INVESTIGATING SOUTH AFRICAN INBOUND TOUR OPERATOR PARTICIPATION IN SUSTAINABLE TOURISM PRACTICES

by

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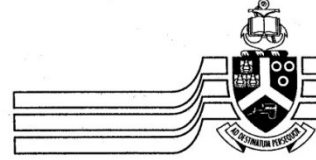
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ABSTRACT

Inbound tour operators play a key role in sustainable tourism development, as they are centrally positioned in the distribution chain and provide the link between the supply and demand of tourism products and services. Embedded in this position, inbound tour operators can put pressure on their suppliers to operate more sustainably, while educating their customers on sustainable tourism practices, and influencing consumers' decision-making before the purchasing of tourism products and services. Inbound tour operators can further implement sustainable tourism practices as part of their business operations. To date, little research has focussed on inbound tour operators' contribution to sustainable tourism development, especially in a developing country context. Sustainable inbound tour operators can also become certified by a sustainable tourism certification programme to showcase their commitment to sustainability. Various studies have highlighted the history, benefits and issues related to certification programmes, but few studies have investigated the perspective that inbound tour operators have towards sustainable tourism certification programmes.

Making use of a qualitative research approach, in-depth interviews were conducted with 22 South African inbound tour operators to investigate and identify the sustainable tourism practices currently being adopted within their organisations. Content analysis was used to analyse the data. The findings produced a list of sustainable tourism practices currently being adopted by inbound tour operators in South Africa. This study proposes that sustainable tourism organisations should become certified by a national or global sustainable tourism certification programme, to prove that they are truly operating sustainably, thus decreasing the effects of greenwashing. In addition, the certification of tourism organisations can assist inbound tour operators in identifying truly sustainable suppliers, fostering the development of a sustainable supply chain management strategy.

Keywords: Certification, inbound tour operators, South Africa, sustainable tourism, sustainable tourism practices.

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"The greatest threat to our planet is the belief that someone else will save it."
Robert Swan

"Without goals, and plans to reach them, you are like a ship that has set sail with no destination."
Fitzhugh Dodson

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DEFINITION OF KEY TERMS

The key constructs used in this study are defined below in Table 1:

Table 1: Definition of key terms

Certification	"… a voluntary procedure that assesses, audits and gives written assurance that a facility, product, process or service meets specific standards. It awards a marketable logo to those that meet or exceed baseline standards" (Honey & Rome, 2001, p. 8).
Corporate Social Responsibility	"…the means of adopting open and transparent business practices that are based on ethical values" (WTTC in Frey & George, 2010, p. 623).
Greenwashing	"… a business that presents itself as 'sustainable', 'ecological', 'green', 'responsible', 'eco', etc., when it doesn't comply with a generally accepted standard, or worse, it is in contradiction with them" (CESD, 2007, p. 7).
Inbound tour operator	A company that focusses primarily on bringing travellers into a country, either through group or individual tour packages (Westcott, Webster, Owens, Thomlinson, Bird, Tripp, Knowles, Henry, Glazer, Robinson, Briscoe, Freeman, Wilson-Mah & Hood, 2015).
Responsible Tourism	"… tourism that promotes responsibility to the environment through its sustainable use; responsibility to involve local communities in the tourism industry; responsibility for the safety and security of visitors and responsible government, employees, employers, unions and local communities" (DEAT, 1996, pp. 19-22).
Sustainable development	"… development which meets the needs of the present without compromising the ability of future generations to meet their own needs" (Brundtland, 1987, p. 39).

Sustainable tourism	"… tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNWTO, 2005).
Tour operator	An organisation that buys tourism-related products directly from the suppliers, combines them into attractive packages, and then sells them to customers (Budeanu, 2005).
Triple bottom line	"… where a company examines the social, environmental and economic effects of its performance on the wider society, begins to improve its performance and reports publicly on progress" (Elkington in CESD, 2007, p. 4).

LIST OF ABBREVIATIONS

Listed in Table 2 below are the descriptions of the abbreviations used throughout this document:

Table 2: Abbreviations used in this document

BEE	Black Economic Empowerment
CBTE	Community-Based Tourism Enterprises
CESD	Center for Ecotourism and Sustainable Development
CIPC	Companies and Intellectual Property Commission
GLES	Green Leaf Eco Standards
CSR	Corporate Social Responsibility
CT	Cape Town
CTC	Canadian Tourism Commission
DEAT	Department of Environmental Affairs and Tourism
DMO	Destination Management Organisation
ETC	English Tourism Council
FEDASA	Federated Hospitality Association of Southern Africa
FTT	Fair Trade Tourism
GBCSA	Green Building Council of South Africa
GDP	Gross Domestic Product
GLET	Green Leaf Environmental Trust
GRI	Global Reporting Initiative
GSTC	Global Sustainable Tourism Criteria
GSTC	Global Sustainable Tourism Council
GTIP	Green Tourism Incentive Programme
ICRTD	International Conference on Responsible Tourism in Destinations
IDC	Industrial Development Corporation
IoDSA	Institute of Directors in Southern Africa
ISO	International Organization for Standardization

ITO	Inbound Tour Operator
JHB	Johannesburg
MDG	Millennium Development Goals
MICE	Meetings, Incentives, Conferences and Exhibitions
NGO	Non-Governmental Organisation
NMSRT	National Minimum Standard for Responsible Tourism
NTSS	National Tourism Sector Strategy
OTA	Online Travel Agency
PDI	Previously Disadvantaged Individual
PTA	Pretoria
RSA	Republic of South Africa
RTG	Responsible Tourism Guidelines
RTMSA	Responsible Tourism Manual for South Africa
SANAS	South African National Accreditation Service
SANParks	South African National Parks
SANS	South African National Standard
SAT	South African Tourism
SATSA	Southern Africa Tourism Services Association
SBS	Sustainability Benchmark Solutions
SDG	Sustainable Development Goals
SRI	Social Responsibility Implementation Programme
STO	Sell To Operator
STSC	Sustainable Tourism Stewardship Council
TGCSA	Tourism Grading Council of South Africa
TOI	Tour Operators' Initiative
TUI	Touristik Union International
UK	United Kingdom
UN	United Nations
UNEP	United Nations Environmental Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization

UNF	United Nations Foundation
UNWTO	United Nations World Tourism Organization
WGBC	World Green Building Council
WTM	World Travel Market

CHAPTER 1: THE RESEARCH PROBLEM IN CONTEXT

1.1 INTRODUCTION AND BACKGROUND

Tourism is one of the fastest-growing sectors globally and continues to show high levels of growth, regardless of economic and geopolitical impacts on its operating environment. In South Africa, tourism is gaining momentum as a key economic sector to grow the economy and in 2016, the tourism industry represented 2.9% of the country's gross domestic product (GDP) (Department of Tourism, 2017). Of the total employment in South Africa, 4.4% can be traced directly to the tourism sector (Stats SA, 2017).

The concepts of sustainable and responsible tourism have formed part of South Africa's development strategy since 1996, with the release of the former Department of Environmental Affairs and Tourism's (DEAT) White Paper on the Development and Promotion of Tourism. Since then, various publications have been generated by the Department of Tourism, and the former DEAT, to assist tourism organisations in understanding and implementing sustainable and responsible tourism practices. It has been highlighted by both the Department of Tourism and the DEAT, that the concepts of sustainable and responsible tourism are the preferred tourism development strategy for destination South Africa (DEAT, 1996). However, the Department of Tourism and the former DEAT relies heavily on South African tourism organisations to support and implement sustainable tourism practices. South Africa is also currently the only African country that has developed National Minimum Standards for Responsible Tourism (NMSRT) (SANS, 2011).

Some research however suggests that the concept of sustainability has been devised in developed countries, and it should not be expected to fit the needs of a developing country's stakeholders (Cavagnaro, Staffieri & Ngesa, 2015; Fox, 2004; Visser, 2008). In developing countries, especially in Africa, poverty and unemployment are major issues, and some researchers suggest that the socio-cultural element of the triple bottom line should take precedence over the environmental and economic elements (Butcher, 2011; Cavagnaro, et al.,

2015; Visser, 2008). For developing countries, job creation and economic growth are still essential focus points and should not be neglected for overall sustainable tourism development. However, the framework of sustainability clearly states that there must be a balance between the ecological, socio-cultural and economic dimensions of tourism development (Stoddard, Pollard & Evans, 2012), thus only focussing on the social dimension would not promote this balance, as environmental issues are also clearly apparent in developing countries.

As a vital role-player in the tourism industry, inbound tour operators can play a critical role in sustainable tourism development, as they are centrally positioned in the distribution chain, providing the link between supply and demand (Cavlek, 2002). Inbound tour operators can therefore influence the direction of tourist flow, product offerings by tourism suppliers and the attitude and behaviour of tourists (Sigala, 2008). Many suppliers in the tourism industry also rely on tour operators, since they have limited resources to promote and distribute their products and services. Embedded in this position, inbound tour operators can put pressure on their suppliers to operate more sustainably, as well as educate tourists on sustainable tourism practices, and also promote and influence consumers' decision-making before purchasing tourism-related products and services. Unfortunately, little research has focussed on inbound tour operators' contribution to sustainable tourism development, especially in a developing country context (Cavagnaro, et al., 2015).

Lately many tourism organisations, including tour operators, accommodation and excursion/activity suppliers, have incorporated elements of sustainability into their business operations. This might be for various reasons such as cost-saving, marketing, differentiation, pressure from the demand-side, increased customer satisfaction, or moral ethics (Poudel, Nyaupane & Budruk, 2016). Some tourism organisations have also been certified by a sustainable tourism certification programme to showcase that they are truly operating sustainably and are not part of greenwashing, as they are being audited based on national or globally recognised standards (FTT, 2018; GSTC, 2018; Travelife, 2018).

1.2 PROBLEM STATEMENT

Sustainable tourism has become a popular topic under investigation. Various studies have focussed on the sustainability of hotels, national parks, aviation and larger tourism organisations (Hassanli & Ashwell, 2020; Van der Merwe & Wöcke, 2007), with few studies investigating the sustainability of inbound tour operators. Dodds and Kuehnel (2010, p. 222) state that "… there are some studies on tour operators and responsible tourism, however, they are mainly UK focussed and examine the destinations in which the tours operate rather than the operators themselves and their participation in CSR [Corporate Social Responsibility] practices".

Most of the studies focussed on or mentioning the sustainability of inbound tour operators were conducted in developed countries such as Canada (Dodds & Kuehnel, 2010), the United Kingdom (UK) (Miller, Rathouse, Scarles, Holmes & Tribe, 2010) and other European countries (Hultman & Säwe, 2016), and it should not be expected that their results can be replicated in developing countries, as factors such as infrastructure, legislation, distribution of wealth and socio-economic issues may differ (Cavagnaro, et al., 2015). Thus, the majority of studies on sustainable tourism published in developing countries have focussed on poverty alleviation, pro-poor tourism, the effect on climate change and community involvement of residents working or living around national parks (Spenceley, 2008; Spenceley & Goodwin, 2008; Visser & Hoogendoorn, 2011).

To the researcher's knowledge, only three studies have focussed on or have included the sustainability of inbound tour operators in developing countries in Africa (Cavagnaro, et al, 2015; Feruzi, Steyn & Reynisch, 2013; Spenceley, 2006). These studies also expressed the lack of academic research linking the concept of sustainable tourism to inbound tour operators in African countries. As stated by Cavagnaro, Staffieri and Ngesa (2015, p. 136) "… research on inbound tour operators (ITO) in general and in developing countries in particular is almost non-existent".

In 2006, Spenceley evaluated the extent to which South African tour operators participated in responsible tourism activities, including both inbound and outbound tour operators. In her

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research, she identified various sustainable tourism practices and barriers through a quantitative research method, collecting data making use of surveys. However, a more comprehensive study is necessary to understand how these practices are being implemented into the various areas of an inbound tour operators' business operations. For example, within the office environment, supply chain management, at a destination management level, and practices implemented to foster a demand for sustainable tourism products and services.

In relation to the above discussion, it becomes clear that there is a need to create a dialogue with various South Africa inbound tour operators to better understand their perspective of sustainable tourism and to identify the current sustainable tourism practices which they have adopted, while at the same time investigating the barriers which inbound tour operators face in operating more sustainably. More research is also needed to investigate whether inbound tour operators feel pressure from their clients to operate more sustainably and whether they are placing pressure on their suppliers to operate more sustainably, given that they are centrally positioned between the supply and demand for tourism products and services. The sustainable destination management practices implemented by inbound tour operators also need investigation, as tour operators have frequently been criticised for destroying the natural and cultural environment of host destinations.

Since the inclusion of both responsible and sustainable tourism in South Africa's tourism strategies, various government publications have been generated to encourage sustainable tourism development, including the NMSRT published in 2011, which creates a national minimum standard that tourism organisations must reach in order to be labelled as responsible and/or sustainable. The NMSRT allows sustainable tourism certification programmes to certify tourism organisations, based on standards developed uniquely for the South African tourism industry. This might be a sound concept but no certification programme to date has been accredited to certify tourism organisations based on these standards (SANAS, 2019).

There are however tourism organisations in South Africa which have chosen to become certified by either international certification programmes or local certification programmes that certify based on globally recognised sustainable tourism standards. These include Fair Trade

Tourism (FTT), who only certify accommodation and activity/excursion suppliers, and Travelife, who certify tour operators (FTT, 2018; Travelife, 2019).

Various studies have highlighted the history, benefits and issues related to certification programmes (CESD, 2007; Dodds & Joppe, 2005; Honey & Rome, 2001; Newton, Quiros, Crimmins, Kapur, Lin, Luo, Rossbach, & Dunivan, 2004; Piper & Yeo, 2011). Studies have also been published in South Africa making use of Fair Trade Tourism as a case study (Boluk, 2011; Strambach & Surmeier, 2013), but few studies have investigated the perspective which inbound tour operators have towards sustainable tourism certification programmes. In Spenceley's (2006) study some tour operators mentioned that they are a member of a sustainable tourism certification programme, and actively make use of sustainably certified suppliers. However, the value added by sustainable tourism certification programmes was not investigated. The question that remains unanswered is thus, what the perspectives of South African inbound tour operators are towards sustainable tourism certification programmes in general, and what value is added by sustainable tourism certification programmes to the development of sustainable inbound tour operators.

1.3 PURPOSE STATEMENT

The purpose of this research study is to investigate South African inbound tour operators' perspective of sustainable tourism and to identify the current sustainable tourism practices that they have adopted, while at the same time investigating the barriers which inbound tour operators face in operating more sustainably. The study also aims to investigate whether inbound tour operators feel pressure from their clients to operate more sustainably, and whether they are placing pressure on their suppliers to operate more sustainably, given that they are centrally positioned between the supply and demand for tourism products and services. The sustainable destination management practices implemented by inbound tour operators will also be investigated.

Inbound tour operators' perspective of sustainable tourism certification programmes will be investigated, to assist in identifying the value sustainable tourism certification programmes add to the development of sustainable inbound tour operators.

The study will be guided by the following research objectives:

- To discuss the concepts of sustainable tourism, sustainable tourism development in South Africa, sustainable inbound tour operators and sustainable tourism certification programmes.
- To identify the sustainable tourism practices South African inbound tour operators participate in.
- To investigate whether South African inbound tour operators put pressure on their supply-side to implement sustainable tourism practices.
- To investigate whether South African inbound tour operators implement sustainable destination management practices.
- To investigate whether South African inbound tour operators experience pressure from their demand-side to implement sustainable tourism practices.
- To identify the value of sustainable tourism certification programmes in developing more sustainable South African inbound tour operators.
- To identify the barriers that hinder South African inbound tour operators from adopting sustainable tourism practices.

1.4 RESEARCH METHODOLOGY

This research study adopted an interpretivism point of view, as the study aimed to interpret the current reality of South African inbound tour operators, which will be complemented by a descriptive study. The descriptive research design fits well with this study, as the key objectives were to identify the various sustainable tourism practices that South African inbound tour operators have adopted in their business operations. The target population for this study was inbound tour operators in South Africa. A qualitative research approach was followed, since the type of information required from inbound tour operators could only be obtained using qualitative research techniques. While investigating the perspectives of tour operators and the practices that they implement, it was not the number of responses that mattered, but rather the detail and richness of their responses. Consequently, qualitative techniques are better implemented under certain conditions, such as where the wealth of information is important.

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Participating organisations were selected by using a non-probability sampling method, namely purposive or judgemental sampling. Organisations had to meet certain criteria, to ensure that the most appropriate sample was selected to reach the research objectives. Participating organisations must be registered as a South African tourism organisation, must be a member of the Southern Africa Tourism Services Association (SATSA), and must be inbound tour operators that specialise in providing their clients with either tailor-made travel packages or pre-developed travel itineraries which include overnight accommodation. Half of the participating organisations must be members or certified by a sustainable tourism certification programme, with the other half **not** being certified or a member of any sustainable tourism certification programme.

The participating organisations were identified through the online listing of FTT approved tour operators, Travelife certified members and members of SATSA. The participating organisations were screened to ensure that they are inbound tour operators and actively operational. Qualifying participants were contacted either telephonically or via email until data saturation was reached. The final sample consisted of 11 South African inbound tour operators 'approved' or certified by a sustainable tourism certification programme, and 11 South African inbound tour operators neither certified nor 'approved' by any sustainable tourism certification programmes, but still actively operating in the industry.

An interview schedule was developed from the literature reviewed, including the certification criteria and standards of FTT, the GSTC and Travelife, to ensure that all the elements related to the sustainability of inbound tour operators were included and investigated. Semi-structured in-depth interviews were conducted with all 22 South African inbound tour operators. Interviews lasted for approximately 45 minutes. Interviews were recorded and transcribed afterwards. Upon the conclusion of the data collection process, content analysis was used to analyse the data collected. A detailed explanation of the research methodology will follow in Chapter 3.

1.5 ACADEMIC VALUE AND CONTRIBUTION OF THIS RESEARCH STUDY

Limited research exists on the sustainability of tour operators in general, with even less research focussing on the sustainability of inbound tour operators in developing countries. The purpose of this research study was to contribute to the limited body of knowledge related to sustainable tourism practices implemented by inbound tour operators, with a special focus on South African tour operators as a case study.

The academic value of this study lies firstly in compiling a list of sustainable tourism practices currently being adopted by inbound tour operators in developing countries. This list includes sustainable tourism practices adopted in inbound tour operators' business and office environments, supply chain management, destination management, and practices adopted to foster a demand for sustainable tourism products and services. Secondly, this study links inbound tour operators to sustainable tourism certification programmes and identifies the value of tourism certification programmes in developing more sustainable South African inbound tour operators.

1.6 DELIMITATIONS

The research study has delimitations related to the context, constructs and theoretical perspectives of the study. First, the literature review is primarily limited to the discipline of sustainable tourism; sustainable tourism in developing countries and in South Africa; sustainable tourism certification programmes; inbound tour operators; and sustainable tour operators. Literature from related disciplines such as ecotourism, sustainable outbound tour operators, sustainable destination management and visitors' attitude towards sustainable tourism was briefly consulted.

Second, this research study is limited to inbound tour operators in the South Africa tourism industry. Thus, it only focusses on tour operators that are based within the South African borders; packaging and operating tour packages targeted at mostly incoming tourists from international destinations or countries visiting South Africa as a holiday destination. Third, this research only includes inbound tour operators that are primarily focussed on the inbound leisure

travel market. Inbound tour operators focussed on the MICE industry (meetings, incentives, conferences and exhibitions), business and corporate travel, and other non-leisure related travel are excluded from the study.

1.7 STRUCTURE OF THE STUDY

The study consists of 5 chapters, each playing a vital role. The first chapter focusses on providing an overview of what the study is all about, and what the study aims to achieve. This includes an introduction to the major themes related to the topics under investigation, explaining the research problem in context, stating the research objectives, providing justification for the study by clarifying the academic and practical contribution this study will bring, and providing a brief overview on the research methodology followed.

The second chapter provides a literature review covering the key constructs of the study. The concept of sustainable tourism is first discussed, whereafter sustainable tourism in developing countries is explained. Next, a discussion is provided on sustainable tour operators, and the chapter concludes with a description of sustainable tourism certification programmes.

The methodology chapter, Chapter 3, offers a detailed and thorough explanation of the research design and research methods followed throughout the planning and execution of the study. The sampling method and the importance of the sample selected is discussed, followed by the process followed in designing and drafting the data collection instrument used. The data collection process and the data analysis process are laid out in detail, to ensure validity, reliability, and transferability. The research limitations are explained and ethical considerations are taken into account.

The fourth chapter provides a full description of the findings after the data were collected and the raw data were analysed. All the findings are provided along with direct quotes and short discussions to clarify responses. This chapter provides the basis on which the discussion and conclusion chapter is built, and is crucial for the development of the study's academic contribution.

Chapter 5 concludes the study by providing a detailed discussion of the research findings. It also links and compares this study's findings with the findings of the literature reviewed in Chapter 2, and similarities and contradictions are identified and discussed, to provide context or explanation to expected and unexpected findings. This chapter also summarises the key findings of the study, to provide industry recommendations, discuss managerial implications, and to provide a basis for future research studies. Chapter 5 concludes with a summary of what each research objective has achieved.

1.8 CONCLUSION

This chapter provided the background to the study and highlighted the topics under investigation before explaining the research problem. The purpose of the study was clearly emphasised and the research objectives listed. The research methodology was briefly explained and the value contribution of this study was made clear and was discussed. The delimitations were stated to ensure that the context of this study was understood, and the structure of this study was explained. The following chapter will provide further context and background through a detailed literature review on the topics that are under investigation.

CHAPTER 2: LITERATURE REVIEW

2.1 INTRODUCTION

The literature review provides the background against which the study is undertaken. It describes the history and the concept of sustainable tourism and explores the development of sustainable tourism in developing countries, with a particular focus on the South African tourism industry.

Thereafter, a discussion follows on tour operators distinguishing between inbound tour operators, outbound tour operators and ground operators, as the focus of this study is on the sustainability of inbound tour operators. The current sustainable tourism practices, which inbound tour operators could implement in their business operations, within their supply chain, and at a destination management level, are discussed to provide context to the research objectives and the chapters that follow.

The link between inbound tour operators and sustainable inbound tour operators is highlighted, with emphasis on sustainable inbound tour operator development within South Africa as a destination, as South Africa will be used as a case study. Literature related to the concept of sustainable tourism certification programmes is discussed - its origin, development, benefits and its current landscape within South Africa.

2.2 SUSTAINABLE TOURISM

The following section provides background on the concept of sustainability from a global perspective. This includes the current actions as set forth by global organisations promoting and driving sustainability, such as the United Nations World Tourism Organization (UNWTO). Thereafter, the concept of sustainability within the tourism sector will be discussed, along with the key stakeholders involved in sustainable tourism development.

2.1.1 Sustainable Development Goals

In 2000, the United Nations (UN) in collaboration with its 191 member states, started a global campaign focussed on meeting the needs of the world's poorest people and countries. With this campaign, the UN released eight Millennium Development Goals (MDGs), which all their members agreed to try to achieve by the year 2015, to combat poverty, hunger, disease, illiteracy, environmental degradation and discrimination against women (WHO, 2000). The eight MDGs are:

1. Eradicate extreme poverty and hunger.
2. Achieve universal primary education.
3. Promote gender equality and empower women.
4. Reduce child mortality.
5. Improve maternal health.
6. Combat HIV/AIDS, malaria, and other diseases.
7. Ensure environmental sustainability.
8. Develop a global partnership for development.

On the release of the UN's MDG's final report in 2015, this campaign was considered as 'the most successful anti-poverty movement in history' (UNDP, 2015). With the success of this campaign, the UN developed a 'Post-2015 Development Agenda', ultimately leading to the development of the now globally recognised "Sustainable Development Goals – Journey to 2030", also known as the 17 Sustainable Development Goals (SDGs). Developed in 2015 and officially put into action in 2016, the new 17 SDGs focus on combining efforts by all countries rich and poor, to fight poverty, inequalities and climate change and promote prosperity while protecting the planet. The 17 SDGs published have five key focus areas (SDG, 2018, p. 15):

1. Sustainable economic growth.
2. Social inclusiveness, employment and poverty reduction.
3. Resource efficiency, environmental protection and climate change.
4. Cultural values, diversity and heritage.
5. Mutual understanding, peace and security.

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In 2018, the UNEP and the UNWTO published the 'Tourism and the Sustainable Development Goals – Journey to 2030'. This publication aims to "… build knowledge, and empower and inspire tourism shareholders to take necessary action to accelerate the shift towards a more sustainable tourism sector by aligning policies, business operations and investments with the 'Sustainable Development Goals' (SDG)" (SDG, 2018, p. 10). This publication followed after the '2017 - International Year of Sustainable Tourism for Development' which presented an opportunity to create awareness among the public and the private sector decision-makers; as well as the general public on the contribution of sustainable tourism to development. The 17 SDGs and their opportunity to make tourism more sustainable are described in Table 3 below:

Table 3: Tourism and the Sustainable Development Goals – Journey to 2030

Public policy		Companies and CSR actions
SDG 1 – End poverty in all its forms everywhere Tourism provides income through job creation at local and community levels. It can be linked with national poverty reduction strategies and entrepreneurship. Low skills requirement and local recruitment can empower less favoured groups, particularly youth and women.	**1 NO POVERTY**	On-going staff training; Partnerships for education; Diversity management; Complementary benefits; In-kind donations for education, Poverty and human rights; Responsible investment and local recruitment; Local purchases and fair-trade
SDG 2 – End hunger, achieve food security and nutrition, promote sustainable agriculture Tourism can spur sustainable agricultural by promoting the production and supplies to hotels, and sales of local products to tourists. Agro-tourism can generate additional income while enhancing the value of the tourism experience.	**2 ZERO HUNGER**	Local and green purchase (food/agriculture); Local supplies and fair trade; Host community involvement; Wildlife and ecosystem protection; Offsetting actions
SDG 3 – Ensure healthy lives and promote well-being for all at all ages Tax income generated from tourism can be reinvested in health care and services, improving maternal health, reduce child mortality and preventing diseases. Visitors fees collected in protected areas can as well contribute to health services.	**3 GOOD HEALTH AND WELL-BEING**	Health prevention programs; Fight against sex tourism, health and disasters awareness and donations; Customer security and health – prevention and facilities
SDG 4 – Ensure inclusive and equitable quality education and promote lifelong learning for all Tourism has the potential to promote inclusiveness. A skilful workforce is crucial for tourism to prosper. The tourism sector provides opportunities for direct and indirect jobs for youth, women, and those with special needs, who should benefit through educational means.	**4 QUALITY EDUCATION**	Professional development and training; Partnerships for education; Diversity management; Education for culture and heritage; In-kind donations for education; On-going staff training, information, facilities; Host community involvement
SDG 5 – Achieve gender equality and empower all women and girls Tourism can empower women, particularly through the provision of direct jobs and income-generation from MMEs in tourism and hospitality related enterprises. Tourism can be a tool for women to become fully engaged and lead in every aspect of society.	**5 GENDER EQUALITY**	Diversity management; Awareness campaigns and in-kind donations towards fight against sex tourism and human rights; Non-discrimination values in staff recruitment and training
SDG 6 - Ensure availability and sustainable management of water and sanitation for all Tourism investment requirement for providing utilities can play a critical role in achieving water access and security, as well as hygiene and sanitation for all. The efficient use of water in tourism, pollution control and technology efficiency can be key to safeguarding our most precious resource.	**6 CLEAN WATER AND SANITATION**	New equipment and technologies; Prevention programs for security and health; Standards and certifications; Community involvement
SDG 7 – Ensure access to affordable, reliable, sustainable and modern energy for all As a sector, which is energy intensive, tourism can accelerate the shift towards increased renewable energy shares in the global energy mix. By promoting investments in clean energy sources, tourism can help to reduce green house gases, mitigate climate change and contribute to access of energy for all.	**7 AFFORDABLE AND CLEAN ENERGY**	New equipment and technologies; Prevention programs for security and health; Standards and certifications; Community involvement
SDG 8 – Promote sustained, inclusive and sustainable economic growth, employment and decent work for all Tourism, as services trade, is one of the top four export earners globally, currently providing one in ten jobs worldwide. Decent work opportunities in tourism, particularly for youth and women, and policies that favour better diversification through tourism value chains can enhance tourism positive socio-economic impacts.	**8 DECENT WORK AND ECONOMIC GROWTH**	Training for professional development; Diversity management and local recruitment; Performance incentives-complementary benefits; Responsible investment and local purchases; Community involvement
SDG 9 – Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation Tourism development relies on good public and private infrastructure. The sector can influence public policy for infrastructure upgrade and retrofit, making them more sustainable, innovative and resource-efficient and moving towards low carbon growth, thus attracting tourists and other sources of foreign investment.	**9 INDUSTRY, INNOVATION AND INFRASTRUCTURE**	Eco-design; New equipment and technologies in energy and water resources; Renewable energies: Equipment and materials for recycling and waste; On-going staff training

Public policy		Companies and CSR actions

SDG 10 – Reduce inequality within and among countries

Tourism can be a powerful tool for reducing inequalities if it engages local populations and all key stakeholders in its development. Tourism can contribute to urban renewal and rural development by giving people the opportunity to prosper in their place of origin. Tourism is an effective means for economic integration and diversification.

