pierwszego autora i „et al.": **Jafari et al. (2018)**… lub **(Jafari et al., 2018)**
- **Brak nazwiska autora/redaktora** — podajemy kilka pierwszych słów tytułu pracy:
  - jeżeli jest to **tytuł książki, periodyku lub raportu** — kursywą: **(Guide to citation, 2020)**
  - jeżeli jest to **tytuł artykułu, rozdział lub strona internetowa** — w cudzysłowie: **(„APA Citation", 2020)**
- Cytowanie więcej niż jednej publikacji:
  - **jednego autora: Jafari (2015, 2017, 2020)** lub **(Jafari, 2015, 2017, 2020)**
  - **dwóch i więcej autorów** — należy je wymienić w kolejności alfabetycznej: **(Jafari & Black, 2010; White, Green, & Brown 2020)**
  - **jeśli autor wydał w danym roku więcej niż jedną publikację**, to po dacie należy dodać kolejne litery alfabetu, np. **(Jafari, 2014a, 2014b)**
- **Przypisy objaśniające, polemiczne, uzupełniające tekst główny** — numerowane kolejno i umieszczone u dołu strony, czcionka 10 pkt, interlinia pojedyncza.
- **Cytowanie źródeł za innym autorem** (jedynie w szczególnych przypadkach): **Jafari (2010) as cited in Black (2016)** lub **(Jafari, 2010, as cited in Black 2016)**

V. Bibliografia
Uporządkowana alfabetycznie według nazwisk autorów/redaktorów i tytułów prac niemających autora/redaktora, a jeśli jest więcej prac jednego autora, to należy je zestawić chronologicznie wg dat wydania.
- Artykuł w czasopiśmie

Zawiera: nazwisko autora, inicjały imienia, rok, tytuł artykułu (prosto), tytuł czasopisma (kursywą), tom (kursywą) i nr czasopisma, zakres stron, DOI:

Oppermann, M.J. (2000). Tourism Destination Loyalty. *Journal of Travel Research*, *39*(1), 78–84. https://doi.org/10.1177%2F004728750003900110

- Pozycja książkowa

Zawiera: nazwisko autora/redaktora, inicjał imienia, rok praw autorskich, tytuł książki (kursywą), numer wydania (w nawiasie), wydawnictwo, DOI lub URL:

Kotler, P., Bowen, J.T., Makens, J., & Baloglu, S. (2017). *Marketing for Hospitality and Tourism* (7th ed.). Pearson Education. https://doi.org/10.1177%2F0047287507303976

- Rozdział pracy zbiorowej

Zawiera: nazwisko autora rozdziału, inicjał imienia, rok praw autorskich, tytuł rozdziału (prosto), In, inicjał imienia, nazwi-

sko redaktora + (Ed./Eds.), tytuł pracy zbiorowej (kursywą), numer wydania i zakres stron (w nawiasie), wydawnictwo, DOI lub URL:

Scott, N.R., & Le, D.A. (2017). Tourism Experience: A Review. In N.R. Scott & J. Gao (Eds.), *Visitor Experience Design* (2nd ed., pp. 30–52). CABI. https://doi.org/10.1080/10645578.2016.1144023

- E-book

Mitchell, J.A., Thomson, M., & Coyne, R.P. (2017). *A guide to citation*. https://www.mendeley.com/reference-management/ reference-manager

- Rozdział z e-booka

Troy, B.N. (2015). APA citation rules. In S.T. Williams (Ed.), *A guide to citation rules* (2nd ed., pp. 50–95). https://www.mendeley.com/reference-management/reference-manager

- Cały portal internetowy korporacji/grupy/organizacji

Zawiera: nazwę korporacji/grupy/organizacji. (rok ostatniej aktualizacji, dzień miesiąca, jeśli podano). Tytuł portalu internetowego. URL:

WHO. (2014, 14 listopada). World Health Organization. https://www.who.int/

- Pojedyncza strona internetowa

Zawiera: nazwisko, inicjał autora. (rok, miesiąc, dzień). Tytuł artykułu (kursywą). Tytuł portalu internetowego. URL:

Mitchell, J.A., Thomson, M., & Coyne, R.P. (2017, January 25). *APA citation. How and when to reference*. https://www.howandwhentoreference.com/APAcitation

1.1. Editorial requirements

I. Size of manuscript
The text should contain up to 9000 words including tables and figures. For drawings, the size of one attachment cannot exceed 20 MB.

II. Required files
1. **Files with the main part of the manuscript** (without authors' data, .rtf, .doc or .docx format):
- title of the article in English and Polish
- concise and factual abstract in English and Polish, from 150 to 300 words, prepared according to structure:
  - purpose
  - methods
  - results
  - conclusions
- keywords in English and Polish (up to 5 words)
- introduction
- body text — organized into chapters/sections, each with a unique title (literature review, methods, results, discussion)
- conclusion (theoretical and practical, research limitations and future work)
- bibliography — complete list of referenced sources

2. **Files with the title page including authors' data** (.rtf, .doc or .docx format)
- the title of the article
- author's first and last name
- academic degree/title
- organization/institution (if applicable)
- ORCID number
- email address
- mailing address

3. **Figures, photos and graphics**

III. Preparing text
1. **Tabeles** (.rtf, .doc or .docx format)
- numbered consecutively and consistently using Arabic numerals
- include a caption and a reference to the data source (e.g. *own research*)
- tables should be referenced in the text by their number rather than expressions such as "above" or "below" (e.g. *cf. Table 1*, not: *see table above/below*)
- do not include blank cells
- any abbreviations used must be expanded below the table