Diversity management; Local enterprise investment; Responsible purchases; Non-discrimination values in staff recruitment and training; Community involvement

SDG 11 – Make cities and human settlements inclusive, safe, resilient and sustainable

Tourism can advance urban infrastructure and accessibility, promote regeneration and preserve cultural and natural heritage, assets on which tourism depends. Investment in green infrastructure (more efficient transport, reduced air pollution) should result in smarter and greener cities for, not only residents but also tourists.

Certifications; Partnerships; Awareness campaigns, in-kind donations for culture and heritage sites; Host community involvement; Clean energy; Resource efficiency; Biodiversity conservation initiatives

SDG 12 – Ensure sustainable consumption and production patterns

The tourism sector needs to adopt sustainable consumption and production (SCP) modes, accelerating the shift towards sustainability. Tools to monitor sustainable development impacts for tourism including for energy, water, waste, biodiversity and job creation will result in enhanced economic, social and environmental outcomes.

Efficiency technologies for energy and water; Renewable energies; Recycling – waste treatment; Pollution reduction; Local purchase and enterprises; Local supplier; Community involvement; Responsible investment; Guest involvement

SDG 13 – Take urgent action to combat climate change and its impacts

Tourism contributes to and is affected by climate change. Tourism stakeholders should play a leading role in the global response to climate change. By reducing its carbon footprint, in the transport and accommodation sector, tourism can benefit from low carbon growth and help tackle one of the most pressing challenges of our time.

Eco-design; New equipment and technologies; Renewable energies; Recycling and waste; Wildlife and ecosystems – landscape protection; Pollution reduction; Offsetting actions; Awareness campaign and in-kind donations for disasters

SDG 14 – Conserve and sustainably use the oceans, seas and marine resources for sustainable development

Coastal and maritime tourism rely on healthy marine ecosystems. Tourism development must be a part of Integrated Coastal Zone Management in order to help conserve and preserve fragile marine ecosystems and serve as a vehicle to promote a blue economy, contributing to the sustainable use of marine resources.

Wildlife and ecosystems animal protection; Pollution reduction; Waste treatment; Offsetting actions; Green purchases; Information for customers and staff; Community involvement

SDG 15 – Protect, restore and promote sustainable use of terrestrial ecosystems and halt biodiversity loss

Rich biodiversity and natural heritage are often the main reasons why tourists visit a destination. Tourism can play a major role if sustainably managed in fragile zones, not only in conserving and preserving biodiversity, but also in generating revenue as an alternative livelihood to local communities.

Wildlife and ecosystems animal protection; Pollution reduction; Waste treatment; Offsetting actions; Green purchases; Information for customers and staff; Community involvement

SDG 16 – Promote peaceful and inclusive societies, provide access to justice for all and build inclusive institutions

As tourism revolves around billions of encounters between people of diverse cultural backgrounds, the sector can foster multicultural and inter-faith tolerance and understanding, laying the foundation for more peaceful societies. Tourism, which benefits and engages local communities, can also consolidate peace in post-conflict societies.

Human rights awareness; In-kind donations; Local enterprises – responsible Investment; Local recruitment and purchases; Diversity and respect policy; Anti-corruption money laundering; Client relationships; Host community involvement

SDG 17 – Strengthen the means of implementation and revitalize the global partnership for sustainable development

Due to its cross-sectoral nature, tourism has the ability to strengthen private/public partnerships and engage multiple stakeholders – international, national, regional and local – to work together to achieve the SDGs and other common goals. Public policy and innovative financing are at the core for achieving the 2030 Agenda.

Professional development; Partnerships for education; Wildlife and ecosystems animal protection; Offsetting actions; Supplier and Customer involvement; Client relationships; Staff involvement and relationships; Community involvement

Source: Sustainable Development Goals (SDG, 2018)

2.2.2 Defining the concept of sustainable tourism

Throughout published academic literature a variety of terms such as 'sustainable development', 'sustainable tourism', 'greening', 'responsible tourism', and 'ecotourism' have been used, creating much confusion on what the concept of sustainability entails. The term 'sustainable development' was first defined in the Brundtland Report (1987, p. 39) as "… development which meets the needs of the present without compromising the ability of future generations to meet their own needs". In 1988 the United Nations World Tourism Organization (UNWTO) (in CESD, 2007, p. 5) declared that sustainable tourism is "… envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, and biological diversity and life support systems". The Mohonk Agreement, an agreement among most of the world's important certification programmes at the time, defined sustainable tourism as "… any kind of tourism that seeks to minimize ecological and sociocultural impacts while providing economic benefits to local communities and host country" (Chester, 2000, p. 98). These definitions were some of the first definitions defining the concept of sustainable tourism as we know it today.

More specifically in South Africa, the term 'responsible tourism' is widely known and used in literature, government documentation and in the industry. The term was first defined in 1996 with the release of the former Department of Environmental Affairs and Tourism's (DEAT) White Paper on the Development and Promotion of Tourism (DEAT, 1996). Responsible tourism was defined as: "… tourism that promotes responsibility to the environment through its sustainable use; responsibility to involve local communities in the tourism industry; responsibility for the safety and security of visitors and responsible government, employees, employers, unions and local communities" (DEAT, 1996, pp. 19-22).

In 2002 during the Cape Town Declaration on Responsible Tourism, a conference preceding the World Summit on Sustainable Development held in Johannesburg later in 2002, a total of 280 delegates from 20 countries came together ultimately declaring the term responsible tourism as "… making better places for people to live in and for people to visit" (Goodwin, 2011, p. 102). During this conference a movement was created "… challenging all shareholders to

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engage with the issues that arise in destinations and to do what they can to address them" (Goodwin, 2011, p. 134).

According to Goodwin (2016), responsible tourism differs from sustainable tourism. Sustainable tourism is defined as a set of objectives aimed towards desirable ends, and as such, Goodwin (2016) claims that sustainable development lacks definition and measurable indicators, and that the concept is inoperative, with no-one taking responsibility. Goodwin (2016) suggests that responsible tourism focusses on what individuals, groups, organisations and governments do to address sustainability issues present at the destination, addressing local priorities, and transparently reporting on what is done to address these local priorities. Ultimately all stakeholders at the destination should take responsibility for their positive or negative impacts.

Within the context of this research study, the term 'sustainable tourism' will be used interchangeably with the term 'responsible tourism' to avoid confusion as both these terms share the same end goal of sustainability. Sustainable tourism includes three main elements, namely: environmental, social and cultural, and economical. These three elements together are also defined as the 'triple bottom line'. Elkington (in CESD, 2007, p. 4) defines the triple bottom line as "… where a company examines the social, environmental and economic effects of its performance on the wider society, begins to improve its performance and reports publicly on progress". A suitable balance must be established between these three dimensions of sustainable tourism to ensure long-term sustainability. The UNWTO suggests that sustainable tourism should (UNWTO, 2005):

1) Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.

2) Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.

3) Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

In 2005, the UNWTO and the United Nations Environmental Programme (UNEP) developed twelve aims as a guide to make tourism more sustainable, entitled 'Making Tourism More Sustainable: A Guide for Policy Makers' (UNEP & UNWTO, 2005, p. 18). The twelve aims are as follows:

1. Economic Viability: To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.

2. Local Prosperity: To maximise the contribution of tourism to the economic prosperity of the host destination, including the proportion of visitor spending that is retained locally.

3. Employment Quality: To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

4. Social Equity: To seek a widespread and fair distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.

5. Visitor Fulfilment: To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability, or in other ways.

6. Local Control: To engage and empower local communities in planning and decision-making about the management and future development of tourism in their area, in consultation with other stakeholders.

7. Community Well-being: To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.

8. Cultural Richness: To respect and enhance the historic heritage, authentic culture, traditions, and distinctiveness of host communities.

9. Physical Integrity: To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment.

10. Biological Diversity: To support the conservation of natural areas, habitats, and wildlife, and minimise damage to them.

11. Resource Efficiency: To minimise the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.
12. Environmental Purity: To minimise the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

It is important to note that these twelve aims are related to the triple bottom line and that the triple bottom line can be applied to any form of tourism – from urban to rural tourism; mass tourism to small niche markets; including all types of tourism organisations such as travel agencies, accommodation suppliers, inbound tour operators, ground operators, transportation services and tour guides (UNEP & UNWTO, 2005).

For the purpose of this study, sustainable tourism is defined as (UNWTO, 2005): "… tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities". This definition thus includes all three elements of the triple bottom line.

2.2.3 Stakeholders involved in sustainable tourism development

There are three stakeholders involved in sustainable tourism development: tourists/consumers, tourism business operators and governments. Currently, all three of these stakeholders treat sustainable tourism as a 'hot potato'; waiting for the other stakeholders to take leadership (Williams & Ponsford, 2009).

Eagles and Cascagnette (1995) propose that consumers' environmental attitudes are the leading factor in them making 'greener' purchasing decisions. Consumers have the potential to influence the entire tourism industry by only demanding sustainable tourism products, but to date, no sufficient evidence has yet shown a change in the tourists' purchasing behaviours (Anciaux, 2019; Liu, 2003; Mowforth & Munt, 1998). Although many research studies suggest that the tourism industry and tourists are increasingly becoming more environmentally conscious (Barr, Shaw, Coles & Prillwitz, 2010; Bookings.com, 2019; Middleton & Hawkins, 1998; Wight, 1993), recent studies have emphasised the difference in tourists' willingness to travel sustainably and their actual purchasing behaviour of sustainable tourism products and services (Anciaux, 2019; Budeanu, 2007; Miller, et al., 2010).

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The large disparity between the increasing claims by consumers to be more environmentally aware and their willingness to buy 'greener' tourism products, was also evident in a research study by Chafe (2005), who found that 70-80% of tourists state that they have high concerns for the social and ecological environment when on holiday, however only 10% actually convert these concerns into purchasing decisions. Furthermore, Miller, Rathouse, Scarles, Holmes and Tribe (2010) found a low level of awareness among UK consumers regarding the impacts of tourism and tourism activities on the environment. Mintel (in Miller, et al., 2010) states that in the UK, less than 1% of tourists consider environmental impacts when planning to go on a holiday.

Research suggests that when tourists go on holiday, the concept of sustainability and the impact of their ecological footprint, take a back seat to other decision-making factors such as cost, quality, availability, location, climate, comfort, ease of transport, and the purpose of the travel journey (Anciaux, 2019; Budeanu, 2007; Williams & Ponsford, 2009). Tasci (2017) draws the same conclusion in a study conducted in the USA market, where the sustainable tourism practices implemented by tourism organisations were found to be the least important element for guests' satisfaction levels. The quality of the product or services, prices and safety and security were identified as the most important contributors to guests' satisfaction levels.

Research studies have also shown that consumers are reluctant to change their purchasing behaviour when planning or going on a holiday, if sustainable alternatives do not match the quality and comfort of the conventional travel methods and suppliers (Anciaux, 2019; Budeanu, 2007). This is especially relevant in Europe and the UK, as the quality, travel time, comfort and prices of low-cost airlines outweigh the benefits perceived by tourists compared to taking the more sustainable option like a bus or train (Anciaux, 2019). Anciaux (2019) also found that sometimes the sustainable option is too expensive for tourists or not available at their preferred holiday destination. For tourists who would like to visit a different continent, there is no other option but to travel by aeroplane or long-haul cruise.

Ultimately, tourists rely on the industry and the governments to take action regarding sustainable tourism through tools that would force behavioural change such as carbon emission tax, legislation, increasing the cost of environmentally destructive behaviour (fees), providing

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education to create awareness, and decreasing the cost of environmentally proactive actions (Budeanu, 2007; Miller, et al., 2010).

Tourism organisations are arguably in the best position to influence the industry to become more sustainable, as they are the suppliers offering the tourism products and services. Unfortunately, tourism organisations have been reluctant to make any significant changes as the demand for sustainable tourism products remains a critical issue (Williams & Ponsford, 2009). However, some tourism organisations see sustainability as a tool to differentiate themselves within this competitive marketplace, resulting in product differentiation, enhanced brand image and stronger community stakeholder support that reduces business transaction costs (Ponsford, Williams & Gill, 2006). Sustainable tourism practices can also be seen as a talking point to encourage guests to return to the tourism organisation. Interestingly, a study by Borden, Coles and Shaw (2017) revealed that sustainable practices could reduce guest satisfaction as practices such as recycling can be an annoying activity if it is being forced onto guests.

As the consumer demand for sustainable tourism products remains a major drawback, studies suggest that aggressive marketing programmes are needed to stimulate mass demand for more sustainable forms of tourism and travel (Kotler, Bowen, & Baloglu, 2016; Middleton & Hawkins, 1998). Williams and Ponsford (2009, p. 400) suggest that "… such action may help create the marketplace needed to help tourism operators shift from primarily an ideological commitment to the concept of sustainable tourism, to more practical investments in sustainable management practices".

Tourism organisations also have the challenge of financing sustainable tourism-related investments. Although the implementation of sustainable initiatives and practices can be a driver for tourism organisations to gain competitiveness and reduce their operating costs, many tourism organisations fear that they will receive no return on their investments (Hassanli & Ashwell, 2020; Holden, 2005). Ultimately, tourism organisations, along with tourism consumers, are looking at governments to provide financial support in terms of incentives, grants or rebates to encourage such an investment.

Regulators such as governments have the power to compel tourism organisations and consumers to implement sustainable tourism practices, enforcing them by law to cooperate. However, factors such as profitability and economic growth opportunities are regarded as more important than sustainability, especially for developing countries (Bramwell, 2005). Furthermore, Williams and Ponsford (2009, p. 398) state that "… governments have little interest in burdening tourism businesses with additional regulations that might dampen their willingness to generate important tax-revenues". A more realistic option for governments is to award incentives to tourism organisations implementing sustainable tourism practices, as it is more economically appealing (Dodds & Joppe, 2005). Many governments have already invested in creating development strategies, tools and best management practices to assist destinations and tourism organisations with sustainable tourism development (CTC, 2000; Laitamaki, Hechavarría, Tada, Liu, Setyady, Vatcharasoontorn & Zheng, 2016; Williams & Gill, 2005). Developed countries in the UK and the European Union have various programmes, incentives and policies in place to encourage the adoption of sustainable tourism practices, as this will give growth to their economy (Hultman & Säwe, 2016). Ultimately, governments rely on tourism organisations for the implementation of sustainable tourism practices and tourism consumers for supporting these tourism organisations.

In South Africa the Department of Tourism has started to implement such an initiative, the Green Tourism Incentive Programme (GTIP), to facilitate tourism organisations to reduce their operating costs and make tourism more sustainable by providing financial incentives when tourism organisations install renewable energy sources (Department of Tourism, 2017).

In addition, host communities can also be considered as a stakeholder in sustainable tourism development. Poudel, Nyaupane and Budruk (2016, p. 477) state that: "Destination management organizations and marketers tend to focus on satisfying tourists, whereas local residents focus on their livelihood and quality of life improvements, so having both tourists' and local residents' perspectives is crucial in tourism planning and management". This is especially relevant for destinations in developing countries where factors such as poverty and human-wildlife conflicts are still major issues (Cavagnaro, et al., 2015).

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Host communities within tourist destinations and around popular tourist attractions and landmarks are influenced by tourism both positively and negatively. Although tourism has been criticised for destroying destinations, by exploiting the natural and cultural environment, tourism can also bring economic benefits to a destination.

In South Africa, 4.4% of the total employment can be traced directly to the tourism sector (Stats SA, 2017). Besides direct employment within the tourism industry, income can be generated from supplying the tourism industry with products and services. Studies suggest that this income generated by supplying tourism organisations is estimated to match, or even surpass, that stemming from direct employment within the tourism industry (Lengefeld & Stewart, 2004; Mitchell & Ashley, 2007). However, Frey and George (2010) identified various obstacles hindering tourism organisations from supporting community-based suppliers. These included the lack of quality standards and quantity capacity, difficulty in ordering and delivering of goods, and high perceived costs associated with using small suppliers.

To overcome these obstacles, and also to further sustainable tourism development in general, co-operation and partnerships are needed between tourism organisations, governments, as well as the host community members, to develop educational opportunities and other socially uplifting initiatives. One example would be the Social Responsibility Implementation Programme (SRI), a job creation programme by South Africa's Department of Tourism. This programme entails a targeted grant, aimed at "… supporting the development of community based tourism, thereby stimulating job creation, sector transformation, economic empowerment, community benefit and geographic spread of tourism investment" (Department of Tourism, 2012).

Thus, by including host communities in the decision-making and planning of sustainable tourism, various benefits may arise, such as the sharing of economic opportunities, the creation of additional entrepreneurial opportunities, educational opportunities, job creation, protection of environmental and cultural heritage and improved quality of life (Poudel, et al., 2016, p. 465).

2.3 SUSTAINABLE TOURISM IN DEVELOPING COUNTRIES

The following section will discuss the sustainable tourism development challenges faced by developing countries in Africa, followed by an exploration of the sustainable tourism landscape especially related to the South African tourism industry.

2.3.1 Sustainable tourism development challenges faced by developing countries in Africa

Sustainable tourism in developed countries has received more attention from scholars, compared to studies focussed on developing countries. It is also apparent that globally the environmental and economic elements of sustainable tourism have received more attention, with the social element neglected in academic research (Guo, Jiang & Li, 2019). This is especially the case for developed countries, as Hultman and Säwe (2016, p. 330) explain: The European Union has three objectives for sustainable tourism: "… to care for tourists, to fulfil the needs of the environment, and to generate economic growth for commercial actors in the destination". Thus, excluding the needs and role of local communities.

Research on sustainable tourism in developing countries has seen growth, largely due to the increased impact of global warming on climate-sensitive areas, such as the Caribbean, Costa Rica, Cuba and small island developing countries, however, the social aspect has seen little investigation (Guo, et al., 2019). It can be argued that developing countries in Africa and elsewhere face both similar and different challenges to those of developed countries. In several developing countries, development took place during colonial times, without the input of the original inhabitants. Today, and especially in Africa, the conflict between human and animal rights is still a sensitive issue (Cavagnaro, et al., 2015, p. 136). This makes it challenging for developing countries in Africa to adapt and implement the sustainable tourism principles derived from developed countries, as they do not completely fit with the landscape and environment of developing countries.

Several developing countries in Africa also face challenges regarding the lack of legislation or the weak enforcement of the existing legislation, major market failures, and as mentioned,

social challenges (Cavagnaro, et al., 2015). Butcher (2011) and Visser (2008) suggest that in developing countries in Africa, the socio-cultural aspect of the triple bottom line should receive more attention than the environmental aspect, so that poverty is eradicated first. However, as issues of conservation, deforestation and global warming are also present and felt in African developing countries, creating a balanced triple bottom line is essential.

Interestingly, Cavagnaro, Staffieri and Ngesa (2015) found in their study conducted in Kenya, that the majority of their respondents were familiar with the three elements of the triple bottom line. Although the concept of sustainable tourism derived from developed countries, the implementation of sustainable tourism practices in developing countries has shown benefits such as free publicity, improved image, better relationships and co-operation with partners within their supply chain and communities, growth in market share and profit and business continuity. Their study also revealed that respondents felt a lack of pressure from the local government to operate sustainably, but that pressure from their demand-side was building.

Overall, there is also a lack of research on sustainable policies that are focussed on African countries. This is demonstrated with a review by Guo, Jiang and Li (2019), which only found two academic research articles published in the last 20 years focussed on sustainable tourism policies with an African country as a case study. Van der Watt (2013) however suggests that the solution to achieving sustainability at a local level requires the collaboration between government organisations and the stakeholders at the destination to plan and undertake initiatives, rather than implementing and developing more policies.

2.3.2 Sustainable tourism development landscape in South Africa

South Africa has embraced the concept of sustainable tourism since the year 1996 when the former Department of Environmental Affairs and Tourism (DEAT) produced the White Paper on the Development and Promotion of Tourism (DEAT, 1996). The White Paper recognised that tourism has so far been a missed opportunity and that the concept of responsible tourism is the preferable tourism development path for the country, as it can "… provide an engine of growth, capable of dynamising and rejuvenating other sectors of the economy" (Spenceley, 2006, p. 6).

The White Paper emphasised that any tourism-related policy in South Africa must include the involvement of previously neglected communities, from both labour services and entrepreneurial activities, and that the principles of responsible tourism should not be seen as a luxury, but rather as a necessity for the development of a sustainable tourism industry (DEAT, 1996). The White Paper further stated that the South African tourism industry must be developed in a responsible and sustainable manner, to develop South Africa as a leader in responsible environmental practices (DEAT, 1996). The key elements of the White Paper were (DEAT, 1996):

- Assessment of environmental, social and economic impacts of tourism developments.
- Monitoring of tourism impacts with open disclosure of information.
- Involvement of local communities in planning and decision-making.
- Ensuring the involvement of communities who benefit from tourism.
- Maintenance and encouragement of natural, economic, social and cultural diversity.
- Sustainable use of local resources.
- Avoidance of waste and over-consumption.

The succeeding national tourism development strategy for South Africa for the years 1998-2000, entitled 'Tourism in GEAR', emphasised that tourism development in South Africa should be government-led, private sector-driven, community-based and labour conscious (DEAT, 1997). As a follow-up document to the 1996 White Paper, in 2002 the DEAT produced and published 'Responsible Tourism Guidelines' to give guidance and provide indicators to the tourism industry on how to approach the concept of sustainable tourism as outlined in the White Paper. The Responsible Tourism Guidelines provides a starting point and goal for the entire tourism sector, as the guidelines not only define the concept of sustainable tourism, but also provide benchmarks that tourism organisations can use to measure and improve their sustainability performance (Goodwin, Spenceley & Maynard, 2002; RTMSA, 2002).

In 2002, as a successor to the Responsible Tourism Guidelines, the DEAT published a 'Responsible Tourism Manual for South Africa'. This manual was in line with international best practice, and specific to South Africa. It aimed to provide not only 'mainstream' but also community-based tourism enterprises (CBTE) with information on sustainable tourism, as well

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as cost-effective and practical opportunities and activities available to develop their businesses into more sustainable tourism organisations (Goodwin, et al., 2002; Spenceley, 2006).

In 2002, South Africa hosted the first conference on 'Responsible Tourism in Destinations' that resulted in a declaration calling on tourism organisations to "… adopt a responsible approach, to commit to specific responsible practices, and to report progress in a transparent and auditable way, and where appropriate to use this for marketing advantage" (ICRTD, 2002, p. 3). At the end of 2002, South Africa had laid a strong foundation for sustainable tourism development, not only through policy, but also by providing guidelines and manuals to help tourism organisations to take advantage of the growing global market. The only concern was that the private sector would not convert these guidelines into actual practice.

In 2011, the Department of Tourism, in partnership with mostly accreditation agencies, but also with other tourism stakeholders and the private sector, developed the National Minimum Standard for Responsible Tourism (NMSRT), also known as SANS 1162. At the time most sustainable tourism certification programmes used different certification standards; with some certifying only one element of the triple bottom line. This resulted in a need to establish a common understanding of what sustainable tourism entails and to develop baseline standards. Furthermore, the NMSRT was developed to (SANS, 2011, p. 1):

a)   establish a common understanding of the minimum criteria for responsible tourism,

b)   promote responsible tourism in the tourism sector, including accommodation, hospitality, travel distribution systems, as well as all organs of state and entities, organised labour and communities involved or interested in the tourism sector in South Africa,

c)   establish the minimum criteria for certification of the sustainability of organisations in the tourism sector, and

d)   be in line with the National Guidelines for Responsible Tourism and the global sustainable tourism criteria.

The NMSRT consists of 41 criteria divided into four categories: sustainable operations and management criteria; economic criteria; social and cultural criteria and environmental criteria (SANS, 2011). Ultimately, the goal of the NMSRT is to provide all of the sustainable tourism certification programmes in South Africa with a minimum baseline standard which can be used to certify tourism organisations. The South African National Accreditation System (SANAS) has been given the responsibility to accredit sustainable tourism certification programmes. Certification programmes can apply to SANAS to become accredited, to certify tourism organisations according to the NMSRT (SANAS, 2019). A detailed discussion on sustainable tourism certification programmes will follow in Section 2.5.

Recently the concept of sustainable tourism has become an important element in the various National Tourism Sector Strategies (NTSS). The concept of responsible tourism has become an important element in the Tourism Act, Act No 3 of 2014 (RSA, 2014). The Department of Tourism started various initiatives to develop and promote sustainable tourism such as training programmes, funding programmes and incentive programmes. In 2017, the Department of Tourism launched the 'Green Tourism Incentive Programme' (GTIP) to encourage tourism organisations in the private sector to move towards greener and renewable energy sources. Managed by the Industrial Development Corporation (IDC), this programme assists tourism organisations in the private sector by partly funding the input costs as well as the energy-efficient audit costs when implementing 'greener' and renewable energy sources (Department of Tourism, 2017).

2.4 SUSTAINABLE TOUR OPERATORS

The previous section provided a background on the concept of sustainable tourism and the current landscape of sustainable tourism development in African developing countries. The following section will proceed by shedding light on the role inbound tour operators can play in sustainable tourism development.

2.4.1 Defining the different types of tour operators

A tour operator can be defined as an organisation that buys tourism-related products directly from the suppliers, combines them into attractive packages, and then sells them to customers (Budeanu, 2005). These tour packages can either be sold directly by the tour operator to clients or through retail outlets or travel agencies (Westcott, et al., 2015). Tour operators are often confused with tour wholesalers, and the two terms are mostly used interchangeably. Tour wholesalers differ from tour operators in the sense that tour wholesalers only sell their packages through sales channels, such as retail travel agents (Mill, 2010). Tour operators can further be classified into inbound, outbound and ground tour operators. As this study will only focus on South African inbound tour operators, it is important to define an inbound tour operator at the outset and distinguish it from outbound and ground tour operators.

An inbound tour operator is a company that focusses primarily on bringing travellers into a country, either through group or individual tour packages (Saffery, Morgan, Tulga & Warren, 2007; Westcott, et al., 2015). An example would be bringing tourists from China to visit South Africa. An outbound tour operator is a company that focusses on taking domestic travellers to foreign counties through tour packages (Westcott, et al., 2015; Saffery, et al., 2007), for example, selling tour packages to South Africans who wish to visit Canada. A ground tour operator is a company that sells travel products and services within their country, to mostly domestic travellers (Saffery, et al., 2007).

2.4.2 Sustainable tour operators' practices

Tour operators can engage in sustainable tourism development by creating a sustainable supply chain, implementing sustainable tourism practices in their business operations and office environment, by contributing to the development of sustainable destinations, and influencing the demand for sustainable tourism products and services.

In 2000 the Tour Operators' Initiative for Sustainable Tourism Development (TOI) was developed by a group of tour operators. It was also supported by the UNEP, the WTO and the United Nations Educational, Scientific and Cultural Organization (UNESCO). This initiative started in response to the realisation that their long-term success depends on operating

sustainably. The TOI's (2003, p. 10) mission was to "… improve the sustainability of the tourism industry, and to encourage tour operators to make a voluntary yet firm corporate commitment to sustainable development". Members of the TOI took action in three key areas which are sustainability reporting, supply chain management and co-operation with destinations (TOI, 2003, p. 10):

- sustainability reporting
- supply chain management
- co-operation with destinations

In 2014 the TOI merged with the Global Sustainable Tourism Council (GSTC) to jointly apply their resources and energies to sustainable destination work based on the GSTC's destination criteria, also known as GSTC-D. More on this and the GSTC will follow in Section 2.5. The following sections discuss the three key areas for action as identified by the TOI, namely sustainability reporting, supply chain management and co-operation with destinations, as mentioned above.

2.4.3 Sustainability reporting

Sustainability reporting has been one of the three key areas for the TOI (Tour Operator Initiative), in 2002 the TOI in cooperation with the Global Reporting Initiative (GRI), developed the 'GRI Tour Operators' Sector Supplement' to be included in the GRI 2002 Sustainability Reporting Guidelines, providing tour operators with a total of 47 performance indicators to help them measure and improve their sustainability performance (Dodds & Kuehnel, 2010). This would assist mostly larger and global tour operating companies to effectively produce a sustainability report that was transparent and had measurable targets.

One of the objectives of this research study is to identify the sustainable tourism practices that South African inbound tour operators have adopted. However, for an organisation to benefit, either financially or in terms of marketing, they must be transparent about their sustainability goals, progress and achievements, and therefore seek to communicate this information to all their stakeholders. Therefore, producing a CSR or sustainability report can be seen as a tool to

openly communicate progress on all the sustainable tourism practices implemented in the business operations.

The concept of 'Corporate Social Responsibility', commonly known as CSR reporting, has become a popular activity for businesses within all sectors. The World Business Council for Sustainable Development (Kotler & Lee, 2005, p. 3) defines CSR as a "… business commitment to contribute to sustainable economic development, working with employees, their families, the local community and society at large to improve their quality of life". In addition to the World Business Council for Sustainable Development's definition of CSR, the World Travel and Tourism Council (WTTC) defines CSR as "…the means of adopting open and transparent business practices that are based on ethical values" (Frey & George, 2010, p. 623). The 17 SDGs, as seen in Table 3, also highlight the CSR actions needed by industry stakeholders to work towards sustainability.

The value and purpose of CSR reporting is to ensure that organisations are aware of their social, environmental, and economic impact, and that they are transparent about their impact. By producing a credible and transparent CSR report, and by following proper sustainability reporting guidelines, organisations can build trust among their clients and all their stakeholders, which in return can positively impact their triple bottom line. According to the Global Reporting Initiative (GRI) (GRI, 2019): "Stakeholders also play a crucial role in identifying these [sustainability] risks and opportunities for organizations, particularly those that are non-financial". CSR reporting and transparency can further help organisations in developing and achieving their sustainability policies, setting targets and better decision-making (GRI, 2019). The importance of transparency has also been emphasized in the King IV Report (IoDSA, 2016).

Producing a sustainability report has become an essential part of 'Integrated Reporting', which combines financial and non-financial parameters as organisations become more focussed and aware of their triple bottom line. This thus constitutes producing one report either annually or bi-annually, integrating their financial report, their sustainability report and their CSR report.The main constraints for tour operators to implement CSR and sustainability reporting into their

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business operations are cost, time, financial resources and the lack of skilled employees (Sheldon & Park, 2011).

There are a variety of sustainable business practices that tour operators can implement within their business operations and their office environment, which can ultimately be measured and reported through an organisation's CSR or sustainability reports. Examples of some of these CSR or sustainable business practices include (Dodds & Kuehnel, 2010; FTT, 2018; GSTC, 2018; Lin, Yu & Chang, 2018; Schwartz, Trapper & Font, 2008; Spenceley, 2006, Travelife, 2019):

- Corporate Social Responsibility (CSR) reporting or sustainability reporting annually or bi-annually.
- The implementation of environmental and social policies including a sustainable or responsible tourism policy.
- Conducting environmental audits to calculate greenhouse gas emissions.
- Engaging in carbon-neutral initiatives to offset greenhouse gas emissions.
- Conducting environmental and social impact studies.
- Appointment of a staff member specifically responsible for sustainable tourism management and CSR reporting.
- Waste management systems such as recycling at the office.
- Donating time or money to environmental or social projects.
- Employment of local people.
- Employment of Previously Disadvantaged Individuals.
- Providing equal employment opportunities (Do not discriminate).
- All employees are paid at least the minimum wage.
- Employees are provided with general training and advancement opportunities.
- Sustainable tourism training for staff.
- Partaking in local community development projects.
- Purchasing local products.
- Buying eco-friendly supplies.
- Having a customer feedback system in place and effectively monitoring feedback.

- Having a policy against commercial, sexual or any other form of exploitation or harassment, including child labour.
- Implementing energy and water-saving tools and strategies.

The above-mentioned practices are not only examples of CSR or sustainable tourism practices which organisations can implement and report on, but also key components in sustainable tourism certification programmes' auditing criteria and standards. These identified practices will form part of this study's data collection instrument as a guideline to identify and investigate inbound tour operators' participation in sustainable tourism practices from a business operations and office environment point of view. Additional practices are to be identified during data collection.

2.4.4 Supply chain management and barriers to sustainable supply chain management

The second key area for action as identified by members of the TOI is supply chain management. The activity of tour operating, as previously discussed, entails a tourism organisation buying tourism products and services in bulk, directly from the supplier (e.g. hotel, airline), and combining these products and services into attractive holiday packages, which are then either sold directly to consumers or through travel agencies (Budeanu, 2005).

Font, Trapper, Schwartz and Kornilaki (2008) argue that sustainability in tourism depends strongly on the development of better linkages between supply and demand. As intermediaries in the supply chain, tour operators are in a position to influence destination management on the supply-side and consumers on the demand-side. By linking supply and demand, tour operators play the important role of not only promoting and distributing products, but also facilitating information sharing in the supply chain (Sigala, 2008).

Management of the 'supply chain' was identified among the TOI members as a key area that would require special attention, as this is where the biggest impact can be made, leading to many tour operators developing and adopting a sustainable supply chain management strategy. This statement is supported by Schwartz, Tapper and Font (2008), who state that a tour operator is only as sustainable as its suppliers.

Sustainable supply chain management ultimately brings environmental and socio-economic considerations into an organisation's supply chain. The TOI (in Schwartz, et al., 2008, p. 299), argues that this includes "… considerations relating to energy and waste management, conservation of nature and heritage, preservation of cultural identity, respect for local communities and contribution to economic development in destinations".

Many tourism suppliers rely on tour operators and agents to buy and promote their products, since they have limited resources to market and promote their own products or services. Tour operators are thus in a favourable position to put pressure on their suppliers to take action towards implementing and developing sustainable tourism practices. Accommodation suppliers implementing sustainable tourism practices have also shown that in the long-term, sustainability can both increase the quality of their product and service offering but also lower the prices for many products and services (Tasci, 2017). This has led to large tour operating companies such as TUI (Touristik Union International) to only make use of suppliers complying with their environmental checklist (Sigala, 2008).

Once TUI realised that their most sustainably managed hotels deliver higher quality and customer satisfaction, they started to encourage all their hotels to become certified by a credible certification programme. Currently all of TUI's hotel partners have a mandatory clause in their contracts requiring them to work towards a 'credible' certification, with credible being defined as a GSTC recognised certification (TUI, 2019). To date, 80% of the hotels owned and managed by the TUI Group are certified by a GSTC recognised certification programme (GSTC, 2019a).

The characteristics of large tour operating companies such as TUI and small tour operators can be very different, not only in terms of scale and market share, but also their influence and bargaining power on their suppliers. However, according to Schwartz, Trapper and Font (2008), for all types of tour operators, small, medium, or large, sustainable supply chain management is integral to product quality, and has the potential to become a key selling point in an industry that is becoming increasingly more competitive.

Schwartz, Trapper and Font (2008) further developed a sustainable supply chain management framework that small to large tour operators can use to implement sustainability into their supply chain (see Table 4). This framework consists of a six-step cycle of continual improvement based on developing goals and objectives, implementing sustainable supply chain management policies, evaluating suppliers' performance, setting priorities for action and evaluating progress. Thus, no matter the size, any tour operator can develop and implement a sustainable supply chain management policy in its own capacity.

Table 4: A Sustainable Supply Chain Management Framework

Supply chain management framework	Small tour operators	Large and medium tour operators	
	Implementation	Initial implementation	Full implementation
Step 1. Engage your business	Appointment of a sustainable tourism representative, create goals, promote dialogue on the issues	Appointment of a sustainable tourism representative and management team, create goals, communicate business benefits to employees, directors and shareholders	Training for the sustainable tourism management team, with this cascaded down
Step 2. Create a policy for SSCM	Written SSCM policy document	Written SSCM policy document	Refined SSCM policy document
Step 3. Integrate your SSCM policy into your business	Identification of how SSCM procedures can be integrated into job roles	Review of job/role specifications, role profiles and working procedures	Investment in a sustainability management system
Step 4. Conduct a baseline assessment of suppliers	Evidence of use of assessment system (including informal systems) for suppliers	Use of formal assessment system (checklists, etc.) for some suppliers/in selected pilot destinations	Use of formal assessment system (checklists, etc.) for all suppliers
Step 5. Prepare and implement an action plan	Evidence of actions to implement the company's SSCM policy (including relevant internal management, staff training and customer communications)	Written action plan with clearly identified priorities for implementation of the company's SSCM policy (including relevant internal management, staff training and customer communications)	Refined action plan with clearly identified priorities for implementation of the company's SSCM policy (including relevant internal management, staff training and customer communications)
Step 6. Monitor and report on progress made	Evidence of monitoring of progress (including use of informal systems and feedback from tour leaders, etc.)	Use of formal monitoring system (checklists, etc.) for some suppliers/in selected pilot destinations	Use of formal monitoring and reporting system (checklists, etc.) for all suppliers, combined with some independent review

Source: Schwartz, Trapper and Font (2008)

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Fort and Cochrane (in Schwartz, et al., 2008) state that the cost of sustainability should not simply be outsourced to suppliers, but tour operators should make it their responsibility to design sustainable products, develop better internal management, communicate responsibility to consumers and collaborate with destinations.

Since tourists are also part of a tour operator's supply chain, tour operators have the opportunity to educate tourists and create awareness about the potential environmental and socio-cultural impacts that they (the tourists) may have on the destination, also providing information on how to avoid these negative impacts. To increase customer satisfaction, tour operators can influence, monitor, control and support the quality of sustainable development concerning all of the components assembled in a tour package including accommodation, transportation and excursions (Sigala, 2008). Orgams (in Tasci, 2017) tested the effectiveness of educational programmes on tourists and found an increase in enjoyment, environmental attitude, knowledge, intentions and behaviour among tourists due to educational programmes implemented at destinations, ultimately leading to an increase in overall quality and customer satisfaction.

There are several barriers that limit tour operators from developing a sustainable supply chain. First, most suppliers feel that sustainability requires a major financial investment and initial costs (Baddeley & Font, 2011). Hassanli and Ashwell (2020) also highlight the financial challenges faced by tourism operators, describing it as a catch-22. On the one side, implementing sustainable tourism practices such as water and energy-saving tools and strategies can be a driver for tourism organisations, as it will reduce their operational cost. However, many tourism organisations fear that they will receive no return on their investment, as commitment to sustainable tourism practices is associated with a long turnover period.

The second barrier includes the resistance of suppliers to change, due to human resource barriers. This includes the lack of qualified staff and training programmes, a lack of understanding and the inability to plan ahead (Dong & Wilkinson, 2007). This argument is also highlighted by Schwartz and Font (2009) who mention that some tour operators and suppliers may be too limited in terms of resources to engage in technical assistance or investment programmes. This is especially relevant in developing countries where ignorance and a lack of

knowledge can be seen among suppliers, staff members, clients and communities, as well as government institutions (Cavagnaro, et al., 2015).

The third barrier mentioned is the lack of consumer demand. Many tour operators and suppliers feel that a 'green gap' exists between the results of research studies, claiming that consumers demand sustainable tourism products and services, and the actual purchasing behaviour that is being experienced by tour operators and suppliers (Baddeley & Font, 2011). This is supported by Dodds and Kuehnel (2010) who state that consumers are to an extent aware of the issues related to sustainable tourism, but it has not yet influenced tour operators and suppliers to change how destinations are selected, what type of accommodation to select and contract, what type of activities and excursions to offer, or how a supplier or activity is being audited. However, some studies have suggested that as consumers become more aware of environmental and social issues, their demand for sustainable products and services may increase, creating a new market, enabling tour operators and their suppliers to differentiate their product offerings (Tixier, 2009).

A consumer research study conducted by the TUI Group in 2017 has shown a significant increase in customer demand for holiday companies to manage their sustainability impacts and to provide more sustainable holiday products (TUI Group, 2018, p. 90):

- 57% would book more environmentally responsible holidays if they were more readily available (up from 40% in 2012).
- 53% have a better image of holiday companies that actively invest in environmental and social initiatives (up from 39% in 2012).
- 68% are prepared to make lifestyle changes to benefit the environment (up from 60% in 2012).

2.4.5 Co-operation with destinations

Co-operation with destinations was highlighted as the third key area of action for TOI members, as TOI members "… work with a cross-section of stakeholders encompassing the diversity of views and interests present at the destination, including the local authorities, the private sector, civil society and NGOs" (TOI, 2003, p. 10).

Tour operators are often criticised as being responsible for the fast and irrational development of the tourism industry by industrialising this economic sector and destroying the natural and cultural resources on which it is based (Cavlek, 2002; Weaver & Oppermann, 2000; Yadav, Sahu, Sahoo & Yadav, 2018). For many years, tour operators have only focussed on economic growth and customer satisfaction, providing holiday packages to some of the most beautiful destinations on earth. Unfortunately, this economically driven mindset has led to the destruction of the environment, as popular destinations became exposed to issues such as exploitation of the natural resources and congestion, increased air pollution, resource consumption and waste generation (Budeanu, 2007). However, also mentioned by Bugeanu (2007), tourist purchases is one of the largest income contributors for host communities in many tourist destinations.

Although tourism contributes to employment and economic development, it can also be responsible for low pay and seasonal employment, instability due to low job status, displacement of local people, disruption or destruction of local cultures, inflation, crime and environmental degradation (Dodds, 2008; Edgell, 2006; Poudel, 2016; Rebollo & Baidal, 2003). According to Dodds and Kuehnel (2010, p. 223) "… tourism operators and destinations are starting to realize the negative impacts that tourism can have on their product offerings and are becoming aware that the very resources that attract tourists need to be protected for long term business sustainability". Cavlek (2002, p. 51) states that tour operators can contribute to developing sustainable tourist destinations by:

- Adding value through differentiation of the standard package holiday, by promoting better awareness of the destination rather than by just providing improved services.
- Pressuring suppliers to follow high environmental standards.
- Educating tourists to behave responsibly towards the environment in tourism destinations.
- Lobbying governments to ensure that sustainable practices are developed and coordinated between governments and tour operators.

In 2012, the GSTC revised its industry criteria, and produced a certification criteria with suggested performance indicators for Tour Operators (GSTC, 2018). This was done to create a common understanding of sustainable tourism with the minimum level of standards that tour operators should aspire to reach. Thus, tour operators operating sustainably or specialising in

sustainable tours, can now become certified by a CSTC recognised certification programme, such as Travelife for Tour Operators, to showcase that they are compliant with global sustainable tourism standards and criteria. In 2014 the TOI and the GSTC decided to merge, to jointly apply their energies and resources on work being done through the GSTC's destination criteria.

2.5 SUSTAINABLE TOURISM CERTIFICATION PROGRAMMES

The previous section provided an overview of how inbound tour operators can participate in sustainable tourism development. One of the sustainable tourism practices derived from the literature was the practice of becoming certified by a sustainable tourism certification programme. The following section aims to provide a background on the concept of certification, as this study aims to link certification with inbound tour operators, to ultimately identify the value sustainable tourism certification programmes add in developing sustainable inbound tour operators.

2.5.1 History of certification

Certification is defined as "… a voluntary procedure that assesses, audits and gives written assurance that a facility, product, process or service meets specific standards. It awards a marketable logo to those that meet or exceed baseline standards" (Honey & Rome, 2001, p. 8). In short, certification is a way of ensuring that an activity or a product meets certain standards (CESD, 2007).

Sustainable tourism certification programmes only really started in 1992 when the United Nations sponsored the Earth Summit in Rio de Janeiro, and Agenda 21 was drafted to urge all sectors of society to be more environmentally and socially responsible. Soon after the Earth Summit in 1996, the ISO 14001 generic standard for environmental management systems was released with many limitations (CESD, 2007). In 2003, the WTO published a document with recommendations to governments for supporting and/or establishing national certification systems for sustainable tourism. By the end of 2007, there were approximately 100 ecological

programmes that could certify or grant awards to tourism organisations; mostly hotels (Tasci, 2017).

Most tourism certification programmes worldwide focus primarily on the environmental part of sustainability such as pollution prevention, energy consumption and environmental protection; with little concentration on the cultural and socio-economic issues (Hassanli & Ashwell, 2020; Toth, 2002). Dodds and Joppe (2005) also state that the majority of certifications and eco-labels in European countries have a larger focus on environmental criteria, with only developing countries in Central- and South America, as well as South Africa, including a broader criteria focussed on cultural and social aspects.

2.5.2 Types of certification

It is important to distinguish between the terms eco-label and certification. Eco-labels or environmental labels simply imply that a product or service has taken its environmental impact into account, or rather, claims are made that it has a lower or positive impact on the environment (Piper & Yeo, 2011). An eco-label does not guarantee that these claims are true, as without certification and standards, eco-labels remain unregulated and any organisation can develop their own eco-label and market its products or services as environmentally friendly.

Globally many different types of certification exist, creating much confusion in the industry about their differences. Certification programmes can be grouped into three categories: first, second or third party certification. These are self-declared certifications (first-party certification); being audited by an independent auditor (second-party certification); or being audited by an independent auditor based on a certification programme's criteria and standard (third-party certification) (Honey & Rome, 2001).

Certification programmes can also be either process-based systems or performance-based systems. Some tourism organisations can be audited against their policies and what their intentions are; while other tourism organisations are being audited against the practices that have already been implemented. Certification programmes also differ between pass/fail certification and grading systems. Some certification programmes have only one standard that

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needs to be reached; while other certification programmes have different levels of standards (Honey & Rome, 2001).

However, according to the Center for Ecotourism and Sustainable Development (CESD) (2007, p. 12), most certification programmes have the following in common:

- Voluntary enrolment by tourism organisations wanting to become certified.
- Well-defined standards and criteria which tourism organisations must meet or exceed.
- Assessment and auditing of tourism organisations to become certified.
- Recognition and awarding the use of a marketable logo to the certified tourism organisations.
- Periodic follow-up audits to renew the certification (most commonly every three years).
- Continual improvement on the certification criteria and standards by the certified tourism organisations (must show continual improvement).
- Transparency between certification programme and tourism organisation in terms of sustainable practices and policies.

2.5.3 Benefits of certification for the different stakeholders

It is important to note that certification is not a substitute for good business practices. As stated by various authors, sustainability only becomes part of a consumer's decision-making once the primary criteria of price, quality, safety, availability and location are met " (Dodds & Joppe, 2005, p. 23; Tasci, 2017). However, certification can benefit consumers, tourism businesses and organisations, governments, the environment and local communities.

According to CESD (2007, p. 11), certification/certified businesses benefit consumers by the following:

- Providing tourists with environmentally and socially responsible choices – it helps consumers to know which businesses are truly socially and environmentally responsible and to make choices on this basis.
- Increasing public awareness of responsible business practices.
- Alerting tourists to the environmental and social issues in an area.
- Offering better quality service.

Certification can benefit tourism businesses and organisations by (CESD, 2007, p. 10):

- Helping businesses to improve themselves as going through a certification process is educational.
- Reducing operating costs.
- Allowing easier access to technical assistance and financing for businesses to implement new technology.
- Providing a marketing advantage to certified businesses, as consumers learn to recognise credible certification brands.

Certification can help governments by (CESD, 2007, p. 11):

- Protecting their market niches as ecotourism or sustainable tourism destinations, especially when the credibility of the destination is threatened by greenwashing.
- Raising industry standards in health, safety, the environment and social stability.
- Lowering the regulatory costs of environmental protection.
- Providing economic benefits to communities: certification can help reduce poverty, especially in rural areas.

Ultimately, certification can benefit the environment and local communities as it (CESD, 2007, p. 12):

- Requires the businesses to protect the environment and do little or no damage to it.
- Requires businesses to respect local culture and provide real economic and social benefits for it.
- Offers quality of service when the business is economically sustainable to ensure that it continues offering benefits in the long term.

2.5.4 Problems concerning certification programmes and baseline standards

One of the problems concerning certification programmes and especially eco-labels, is that no regulation is in place to control tourism organisations from self-declaring themselves as being a sustainable and responsible business. Many of these tourism organisations use their own marketing platforms to advertise that their product offering helps to conserve the environment or contribute to social and community aspects (CESD, 2007). However, in reality, without

concrete evidence or being affiliated with a credible association or certification programme, these claims can be considered to be 'greenwashing' (CESD, 2007).

According to CESD (2007, p. 7) the term 'greenwashing' refers to "… a business that presents itself as 'sustainable', 'ecological', 'green', 'responsible', 'eco', etc., when it doesn't comply with a generally accepted standard, or worse, it is in contradiction with them." Thus, without certification programmes that are accredited by a local or global accreditation body, it is impossible to determine which tourism organisations are truly operating sustainably and which tourism organisations can be accused of greenwashing.

Due to the lack of leadership by the governments, non-government organisations and industry-led organisations were established to operate certification programmes, creating awareness and applying legislative pressure on governments (CESD, 2007). One issue with this is the costs involved, as many of these organisations rely on subsidies and sponsorships, thus, making it difficult for them to ensure their long-term economic sustainability. Cost is also an issue for many tourism organisations wanting to become certified, because unless they are subsidised, not all firms will have the same potential access to become certified (Dodds & Joppe, 2005).

On the other hand, the biggest problem concerning certification standards is that before 2008, no international standards existed for sustainable tourism; and each certification programme had to certify tourism organisations based on their own developed standards (Toth, 2002). As far back as 2001, Fort and Buckley (2001) stated that there were over 100 different eco-labels in the tourism industry. In 2016, the estimated number grew to about 150-180 eco-labels (Kraus, 2016). The vast growth in the number of certification programmes, each varying in terms of quality, criteria, contents and scope, ended up confusing tourists to the point where they simply choose to ignore them (Lübbert, 2001). Aware of the dangers of "… uncontrolled proliferation, confusion of the consumer, lack of brand recognition, and widely varying standards …" it was necessary for certification programmes to develop a common language and global minimum standards (CESD, 2007, p. 9).

In 2002, a study by the Sustainable Tourism Stewardship Council (STSC) was conducted which recommended that an accreditation body should be formed that would in effect certify the certifiers (Dodds & Joppe, 2005). In 2007, an organisation named the 'Partnership for Global Sustainable Tourism Criteria' (GSTC) was formed as a coalition of 32 partners, initiated by the Rainforest Alliance, the UNEP, the United Nations Foundation (UNF) and the UNWTO. The purpose was to foster an increased understanding of sustainable tourism practices and the adoption of universal sustainable tourism principles (GSTC, 2018).

In 2008, the GSTC Partnership developed a set of baseline criteria organised around the four pillars of sustainable tourism: "… effective sustainability planning; maximizing social and economic benefits to the local community; reduction of negative impacts to cultural heritage; and reduction of negative impacts to the environment" (GSTC, 2018). Ultimately in 2010, the GSTC Partnership and the STSC decided to merge, forming the current 'Global Sustainable Tourism Council' also known as the GSTC. Since then, in 2013 the GSTC developed a 'Destination Criteria' (GSTC-D), which now serves as the world's baseline standard for tourism destination management and as a framework for national or regional sustainability standards. This criteria and standard enabled certification programmes to not only certify individual tourism organisations but an entire destination. In 2014, the GSTC further merged with the Tour Operator Initiative (TOI), an organisation led by large tour operators committed to sustainable value chain development.

2.5.5 Consumers' awareness and/or lack of awareness of certification programmes

Early research conducted in 2002 by the English Tourism Council (ETC), found that 58% of their respondents expressed their commitment to the environment when selecting accommodation suppliers, with 84% of the respondents stating that they would rather choose an accommodation supplier who is certified by a certification programme if they had the option (ETC, 2002).

Research conducted in 2019 by one of the world's leading online travel agencies, Booking.com, also found that "… 70% of global travelers say they would be more likely to book an accommodation knowing it was eco-friendly, whether they were looking for a sustainable stay

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or not. However, when it comes to recognizing a sustainable place to stay, almost three quarters (72%) of global travelers say that they are not aware of the existence of eco-labels for vacation accommodations, while well over a third (37%) of [travellers] affirm that an international standard for identifying eco-friendly accommodation would help to encourage them to travel more sustainably, and 62% would feel better about staying in an accommodation if they knew it had an eco-label" (Bookings.com, 2019).