2. **Figures, photos and graphics**
- editable (formats: .tif for bitmaps, .eps for vector files, and xls or .xlsx for charts)
- bitmaps — minimum resolution: 300 dpi, width: 125 mm
- all figures should be numbered consecutively using Arabic numerals
- for any artwork that has already been published elsewhere, indicate the original source (or otherwise state Source: *own research*)
- apply no lettering in white against black background, whether in bold or italics, and no black fills or excess frames
- if the figure is referenced in the text, use its number rather than expressions such as "above" or "below" (e.g. *cf. Fig. 1*, not: *see figure above/below*)
- provide explanations of any abbreviations used

3. **Body text**
- margins: 2.5 cm each
- continuous throughout the text, using Arabic numerals, placed at the bottom of page (footer)
- typeface: Times New Roman, 12 pts
- line spacing: 1.5 line
- highlights or emphasis: apply **bold** print
- foreign (non-vernacular) words and expressions: ***italicized***
- people's names: give full name (including all given names and last name) at first mention; for any further references – quote last name only
- abbreviations and acronyms: when first used, give the complete phrase (name), including its abbreviation in brackets; onwards — use abbreviation only

IV. In-text citations
APA style (see: APA reference guide, https://www.scribbr.com/apa-style/apa-seventh-edition-changes/)
- are placed within the text and include the author's surname and year of publication: **Jafari (2003)** or **(Jafari, 2010)**
- Direct quotes should also contain the page number: **Jafari (2003, p. 24)** or **(Jafari, 2003, p. 24)**
- **In the case of two and three authors**, all surnames should be listed with either „and" or „&" placed before the last one: **Smith and White (2018)…** or **(Smith & White, 2018) Beggs, Ross and Goodwin (2008)…** or **(Beggs, Ross & Goodwin, 2008)**
- **In the case of more than three authors** — only the first author's surname should be given, followed by „et al.": **Jafari et al. (2018)…** or **(Jafari et al., 2018)**
- **If the author/editor is unknown**, the first few words of the reference should be used:
  - **if this is the title of a book, periodical or report**, it should be italicised: **(Guide to citation, 2020)**
  - **if this is the title of an article, chapter or a website**, it should be placed in quotation marks: **("APA Citation", 2020)**
- Citing multiple works:
  - **by the same author: Jafari (2015, 2017, 2020)** or **(Jafari, 2015, 2017, 2020)**
  - by two or more authors — they should be listed alphabetically by the first author: **(Jafari & Black, 2010; White, Green, & Brown 2020)**
  - **if the author published multiple works in one year**, each work should be cited with consecutive letters of the alphabet following the year, e.g.: **(Jafari, 2014a, 2014b)**
- **Other references containing any additional comments or explanations, references to legislation**, court rulings and decisions, as well as links to websites that are provided outside the main body of the text must be numbered consecutively and placed at the bottom of the page (as footnotes) using 10 pts font with single line spacing
- Citing secondary sources (only in exceptional cases): **Jafari (2010) as cited in Black (2016)** or **(Jafari, 2010, as cited in Black 2016)**

V. Reference list
A reference list should be ordered alphabetically by first author's / editor's surname or by title, in the case of works whose author/ editor is unknown, and in the case of authors with multiple works, they should be listed chronologically by year of publication.
- **Referencing a journal article**

The basic format is: Author surname, Initial(s)., (Year), Article title (not italicised), Journal title (italicised), Volume (italicised) (issue or part number), page numbers, DOI:

Oppermann, M.J. (2000). Tourism Destination Loyalty. *Journal of Travel Research*, *39*(1), 78–84. https://doi.org/10.1177%2F004728750003900110

- Referencing a book

The basic format is: Author/Editor surname, Initial(s)., (copyright year), Book title (italicised), edition number (in brackets). Publisher. DOI or URL:

Kotler, P., Bowen, J.T., Makens, J., & Baloglu, S. (2017). *Marketing for Hospitality and Tourism* (7th ed.). Pearson Education. https://doi.org/10.1177%2F0047287507303976

- Chapter in an edited book

The basic format is: Surname of the chapter's author, initial(s)., Copyright year, Chapter title (not italicised), In, Editor initial(s)., Surname + (Ed.) or Editor initial(s)., surnames (separated by "&") + (Eds.), Edited book title (italicised), edition number and page range (in brackets). Publisher. DOI or URL:

Scott, N.R., & Le, D.A. (2017). Tourism Experience: A Review. In N.R. Scott & J. Gao (Eds.), *Visitor Experience Design* (2nd ed., pp. 30–52). CABI. https://doi.org/10.1080/10645578.2016.1144023

- Referencing an e-book

Mitchell, J.A., Thomson, M., & Coyne, R.P. (2017). *A guide to citation*. https://www.mendeley.com/reference-management/ reference-manager

- Referencing a chapter in an e-book

Troy, B.N. (2015). APA citation rules. In S.T. Williams (Ed.), *A guide to citation rules* (2nd ed., pp. 50–95). https://www.mendeley.com/reference-management/reference-manager

- Referencing an entire website created by a corporation, institution or group

Use the following format: Corporation/group/organization name. (year website was last updated/published, month day if given). Title of website. URL:

WHO. (2014, 14 listopada). World Health Organization. https://www.who.int/

- Referencing a single web page

Use the following format: author surname, initial(s). (year, month, day). Page title (italicised). Site name. URL:

Mitchell, J.A., Thomson, M., & Coyne, R.P. (2017, January 25). *APA citation. How and when to reference*. https://www.howandwhentoreference.com/APAcitation

ISSN 2658-1736