These research studies by the English Research Council and Booking.com sound very promising, however as previously discussed, research studies have found a large disparity between the increasing claims by consumers to be environmentally aware and their actual purchasing behaviour (Baddeley & Font, 2011; Chafe, 2005; Dodds & Kuehnel, 2010; Font & Wood, 2007; Miller, et al, 2010). In 2003, EplerWood International (in Font & Wood, 2007) surveyed tour operators' clients travelling to Ecuador and the Galapagos Islands. The study found that 70% of the respondents expressed no interest or concern for social or environmental issues when selecting travel products, with only 8% of the respondents showing interest in purchasing a sustainable tour. Similar results were found by Chafe in 2005, with 70-80% of tourists expressing a high concern for eco-social components, but only 10% converting these concerns into actual purchasing behaviour. In 2002, a report by the WTO suggested that in the USA the ecotourism market is closer to 5% (WTO, 2002). In a paper published by Font and Wood (2007), Wood stated that when he was the President of the International Ecotourism Society, tour operators and lodge owners were making it known that their clients were not mentioning any desire for 'green standards'.

Since most tourists have a high social and environmental concern, it can be argued that if tourism organisations start to invest in sustainable tourism marketing programmes, and certification programmes become more recognised, tourists' might be influenced to convert their initial willingness into the actual purchasing of sustainable tourism products and services (Kotler, et al., 2016; Middleton & Hawkins, 1998). However, brand recognition is a major challenge for certification programmes.

Tasci (2017) conducted a study of 411 American residents to provide any three performance measures used within the tourism and hospitality industry. These performance measures could

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include any benchmarks, standards, licences, or certificates used. Fifty per cent (50%) of the respondents were not able to provide any name, 63% of respondents could not provide a second name, and 77% could not give a third name. More importantly, none of the major 'globally recognised' sustainable tourism certification programmes were mentioned.

Research conducted in Europe indicates that 20% of German tourists welcome marketing material from tourism organisations highlighting environmentally friendly options. In addition over 80% of Dutch tourists would like to find environmental issues in marketing material, of which 73% state that they would use this information for selecting holidays (Budeanu, 2007; Chafe, 2005). However, a study conducted in 2000 revealed that only around 3-19% of German tourists and 6% of Dutch tourists were aware of the existence of eco-labels (CREM, 2000).

Clearly, there is a lack of both certification programmes and tourism organisations in the marketing of sustainable tourism products and services, which is supposed to be one of the largest benefits for tourism organisations to attract more consumers. Tasci (2017) suggests that certification programmes should rather adopt a marketing approach because if consumers are not even aware of their names, tourism organisations will become more reluctant to pay for certification.

However, certification programmes are mostly run by government agencies or NGOs lacking the necessary marketing experience and finances to effectively promote certified tourism organisations. They are also reluctant to get involved with marketing companies as it conflicts with their core business of evaluating standards (Font & Wood, 2007). Tourism businesses are also to blame, as researchers investigating the Certification of Sustainable Tourism (CST) Programme in Costa Rica, found that besides the fact that only 5% of hotels in Costa Rica were certified by the CST, nearly half of the certified hotels did not advertise that they had been certified (Newton, et al., 2004).

Even tourism businesses who do advertise and promote their certified status, find it challenging, as many of the benefits associated with sustainable tourism standards are not visible to consumers when booking a tourism product or service. Font and Woods (2007) provide three explanations of the challenges faced:

1) The difference between a hotel that consumes little water and energy and produces little waste (amongst other criteria) is not obvious to the client.

2) For most clients, it is not as meaningful as other product attributes such as location, overall quality, facilities, and so on.

3) There are plenty of hotels out there with the same standards, but they are not certified.

Ultimately, tour operators and wholesalers who are considered as 'key buyers', are not actively promoting certified suppliers because "… (i) the labels are not consistently available around the world, and (ii) they do not represent meaningful value to the customer" (Font & Wood, 2007, p. 158). Thus, this comes back to the issue of too many different certification programmes and eco-labels in the industry that confuse consumers, decreasing the value of certification.

In 2004, one of the most recognised sustainable tourism certification programmes Green Globe conducted a member's survey which revealed that 18% of their members indicated an increase in media exposure; 22% indicated that they experienced an increase in green market appeal; and 8% indicated that they had received more customers due to their Green Globe membership (Font & Wood, 2007). Furthermore, Kahlenborn and Dominé (in Font, 2002, p. 203) state that "… international labels are the only ones likely to make a difference to the tourist, and if eco-labelling is meant to influence purchase as well as being a tool for peer pressure, then international labels are here to stay". This is vital as brand recognition could lead to an increase in consumers' actual purchasing behaviour.

This is supported by Font and Wood (2007, p. 154) who state that "…certification can help incrementally with product positioning, and while some businesses perceive that it does, they recognize that this benefit takes years to accrue". Bien (2005) suggests that consumer demand takes between 8 to 15 years to develop, long after a certification programme has been established.

With the development of the GSTC's destination criteria in 2013, accredited certification programmes are now able to certify entire destinations. Destination leaders can pledge to adhere to the GSTC's destination criteria. Thereafter, the GSTC will provide training to the local government and key shareholders, advise on the sustainability gaps present, oversee the

programme to ensure the destination meets the required standards, assist in motivating stakeholders, and ultimately provide recognition through certification. This process is illustrated below in Figure 2 - 'Roadmap for Sustainable Destinations' (GSTC, 2019b). This approach might be an excellent opportunity for entire destinations to not only work towards sustainability, but also to eventually become recognised and branded as a sustainable destination.

Figure 1: Roadmap for Sustainable Destinations

Roadmap to Sustainable Destinations

Destination leadership pledges to adhere to the GSTC Destination Criteria

GSTC provides training to government and key stakeholders

Expert team assesses current practices guided by GSTC-D; destination council addresses sustainability gaps

Council oversees progam to meet sustainability standards and motivate stakeholders

Destination receives public recognition for achievements such as certification

Source: Global Sustainable Tourism Council (GSTC, 2019b)

Tasci (2017, p. 386) also suggests that "… consumers may need to be reminded how sustainable tourism practices may improve quality, safety/security, and even prices, due to an optimum use of resources. The attractiveness of sustainability standards and benchmarks can be increased by linking them to quality, price, safety and security benefits sought by consumers". This is essential as research emphasises that sustainable tourism operators must deliver good quality and the same entertainment as conventional holidays (Budeanu, 2007).

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2.5.6 Certification and award programmes in South Africa

In South Africa, a variety of sustainable and responsible tourism awards and certification programmes exist. The most recognised sustainable tourism award programme is the 'African Responsible Tourism Awards' hosted annually as part of the World Travel Market Africa event in Cape Town. In 2019, the Federated Hospitality Association of Southern Africa (FEDHASA) announced a re-launch of the previous 'Imvelo Awards for Responsible Tourism', after the awards programme had been inactive since 2015. The new 'Imvelo Awards for Responsible Tourism' will be held in association with South African Tourism (SAT) and the Lilizela Awards.

The Lilizela Awards is the most recognised tourism awards programme in South Africa. This awards programme started as an initiative by the Department of Tourism; spearheaded by SAT and delivered by the Tourism Grading Council of South Africa (TGCSA). Although it is the most recognised awards programme in South Africa, this award does not focus primarily on sustainable or responsible tourism practices, providing an opportunity and space to re-launch the Imvelo Awards for Responsible Tourism, which will only focus on giving recognition and accolade to tourism organisations which excel in sustainable and responsible tourism development (SAT, 2019).

In terms of sustainable tourism certification programmes in South Africa, four programmes could be identified: the Green Building Council of South Africa's Green Star rating tool, the Greenleaf Eco Standard, GreenLine by Heritage, and Fair Trade Tourism.

The Green Building Council of South Africa (GBCSA), founded in 2007, is a membership-based organisation focussed on the design, building and operation of green buildings. The GBCSA, also a certification programme, makes use of a Green Star SA rating tool consisting of nine different categories addressing both environmental and sustainable aspects of designing, constructing and operating a building. With the use of a label, the Green Star tool recognises and rewards environmental leadership in the property industry by rating properties on a 6-star scale. The GBCSA is also a member of the World Green Building Council (WGBC) (GBCSA, 2017).

The Green Leaf Eco Standard started in 2007 when UK Tour Operators and the Wilderness Foundation came together with the vision "… to enable and certify the balance between business and nature" (GLES, 2018). The standard consists of a series of modules that act as sustainability and certification assessment tools, to assess the performance of any property or international organisation. These modules are designed to apply specifically to various sectors in the industry, including tourism, business, manufacturing, events and conferences, and products. The standards were established by a technical committee of sustainability experts, who are also responsible for the governance of the GLES. The technical committee is however appointed by the Green Leaf Environmental Trust (GLET), that is also responsible for reviewing the suitability of GLES Accredited Facilities (GLES, 2018).

GreenLine is a certification initiative offered by the Heritage Environmental Management Company and is also a division of Sustainability Benchmark Solutions (SBS) International. In 2013, GreenLine launched an updated version of their certification programme and now makes use of two levels of certification: Silver Class and Gold Class. The first level of certification called Silver Class, is on par with South Africa's NMSRT (SANS 1162). GreenLine also produced a booklet that guides tourism organisations on how to interpret the NMSRT (GreenLine, 2018). The second level of certification called Gold Class, requires a tourism organisation to achieve a score of 75% or more based on criteria designed by Greenline.

Lastly, Fair Trade Tourism (FTT), founded in 2001, is the only certification programme in South Africa recognised by the GSTC and still the only tourism organisation in the world that incorporates fair trade principles into its certification criteria. FTT is primarily focussed on education and raising awareness of the fair trade principles in the tourism industry, and also certifies tourism organisations that comply with their criteria and standards. Tourism organisations can also become non-certified members to get access to their sustainability toolkits, policies, templates and business development services (FTT, 2018).

Although not considered as a certification, FTT does 'approve' tour operators and award them with a marketable logo in exchange for their help to support and promote FTT certified accommodation suppliers and activities, thereby encouraging a sustainable supply chain. FTT approved tour operators are required to have at least one packaged holiday or itinerary with

50% of its bed nights at FTT certified or mutually recognised accommodation suppliers, and the inclusion of FTT certified activities contributing towards the percentage of bed nights. This itinerary must then be promoted as a 'Fair Trade Holiday'. FTT approved tour operators also receive other benefits such as networking and information sharing within the context of sustainable tourism (FTT, 2018).

There are also a variety of international certification programmes that can certify South African tourism organisations such as GreenGlobe and Greenkey. It is important to note that none of these certification programmes mentioned certify tour operators, but only accommodation suppliers and tourism-related activities. Currently, only the international and GSTC accredited certification programme, Travelife for Tour Operators, certifies tour operators in South Africa, however, to date only three tour operators have been certified in South Africa (Travelife, 2019). In 2018, FTT and Travelife signed a partnership agreement, combining forces to offer sustainability training and certification for tour operators throughout Southern Africa, enabling tour operators to become part of the globe's biggest network of sustainability accredited tour operators (ATTA, 2018). This collaboration might be essential from a global tourist perspective. As discussed previously, global brand recognition is essential for certification programmes to influence consumers' actual purchasing behaviour, and to provide peer pressure and encouraging fellow tour operators to also become certified.

In support of the above, certification and membership benefits, together with sustainable tourism certification programmes can provide education and guidelines to all industry stakeholders. In 2018, FTT produced the 'Captive Wildlife Guidelines' aiming to assist the travel industry and tour operators to make decisions about which captive wildlife facilities to support and which to avoid (FTT, 2018). These guidelines provide tour operators with a tool to easily assess captive wildlife facilities and to determine whether a facility is operating ethically and sustainably. However, tour operators still have the responsibility to make use of this tool when developing travel itineraries and selecting activity suppliers. The Southern African Tourism Services Association (SATSA) is currently also in the process of developing 'Animal Interaction Guidelines' in partnership with South African Tourism (SAT), with their release date unknown (SATSA, 2019).

2.6 CONCLUSION

This chapter provided the background against which this study was undertaken. First, the concept of sustainable tourism was discussed, including the development of the concept, its importance, key publications, organisations and developments, and the current status. The sustainable tourism landscape of developing countries and South Africa was discussed, to conceptualise the context and environment in which this study was conducted.

Inbound tour operators were then defined, followed by a discussion on the role that inbound tour operators can play in sustainable tourism development. Various sustainable tourism practices were identified providing a context to the following chapters. The chapter concluded by providing a background on sustainable tourism certification programmes. This literature review of sustainable tourism certification programmes was vital, as this study aims to link certification to inbound tour operators to identify the value certification add to the development of sustainable inbound tour operators. The following chapter will proceed with a detailed discussion explaining the research methodology followed in this study.

CHAPTER 3: RESEARCH DESIGN AND METHODS

3.1 INTRODUCTION

The previous chapter built an understanding of the fundamental concepts of sustainable tourism, inbound tour operators, and sustainable tourism certification programmes, to provide an understanding of the role inbound tour operators play in sustainable tourism development.

This chapter describes the research design and methods followed. The research paradigm/philosophy is explained, followed by a description of the inquiry strategy and the broad research design. The research methods used in this research study are then discussed, including the sampling method, the data collection strategy, and the data analysis technique. The quality and rigour of the research methods are considered and discussed, as well as the research ethics. The limitations of the study are also provided.

3.2 RESEARCH PARADIGM/PHILOSOPHY

An interpretivism point of view was adopted as the research study aimed to interpret and describe the current reality of South African inbound tour operators and to identify the current sustainable tourism practices which they have adopted. An interpretivist approach emphasises that human beings are different from physical phenomena as they create meanings. As participation in sustainable tourism practices is entirely voluntary, many tourism organisations take part in sustainable tourism practices for different reasons and in their own unique and diverse way. According to Saunders, Lewis and Thornhill (2016, p. 140), "… the purpose of interpretivist research is to create new, richer understandings and interpretations of social worlds and contexts". Adopting an interpretivist point of view was appropriate as it fits the complexity, richness, multiple interpretations and meaning-making nature of the concept of sustainable tourism, as well as South African inbound tour operators.

3.3 DESCRIPTION OF INQUIRY STRATEGY AND BROAD RESEARCH DESIGN

Research design refers to the master plan that is needed for the collection of information that acts as a framework with methods and procedures to guide the research study (Zikmund, 2003). The selection of a research strategy was guided by the research objectives, the purpose of the research, the extent of time and resources available, the existing knowledge, the ease of access to participants and the data available (Saunders, Lewis & Thornhill, 2012).

The research design chosen for this study was a qualitative research approach, collecting data by conducting in-depth interviews. The term 'qualitative' is often used to describe data collection techniques such as interviews, that generate or use non-numerical data (Saunders, et al., 2016). The reason for adopting a mono method qualitative research study approach was to collect rich data by asking open-ended questions and allowing participants to elaborate on certain key questions and topics.

As participation in sustainable tourism practices is voluntary, adopting a qualitative research design allowed the researcher to better capture the participants' point of view, aiding with understanding how participants adopted sustainable tourism practices within their organisations, and the relationships that participants have with their clients, suppliers, sustainable tourism certification programmes and the Department of Tourism. Most importantly, this research design provided an opportunity to probe, which is vital to clarify and understand certain responses from the participants, as some concepts, terms and practices might be considered complex and unknown to some participants.

There are six potential advantages of using a qualitative approach, as highlighted by Leedy and Ormrod (2015, p. 271):
- Exploration: Participants can help you gain initial insights into what has previously been a little-studied topic or phenomenon.
- Multi-faceted description: Participants can reveal the complex, possibly multi-layered nature of certain situations, settings, processes, relationships, systems or people.
- Verification: Participants can allow the researcher to test the validity of certain assumptions, claims, theories, or generalisations within real-world contexts.

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- Theory development: Participants can enable you to develop new concepts or theoretical perspectives related to a phenomenon.
- Problem identification: Participants can help you to uncover key problems, obstacles, or enigmas that exist within the phenomenon.
- Evaluation: Participants provide a means through which you can judge the effectiveness of particular policies, practices or innovations.

Throughout the last 30 years, the Department of Tourism and the former DEAT published various documents related to sustainable tourism. At the same time, the sustainable tourism certification programme landscape has developed with the release of a global sustainable tourism standard and criteria. Also, with the advancement of technology and an increase in sustainability awareness, many tourism organisations started to implement and experiment with sustainable tourism practices (Strategic Direction, 2009).

Taking this into account, a descriptive research design was the most fitting and appropriate research design to follow. Saunders, Lewis and Thornhill (2016, p. 175) state that "… the purpose of descriptive research is to gain an accurate profile of events, persons or situations", known to accompany research questions that include "What", "Where", "When", "How", and "Who". The descriptive research design is appropriate since the key objectives are to identify the various sustainable tourism practices that South African inbound tour operators have adopted in their business operations, and to identify the value certification programmes add to the development of sustainable inbound tour operators.

The following are appropriate descriptors that best describe and summarise the broad research design of the research study:
- Empirical study: The researcher collected and analysed primary data gathered through conducting semi-structured in-depth interviews.
- Basic research: Basic research was undertaken "… purely to understand the process of business and management and their outcomes" (Saunders, et al., 2016, p. 10).
- Descriptive: The researcher aimed to build an accurate profile of the sustainable tourism practises being adopted by South African inbound tour operators, and to identify the value of certification programmes in developing sustainable inbound tour operators.

- Cross-sectional: Cross-sectional studies entail the study of a phenomenon (or phenomena) at a particular time (Saunders, Lewis & Thornhill, 2009). Cross-sectional research was used in this study as the in-depth interviews only captured and represented the data given at the time of response.
- Qualitative data: Qualitative data refers to non-numerical data (Saunders, et al., 2016). The data collection technique used was semi-structured interviews which generate non-numerical data.
- Content analysis: Content analysis is an analytical technique that codes and categorises qualitative data (Saunders, et al., 2016).

3.4 SAMPLING

A target population is the "… complete set of cases or group members that are the actual focus of the research inquiry, and from which a sample may be drawn" (Saunders, et al., 2016, p. 729). The target population for this research study was all the inbound tour operators located within the South African borders. Non-probability sampling was used in this research study as the probability of each South African inbound tour operator being selected from the target population was unknown.

Due to the limitations of time, costs and logistics; a non-probability sample was drawn making use of purposive or judgemental sampling, where the researcher was expected to use his judgement to select cases that would best enable him to achieve the research objectives (Saunders, et al., 2016). The criteria used to select the participating organisations to include in the study sample were as follows:

1) The participating organisation must be registered as a South African tourism organisation with the Companies and Intellectual Property Commission (CIPC) of South Africa.
2) The participating organisation must be a member of SATSA to ensure that the tourism organisation is actively operational in the industry.
3) All of the participating organisations must be inbound tour operators whose core business includes tourists from international markets visiting South Africa.

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4) All of the participating organisations must specialise in providing their clients with either tailor-made travel packages or pre-developed travel itineraries which include overnight accommodation (day tours were not part of this research study's scope).

5) Half of the participating organisations must either be certified or a member of a sustainable tourism certification programme.

6) The other half of the participating organisations must **not** be certified or a member of any sustainable tourism certification programme.

The sample for this research study can be categorised into three types of South African inbound tour operators. The sample consists of two South African inbound tour operators who are certified by Travelife for Tour Operators. Travelife for Tour operators is an international sustainable tourism certification programme and currently the only certification programme globally to have certified South African inbound tour operators. To date, only three tour operating organisations in South Africa have been certified by Travelife. Two Travelife certified inbound tour operators were eligible and willing to participate in this research study, with the third being a volunteer programme, thus not meeting the sampling criteria.

These two Travelife certified inbound tour operators were selected as it was assumed that being certified and audited every three years against a GSTC accredited certification programme's criteria and standards may provide in-depth information and insights into the value and role played by sustainable tourism certification programmes. Furthermore, as these two South African inbound tour operators have to comply with global criteria and standards, it was expected that various sustainable tourism practices would be identified, as it is either mandatory as part of the certification, or voluntary but an essential part of their business operations and culture. As these two Travelife certified inbound tour operators specialise in providing their clients with sustainable tourism products and services, it was assumed that they would be in the best position to answer questions regarding the perceived demand for sustainable tourism travel products and services, as well as to provide insights into how they approach sustainable supply chain management.

Due to the limitation of only having two certified inbound tour operators within South Africa, the researcher decided to approach South African inbound tour operators who are 'approved'

members of Fair Trade Tourism (FTT), the South African-based sustainable tourism certification programme and Africa's largest portfolio of certified accommodation suppliers. *It is important not to confuse FTT 'approved' members with being certified members, as FTT 'approved' members have not been audited against any criteria or standard related to sustainable tourism.*

FTT does not certify inbound tour operators, only accommodation suppliers and tourism activities. FTT does however 'approve' tour operators and award tour operators with a marketable logo in exchange for their help in supporting and promoting FTT certified accommodation suppliers and activities, encouraging a sustainable supply chain. To become an 'approved' member of FTT, tour operators are requested to sign a code of conduct and to develop at least one travel package with half its bed nights at FTT certified accommodation suppliers.

The researcher decided to include FTT 'approved' inbound tour operators as part of the sample with the assumption that FTT 'approved' inbound tour operators would not only have adopted more sustainable tourism practices than other non-certified and non-approved South African inbound tour operators, but would also have a greater commitment to sustainable tourism development and some experience with a sustainable tourism certification programme. All the FTT 'approved' inbound tour operators complying with the researcher's set criteria were approached, but due to a lack of willingness to participate only nine of the thirty FTT 'approved' inbound tour operators agreed to participate in the study.

To create a sample that would better represent the target population but at the same time contribute to achieving the set research objectives, 11 non-certified and non-approved South African inbound tour operators were added to the sample. These 11 non-certified and non-approved South African inbound tour operators were selected through the judgement of the researcher to match the characteristics and organisational size of the existing participating organisations in the existing sample group.

Information gathered from the larger sample group promoted a better understanding regarding the demand for sustainable tourism, as perceived by certified and approved as well as non-

certified and non-approved South African inbound tour operators. The larger sample group also increased the number of sustainable tourism practices that were identified, and enabled the researcher to explore the value of sustainable tourism certification programmes, as perceived by South African inbound tour operators with a different level of experience and exposure to sustainable tourism certification programmes. This larger sample further aided in better understanding South African inbound tour operators' ability to influence their suppliers and the barriers which they face in implementing sustainable tourism practices. It also ensured that the information gathered would be valuable, information-rich and would contribute to achieving the research objectives.

Creswell (in Saunders, et al., 2016, p. 297) suggests that five to thirty participants would be an appropriate sample size when conducting interviews. The researcher was able to conduct in-depth interviews with 22 participants, whereafter data saturation was reached. Data saturation means that "… you have continued collecting data up to the point at which no new data are forthcoming" (Wagner, Kawulich & Garner, 2012, p. 88). The sample size was deemed appropriate taking into consideration that there is an estimate of 330 tour operators listed on SATSA's website, including inbound, outbound and ground tour operators (SATSA, 2019).

The sample consists of inbound operators located in two main geographical regions: Cape Town and surroundings, and Gauteng. The reason for selecting these two regions is that most South African inbound tour operators' offices are located in one of these two regions. This may be because these two regions are the two main entry points for inbound tourists into South Africa, and also the two major tourist destinations within South Africa. Ultimately, the majority of inbound tour operators in South Africa use one of these two destinations as the starting or finishing destination for their tours. One participant located outside of these two regions (Nelspruit in Mpumalanga) was also included in the sample, as there was a need for more FTT approved inbound tour operators.

3.5 DATA COLLECTION STRATEGY

The data collected for this research study can be classified as primary data. Primary data, also 'new data', are "… data collected specifically for the research project being undertaken" (Saunders, et al., 2016, p. 724). The data were collected through semi-structured in-depth interviews. In semi-structured interviews, the researcher may follow a standard list of questions and include a few tailor-made questions to get clarification or to probe a participant's reasoning (Leedy & Ormrod, 2015). The researcher made use of an interview schedule (Annexure A) containing all of the questions including a list of prompts to promote and further the discussion on certain key topics.

According to Saunders, Lewis and Thornhill (2016, p. 394), in-depth and/or semi-structured interviews have an advantage in the following circumstances, as apparent in this study:

- Where there are a large number of questions to be answered.
- Where the questions are either complex or open-ended.
- Where the order and logic of questioning may need to be varied.

Semi-structured interviews have the advantage that interview questions can be explained to the interviewee if the interviewee may have misunderstood a particular question, increasing the quality of the data collected. This was essential for this study as some of the concepts and terms, for example, 'triple bottom line', had to be explained to some participants. Collecting data through semi-structured interviews enabled the researcher to capture a participant's point of view and experience of a situation (Bloomberg & Volpe, 2012). The data collected through a semi-structured interview can also be widely applied.

There are a few limitations and challenges associated with in-depth interviews. The first issue is time, as interviewing is a very time-consuming process. Second is the issue of costs, such as travel and living costs. These issues were apparent as most financial resources were spent on travelling to the various participants to conduct the in-depth interviews, with some participants only allowing a certain amount of time to conclude the interview. The third issue concerns the quality of the data collected, as the quality of the data depends on how the interviewer conducts the interview, and the quality of the interaction between the interviewer

and the interviewee. Fourth, not all people were equally articulate, cooperative and perceptive (Bloomberg & Volpe, 2012).

These challenges have to be overcome to ensure that the quality of the sample and the quality of the data collected would not be influenced. The issue of time was resolved as the researcher decided to schedule all the interviews to be conducted in a certain region on the same day, to ensure that time was effectively and efficiently utilised. A bursary from the University of Pretoria covered most of the expenses during the data collection period. Furthermore, the researcher ensured that the interview schedule was developed in such a way to promote a logical flow of conversation. This allowed participants to be at ease during the interview, resulting in participants feeling comfortable to disclose information on their organisation's sustainable tourism practices. Excellent cooperation was received from the participants and the researcher was able to conduct in-depth discussions on all the major topics that this research study set out to investigate.

3.5.1 Interview process

To ensure a high-quality interview process, the researcher made use of three key measures that an interviewer conducting semi-structured or in-depth interviews must include during preparation (Saunders, et al., 2016, p. 401):

- Get a good level of knowledge about the research topic and organisational or situational context in which the interview is to take place.
- Develop interview themes and supply information to the interviewee before the interview.
- Choose an interview location where the interviewee will feel comfortable.

These key measures were taken into account as follows:

A literature review was conducted to ensure that adequate knowledge was gained on all topics related to the study. Furthermore, an extensive screening was conducted on each participating organisation, to ensure that the pre-set selection criteria were met. This was necessary as the sample was chosen through a purposive or judgemental sampling method. The researcher also

browsed through each participating organisation's website to ensure that the questions being asked would be to the point and relevant. This further enabled the researcher to ask questions directly related to the research topics.

Before conducting the in-depth interviews, the researcher contacted all the prospective participants either by email or telephonically, explaining the purpose of this research study, the importance of their contribution, and asking for their participation in the research study. Upon a participant's agreement to participate, a convenient time and date for both the interviewer and the interviewee were established. The participants were provided with the option to choose their preferred interview location.

Due to the different geographical regions present in this research study, the researcher spent two two-week periods in Cape Town for data collection. As the researcher is located in the second geographical region (Gauteng), interviews were scheduled over a two-month period, as the participants agreed to participate in the study. The researcher conducted face-to-face interviews with the majority of the participants. The reason for this approach was to improve the flow of the interviews, to increase the likelihood of valuable conversations and interactions, to increase the quality of responses and to collect high quality and comprehensive data.

However, due to travel costs and availability, one of the participants was interviewed telephonically, and two participants located outside of the two geographical regions at the time of data collection were asked to answer the interview questions electronically by email. All the main questions were answered and discussed in detail.

3.5.2 Data collection instrument

The researcher made use of an interview schedule containing all the major questions including a list of prompts to promote and further the discussion on certain topics. Various academic and industry sources were consulted in the design of the interview schedule. Firstly, the questions used in the questionnaire by Spenceley (2006) were adapted to be used in an open-ended interview schedule. Secondly, the global baseline standard and criteria developed by the GSTC was consulted to identify the core elements associated with sustainable tourism (GSTC, 2018). Thirdly, the certification criteria used by Travelife was observed, as it provides a benchmark of

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best practice directly associated with sustainable tour operators (Travelife, 2019). Fourthly, the certification criteria used by FTT was consulted to make the interview schedule relevant to a developing country context (FTT, 2018). Finally, the literature review identified additional themes to be covered in the interview.

The interview schedule was divided into six sections, each with a separate focus. The researcher followed the interview schedule according to these six sections, to simplify the analysis of the data and to create a logical flow when conducting the in-depth interviews. The order of these sections was important as it formed a pattern and continued to build on each other as the interview progressed.

The first section of the interview schedule focussed on the sustainable tourism practices that the participating organisations may have implemented in their business operations and office environment. The second section of the interview schedule focussed on the supply-side of the organisation's supply chain, aiming to both identify sustainable tourism practices which the organisation may have implemented into its supply chain, and to ascertain whether the organisation put pressure on its accommodation suppliers as well as its activities and excursion suppliers to operate more sustainably.

The third section of the interview schedule focussed on the organisations' participation in sustainable destination management practices, especially within the destinations visited on tour. This included investigating whether the participants felt that their organisations contributed positively towards the local communities, natural environment and cultural environment. Section 4 of the interview schedule focussed on the demand-side of the organisations' supply chain, aimed at exploring the perceived demand for sustainable tourism products and services, and whether the participants felt pressure from their clients to implement sustainable tourism practices.

Section 5 of the interview schedule focussed on identifying the value sustainable tourism certification programmes add or can add to the organisations' overall sustainability, and inbound tour operators in general. The last section of the interview schedule focussed on the barriers faced by the participating organisations that hinder them from participating in

sustainable tourism practices. Table 5 provides a summary of the research objectives, the sections of the interview schedule that covered each objective and the sources from which the section was developed. The data collection instrument is attached as Annexure A.

Table 5: Research objectives and interview schedule sections matrix

Research objectives	Relevant section in the interview schedule	Sources
To discuss the concepts of sustainable tourism, sustainable tourism development in South Africa, sustainable inbound tour operators and sustainable tourism certification programmes.	Literature review	See literature review (Chapter 2)
To identify the sustainable tourism practices South African inbound tour operators participate in.	Section 1 – 5	(Spenceley, 2006) (GSTC, 2018) (Travelife, 2019) (FTT, 2018)
To investigate whether South African inbound tour operators put pressure on their supply-side to implement sustainable tourism practices.	Section 2	(Spenceley, 2006) (GSTC, 2018) (Travelife, 2019) (FTT, 2018)
To investigate whether South African inbound tour operators implement sustainable destination management practices.	Section 3	(Spenceley, 2006) (GSTC, 2018) (Travelife, 2019) (FTT, 2018)
To investigate whether South African inbound tour operators experience pressure from their demand-side to implement sustainable tourism practices.	Section 4	(Spenceley, 2006) (GSTC, 2018) (Travelife, 2019) (FTT, 2018)
To identify the value of sustainable tourism certification programmes in developing more sustainable South African inbound tour operators.	Section 5	(Spenceley, 2006) (GSTC, 2018) (Travelife, 2019) (FTT, 2018)
To identify the barriers that hinder South African inbound tour operators from adopting sustainable tourism practices.	Section 6	(Spenceley, 2006) (GSTC, 2018) (Travelife, 2019) (FTT, 2018)

3.5.3 Pre-testing of the data collection instrument

The data collection instrument was pre-tested by the researcher's supervisors and the managing director of Fair Trade Tourism for their expert insight, advice and contributions. Furthermore, during a pilot study, the researcher interviewed two knowledgeable employees of FTT to assess the flow of the interview schedule, and whether participants understood the questions being asked. Without any adjustments necessary, the researcher felt confident that the interview questions were valid and that the data collected would be reliable.

3.6 DATA ANALYSIS STRATEGY

Content analysis was the most appropriate data analysis strategy to get meaning from the data collected. This data analysis strategy can further be divided into two types of content analysis: quantitative content analysis and qualitative content analysis. Both of these data analysis strategies are very similar but with a few differences, and are frequently used by researchers collecting qualitative data through in-depth interviews (Saunders, et al., 2016). Both of these types of content analysis strategies were used to analyse the data collected.

According to Saunders, Lewis and Thornhill (2016, p. 608), "… content analysis is an analytical technique that codes and categorises qualitative data in order to analyze them quantitatively". This data analysis approach is also known as quantitative content analysis. This technique was used to analyse the data collected from questions that required either a yes or no response, or for the responses that can only be grouped into a limited or small number of categories. By using a quantitative content analysis approach, the researcher was able to convert the qualitative data collected into quantitative data, to identify the frequency of set responses.

However, some of the data collected were purely qualitative and required a qualitative content analysis approach. According to Schreier and Mayring (in Flick, 2014, p.2), "… qualitative content analysis is a method for systematically describing the meaning of qualitative data". With this approach, codes were used to identify the frequency of similar responses. Coding involves labelling each unit of data in the interview transcript with a code that symbolises or summarises that extract's meaning (Saunders, et al., 2016). Ultimately, codes were used to provide the

basis for the development of categories, by grouping codes related to the same topic together (Wagner, et al., 2012).

The in-depth interviews with the participants were recorded with an audio-recorder and transcribed afterwards by a professional third-party transcriber. Making use of an audio-recorder was vital, as Saunders, Lewis and Thornhill (2016, p. 575) state that "… this will help you to recall the context and content of each interview or observation, as well as informing your interpretation, as you will be more likely to remember the precise circumstances of your data collection", thus increasing the validity of the data. In addition to the transcribed audio-recordings, for every interview a copy of the interview schedule document was used to capture the participants' responses in writing. This was done not only to increase reliability, but also to ensure that all of the data was being collected and to avoid losing data if a technical problem was to arise.

After the audio-recording was transcribed, Microsoft Office Excel was used to sort the data and conduct the data analysis. This was the most appropriate data analysis approach, as the researcher felt comfortable with the amount of data and is skilled and familiar with Microsoft Office Excel. For every question in the data collection instrument, a separate Excel sheet was created. From the transcripts formatted in Microsoft Office Word, each participant's response to each question was copied to the Excel sheet, along with the participating organisation's unique code for identification. Thus, all participants' responses to all questions were captured in one location to simplify the data analysis. An example of how the data from Question 1 was sorted and analysed can be seen below in Figure 3.

Figure 2: Example of the data analysis process

	Question 1) Are you familiar with the concept of responsible/sustainable tourism?			
	Answer			
Respondent ID	Yes	No	Other	Comment or Quote
1	y			Yes, and over the past few years more and more.
2	y			Absolutely
3	y			
4	y			
5	y			
6	y			
7	y			
8	y			
9	y			
10	y			
11	y			
	11	0	0	
12	y			
13	y			
14	y			Yes, it is something that has been around for a while, so it is something that is very important to us, being in safari. It is a part of what we do, whether we do it in top of mind all the time but just by doing safari we have sustainable tourism in a way.
15	y			
16	y			
17	y			
18	y			
19	y			
20	y			
21	y			
22	y			
	11	0	0	
	22	0	0	

3.7 ASSESSING AND DEMONSTRATING THE QUALITY AND RIGOUR OF THE RESEARCH DESIGN

The following section describes the methods implemented to minimise or eliminate errors during data collection, and how validity, reliability and transferability were ensured.

3.7.1 Errors in data collection

When making use of semi-structured in-depth interviews as a data collection instrument, there are three types of potential bias to consider: interviewer bias, interviewee or response bias and participation bias. Interviewer bias "… is where the comments, tone or non-verbal behaviour of the interviewer create bias in the way that the interviewees respond to the questions being asked" (Saunders, et al., 2016, p. 397). This may be because the interviewer attempts to impose his/her own beliefs on the interviewer, or in the way in which the interviewer interprets responses. The researcher was aware of his impact during the interviews and strove to remain unbiased and neutral at all times. Furthermore, active listening skills were demonstrated during every interview, and extra caution was taken to ensure that responses were recorded accurately and comprehensively.

Interviewer bias can further lead to interviewee or response bias. Interviewee or response bias can be caused by the interviewees' perception of the interviewer. Perceived interviewer bias may occur when the interviewee chooses not to discuss certain topics, or decides to only provide part of the information required (Saunders, et al., 2016). The researcher was aware that this type of bias might be faced, as organisations may over-exaggerate their participation in sustainable tourism practices, as they may feel that it is the right thing to say. Aware that this could potentially influence the quality and reliability of the data, before each in-depth interview, the researcher ensured that he had an adequate level of knowledge on the context of each participating organisation and their approach to sustainable tourism. This allowed the researcher to ask specific questions related to that organisation and to probe participants to explain vague or questionable responses.

Lastly, participation bias refers to the nature of the individuals or participants who agree to be interviewed, and their willingness to participate and invest time in the interview (Saunders, et al., 2016). It was noticed that it was mostly inbound tour operators already involved in sustainable tourism practices, or who were at least aware of the concept of sustainable tourism, who immediately agreed to participate in this study. This bias was overcome by emphasising the fact that there is a general lack of participation in research studies related to inbound tour operators, and highlighting that participation would be of high value, whether or not the organisation actively participates in sustainable tourism practices. This seems to have increased the response rate and participants' willingness to contribute to this study and actively participate during the interviews.

Furthermore, the researcher demonstrated his commitment to confidentiality, and explained how data would be treated after the in-depth interview had been completed, and offered to provide a summary of the research findings on request (Zikmund, Badin, Carr & Mitch, 2013). Additionally, the participants were given the option to choose the location of the in-depth interview, to ensure that the interviewees were in a comfortable and familiar environment.

3.7.2 Reliability and dependability

Reliability refers to replication and consistency, being able to replicate an earlier research design and achieving the same findings (Saunders, et al., 2016). Dependability is the parallel criterion to reliability. According to Saunders, Lewis and Thornhill (2016, p. 398), "… the issue of reliability/dependability in relation to findings derived from using in-depth or semi-structured interviews is that these are not necessarily intended to be repeatable since they reflect reality at the time they were collected, in a situation which may be subject to change".

However, reliability and dependability can still be established by providing a detailed and thorough explanation of why the research design was selected, reasons for choosing the strategies and methods used, and explaining how the data was collected and analysed. Throughout the entire research study, the researcher intended to provide as much detail as possible, along with extensive explanations and reasoning behind the research methodology, findings, discussion and conclusion.

3.7.3 Validity and credibility

Validity refers to the appropriateness of the measures used, the accuracy of the analysis of the results and the generalisability of the findings. Credibility is the parallel criterion to internal validity, which is established when research accurately demonstrates a causal relationship between two variables. According to Saunders, Lewis and Thornhill (2016, p. 400), "… semi-structured and in-depth interviews can achieve a high level of validity/credibility when conducted carefully using clarifying questions, probing meanings and by exploring responses from a variety of angles". The researcher ensured that a positive relationship was built with the participants, that sufficient data was collected, and made use of probing to check vague responses to ensure both validity and credibility (Saunders, et al., 2016). Credibility was further increased by recording every interview with an audio-recorder, as well as manually recoding the responses instantly on a copy of the data collection instrument.

3.7.4 Transferability

According to Geertz (in Wagner, et al., 2012, p. 243), transferability is "… the basis for making similarity judgments; it is achieved by maintaining all versions of the data in their original forms and by presentation of thick description". Transferability is the parallel criterion to external validity, which is concerned with the question: can a study's research findings be generalised to other relevant settings or groups? Transferability in this research study was established by providing a full description of the research objectives, design, context, findings, discussion and interpretation in the final dissertation.

3.8 RESEARCH ETHICS

Ethics is an issue that must be considered throughout the entire research study including the research design and the implementation process (Wagner, et al., 2012). In the context of research, "… ethics refer to the standard of behaviour that guides your conduct in relation to the rights of those who become the subject of your work, or are affected by it" (Saunders, et al., 2016, p. 239). Diener and Crandall (1978, p. 132) break down the ethical principles of business research into four main areas, and these were taken into account:

- Harm to participants. No physical or psychological harm was done to any participant in this study. This includes physical injury, stress, embarrassment or loss of self-esteem.

- Lack of informed consent. Each participant was provided with an informed consent form that he or she signed before participating in the study. This was done to ensure that each participant was informed about the nature of the study, aware that he or she was allowed to stop participating at any time and that he or she had participated in this study voluntarily. An example of the informed consent form is attached as Annexure B.

- Invasion of privacy. The research study was not an anonymous research study as the research sample is known. However, the participants and the participating organisations were not mentioned in the findings or conclusion of this study. This was done by referring to the participant or organisation in generic terms, such as 'one inbound tour operator stated that …' Also, the interview schedule was designed to exclude any personal questions that could threaten a participant or participating organisation's privacy.

- Deception. All the participants were informed, before signing the informed consent form, about the nature of the research study, and that a summary of the findings would be sent to the participants on request.

Other ethical considerations were also taken into consideration:

- Plagiarism. Proper recognition was given to all sources used. All secondary data were accompanied by in-text references. A Turnitin report is attached as Annexure E.

- Permission of organisation. Ethical clearance was obtained from the University of Pretoria's Faculty of Economic and Management Sciences' Research Ethics Committee. A letter of approval is attached as Annexure C.

- Permission of participants.

- Researcher's honesty, objectivity and integrity. The researcher was honest in reporting on all findings and remained unbiased throughout the research process.

- Reciprocity. No transactional exchange such as money or gifts was given to participants from whom primary data was collected. Participation in this research study was strictly voluntary.

3.9 LIMITATIONS OF THE RESEARCH

The qualitative research design and purposive/judgement sampling method used in this research study, meant that the findings could not be generalised to reflect the entire target population. Although the sample size and sampling method is appropriate and sufficient for qualitative research, with data saturation being reached for the sample selected, generalisation reflecting the entire target population is not possible.

The sample selected was sufficient to reach the research objectives in identifying sustainable tourism practices adopted by South African inbound tour operators, especially with half the sample being a member of a sustainable tourism certification programme and two participating organisations being certified. This allowed the researcher to gather in-depth information on this sample group, and to ultimately identify the value sustainable tourism certification programmes add to the development of sustainable inbound tour operators.

3.10 CONCLUSION

This chapter presented and described the research methodology followed in this study. The overall research design and research methods used in the study were discussed and an explanation was provided on why an interpretivism point of view was adopted, and why a descriptive research design was the most fitting research design.

This chapter further explained the use of semi-structured in-depth interviews to collect data, making this a qualitative research approach. The sampling method was then explained, followed by a discussion on content analysis as the data analysis technique. The quality and rigour were assessed and the principles of ethical research that were taken into consideration were discussed. Last, the research limitations were identified and discussed. In the following chapter, the research findings will be presented.

CHAPTER 4: FINDINGS

4.1 INTRODUCTION

The previous chapter described the research methodology and explained the process followed to collect and analyse the data. In this chapter, the findings of the study are presented, starting with a discussion on the sample profile. The findings are then presented in the same order as the six sections in the data collection instrument. The sections are as follow: sustainable business practices by inbound tour operators, sustainable supply chain management by inbound tour operators, sustainable destination management practices by inbound tour operators, the demand-side of sustainable supply chain management by inbound tour operators, value-added by sustainable tourism certification programmes, and barriers faced by inbound tour operators in operating more sustainably. The conclusions drawn from the findings, and the addressing of the research objectives, will follow in Chapter 5.

4.1.1 Profile of participating inbound tour operators and interviewees

Table 6 and 7 below describe each participant and organisation interviewed. These two tables give background to direct quotes presented in the findings and allow for easy identification of whether an organisation is certified, FTT approved or neither certified nor approved. Please note that participants' comments are provided verbatim and in quotation marks throughout this chapter. The participants are labelled randomly, making use of alphabetical letters ranging from A to S, with an added acronym to highlight whether the organisation is certified or FTT approved (CFA), or not certified nor FTT approved (NON).

In these tables, the approximate size of the participating organisations is mentioned. Small (S) organisations can be categorised as having only a few employees, and in most instances the owners are the only employees, working from a home office. Medium (M) organisations are perceived as slightly bigger than small organisations, with at least five full-time employees working in the organisation's office. Larger (L) organisations are identified as having a larger, non-home office, employing 10 or more full-time employees, and in most cases are owned by

a larger organisation or a group of shareholders. The location of the participants' home or the organisations' head office is mentioned in the table, with "CT" referring to Cape Town and surroundings, "JHB" referring to the Johannesburg area, "PTA" referring to Pretoria and surroundings, and "NLP" referring to Nelspruit. This table further states the gender of the interviewees, their position in the organisation, the number of years the participating organisation has been in operation in the tourism industry (YIO), as well as a short description categorising their product offerings and highlighting their specialities.

Table 6: Certified and FTT approved organisations

Participant code	Size	Location	Participant position	Male/ Female	YIO	Certified/ Approved	Type of product offerings
CFA – A	L	CT	CEO	M	73	FTT approved	Safari and guided tours, tailor-made tours for groups and FITs.
CFA – B	L	CT	CEO	M	45	FTT approved	Private luxury tours, also incentive travel and events.
CFA – C	L	CT	Marketing and Product Manager	M	22	Travelife Certified	Self-drives, small and large group tours, guided tours.
CFA – D	L	CT	General Manager and Market Developer	M	14	Travelife Certified	Sustainable and responsible tours.
CFA – E	S	CT	Operations Manager	M	6	FTT approved	Guided small group tours, focussed on sustainable travel.
CFA – F	S	CT	Owner	M	21	FTT approved	Small and private group retreats.
CFA – G	L	CT	Operations Manager	F	22	FTT approved	Self-drives, private guided tours, scheduled tours, tailor-made packages and safaris.
CFA – H	M	JHB	Operational Manager / Director	M	13	FTT approved	Guided overland tours for small and large groups.
CFA – I	M	JHB	Director	F	28	FTT approved	Tailor-made tours for all budgets and locations in Africa, incentive travel.
CFA – J	S	CT	Director	M	2	FTT approved	Ethical travel and tailor-made travel packages.
CFA – K	M	NLP	Managing Director	F	3	FTT approved	Tailor-made tours for all budgets, self-drives and luxury travel.

Table 7: Non-certified and non-approved organisations

Participant code	Size	Location	Participant position	Male/ Female	YIO	Type of product offerings
NON – L	L	CT	Communications Creative	M	12	Small group tours, luxury tours, private tours, educational tours.
NON – M	S	CT	Owner	F	23	Tailor-made tours for all budgets and locations in Africa.
NON – N	L	CT	Operations and Product Manager	M	17	Tailor-made luxury tours.
NON – O	S	JHB	Managing Director	F	29	Guided adventure and hiking tours.
NON – P	S	CT	Managing Director	F	11	Tailor-made tours focussed on the Dutch market.
NON – Q	S	PTA	Managing Director	M	3	Safari tours, adventure tours, and overland tours.
NON – R	L	JHB	CEO and Marketing Manager	M	36	Guided adventure, overland and safari tours, also self-drives, private tours and motorcycle tours.
NON – S	L	PTA	Operations Manager	M	13	Day and overnight tours, private tailor-made tours, overland tours and safaris.
NON – T	L	CT	Sales and Marketing Director	M	101	Luxury tours to South and East Africa.
NON – U	L	CT	Client Experience Manager	M	15	Tailor-made tours, safari and wildlife tour packages.
NON – V	S	CT	Owner	F	9	Guided small group tours, focussed on sustainable travel.

4.2 SUSTAINABLE BUSINESS PRACTICES BY INBOUND TOUR OPERATORS (INCLUDING CSR AND SUSTAINABILITY REPORTING)

In the first section of the interview, various sustainable tourism practices adopted by participating organisations within their business operations and office environment were identified. The participants' knowledge and awareness related to key concepts associated with the concept of sustainable tourism were also tested.

To start the interview, participants were asked whether they are *familiar with the concept of sustainable tourism*. All the participants stated that they were familiar with this concept. However, when the participants were asked if they were *familiar with the term 'triple bottom line'*, only seven participants stated that they had previously heard of this term. After explaining the three elements of the 'triple bottom line', economic, social and environmental elements, some participants (3) stated that they were familiar with the concept, but not the term.

Participants were asked if they were *familiar with the practice of Corporate Social Responsibility (CSR) reporting* and if their organisation partakes in any means of CSR reporting. Most of the participants (21) stated that they were familiar with this practice, however, only nine participants stated that their organisation produces and publishes such a report. Six of these nine participants stated that they deliver a CSR report to their shareholders, as they are part of a larger organisational group, producing a CSR report either annually or bi-annually. Two participating organisations produce a CSR report, as it is mandatory as part of the Travelife certification programme criteria requirements, with one participant who delivers a CSR report to its partners, clients and suppliers to showcase their sustainable tourism activities. The major reason mentioned by participants for not producing a CSR report was that they feel their organisation is too small for such a practice.

Participants were then asked whether they have a *staff member that focusses on CSR and sustainability*. Five participants stated that their organisations have a staff member whose primary responsibility it is to focus on CSR and sustainability; while three organisations have a committee dealing with sustainable tourism practices; four organisations have a staff member

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who focusses on sustainability as a secondary task to their primary job description and responsibilities; whereas ten organisations do not have any staff member focussed on sustainability.

The participants were asked if their organisation have a **sustainable tourism policy**. Interestingly the majority of participants (15) stated that their organisation does have a sustainable tourism policy in place, however, nine of the fifteen participants claimed that it is unwritten, with only six participants claiming to have a written policy.

> *"Everything I do is based on pure moral, social and environmental values, unwritten but it forms the basis of every single thing that I do. I am aware of the environmental, social and cultural impact that my tours have"* (CFA – F).

Some of the participants referred to this type of policy as a 'responsible tourism policy', as the term 'responsible tourism' as well as the concept has increasingly been used within the South African tourism industry (Goodwin, 2011). The concept of a responsible tourism policy and a sustainable tourism policy remain the same in the context of this study. Of the fifteen participating organisations claiming to have a responsible/sustainable tourism policy, ten were either certified by Travelife or an approved member of FTT.

> *"[We] follow Fair Trade [Tourism] practices in our own office and day-to-day operations"* (CFA – K).

Participants were asked whether their organisation **measures and offsets greenhouse gas emissions** for their office environment and their clients respectively. Only three participants stated that their organisation partakes in the practice of offsetting greenhouse gas emissions for their office environment. All three of them make use of third party organisations who plant trees to offset their greenhouse gas emissions on their behalf.

> *"We offset the greenhouse emissions of running our office once a year and that includes travel cost, paper, energy, everything and we put that through a calculator and then a certain number of carbon off-setting comes out. We choose to do that*

through planting trees with Greenpop. They [Greenpop] also have a very large social aspect" (CFA – D).

Greenpop is a not-for-profit organisation planting trees through urban greening and reforestation projects, spreading environmental awareness and activating people through green festivals and workshops across Southern Africa (Greenpop, 2019).

Another participant (NON – L), also working through Greenpop, stated that his organisation has pledged to plant one tree per week for all the paper being used in the office. A third organisation (CFA – B) would annually at trade shows purchase five trees per square meter of office space, from various carbon offsetting organisations. From a client perspective, three organisations offset their clients' greenhouse gas emissions by also planting trees through Greenpop.

> *"We offset the greenhouse gas emissions of the tourists, those that book direct with us … You can put in your number of nights, type of accommodation, kilometres driven, excursions, meals, this has all been standardised and you crunch the numbers, domestic flights, anything and then a certain amount of offsetting comes out of that. It then translates into one adult tree type of thing. Then we include it in the quote we make out to them. The client will then get a certificate of where the trees are and they can put those coordinates in Google Earth to see where the trees are planted. We try to make it as transparent and as tangible as possible"* (CFA – D).

> *"…Greenpop … you buy a tree and then they give you a little tree chain with the GPS coordinates of the tree that you bought. So we get one of these for every traveller. So every guest is essentially contributing to a sustainable future in their own right"* (CFA – E).

Some participants did mention their organisation adopting certain practices in trying to lower their greenhouse gas emissions, for example, not allowing their tour busses to idle while picking-up, dropping-off or waiting for their clients, as well as providing self-drive clients with tips on how to drive more fuel efficiently.

The participants were asked whether their organisations have a **waste management system** in place and whether they **practice recycling**. The majority of the participants (18) mentioned that their organisations have a waste management system in place and recycle at the office. As recyclable waste is not collected separately by most of the local municipalities in South Africa, seven organisations make use of private companies to collect their recyclable waste, while six participants take their recyclable waste to recycling plants themselves. Six participants stated that their organisations are in a position to put their recyclable waste out for the municipal waste collectors to collect and recycle. One of the participants, who also works in the conference industry, mentioned that:

> *"We have companies that collect all the banners afterwards and convert those banners into conference satchels. We also have companies converting old apple crates into exhibition space at conferences, also tyres into seating. These are all different ways and mechanisms of how we are getting to do things better"* (CFA – B).

Furthermore, two of the participants mentioned that their organisations recycle the used oil from their tour vehicles after the vehicles have been serviced. Some organisations combine recycling with other projects such as sending recyclable waste to township projects where they use cans to make ornaments, or use recyclable plastics to build and sell owl-nesting boxes. Two of the participants stated that their organisations are busy with an internal awareness campaign to eliminate all single-use plastic from their offices by 2020.

> *"We have a vision by 2020 that you will not see any single-use plastic in any of our offices, be it wrapping, utensils, disposable plates or whatever you could think of in the office"* (CFA – B).

Other practices mentioned by participants include simply not making use of plastic bags, only printing double-sided, recycling printer cartridges, providing a water dispenser for their staff to fill their water bottles, and giving recyclable waste to the general waste collectors on the street, as they are considered "*the most efficient recyclers in South Africa*" (NON – O). One organisation even allows their depot cleaners to recycle paper, stating:

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"We allow them [our depot cleaners] to separate the papers and they recycle it on their side. It gives them a small income and it is our part we play in the recycling process as well" (NON – S).

The participants were asked whether their organisations **donate to charity** and to explain how the process works. Most organisations seem to be very active when it comes to donating to a charity. Almost all of the organisations (18) have a project or charity which they support, if not a variety of different projects and charities. Nearly two-thirds of the organisations (12) mentioned donating to charity organisations with a social aspect such as orphanages, school feeding programmes, sponsoring a soccer team in a community, adult education centres, and projects among the staff donating blankets and jackets. The non-profit organisation, Uthando South Africa, was mentioned most frequently by participants, along with organisations such as the Eco Kids Foundation, the South Africa Day Foundation, the African Scholar Fund, the TreadRight Foundation and the Freedom Challenge Africa. Donating to conservation projects was mentioned to a lesser extent (by seven participants), with some participants mentioning conservation organisations such as the Rhino Ride, the Rhino Art Project, the Turtle Trust, sponsoring of penguin houses through Marine Dynamic, the Endangered Wildlife Trust, Save the Rhinos, Rhinos without Borders and Wildlife ACT.

A third of the participants (7) mentioned that their organisations felt more strongly about donating time and manpower than simply donating money. Time is being donated in terms of building infrastructure such as a school or a crèche, mentoring start-up businesses, up-skilling local community members to become tour guides, hosting Christmas parties for the disabled, taking underprivileged school children on educational trips and sponsoring their tour vehicles for charity events. About a third of the organisations (8) have a policy to donate a certain percentage of their profit, or to add a predetermined amount to their clients' quote, that is donated to charity organisations or used to fund projects.

"Every person that books with [us] we tell them that 1% of their booking goes towards our charities and they can choose on their booking form which one of the two [projects] they want to donate to" (CFA – I).

Five participants stated that their organisation is operating within a larger organisational group, with the larger organisational group having a CSR or sustainability department responsible for managing a foundation or trust. These participants stated that each organisation within the larger organisational group contributes a share of its profit into a pool that their CSR or sustainability department uses to donate to various organisations, charities and/or use the money to fund and run their own foundation, which includes community and conservation projects. One of the five participants stated that:

> *"10% of our net profit goes to [our] trust and through the trust we do donations and we also extend loans to people trying to start up something in tourism"* (CFA – D).

One participant currently not donating to any charity or organisation stated that it is most certainly a possibility.

> *"I deal with a higher-end market, mostly the 5-star market. Those kinds of people, if they are spending R50 000 per person for a tour, for me to ask them to donate an extra R200-R500 is not really going to pinch their budget, but that could create a really nice fund which we can then support a project with"* (NON – M).

Participants were asked whether their organisation focusses on **employing local individuals** and what they consider being local. Most of the participants (21) stated that their employees are based locally, with local mainly being described as 'South African citizens'. Some of the participants described 'local' as the immediate area (i.e. town/city) where the organisation's office is based, to minimise staff relocation and daily transportation costs. Four participants mentioned employing a few international employees or taking on interns from foreign countries, as some of the organisations target an international market with foreign languages. All of the organisations employing tour guides mentioned the importance of their tour guides being local, as it provides their clients with a more authentic experience.

The participants were then asked whether their organisation **employs 'previously disadvantaged individuals' (PDIs)**. More than half of the participants (13) stated that their organisation does employ PDIs. Five of these organisations provide internship opportunities for

PDIs; three organisations have a development programme which includes training and employing PDIs who were for some reason not able to complete their National Senior Certificate, and two organisations have to employ PDIs as they are BEE registered and need to uphold their BEE (Black Economic Empowerment) status. BEE is a racially inclusive programme launched by the South African government to address the radicalised inequality in South Africa. Attaining a 100% BEE rating allows organisations to apply for government tenders, purchase a state-owned asset and enter a public-private partnership. Furthermore, attaining a BEE certificate makes an organisation eligible for grants and obtaining finance (OCFO Insights, 2015).

Participants were also asked whether their organisation provides **equal employment opportunities** and whether all the **employees are paid at least minimum wage**. All of the participants (22) replied 'yes', with six participants adding that employees are being paid much more than the minimum wage.

The participants were then asked whether their organisation provides employees with **general training and advancement opportunities**. The majority of participants (19) indicated that their organisations do provide employees with general training and advancement opportunities. About half of these organisations (9) allow their employees to enrol for further training such as German classes, Pastel courses, small business management online courses, courses on how to use social media effectively or Microsoft Office skills training. Other forms of training include job-specific training (7), internal system training (6) and product training (5).

> *"We have developed an e-learning platform, where we have bought certain courses from [a training academy] that we put on our [own internal] recognised platform. They, [the employees], can go into it in their own time and learn about time management, project management and so on and then obviously we have added our own systems on that"* (CFA – G).

The participants were then asked specifically whether their organisations provide **training to employees on sustainable tourism practices**. Half of the participants (11) stated that their

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organisations do provide training to employees on sustainable tourism practices. However, five of these eleven participants stated that it is more of an 'awareness training'.

"It is to make our staff aware about sustainable tourism and what it is about and what is the implication of that in the bigger picture of tourism. So it is more about awareness" (CFA – H).

Some of the participants stated that their organisations include a sustainable tourism element as part of their formal training, or provide training on the sustainable tourism practices that their accommodation suppliers partake in. Two of the participants stated that to be Travelife certified, all employees must complete an online training course provided by Travelife. Their employees must write an exam and upon successful completion receive a personalised Travelife certificate.

Participants were asked whether and what type of **local products** their organisations *purchase*. All of the participants (22) indicated that their organisations support the purchasing of local products. Examples of local products mostly included gifts to clients, such as branded mugs, buffs, proudly South African snacks, clothes, and local arts and crafts. Other local products that were mentioned were office supplies, groceries, and services such as maintenance and installations.

The participants were then asked whether their organisations *purchase eco-friendly supplies*. Almost all of the participants (19) stated that their organisations buy eco-friendly supplies where they can. Examples included cleaning materials, paper and unbleached toilet paper. Three of the participants stated that their organisations give eco-friendly gifts to their clients, for example, eco-friendly lip balm, eco-friendly pens, and arts and crafts sourced from a local community project which they support.

Participants were asked whether their organisations have a *customer feedback system* in place and how they monitor and manage their customer feedback system. The majority of participants (15) stated that their organisations have a customer feedback system in place. Feedback is collected either by giving the clients a feedback form to fill in after the tour, or by

sending clients a feedback form or a link to an online feedback form via email. Although seven of the organisations do not have a formal feedback system in place, feedback is still gathered through conversation that tour guides have with clients during the tour. Some organisations (4) work mostly through agents and receive feedback from the agent and not from the actual clients. A few participants stated that their organisations encourage their clients to give them a rating and feedback via online platforms such as Tripadvisor and Facebook.

The participants were then asked whether their organisation has a **_formal policy against commercial, sexual or any other form of exploitation or harassment, including child labour_**. Only twelve of the participants indicated that their organisations have a formal policy of this sort. However, many participants mentioned that their organisation does not tolerate any form of harassment or exploitation, as it is illegal in South Africa, and if something like that should happen, the organisation would hand the case over to the national authorities.

Participants were asked at the end of this section whether there are **_any other sustainable tourism practices_** implemented in or at the office that have not been mentioned. Five participants mentioned that their organisations have solar power panels on the roof of their office buildings, with three organisations who are in the planning process of installing a solar power system. One participant mentioned that the government would subsidise their solar power investment through its Green Tourism Incentive Programme, with another participant starting to experiment with a biogas system for their home office. Making use of energy-saving light bulbs and using a fan instead of air-conditioning was also mentioned.

Due to the 2018/2019 drought in South Africa, especially in the Western Cape, many participants, at the time of the fieldwork, mentioned their increased awareness of water consumption. Many water conservation practices were mentioned such as the installation of pressure reducers on taps and toilets, capturing of rainwater, not washing the office windows or any tour vehicles, and the installation of water tanks, greywater systems and making use of groundwater. One participant (CFA – H) not located in the drought area, also mentioned the capturing of rainwater from the roof of the organisation's warehouse which is then used for washing the organisation's vehicles and for irrigation. Six participants mentioned their organisations limiting or reducing the amount of paper used in the office. Many participants

stated that their organisations are moving towards a paperless office, with some organisations only printing double-sided and making use of scrap paper.

"We invested a huge amount of money in a new operating system which we will be implementing in May of this year [2019]. We will then become a paperless office because of the system ... Everything will become electronic" (NON – U).

4.3 SUSTAINABLE SUPPLY CHAIN MANAGEMENT BY INBOUND TOUR OPERATORS

This section of the interview aimed to identify the sustainable tourism practices adopted by South African inbound tour operators within their supply chain and to determine whether the participating organisations place pressure on their suppliers to operate more sustainably.

To begin this section, the participants were asked **what their organisation generally takes into account when sourcing accommodation suppliers**. Interestingly, sustainable tourism practices were mentioned most frequently (11). However, it was not considered a deciding factor. The biggest influence on their decision-making is requests from the clients (10).

"We will always just ask the clients what they want and we will just make it tailor-made for them" (NON – P).

"Sometimes we can suggest what we think is best for the client and we can then choose what we like, but often times the client has done research and knows where they want to go, or they get referrals from friends and family" (NON – T).

"Ultimately whatever the client asks for we will try and arrange that" (NON – S).

Location (8) and price (7) were mentioned as the leading decision-making factors taken into account when sourcing accommodation suppliers. Other factors included quality and service levels, group size, relationship with suppliers, uniqueness with an experience factor and high customer satisfaction. Some participants stated that their organisations prefer working with bigger chain groups, as they are bound to follow certain rules and regulations, and must comply

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with certain industry standards including the ISO standards and a star rating by the Tourism Grading Council of South Africa (TGCSA).

"Most of the time we go with the bigger chains because we use them throughout South Africa and then they have certain BEE standards and all those kinds of things. With the bigger chains, they are bound to the group's rules with eco-friendliness and the standards and the star ratings" (NON – S).

However, the majority of organisations prefer not working with bigger chain groups, as they seek to provide their clients with a unique and authentic experience.

"Every property needs to offer an experience, whether that be a great restaurant, a great view, incredible service, but it has got to offer something beyond just a bed. As a result, we work very little with big hotel groups because, for me, my client must not just be a number" (NON – M).

Participants were then asked specifically **whether or not sustainable tourism practices form part of the decision-making process when selecting accommodation suppliers**. The majority of participants (14) stated that it does form part of the decision-making process. An additional three participants mentioned that sustainability is only taken into account when the organisation has to pick between two similar options, and will then give preference to the more sustainable option. Five participants stated that sustainable tourism practices do not form part of the decision-making process when selecting accommodation suppliers. Most of the answers were similar to participant NON – M's response:

"We prefer to work with properties that are at least trying to do something" (NON – M).

Surprisingly, of the fourteen organisations who stated that sustainable tourism practices do form part of the decision-making process when selecting accommodation suppliers, only six were Travelife certified or FTT approved, with the majority of organisations (8) not associated with Travelife or FTT. This is a concern since it is expected that Travelife certified and FTT approved organisations would be more focussed on selecting sustainable accommodation

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suppliers, compared to non-certified or approved organisations, as they are supposed to actively encourage a sustainable supply chain.

The participants were then asked to mention the **type of sustainable tourism practices considered when selecting accommodation suppliers**. More participants mentioned social practices (13) compared to environmental practices (12). The reason for this may be due to the uniqueness of South Africa as a destination. As one participant explained:

> *"I think in South Africa we do not realise that we are in a unique situation … If you look worldwide, most countries, for example, if you go to Costa Rica you will find lots and lots of eco-projects and maybe only one or two that involve people. And that is the country that has the best eco-tourism rating in the world, but it is all about nature … In South Africa it is very difficult because what you will find in most cases, what I find almost always, if it is eco-tourism it includes local society and people and taking care of them"* (CFA – C).

Participants were asked whether their organisations put **pressure on their accommodation suppliers to become more sustainable**. Only seven participants replied 'yes', with the majority of participants (15) stating 'no'. The biggest reason, mentioned by four participants, for their organisation not applying pressure, is that they feel it is not their duty and that they do not have the time for it. Eight participants mentioned that their organisations would rather encourage their accommodation suppliers to become more sustainable by providing them with feedback on practices that they or their clients discourage or find to be not sustainable. Two participants mentioned that, if an accommodation supplier is not sustainable, their organisation will simply not make use of their product offering in future.

The participants were then asked if they feel that their organisations are **in a position to put pressure on accommodation suppliers** to implement or participate in sustainable tourism practices. Thirteen participants stated 'yes' as their organisations either have the bargaining power to negotiate or are not reluctant to speak their mind.

"Yes, the volume of business we send we would have no problem telling someone we do not use them because of their environmental practices" (NON – R).

"I think we are. Even though you might not be in a position, I think you should be and you should tell people that there is no excuse" (CFA – E).

The biggest reason for stating 'no' is that some participants (9) felt that their organisation is too small to put pressure on accommodation suppliers, and that they have no bargaining power. One of the participants who stated 'no' mentioned that their organisation has the bargaining power, but it is not their duty.

"We are in a position to put pressure on them. It is a huge job but it is not our job. I think they themselves should become more responsible" (CFA – A).

One participant mentioned that if South African inbound tour operators stand together, collectively an impact could be made.

"It would be great to say yes, being a very small business, I think not. If everyone starts putting pressure on suppliers it will definitely make an impact. The bigger guys out there have more muscle power to create impact, but I think the more people that are talking about it, the more pressure there is. You can't say that even though we are small we have no impact because if all the small people say the same thing, you start creating impact" (NON – M).

In contradiction to other participants, one participant felt that pressurising accommodation suppliers is not the correct method and that education would be a more suitable approach.

"I have found that when you pressurise people, you get more resistance and they become more adamant. I do not think pressure is the best way to do it, I think educating is better" (NON – V).

Four participants mentioned that as the demand for sustainable tourism increases, the more their power will increase.

"It is not a very strong position because tourism is by demand and the demand from clients wanting to have sustainable accommodation is still small. It has grown the last couple of years but I have been working in sustainable tourism for 15 years now and it is just the last two/three years that I have actually seen increasing numbers in that. It is one of the few sectors where the change has been pushed by the industry rather than on demand from the clients … In tourism there is a growing demand from the European tour operators, but if you really look at the numbers it is still small, but it is fast-growing markets and the impact will be much higher in future" (CFA – C).

Participants were asked whether their organisations have ever put **pressure on an accommodation supplier to become certified by a sustainable tourism certification programme**. Only the two organisations certified by Travelife responded 'yes'. Six participants stated that they have mentioned it or encouraged it. The majority of the participants (14) replied 'no'. The reasons being that either they do not 'believe' in certification programmes or that it is not their duty.

The participants were then asked what their organisations generally **take into account when sourcing non-accommodation suppliers such as activities and excursions**. Most of the participants stated that they follow the same selection process as for sourcing accommodation. Eight participants did mention that their organisations are very aware of activities that include animal interaction, as it is currently a hot topic worldwide.

"We would never use something, like elephant back safaris or any animal petting, and we would definitely stay away" (NON – N).

Other activities mentioned were ostrich riding and feeding, lion cub interaction, and shark-cage diving. Interestingly, six participants mentioned that their organisations put pressure on suppliers that are involved in animal interaction activities, to refrain from these activities.

"We do put pressure on animal interaction suppliers. That we are very strict on. So any venue that offers feeding, walking, touching or riding animals we will immediately get a consultant in here and we will check…" (CFA – A).

Participants were then asked what **type of contracting agreement their organisations have with their suppliers**. The majority of participants stated that their organisations sign 'Sell to Operator' rate agreements, better known as STO rate agreements, with their accommodation suppliers. When asked about agreements related to community visits or township tours, only six participants claim that their organisations have a written contract; five organisations have a verbal agreement based on trust; four organisations make use of ground operators such as Uthando South Africa or Love Limpopo, and seven organisations do not have any formal agreements.

4.4 DEMAND-SIDE OF SUSTAINABLE SUPPLY CHAIN MANAGEMENT BY INBOUND TOUR OPERATORS

This section aimed to identify whether South African inbound tour operators feel pressure from their demand-side to offer and provide sustainable tourism products and services.

First, the participants were asked whether they **perceive a growing demand for sustainable tourism** products and services. Most participants (21) felt that there is a growing demand for sustainable tourism, with only one participant who was not sure.

"[The demand is growing] without a doubt. The world is making more and more noise around carbon emissions, plastics and so forth. The noise will not become any less, it will just become more and more as we progress into growing destination South Africa" (CFA – B).

The participants were asked whether their **clients ever ask about their sustainable tourism practices _before_ purchasing** their products and services. In total, fourteen participants responded 'yes'. Only five participants answered with a definite yes; six participants answered 'yes, but rarely'; and three participants claimed that through their advertising and the visibility

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and transparency of their commitment to sustainability, it is implied. Eight participants stated 'no'.

> *"Very few actually, I would say. I would say less than 5% actually ask, but I think there is more of an awareness around it. I do not think it is at a point where a tourist will say we won't stay anywhere that is not sustainable or supporting sustainable tourism, but there is a greater awareness. When people get here they ask more questions, and they ask more questions of the lodges"* (NON – M).

Participants were also asked whether or not their **clients ask about their sustainable practices *after* purchasing** their products or services. Interestingly, fewer participants (8) stated 'yes'. Only two participants replied with a definite yes; three participants stated 'yes but rarely'; again three participants claimed that during the tour they make their sustainable tourism practices visible so that their clients do not have to ask; and 14 participants answered 'no'.

> *"I think almost when they get here there is a general awareness. We are taking them into areas that have such an incredible impact on their lives, depending on where they are from. That is why there is such a high return to Southern Africa because we have such incredible pieces of land, we have incredible wildlife, we have incredible biodiversity, incredible oceans and I think when people get here they start becoming aware of it"* (NON – M).

Participants were then asked whether **agents ever ask about their sustainable tourism practices**. A majority of 12 participants answered 'yes'. Four participants answered with a definite yes, four participants answered 'yes but rarely'; four participants claimed that it is implied as they are very visual and transparent about it; two participants stated that they do not work with agents; and eight participants answered 'no'. One participant mentioned that online travel agencies such as Tour Radar ask a lot of questions before their organisation can be classified as an eco-friendly or sustainable tour operator. Another participant further stated that European agents ask a lot of questions and sometimes agents from North America.

Participants were asked whether their organisation feels **pressure from their demand-side to implement sustainable tourism practices**. None of the participants stated that their organisation feels any pressure from their demand-side to implement sustainable tourism practices. Eight of the participants claimed that their organisations are already operating sustainably and that they are ahead of their clients. Four participants stated that although their organisations do not feel any pressure from their demand-side, they partake in and implement sustainable tourism practices because it is something the organisation feels passionate about.

As education plays a crucial role in raising awareness and sharing the correct information, participants were asked whether and how their organisations **educate their clients on sustainable tourism practices**. Most participants (20) stated that their organisations educate their clients on sustainable tourism practices. This is mostly done through their tour guides (12) who will talk about the conservation issues in that specific area, or educate clients on local issues before visiting a township or local community.

> *"The tour guide might arrive at a specific site and tell them what interesting things they have done at the place, like how they recycle water. We educate them in the townships, there is a lot of education on how the communities there create vegetable gardens ..."* (CFA – A).

The second and third most frequent response was education done by accommodation suppliers (7) and when the subject is brought up during a conversation (5).

> *"Usually when you are at a safari lodge, it is usually two-nights minimum stay and the lodges will explain about what they are doing"* (CFA – A).

> *"Through our published itinerary, we always include details on why a particular place has been chosen for its ethicality"* (CFA – J).

> *"Where the conversation is leading in that direction we certainly will expand on whatever we are doing or what the different properties might be doing"* (NON – T).

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Other responses included providing clients with responsible tourism tips, highlighting the organisation's own conservation and community projects before, during and after the tour; and educating clients through marketing and promotional material.

Participants were also asked whether their organisations **encourage their clients to partake in sustainable tourism practices**. Most of the participants (18) stated that their organisations do encourage their clients to partake in sustainable tourism practices. This is done by encouraging clients to donate to charity, making use of aluminium water bottles instead of purchasing plastic water bottles, or by recycling empty plastic water bottles, and by encouraging clients to get involved in the organisation's own community or conservation projects, or the projects present at accommodation suppliers.

> *"If there is a lodge they are staying at and it is involved in nice projects, we will tell them about it. We would say whilst you are there it would be worthwhile getting involved"* (CFA – I).

During the recent (2018/2019) drought period in the Western Cape, most organisations encouraged their clients to save water and to use water wisely when travelling to that region. One participant (NON – S) mentioned that during the drought period, they encouraged clients to fill a few water cans before entering the water-sensitive areas.

Participants were asked how **universally accessible** their organisations' tours are. Only four participants stated that all of their tours are universally accessible; seven participants stated that their organisations can arrange a universally accessible tour on request; three participants claimed that some of their tours are universally accessible; with eight participants stating that their organisations cannot accommodate such a client. The main reason given for not having a universally accessible tour was that it is physically not possible to accommodate such a client on some of the activities or at some of the destinations. Some of the participants did state that if their organisations received such a request, they would recommend a tour operator that specialises in universally accessible tours.

4.5 INBOUND TOUR OPERATORS' RESPONSIBILITY IN MANAGING THE DESTINATION MORE SUSTAINABLY

This section of the interview aimed to identify the sustainable tourism practices adopted by South African inbound tour operators that positively influence the destinations visited.

Participants were first asked how their organisations decide on **which destinations to include in their itineraries**. As with sourcing accommodation suppliers, the destination is mostly determined by their clients (11); followed by demand trends (9); the type of attractions in the area (4) and uniqueness (4).

> *"A lot of marketing work is done overseas by SA Tourism. When people want to come here they have got a very good idea of what they want. Your first-time visitor always wants to go to the Kruger National Park and the Garden Route … It is when they come back for the second or third time, which is when we actually have the opportunity to sell them something different, a unique experience…"* (CFA – G).

Participants were then asked **whether the concept of sustainable tourism development forms part of their organisations' decision-making process when selecting a destination**. Nine participants (9) stated that sustainable tourism development does form part of their organisations' decision-making when selecting a destination, with nine (9) stating 'no'. For most of the organisations stating 'yes', the sustainability of the destination is dependent on sustainable accommodation suppliers within that destination, or communities and community projects within that destination.

Participants were asked whether they feel that their organisations have a **positive impact on local communities**. Most of the participants (21) felt that their organisations do have a positive impact on local communities by simply taking clients to visit local communities (8), or positively impacting local communities through the community projects that they are supporting (8). Some organisations create a positive impact through their clients donating to community projects (6) and making use of accommodation suppliers involved in a community project (5). Other

responses also included deliberately making use of black-owned suppliers and by making use of local tour guides.

It was clear that most participants felt that tourism creates a ripple effect and by simply bringing clients into South Africa, the country as a whole is benefitting economically. Many participants mentioned examples such as:

"We bring the clients there [to the local communities], we are the transport for [bringing] the outside world [to the communities]" (CFA – H).

"Well through tourism, definitely there is an opportunity to uplift local communities just by bringing business [to the local communities] and creating jobs [for community members in the tourism industry]" (NON – N).

Some organisations ensure a positive impact by giving their clients the opportunity to get involved.

"With some of the groups we have our tour guides telling people … [that] we are going to be visiting a school in an impoverished area, we are going to stop at the supermarket and then tell them what the community/kids need such as pens, food, soccer balls, etc." (CFA – A).

Some organisations work through their accommodation suppliers to impact local communities.

"A lot of the lodges have schools, a clinic or a village on their doorstep and sometimes our clients say that they would like to make a donation for school books or stationery or clothes or shoes" (NON – T).

"One should support properties that are working together with their local communities … It is one thing in Cape Town, but if you are looking at areas around the Kruger and [other] sensitive environments, there I would definitely only support, whether it is game lodges or ocean lodges or anything like that, those that are

conserving the environment, looking at its energy policies and working with local communities" (NON – M).

The participants were then asked if they feel that their organisations have a ***positive impact on the local natural environment***. Most of the participants (21) felt that their organisations do have a positive impact. The two leading practices mentioned were through the support of the organisation's own conservation projects (7) and by paying conservation fees when entering a national park (7). Educating clients on environmentally friendly practices (5) and using accommodation suppliers with a conservation element or project (5) were also mentioned.

Many participants felt that by simply bringing their clients to South Africa, and the various South African National Parks (SANParks), would generate revenue which the government and SANParks should be used to positively impact and conserve the natural environment. Many participants also stated that through their tour guides they are in a position to educate their clients on the various environmental issues such as rhino poaching, and environmentally sustainable behaviour such as recycling.

> *"Even on the vehicles we have a new recycling system. In the past we just had a bin that people could put their waste in, [but] now we have a brown bag that is specifically for clean recyclables"* (NON – L).

One participant stated that their organisation provides its self-driving clients with tips on how to drive more economically, where to buy sustainably sourced fish and information on drinking water, so that their clients do not have to buy bottled water. A few participants mentioned that their organisations' tour vehicles stick to the designated roads when driving in a national park to eliminate erosion or harm to any fauna and flora.

Participants were asked whether their organisations ***engage with the local Destination Management Organisations (DMOs)***. Only one-third of the participants (7) stated that their organisations engage with local DMOs. Some of the engagements are to help the organisations to bring international agents to visit South Africa; DMOs sponsoring familiarisation and educational trips; DMOs sponsoring organisations to attend international travel exhibitions;

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providing the organisations with statistics on destinations; assisting with border permits and providing organisations with pictures to use for marketing. None of the participants mentioned engagements or collaborations concerning sustainable tourism development with any DMOs at the visiting destinations.

4.6 VALUE ADDED BY SUSTAINABLE TOURISM CERTIFICATION PROGRAMMES

This section aimed to determine whether the organisations find value in sustainable tourism certification programmes, to identify what value sustainable certification programmes add and can add, and what role they should play in the development of sustainable inbound tour operators. The participants' awareness regarding literature published by the government on sustainable tourism was also tested, as well as the organisations' participation in sustainable tourism award programmes.

In South Africa, several official government documents have been published since 1994 covering the topic of sustainable and responsible tourism. The participants' awareness of the existence of the three different publications by the former DEAT and one publication by the Department of Tourism was tested.

First, the participants were asked if they are familiar with the **DEAT's White Paper on Responsible Tourism** published in 1996. Only eight participants were aware/acknowledged its existence. Second, the participants were asked whether they are familiar with the **DEAT's Responsible Tourism Guidelines** and the **DEAT's Responsible Tourism Manual**, both published in 2002. Only six participants acknowledged the existence of these documents. More recently, and more focussed on certification programmes, in 2011 the Department of Tourism published the **National Minimum Standards for Responsible Tourism (NMSRT)**, also known as SANS 1162. The participants were asked whether they are familiar with this document. Only four participants were aware and/or acknowledged its existence.

A difference in familiarisation and/or awareness of these government documents was identified between the participants whose organisations are certified by Travelife or approved by FTT, compared to the participants whose organisations are not certified or approved by any of the

above certification programmes. Of the eight participants who were aware/acknowledged the existence of the DEAT's White Paper on Responsible Tourism, six participants' organisations were certified/approved. Of the six who were aware/acknowledged the existence of the DEAT's Responsible Tourism Guidelines and the DEAT's Responsible Tourism Manual, four participants' organisations were certified/approved. All four participants who were aware of and/or acknowledged the existence of the Department of Tourism's NMSRT were from certified/approved organisations.

Participants were asked whether their organisation has ever **competed for a local or international tourism industry award**. Half of the participants (11) stated that their organisations have competed in the past for a local or international industry award. Eight participants stated that their organisations have previously competed for the local Lilizela Tourism Awards; three organisations have previously competed for the WTM Responsible Tourism Awards and two organisations have previously competed for the World Travel Awards. Of the eleven organisations who had previously competed for an award, most organisations' participants (8) indicated that they found the process valuable. The biggest value identified was self-reflection, as most of the participants (6) stated something such as:

> *"It did make us look at what we do offer and what we do, it is self-reflective and made us more aware of what we do"* (NON – N).

The second biggest value identified was marketing mentioned by four participants, followed by recognition mentioned by three participants.

> *"Firstly, it is recognition of your efforts, and as such it makes for a nice marketing tool. Secondly, it makes your staff feel proud and makes them realise that you are actually working towards something"* (CFA – D).

As predetermined in the research design and sampling method, half of the organisations (11) were either certified by Travelife or approved by FTT. Only the participants from the organisations that are certified/approved were asked **what value, if any, certification programmes add to their organisation's own business**.

The majority of participants explained that their organisations do not find any monetary or direct value in terms of more bookings, but rather indirect value such as marketing, networking, education and validation. Some participants mentioned that their organisations do not find any value from a marketing point of view, with other participants claiming that being able to use the certified/approved logo on marketing material such as brochures and the organisations' websites, assists to attract environmentally and socially aware tourists wanting to 'help Africa'. By having the membership and using the logo, some organisations mentioned that it provides proof to their clients that they are committed to sustainability.

Another value-added element mentioned by participants is the opportunity to network with like-minded individuals who are also passionate about sustainable tourism, and that it puts them in contact with truly sustainable and certified accommodation suppliers. Education was also mentioned as a value-adding element.

> *"It helps us to follow best practices and be more aware of how to best operate in an ever-changing industry"* (CFA – K).

Some of the participants mentioned the value of FTT's captive wildlife guidelines and waste management workshops. Other participants stated that their organisation simply supports Fair Trade Tourism because it is a 'good thing to support'.

All of the participants (from certified/approved and non-certified or approved organisations) were then asked whether they find **certification programmes in general valuable** in the industry. Thirteen participants stated 'yes'; seven participants stated that 'it can be' or 'it depends'; and only two participants responded 'no'. The biggest issue that was brought up was that becoming certified is too expensive.

> *"The values and the approach might be right, but it ends up being too expensive for smaller companies to do it. It gets lost. The people don't get the certification because it is too expensive and then that whole thing loses its value because it is just another company that is trying to make money"* (CFA – E).

Many of the participants highlighted the issue of greenwashing. They maintained that they want certification programmes such as FTT to audit organisations against certain standards and criteria, to make use of their logo, rather than simply getting approved.

"The problem is that you can join an organisation without being scrutinised. Someone is going on tour to see what you are doing, you just pay them a fee and then you get this stamp of approval that you are green, based on what?" (NON – R).

"We have this Fair Trade certification but it is difficult. That does not really make a difference we feel to our business, because we feel it is really easy to get the certification in some ways. You never get audited. You can just buy it and promise that you will do these things. That is where I feel it comes a bit short. You have this Fair Trade thing, you hand in your itinerary, but your company does not necessarily have any of these practices. So for us, it is more important to actually do the things than have the certifications" (CFA – E).

Most of the participants did feel that certification programmes can be valuable, not just for marketing and education, but also for creating awareness, assisting with guidelines, giving recommendations and setting a standard.

"It just sets the standard and makes sure that someone can just say something without having the proof that it was actually done" (NON – L).

Participant CFA – D, who is certified by Travelife, summarised:

"It [certification] is part of the idealism. We would like the whole tourism industry to become sustainable and I want to showcase that you can run a company sustainability and still make a good profit … because many people think it is not and that is not the case. It is basically showcasing to fellow tour operators that you can be profitable.

The second reason is a very practical one. There is such an enormous amount of greenwashing going around, it makes it very tangible and makes us accountable to our clients because we are independently audited. It shows our clients that we do not just talk the talk but walk the walk.

Thirdly, it saves us an enormous amount of time in having to explain what we do. If you want to compare us to [a certain organisation] who claims to be fairly sustainable, not so much as they claim, but they have a good policy, they have an enormous amount of space reserved on their website to explain what they actually do. We have one logo and that tells people the same from a marketing perspective. It helps a lot because it tells people what we do" (CFA – D).

Participant CFA – D further explained the value-added in being certified:

" … It is also important to be certified because it tells our providers that we are serious about what we do. They have the same problem as we do. They do not know who is a part of the greenwashing, or who is sustainable and responsible … Through the certification, they could actually find us.

They know that we are going to be audited … when they [Travelife] come to audit us, they open the kitchen drawers and look at what coffee we have and cleaning materials and they look in the bins. They talk to our providers and our staff to find out what we are saying and doing about sustainable tourism. They want us to show them where we have planted the trees. So they do a pretty thorough audit just to make sure we are who we say we are. The providers know it, so it also helps them to get credibility" (CFA – D)

Participants were then asked specifically **what role certification programmes can and should play** in developing more sustainable inbound tour operators. The most frequent response was education.

"I think that they should be doing a lot of the education … They should have two arms for their education programmes. They should be educating the operators and

industry professionals, but they should also be educating the end-user, the consumers. Most of them are not doing it" (NON – V).

"They are following world guidelines and helping us be aware of what is new, what is in decline, what is not allowed, and what is not accepted anymore. That is what their job is and that is why we are members, to get the information" (CFA – A).

Some participants suggested that certification programmes should make it easier to become certified by creating a minimum level of certification and as you progress, moving up to a higher level.

"It needs to be something that is not completely impossible … Almost at different levels, one could get involved and I think that would then make it much easier for people to start walking down that road" (NON – M).

Some participants mentioned making it easier and more affordable for accommodation suppliers and activities to become certified, also suggesting a minimum level of certification.

"I think their guidelines and their requirements are a bit strict and it is too specific. So some of the companies that we use are not necessarily qualified with them [Fair Trade], but are much more geared towards social upliftment and that kind of thing … I think they need to change and look into that, how are they going to get smaller accommodation and activity providers on their qualifications and get them certified" (CFA – E).

Some participants mentioned more marketing and promotion of certified organisations, sharing information, giving guidance and partnering with larger organisations. One participant (CFA – H) suggested that certification programmes should adopt a top to bottom approach, rather than starting at the bottom, by working with organisations and authorities such as SATSA and the DMO's at the various destinations, to put more pressure on accommodation suppliers and tour operators to become certified.

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The participants were then asked **how they feel overall about the concept of sustainable tourism**. All of the participants answered positively making use of words such as 'vital', 'crucial', 'important', 'must', 'key', inevitable' and 'necessary'.

"It is absolutely critical. In a world where resources are diminishing, sustainability is absolutely critical. Where wilderness is shrinking, the environment is becoming increasingly polluted, traditional cultures are dying out, where there is mass exploitation, sustainability is critical. You cannot kill the goose that lays the golden eggs, you need to look after it" (CFA – F).

"I think it is a fantastic concept and if the world wants to continue functioning, it is vital. It has to go that way. It is the only way we are all going to survive at the end of the day. Everyone just needs to be more responsible, worldwide" (CFA – I).

"It is exponentially becoming more and more important. We are too complacent at the moment as it takes a crisis to make people aware, instead of being proactive about it" (NON – N).

Participants were then asked whether they think **inbound tour operators can and will influence the industry** to become more sustainable. A vast majority of the participants (19) stated 'yes'. Some participants mentioned that they are looking towards other groups and organisations to drive the influence and force the change.

"I think they certainly can. These different groups that you have mentioned, like Fair Trade, are growing and becoming a strong voice. Organisations like SATSA, every year they do an audit on you and you have got to submit a whole lot of documentation, and they have started including something that asks you what you have been doing in terms of your sustainable practices. I think that we definitely can influence the industry, even the small ones have got a voice" (NON – T).

"I think they can, especially the big operators, people with the big buying power definitely can … They can just say to someone who is not running a sustainable business, 'we are not going to book you'. It is that simple. For a small company like

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us, if we tell a supplier we are not booking them, they are not going to care. The big operators that are putting lots of bums in beds and activities and sending big revenue through there, they can tell a property 'we are not going to use you until you up your sustainability game', they will up their game" (CFA – I).

Other participants felt that it is their own responsibility as inbound tour operators to drive the influence in whatever capacity possible.

 "I think everyone can get involved in some form or another in sustainable tourism, no matter what it is. Whether it is recycling at the office, using scrap paper or stepping up to the next level and as a business only using properties that have sustainable practices in place. I think we all have to be constantly stepping up the game and making sure that in whatever capacity we can, that is what we need to do" (NON – M).

"I think TripAdvisor said that in an earlier report, especially about animal interaction. Sometimes customers cannot tell a tour operator or supplier that this is wrong. Sometimes it needs to be the other way, you cannot offer that experience. You need to make sure that your product is sustainable, then people will notice that … As a tour operator you have that influence, you can make that decision for the customer. We have a massive role to play in making sure that our customers are making the right decisions" (NON – L).

One participant felt that inbound tour operators are the least likely to influence the industry to operate more sustainably, as they do not feel any pressure from their demand-side.

"The problem with that is the clients do not really care so we are not under any pressure from our clients to make sure this happens. Because they are foreigners, they want to come on holiday and are not interested in what happens here. We are probably least likely because we are not pressured to do it" (NON – N).

4.7 BARRIERS FACED BY INBOUND TOUR OPERATORS IN BECOMING MORE SUSTAINABLE

Participates were asked about barriers faced by inbound tourism operators in becoming more sustainable. The biggest barriers mentioned by participants for organisations to become more sustainable were financial resources (10) and time (5). The lack of truly sustainable tourism suppliers (3), rates of sustainable suppliers (3) and the lack of demand for sustainable tourism products and services (1) were also highlighted.

> *"Finances is a big one because it asks for quite a lot of investment in the beginning to become sustainable, but also any development or projects that you do to help communities is expensive and it does not necessarily ask a lot in terms of money but in terms of time"* (CFA – C).

> *"Working with other companies who are not sustainable and trying to find somebody who actually is"* (NON – Q).

> *"There are not many companies that can provide you with eco-friendly stuff, so the supply is less than the demand which means that the prices get affected"* (NON – S).

> *"We do not have the staff to sit and phone every supplier to check that they are sustainable ... Not having enough manpower. We do not have enough people to check what their sustainability programmes are"* (CFA – A)

> *"The other barrier is that there is no demand from the client's side"* (CFA – D)

Eight participants stated that their organisations do not face any barriers and that everyone can participate in sustainable tourism practices in their own capacity.

> *"No, there are no barriers. Sustainability starts with you and me. It just depends on what it is that you do and what you plan to do, what your vision is"* (CFA – B).

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"I do not think anything because I do not have any question or hesitation. I feel so strongly about it. I would rather not take the business" (NON – O).

4.8 CONCLUSION

This chapter revealed the findings from the interviews conducted in the empirical phase. The findings provide an understanding of how sustainable tourism practices can be implemented throughout the various operational areas of an inbound tour operator, including the business and office environment, the supply-and demand-sides, and at a destination management level. The value added by sustainable tourism certification programmes as perceived by the participating organisations was presented and the barriers faced by inbound tour operators in becoming more sustainable were identified. The following chapter will proceed with a detailed discussion on the data collected, to ultimately draw a conclusion and provide recommendations.

CHAPTER 5: DISCUSSION, RECOMMENDATIONS AND CONCLUSION

5.1 INTRODUCTION

The purpose of this research study was to investigate South African inbound tour operators' participation in sustainable tourism practices, to identify the sustainable tourism practices which they have adopted and the barriers they face in operating more sustainably. Furthermore, inbound tour operators' perception of sustainable tourism certification programmes was explored, to assist in identifying the value sustainable tourism certification programmes add to the development of sustainable inbound tour operators.

The research objectives will be discussed in the following order:

- To discuss the concepts of sustainable tourism, sustainable tourism development in South Africa, sustainable inbound tour operators and sustainable tourism certification programmes.
- To identify the sustainable tourism practices South African inbound tour operators can participate in.
- To investigate whether South African inbound tour operators put pressure on their supply-side to implement sustainable tourism practices.
- To investigate whether South African inbound tour operators implement sustainable destination management practices.
- To investigate whether South African inbound tour operators experience pressure from their demand-side to implement sustainable tourism practices.
- To identify the value of sustainable tourism certification programmes in developing more sustainable South African inbound tour operators.
- To identify the barriers that hinder South African inbound tour operators from adopting sustainable tourism practices.

The following sections provide a discussion on each of these research objectives, also linking findings to existing academic literature as reviewed in Chapter 2. The managerial implications and recommendations are discussed, limitations identified and recommendations for future research studies made.

5.2 THE CONCEPTS OF SUSTAINABLE TOURISM, SUSTAINABLE TOURISM DEVELOPMENT IN SOUTH AFRICA, SUSTAINABLE INBOUND TOUR OPERATORS AND SUSTAINABLE TOURISM CERTIFICATION PROGRAMMES

The first research objective, 'To discuss the concepts of sustainable tourism, sustainable tourism development in South Africa, sustainable inbound tour operators and sustainable tourism certification programmes' was accomplished in the second chapter of this study. This was done through an in-depth review of academic literature and industry publications related to the above-mentioned topics.

The first section of the literature review chapter provided a broad understanding on the history and development of sustainable tourism, also highlighting and discussing key industry publications by the UNEP and the UNWTO (UNDP, 2015; UNEP & UNWTO, 2005; SGD, 2018). This section defined the term sustainable tourism as "… tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNWTO, 2005). The various stakeholders involved in sustainable tourism development were identified as consumers/tourists, tourism organisations, governments and host communities. The role that each stakeholder plays in sustainable tourism development was discussed, and it was highlighted that none of these stakeholders are actively driving sustainable tourism development, with each stakeholder waiting for the others to take leadership (Poudel, et al., 2016).

Sustainable tourism development in developing countries was discussed with a particular focus on the South African tourism industry. Various government publications were identified and

discussed, including the former DEAT's White Paper on Responsible Tourism (DEAT, 1996), the DEAT's Responsible Tourism Guidelines (Goodwin, et al., 2002), the DEAT's Responsible Tourism Manual (RTMSA, 2002) and the Department of Tourism's NMSRT (SANS, 2011). It was made clear that South Africa identified sustainable and responsible tourism as the preferred tourism development strategy for destination South Africa.

Next, the literature review chapter discussed the concept of sustainable tour operators. First, inbound tour operators were distinguished from outbound and ground tour operators, as this study only investigates South African inbound tour operators. Inbound tour operators were defined as a company that focusses primarily on bringing travellers into a country, either through group or individual tour packages (Saffery, et al., 2007; Westcott, et al., 2015). Thereafter, the section was structured by discussing the three key areas, as identified by the TOI (2003), where tour operators can take action to operate more sustainably, namely sustainability reporting, sustainable supply chain management and co-operation with destinations. These key areas provided a baseline on which this study was built.

The literature review chapter concluded with a detailed discussion on sustainable tourism certification programmes - their origin, development, benefits and their current landscape within South Africa. This section highlighted the development of the GSTC's global baseline standard for sustainable tourism, enabling sustainable tourism certification programmes to certify accommodation suppliers, tour operators and entire destinations, based on globally recognised standards (GSTC, 2018). The discussion on sustainable tourism certification programmes was essential, as this study links sustainable tourism certification programmes to South African inbound tour operators, to identify the value sustainable tourism certification programmes add to the development of more sustainable inbound tour operators.

5.3 SUSTAINABLE TOURISM PRACTICES ADOPTED BY SOUTH AFRICAN INBOUND TOUR OPERATORS

Tourism organisations have started to realise that their product offerings and services can result in a negative impact on the local environment and on their long-term sustainability (Dodds & Kuehnel, 2010). Although South African tourism organisations' participation in sustainable tourism practices is still limited (Van der Merwe & Wöcke, 2007), the findings indicate that South African inbound tour operators are familiar with the concept of sustainable tourism. This may be due to the local and global increase in awareness of social and environmental issues, such as poverty, climate change and over-tourism, as suggested by Guo, Jiang and Li (2019), and Poudel, Nyaupane and Budruk (2016). There has also been an increase in academic research on sustainable tourism and campaigns by large organisations, such as the UNWTO, calling on all sectors of the tourism industry to take action to reduce their negative impact. Governments have also started to implement policies and initiatives to encourage sustainable tourism development (Hassanli & Ashwell, 2020; UNWTO, 2005).

Earlier research by Butcher (2011) and Visser (2008) suggests that in developing countries and especially in African countries, the social element of sustainability should take precedence over the environmental and economic elements, so that poverty is eradicated first. However, in the majority of research studies and definitions of sustainable tourism, it is emphasised that there should be a balance between all three of the triple bottom line elements (Cavagnaro, et al., 2015; Poudel, et al., 2016; Stoddard, et al., 2012; UNWTO, 2005).

Findings from this study confirm the findings of Spenceley (2006), Van der Merwe and Wöcke (2007) and, Cavagnaro, Staffieri, and Ngesa (2015), that in the South African and African tourism industry, the social element has received slightly more attention than the environmental element of the triple bottom line. This may be due to the large unemployment and poverty rate, and that the need for social development, job creation and economic growth is still being considered a priority factor. Thus, for tourism organisations in South Africa and Africa, the opportunities available locally to get involved in social upliftment projects are abundant.

This finding contradicts research from developed countries who found that the social element of the triple bottom line has been neglected (Dodds & Joppe, 2005; Hassanli & Ashwell, 2020; Hultman & Säwe, 2016).

One sustainable business operation element that is currently lacking among participating tour operators is the practice of producing a formal CSR or sustainability report. This was also found by Spenceley (2006) as well as Van der Merwe and Wöcke (2007). Sustainability reporting was highlighted by the TOI as one of the three key areas where tour operators can take action to operate more sustainably, as CSR reporting and transparency can help organisations in developing policies, setting targets and better decision-making, to ultimately achieve their sustainability goals (GRI, 2019; TOI, 2003).   Although many participants noted that their organisations are actively involved in social or environmental projects and practices, it is mostly organisations who were part of larger organisational groups or certified by a sustainable tourism certification programme, who produce such a report. This is concerning as the tourism industry is being dominated by small and medium-sized enterprises (Font, Garat & Jones, 2016). Also lacking among organisations is a written responsible/sustainable tourism policy, although many participants claimed to have an unwritten responsible/sustainable tourism policy.

Producing a CSR report/sustainability report and having a written sustainable tourism policy can become the starting point for identifying possible opportunities, setting sustainability goals and fostering a positive change in tourism organisations' attitude towards sustainable tourism development (Lin, et al., 2018). Besides, research suggests that in producing a CSR report, tourism organisations can show suppliers and potential clients that their business is committed to sustainable tourism development, possibly leading to product differentiation, increased marketing opportunities and increased brand loyalty (Dodds & Joppe, 2005).

As seen in the previous chapter, this study identified various sustainable tourism practices that the participating South African inbound tour operators have adopted in their business operations, including sustainable tourism training to employees, employment of local employees, offsetting greenhouse gas emissions by planting trees, donating to charities, as well as the purchasing of local or eco-friendly products and suppliers. By investing in sustainable tourism practices, tourism organisations can benefit economically with increased

revenue from improved "… brand image, reputation, market position, qualifications and morale from employees, relationships with the firm to customers and other stakeholders, and reduced operating costs from the implementation of eco-efficient processes" (Lin, et al., 2018, p. 4). Although benefits will only be seen in the medium- to long term, studies suggest that the return on investment is positive and that business performance will see improvements (Becker-Olsen, Cudmore, & Hill, 2006; Frey & George, 2010).

For ease of reference, a complete list of all the sustainable tourism practices as identified in the findings is available in Section 5.13. Globally inbound tour operators can use this list as an aid to identify the sustainable tourism practices currently being adopted by inbound tour operators in a developing country and could possibly implement some of these practices in their own organisation and business operations. These practices could ultimately form part of an organisation's sustainable tourism strategy and progress should be reported by delivering an annual or bi-annual CSR or sustainability report.

5.4 PRESSURE BEING PLACED ON TOURISM SUPPLIERS

Being positioned between the supply and demand of tourism-related products and services, tour operators play the important role of promoting, distributing products and services, and facilitating information sharing in the supply chain (Sigala, 2008). Therefore developing better linkages between supply and demand is crucial for sustainable tourism development (Font, et al., 2008). Supply chain management, and the development of a sustainable supply chain, were identified by the TOI as the area where the biggest impact can be made (TOI, 2003). A tour operator's customer satisfaction level can also be influenced by suppliers, as tour operators are dependent on their suppliers to provide their guests with a high quality and satisfactory experience (Sigala, 2008).

Findings from this study suggest that South African inbound tour operators do take their prospective suppliers' sustainable tourism practices into consideration when developing travel itineraries. Participating organisations demonstrated a preference to work with sustainable suppliers, stating that if there is a choice between two similar products or services, within the same price and quality range, preference is given to the sustainable supplier.

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This confirmed the result of Feruzi, Steyn, and Reynisch (2013), which states that 80.8% of their respondents, being tour operators in Tanzania, agreed to support accommodation providers who followed specific eco-tourism principles. This may be as a result of the host destination, and the expectations of tourists when visiting an African country. Thus, inbound tour operators seek accommodations suppliers with social and environmental projects, to add a unique element of sustainability to their clients' visit, to ensure a memorable 'African' experience.

It is important to note that sustainable tourism practices is not the leading factor when selecting products and services, and preference is only given to sustainable suppliers if they provide the required location, quality, cost, safety and aesthetic value, as also found by Budeanu (2007). This finding also confirms those of Anciaux (2019), that if a sustainable option can be found, so much the better, but if not, then the concept of sustainability is ignored.

Findings further revealed that some of the smaller organisations felt that they have no bargaining power over accommodation suppliers and are not able to influence or pressure their suppliers to operate more sustainably. What is even more concerning is that some of the larger organisations, who do have bargaining power over their suppliers, stated that it is not their responsibility or duty to put pressure on suppliers to implement sustainable tourism practices. Frey and George (2010) also highlight that tourism organisations do not have a negative attitude towards sustainable tourism, however, they are facing too many other constraints in their general business environment to feel empowered enough to implement and force change.

Interestingly, many participants from both small and large tourism organisations, mentioned that their organisations do put pressure on or simply avoid suppliers involved with animal interaction and mistreatment. This indicates that if all South African inbound tour operators collectively stand together to foster and promote sustainable tourism development throughout their supply chain, pressure can be placed on tourism suppliers to start investing in sustainable tourism practices.

Frey and George (2010) also identify the missing link between the tourism organisations' intention to drive sustainability and the willingness of managers to commit resources to change

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management practices. As the demand for sustainable tourism products and services is growing, along with the fact that tourism suppliers are an extension of inbound tour operators' products and services, increased commitment by inbound tour operators to foster the development of a sustainable supply chain might become essential for organisational success, reputation and overall customer satisfaction (Budeanu, 2007; Frey & George, 2010; Spenceley, 2006). Trapper and Font (in Sigala 2008) also mention that: "Achieving product and service sustainability nowadays has become an indispensable requirement of demand, and tourism is not an exception".

5.5 SUSTAINABLE DESTINATION MANAGEMENT

Sustainable destination management is becoming increasingly important for destination managers to ensure that the same resources attracting tourists to the destination are not destroying the destinations' natural and cultural resources (Poudel, et al., 2016).

This study found that the sustainability of destinations was not a decision-making factor for South African inbound tour operators when selecting the location for tour itineraries. The destination is rather determined by the tour operators' clients and demand trends. The sustainability of a tour itinerary is mostly determined by the suppliers within the destination and the tour operators' own projects and initiatives included on their tours.

In contrast to various studies arguing that the social element of sustainability is being neglected (Hultman & Säwe, 2016; Missimer, Robert, Broman & Sverdrup, 2010), at a destination level, this study has found various sustainable tourism practices focussed especially on the social element. These practices are either located at the accommodation suppliers, which in most instances have a social or community project which guests are encouraged to support, or projects driven by the tour operators themselves creating opportunities for their clients to partake in social or community projects and activities. Besides the social element provided/arranged by inbound tour operators and/or accommodation suppliers, social and community projects are abundant throughout South Africa and easily accessible to tourists seeking such an experience.

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Findings further identified various sustainable tourism practices being implemented by participating organisations during a consumers' visit. This increases customer satisfaction and at the same time create an opportunity for inbound tour operators as well as local guides to create awareness and educate tourists on the local sustainability issues. Participating organisations agree with Orgams (in Tasci, 2017), that education is key for sustainable tourism development, while at the same time contributing towards to overall quality and customer satisfaction.

Although various sustainable tourism practices are being implemented by tour operators at a destination level, little engagement between the inbound tour operators and the local DMOs (Destination Management Organisations) was found which focussed on sustainable tourism development. This is concerning as "Co-operation with Destinations" was one of the TOI's key focus areas (TOI, 2003). Currently, tour operators link sustainability only to their suppliers and their own projects and initiatives. This was also apparent in terms of tour operators' environmental contribution on a destination level. Although some environmentally sustainable practices are apparent on tour, and some inbound tour operators drive their own environmental projects and initiatives, it was commonly found that inbound tour operators rely on government organisations (i.e. SANParks), to drive environmental sustainability, since they have to pay entrance fees to visit and take their clients into government-run national parks.

It was clear that most participants felt that there is a ripple effect through tourism and by simply bringing clients to South Africa, the country as a whole is benefitting economically. This mind-set can be considered as a big threat to sustainable tourism development. Although tourism can benefit destinations economically, especially tourism in developing countries, tourism is also criticised for destroying the natural and cultural resources upon which the destination is based (Dlamini & Masuku, 2013; Poudel, et al., 2016; Ruschkowski, Burns, Arnberger, Smaldone & Meybin, 2013). Therefore, it is essential for inbound tour operators to play their part as stakeholders in sustainable tourism development, to ensure that destination South Africa remains an attractive and desirable tourist destination.

5.6 PRESSURE RECEIVED FROM THE DEMAND-SIDE

The lack of demand for sustainable tourism products have been highlighted by various authors as a barrier to sustainable tourism development (Baddeley & Font, 2011; Cavagnaro, et al., 2015; Dodds & Kuehnel, 2010). Studies have also highlighted that the demand for sustainable tourism is rapidly growing with an increase in consumers' general awareness of sustainability issues (Bookings.com, 2019; Chafe, 2005; Tixier, 2009; TUI, 2017). Findings from this study show that inbound tour operators in South Africa perceive a growing demand for sustainable tourism products, however, the number of clients and agents asking about sustainable tourism practices before purchasing products remains low. CREM (2000) found that 50% of German and Dutch tourists expect the host destination to provide good environmental quality, and do not feel the need to enquire about a tourism product's sustainability before their purchase. In the UK, Miller, Rathouse, Scarles, Holmes and Tribe (2010) found that tourists' understanding of how tourism relates to the environment is weak, as their general awareness about the environment and global issues is low.

The findings of this study suggest that inbound tour operators in South Africa feel that there is an increase in tourists' general awareness related to environmental and social issues. However, this awareness is only realised when tourists arrive at the destination and then become more informed and educated on the sustainability issues present.

This is especially relevant for incoming tourists from all markets to South Africa, as tourists seek a unique "African" experience which generally includes social and environmental elements. Regardless of target markets, the majority of organisations in this study stated that they educate tourists on sustainability, as their tour guides highlight and promote sustainable tourism practices, also creating awareness on the social and environmental issues present at the destinations visited.

Inbound tour operators feel no pressure from their demand-side to implement sustainable tourism practices. As one participant (CFA – C) mentioned: "It is one of the few sectors where the change has been pushed by the industry rather than on demand from the clients". The gap between intent and actual purchasing behaviour was evident in this study, also highlighted by

Chafe (2005), stating that 70-80% of tourists state a high concern for the environment and social components on holiday, with only 10% converting this concern into actual purchasing decisions.

As also found by Tixier (2009) and Ponsford, Williams and Gill (2006), sustainable tourism practices are mostly adopted by specialised sustainable inbound tour operators as a differentiator from other inbound tour operators in a competitive market. However, some participants stated that sustainability is something that they feel passionate about and that it is something that they want to support and promote as part of the organisation's mainstream business operations. Cavagnaro, Staffieri and Ngesa (2015) also found in their study on Kenyan inbound tour operators that participation in sustainable tourism practices is not necessarily driven by profit, but rather by a desire to improve their own and their family's quality of life.

5.7 THE VALUE OF CERTIFICATION PROGRAMMES IN THE DEVELOPMENT OF SUSTAINABLE INBOUND TOUR OPERATORS

Participating organisations revealed that they do find value in sustainable tourism certification programmes. Certified/approved members of a sustainable tourism certification programme identified various benefits, with non-certified/approved operators also highlighting the perceived value sustainable tourism certification programmes can add to their organisations.

Although various benefits have been identified in this study, in the broader scope of the South African tourism industry, very few organisations participate in sustainable tourism certification, as only three tour operators in South Africa are certified by a sustainable tourism certification programme. As with the issue regarding the demand for sustainable tourism products, there seems to be a gap between tour operators' willingness to participate, and their actual participation in sustainable tourism practices, as also highlighted by Budeanu (2007) and Tasci (2017).

This might be directly related to the low levels of awareness and demand for certified products and services, as suggested by Tasci (2017), Fairweather, Maslin and Simmons (2005) and

Jarvis, Weeden and Simcock (2010). This is also highlighted by Font and Wood (2007), who state that both lodge owners and tour operators find no desire from their clients to meet "green standards".

Besides the low level of awareness from a demand-side, participating organisations found little benefit from a marketing perspective by being a member of a certification programme, suggesting that certification programmes should promote/market and educate both end-users and tourism suppliers. Tasci (2017, p. 388) also suggests that certification programmes "… needs to start following a marketing approach, understanding customer needs, wants and attributes before formulating and promoting these certificates". However, as pointed out by Font and Wood (2007), the majority of certification programmes are NGOs or government agencies with a lack of marketing skills and experience. Furthermore, most certification programmes do little promotion themselves as they perceive that getting involved in marketing conflicts with their primary task of evaluating standards.

Participants further mentioned the issue of the cost of becoming certified, especially for smaller tourism organisations. This does not only include the cost of certification, but also the cost of reaching and maintaining a certain standard, as well as the cost of time, as also highlighted by Frey and George (2010). Bien (2005) however suggests that compliance with set standards, the sharing of best practices and cost-saving can help justify the certification incentive. Participant CFA – D, who is certified by Travelife, stated that it is indeed possible to be profitable while still operating sustainably.

In the DEAT's Responsible Tourism Guidelines, active participation by all shareholders was highlighted as a key success factor. The practice of becoming certified by a sustainable tourism certification programme was also highlighted as one of the Responsible Tourism Guidelines. This is concerning, as this study found that the vast majority of participants were not even aware of the government publications relating to sustainable tourism. In 2007, Van der Merwe and Wöcke investigated the extent to which the sustainable tourism practices promoted in the DEAT's Responsible Tourism Guidelines were implemented within the South African **hotel** industry, and also found low levels of participation in any sustainable tourism practices.

The low level of awareness of government publications related to sustainable tourism practices can be seen as an opportunity for not only South African inbound tour operators, but also other organisations within the South African tourism industry. Valuable literature is currently not being utilised such as the DEAT's Responsible Tourism Manual. This manual includes a range of practical and cost-effective sustainable tourism practices available to tourism organisations, as well as many useful sources of information and examples of best practice that can help to guide tourism organisations with the implementation of sustainable tourism practices. This can ultimately lead to various benefits including differentiation, marketing, cost-saving and profit, while at the same time benefiting the ecological and social environment.

The concept of greenwashing was highlighted by participants from both certified and non-certified/approved organisations. Some of the non-certified/approved organisations felt that without being audited against a set standard, no organisation should be allowed to receive any form of award or label, as they might not be operating in a sustainable manner and consider this as a money-making scheme.

Participants from certified organisations found that certification protects them from greenwashing, showing their clients, their suppliers and the industry that they are committed to sustainability, as they are being audited against set standards every three years. Font and Wood (2007) also state that certification can help protect customers against false claims. The two certified participants also stated that they do not have to promote and explain each of their sustainable tourism practices individually, as their certification speaks for itself. This is concerning, as with only three tour operators in South Africa (three in total – two in the sample) being certified and audited, greenwashing can be considered as a major threat.

In summary, the following has been identified as the value that sustainable tourism certification programmes add to the development of sustainable inbound tour operators. These value-added elements can be categorised into two categories: 1) The value that sustainable tourism certification programmes add to **all the industry stakeholders, including inbound tour operators** and, 2) The value that sustainable tourism certification programmes add to **inbound tour operators specifically**:

1) The value that sustainable tourism certification programmes add to **all the industry stakeholders, including inbound tour operators**:

- Providing sustainable tourism education to all industry stakeholders, including inbound tour operators, accommodation and activity/excursion suppliers, host communities and tourists.

- Information sharing, especially the sharing of best practices.

- Providing guidance and recommendations on how to approach sustainability issues.

- Providing opportunities to stakeholders to network with like-minded individuals.

- Creating general awareness related to sustainable tourism.

- Setting national and global baseline sustainability standards to work towards.

- Assisting all stakeholders in identifying truly sustainable and certified accommodation and activity/excursion suppliers, destinations and inbound tour operators, to minimise the effects of greenwashing.

2) The value sustainable tourism certification programme add to **inbound tour operators specifically**:

- Providing sustainability training to inbound tour operators through the process of becoming certified.

- Providing sustainability training to certified inbound tour operators' employees.

- Certifying inbound tour operators based on national or globally recognised standards.

- Assisting in promoting and branding sustainably certified inbound tour operators by providing a marketable logo.

- Providing justification, through certification standards and periodic audits, that an inbound tour operator is truly operating sustainably and that they are not subject to greenwashing.

- Assisting inbound tour operators in identifying truly sustainable and certified accommodation and activity/excursion suppliers and destinations, to aid in developing a truly sustainable supply chain, and minimise the effects of greenwashing.

5.8 BARRIERS FACED BY INBOUND TOUR OPERATORS

Various barriers faced by South African inbound tour operators hindering the adoption of more sustainable tourism practices were identified throughout this study. Each of the above sections described some of the barriers faced within that specific area of an inbound tour operator's business.

The low demand for sustainable tourism products and services can be considered as a massive barrier. Findings suggest that clients and agents rarely ask about an inbound tour operator's sustainable tour practices before the purchasing of their products or services. Findings also suggest that the sustainability of inbound tour operators' accommodation and activity/excursion suppliers is not a leading decision-making factor when building a tour itinerary, as the location, quality, cost, safety and aesthetic value remain the leading decision-making factors. Smaller inbound tour operators also stated that they do not have enough bargaining power to apply pressure on suppliers to operate more sustainably. Numerous barriers related to sustainable tourism certification programmes were also identified, including the cost of certification, the high level of standards, lack of marketing and greenwashing.

As a concluding section and at the end of each in-depth interview, participants were asked to state the biggest barriers hindering them from operating more sustainably. The most pressing/biggest barriers to sustainability adoption were highlighted as financial resources and time, as also indicated by Baddeley and Font (2011), Tasci (2017) and Cavagnaro, Staffieri, and Ngesa (2015). In addition, availability, sourcing and the rates of sustainable suppliers were highlighted, along with the low demand from clients requesting sustainable products and services. Human resources and lack of education were also listed as barriers.

Financial resources are mostly related to the initial investment cost to implement sustainable tourism practices. It is crucial to note that sustainability is a long-term investment with Bien (2005) and Font and Wood (2007), suggesting that an 8 – 20 year cycle of investment is required. This might hinder organisations from taking the first step towards the implementation of sustainable tourism practices, as the financial return on investment will not be immediate or within the short-term.

Time as a barrier does not only refer to the immediate time available to plan and implement sustainable tourism practices, but also time in terms of continued dedication and commitment to an organisation's long-term sustainability goals and objectives. Time further includes the time spent on training employees and educating clients, and time spent sourcing sustainable accommodation and activity/excursion suppliers. These findings confirm those of Frey and George (2010), who state that tourism business managers and owners perceive responsible tourism management as both expensive and onerous.

Some participants also identified the rates and availability of sustainable suppliers as barriers, stating that the demand for sustainable suppliers is more than the supply, resulting in sustainable suppliers charging premium rates, making sustainable travel itineraries unaffordable to clients. As an indication, Zhang, Wu, Liu and Zhang (2020) found that 'green' hotels in Beijing enjoy a 6.5% price premium compared to 'all-else-equal' non-green hotels.

It is noteworthy that many participants indicated that their organisations face no barriers in implementing sustainable tourism practices and see sustainable tourism as a long-term vision that everyone should work towards in their own capacity. Cavagnaro, Staffieri and Ngesa (2015) also found in their study on Kenyan inbound tour operators that participation in sustainable tourism practices is not necessarily driven by profit, but rather by a desire to improve their own and their family's quality of life.

5.9 MANAGERIAL IMPLICATIONS AND RECOMMENDATIONS

This study highlights various issues that need to be addressed by all of the stakeholders involved in the South African tourism industry, both private and governmental, for inbound tour operators to operate more sustainably. This section will first discuss some of the sustainability issues as identified within the literature review chapter, to provide context to the managerial implications and recommendations.

5.9.1 Context/backdrop to the managerial implications and recommendations

Since 1996, various documents, including strategies, manuals, guidelines and standards were published by South African governmental organisations related to sustainable tourism, in an attempt to promote and further the adoption of sustainable tourism practices within the South African tourism industry. With the release of the former DEAT's White Paper on Responsible Tourism in 1994, sustainable tourism was stated not as a luxury but rather a necessity (Frey & George, 2010). This led to the publishing of the DEAT's Responsible Tourism Guidelines and the DEAT's Responsible Tourism Manual, both in 2002. In 2011, the Department of Tourism, in collaboration with various stakeholders, introduced the NMSRT, to set a baseline standard for the industry and certification programmes. Thus, the assumption would be that the South African tourism industry had a good foundation in terms of its future sustainable tourism landscape.

Since the release of these publications, various obstacles are faced regarding implementation and participation. The low level of awareness by South African inbound tour operators, as found in this study, as well as the low level of awareness by the hotel industry related to these publications (Van der Merwe & Wöcke, 2007), may question the success of these publications from an implementation and adoption point of view. Furthermore, nine years later, no certification programme in South Africa has yet been accredited by SANAS to certify tourism organisations according to the NMSRT (SANAS, 2019).

Although many tourism organisations are participating in sustainable tourism practices in their own capacity, greenwashing can be seen as a major threat to not only certification programmes, but also the wider tourism industry. If an organisation is not certified by an accredited certification programme, and not being audited against national or global baseline standards, all claims made regarding an organisation's sustainability are exposed to greenwashing as its legitimacy may be challenged. From an inbound tour operator perspective, this is concerning as FTT approved tour operators are not being audited against a set criteria. What is even more concerning is that only two participants in this study stated that they put pressure on their suppliers to become certified by a sustainable tourism certification programme, questioning FTT approved tour operators' responsibility to promote a sustainable supply chain.

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In 2019, the Tourism Grading Council of South African announced that they will award a "Responsible Tourism accolade" to tourism accommodation suppliers complying with the NMSRT (TGCSA, 2018). What is concerning is that the Responsible Tourism accolade is a recognition mechanism and not an accreditation nor a certification, adding to the greenwashing problem. This suggests a non-alignment in strategy by governmental organisations, ultimately undervaluing the concept of certification and contradicting their own publications.

Research suggests that globally there is a problem, as there are too many certification programmes each with their own standard (Font, 2002; Toth, 2002). In South Africa we have national baseline standards for certification (NMSRT), however, as mentioned above, no certification programme is currently accredited by SANAS to certify against these standards. There is currently no sustainable tourism certification programme in South Africa that certifies inbound tour operators, not to mention certification against the NMSRT. Only the international sustainable tourism certification programme, Travelife, certifies tour operators in South Africa.

From a demand-side, this can be seen in a positive light and as an opportunity, as research by Kahlenborn and Dominé (in Font, 2002, p. 203) suggests that "…international labels are the only ones likely to make a difference to the tourist, and if eco-labelling is meant to influence purchase as well as being a tool for peer pressure, then international labels are here to stay". As South African inbound tour operators focus on international markets, being part of an international sustainable tourism certification programme may provide more benefits than a South African certification programme, which will be unknown to international and inbound tourists.

From a supply-side, very few accommodation suppliers and activity/excursion suppliers are certified by any sustainable tourism certification programme. Fair Trade Tourism, Africa's largest sustainable tourism certification programme, only has 60 certified members in South Africa, and only certifies on the GSTC's global standards, which many suppliers find both difficult to reach and expensive (FTT, 2018). GreenLine, who does certify based on the NMSRT, only has 17 certified suppliers in South Africa, and is currently not accredited by SANAS to certify against the NMSRT (SANAS, 2019).

With only a limited number of legitimate certified suppliers, inbound tour operators would find it difficult to develop sustainable tourism travel packages only supporting these few certified suppliers, known to be operating in a truly sustainable manner. Thus, developing a sustainable supply chain is very challenging.

5.9.2 Managerial implications and recommendations to the industry stakeholders

Ultimately, all stakeholders in the tourism industry will need to work together and align their strategies, to achieve the main goal of sustainability. South African inbound tour operators need to actively promote and market sustainable tourism products and services, and educate their clients on the concept of sustainable tourism to drive and foster demand. They should also actively support sustainable tourism suppliers and give preference to suppliers who are certified by an accredited sustainable tourism certification programme, to encourage non-sustainable suppliers to become more sustainable. South African inbound tour operators can use the sustainable tourism practices identified in this study as a source for ideas, as well as make use of Font, Trapper, Schwartz and Kornilaki's (2008) "Sustainable Supply Chain Management Framework for Tour Operators" to implement and adapt to a sustainable supply chain.

South African tourism suppliers such as accommodation and activity/excursion suppliers, should make use of the DEAT's Responsible Tourism Guidelines and the DEAT's Responsible Tourism Manual to educate themselves on how to implement sustainable tourism practices cost-effectively. Alternatively, South African tourism suppliers can become a member of a sustainable tourism certification programme to receive training on how to operate sustainably, and to start the process towards becoming a truly sustainable tourism organisation free from greenwashing. Organisations may also use the NMSRT as a tool when developing their organisational sustainable tourism strategy, goals and objectives to work towards the national benchmark.

The government needs to drive the education and create awareness on the importance of sustainable tourism. It is also necessary to create awareness of its already published documentation related to responsible/sustainable tourism. The government should assist and promote sustainable tourism certification programmes to become accredited by SANAS and

certify against the NMSRT. The government ought to furthermore provide incentives to or subsidise tourism organisations to become certified by a sustainable tourism certification programme, to promote certification and discourage greenwashing. In 2003, the World Tourism Organisation published a document entitled "Recommendations to governments for supporting and/or establishing national certification systems for sustainable tourism", which might be able to assist with the alignment of strategy between the different stakeholders involved in sustainable tourism (UNWTO, 2003). The government may also become a member of the GSTC to receive training on how to become a sustainable tourism destination (GSTC, 2012). Through its marketing arm, South African Tourism (SAT), the government can market and promote South Africa as a sustainable tourism destination fostering an increase in demand for sustainable tourism products, or in the interim, market and promote the current sustainable tourism organisations and destinations.

South African certification programmes should consider certifying with two levels of standards. One level should be in line with South Africa's NMSRT with a higher level in line with the GSTC's global standards. Various participants suggested that the current standards for FTT (accommodation and activity/excursion suppliers) and Travelife (tour operators) are too high and it is almost impossible for them to reach those standards. This certainly creates an opportunity for certification programmes to officially certify against the NMSRT, which is a lower level of standards compared to FTT and Travelife's globally recognised standards. This may encourage tourism organisations to start small and build themselves toward a globally recognised standard. At the same time, action needs to be taken to combat greenwashing to ensure that all claims to be sustainable are in line with one of the above-mentioned standards.

With a combined effort from all the stakeholders involved in the South Africa tourism industry, South Africa can become a truly sustainable tourism destination, and hopefully someday become certified as a sustainable tourism destination based on globally recognised standards.

5.10 LIMITATIONS

Besides the limitations as described in the research methodology chapter, some limitations were identified during the data analysis and are important to highlight. First, no real comparison could be made between certified/approved organisations and non-certified/approved organisations. Although a comparative study was **not** intended for this research study, it was apparent that some participants were not able to differentiate between being Travelife certified and being FTT approved, with general comments being made on certification programmes, based on FTT's approved processes and practices. Therefore, extra caution had to be taken during data collection and data analysis to ensure that unconsciously misunderstood concepts and practices by some participants would not influence the research findings and conclusion.

Second, the researcher found that participants were extremely willing to discuss and provide information on the social or environmental projects in which their organisations were involved, however, the participants were not always familiar with some of the concepts and terms related to sustainable tourism as defined in academic literature. This necessitated more extensive probing and explanation before the interviewer and the participants could enter into a deeper discussion on certain topics, even though they were familiar with the general concepts.

Last, as mentioned in Chapter 3, the sampling method used, purposive/judgemental sampling, came with the limitation that findings cannot be statistically generalised to reflect the entire target population. The sampling method used was however fitting, in order to gain in-depth insight to ultimately reach all the research objectives.

5.11 RECOMMENDATIONS FOR FUTURE STUDIES

In this research study, only South African inbound tour operators were taken into consideration, leaving gaps in academic literature to investigate the influence of other tourism organisations on sustainable tourism development. Not all of the income generated through inbound tourism is directly related to inbound tour operators, as other booking methods can be utilised, such as direct bookings and bookings via online travel agencies (OTAs). Especially with the growth of the sharing economy and global organisations such as Airbnb, inbound tour operators may see

a decrease in market share, and will not be in a position to influence as many inbound tourists' decisions and choice of accommodation suppliers and activity/excursion suppliers.

Further research may explore the possible partnerships and collaborations between GSTC accredited certification programmes and large OTAs such as Booking Holdings and the Expedia Group, not just to promote truly sustainable and certified tourism suppliers, but also to create awareness among tourists and to foster a demand for sustainably certified tourism products and services. One example includes the GSTC accredited certification programme Green Key, which has already partnered with various OTAs, to promote their certified members as "eco-friendly" suppliers (Green Key, 2019). Recently, Expedia Group partnered with FTT to state on their booking sites under the "awards" section whether a property is FTT certified.

Inbound tourism generates less than half (44%) of South Africa's total income generated through tourism, with domestic tourism generating the majority (56%), leaving the domestic tourism market's influence on sustainable tourism development unexplored (Stats SA, 2018). Future research studies may focus on the domestic tourism market to identify whether there is a local demand for sustainable tourism products in South Africa from domestic travellers. This might be essential as demand for sustainable tourism products from domestic travellers is currently unexplored. Future research studies can also test domestic tourists' awareness of local sustainable tourism certification programmes, and whether such programmes can influence domestic travellers' purchasing behaviour and choice of accommodation and/or activity/excursion.

5.12 ACADEMIC VALUE AND CONTRIBUTION OF THIS RESEARCH STUDY

The purpose of this research study is to contribute to the limited body of knowledge related to sustainable tourism practices implemented by inbound tour operators. This was achieved by focussing on South African inbound tour operators as a case study, to identify the sustainable tourism practices currently being adopted and implemented within a developing country.

The academic value and contribution of this research study was delivered by compiling a list of sustainable tourism practices currently being adopted by inbound tour operators in a developing

country. This list includes sustainable tourism practices adopted within inbound tour operators' business and office environments, destinations visited, supply chain management and practices adopted to foster a demand for sustainable tourism products and services. In addition, academic value was produced by linking inbound tour operators to sustainable tourism certification programmes, and to identify the value sustainable tourism certification programmes add in developing more sustainable South African inbound tour operators.

The above-mentioned academic value and contribution can further aid the various stakeholders within the tourism industry, including the South African government and the local tourism suppliers, to better understand the role that inbound tour operators can and should play in sustainable tourism development, given that responsible and sustainable tourism was identified as the preferred tourism development strategy for South Africa. This research study will further give sustainable tourism certification programmes a better understanding of inbound tour operators' perspectives and outlook towards the concept of certification, and identify how value can be created for inbound tour operators. Last, the study can help inbound tour operators globally to identify the current sustainable tourism practices being adopted by inbound tour operators, enabling learning through the sharing of best practices, and to hopefully increase other inbound tour operators' willingness to adopt some of these sustainable tourism practices into their own business operations.

5.13 LIST OF SUSTAINABLE TOURISM PRACTICES ADOPTED BY SOUTH AFRICAN INBOUND TOUR OPERATORS

A list of all the sustainable tourism practices implemented by the South African inbound tour operators that participated in this research study will follow. This list consists of five sub-sections, each related to a different operational area within an inbound tour operator's business. The sub-sections are sustainable business operation practices, sustainable supply chain management practices, sustainable destination management practices, demand-side of supply chain practices, and government literature, sustainable/responsible tourism awards and sustainable tourism certification programmes.

5.13.1 Sustainable business operation practices:

- Corporate Social Responsibility (CSR)
  - Deliver a CSR report annually or bi-annually.
  - Deliver a non-financial or sustainability report annually or bi-annually.
  - Employ a staff member to focus on sustainability, CSR reporting and sustainability reporting.

- Sustainable or responsible tourism policy
  - Develop a written sustainable or responsible tourism policy visible to all employees and the public.

- Offset greenhouse gas emissions
  - Purchase/plant trees to offset greenhouse emissions from the office environment.
  - Purchase/plant trees to offset each client's greenhouse gas emissions from the client's tour.
  - Offset the paper used in the office through the purchasing/planting of trees.
  - Don't allow tour buses to idle while picking-up, dropping-off or waiting for clients.
  - Provide self-drive clients with tips on how to drive more efficiently.

- Waste management system
  - Recycle plastic, paper and tin at the office.
  - Recycle used oil after the tour vehicles have been serviced.
  - Combine recycling with other projects such as sending recyclable waste to township projects where they use cans to make ornaments, or send recyclable plastics to an owl centre which uses plastic to build owl-nesting boxes.
  - Eliminate all single-use plastic from the office.
  - Only print double-sided.
  - Recycle the printers' cartridges.
  - Make use of scrap paper.
  - Invest in an operating system to become a paperless office.

- Provide employees with a water dispenser to fill their water bottles.
- Give recyclable waste to the general waste collectors on the street.
- Allow depot cleaners to recycle paper for an additional income.

- Donate to charity
  - Donate to charity organisations with a social aspect such as orphanages, school feeding programmes, or adult education centres.
  - Sponsor a soccer team in a rural community.
  - Start a project among the staff to donate blankets and jackets to the homeless.
  - Donate to conservation projects such as the Rhino Ride, the Rhino Art Project, the Turtle Trust, the Endangered Wildlife Trust, Save the Rhinos, Rhinos without Borders, or Wildlife ACT.
  - Sponsor penguin houses through Marine Dynamic.
  - Donate time in terms of building infrastructure such as a school or a crèche, mentor start-up businesses, up-skill local community members to become guides, host Christmas parties for the disabled, take underprivileged school children on educational trips, or sponsor vehicles for charity events.
  - Implement a policy to donate a certain percentage of the organisation's profit or to add a certain amount/percentage to each client's quote to be donated to charity organisations, or used to fund community or conservation projects.

- Employment of local people
  - Employ local staff at the office and local tour guides.
  - Give preference to individuals residing in the immediate area to minimise staff relocation and transportation costs. Thereafter broaden the search to include all South African citizens.

- Employment of Previously Disadvantaged Individuals (PDIs)
  - Register as a BEE (Black Economic Empowerment) organisation.
  - Provide internship opportunities for PDIs.
  - Create a development programme to train and employ PDIs.

- Equal employment opportunities
  - Provide equal employment opportunities and do not discriminate.

- Minimum wage
  - Pay all the staff at least minimum wage and fair market-related salaries.

- General training and advancement opportunities
  - Provide employees with training opportunities such as German classes, Pastel courses, small business management online courses or Microsoft Office skills training.
  - Provide employees with job-specific training, internal system training and product training.

- Sustainable tourism training
  - Provide employees with training on sustainable tourism practices through regular awareness training.
  - Include a sustainable tourism element as part of the formal training.
  - Provide training on the sustainable tourism practices accommodation and activity/excursion suppliers partake in.
  - Educate employees through Travelife's online sustainable tourism training course.

- Purchase local products
  - Local products may include gifts that are given to clients such as branded mugs, buffs, proudly South African snacks, clothes, or local arts and crafts.
  - Other local products may include office supplies, groceries, or services such as maintenance and installations.

- Purchase eco-friendly supplies
  - Give eco-friendly gifts to clients such as eco-friendly lip balm, eco-friendly pens, or arts and crafts sourced from a local community project.

- Purchase eco-friendly supplies such as cleaning materials, paper, or unbleached toilet paper.

- Customer feedback system
    - Give clients a feedback form to fill in after a tour.
    - Send clients a feedback form or a link to an online feedback form via email.
    - Ask agents for feedback received from their clients.
    - Gather feedback through conversations between the tour guides and clients during a tour.
    - Ask clients to give the organisation a rating and feedback via online platforms such as Tripadvisor and/or Facebook.

- Exploitation and harassment policy
    - Develop a formal policy against commercial, sexual or any other form of exploitation or harassment, including child labour.

- Other sustainable tourism practices
    - Electricity saving methods.
        - Make use of energy-saving light bulbs.
        - Use a fan instead of air-conditioning.
        - Move to renewable energy such as solar power, as it can be subsidised by the government's Green Tourism Incentive Programme.

    - Water-saving.
        - Install pressure reducers on taps and toilets.
        - Capture rainwater.
        - Use captured rainwater for irrigation and the washing of tour vehicles.
        - Install water tanks.
        - Implement a greywater system.
        - Make use of groundwater.
        - Experiment with biogas systems.

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5.13.2 Sustainable supply chain management practices:

- Include sustainable tourism practices as part of the decision-making process when selecting accommodation and activity/excursion suppliers.
  - o Give preference to suppliers who are certified by an accredited and credible sustainable tourism certification programme.
  - o Pressurise or encourage suppliers to become certified by an accredited and credible sustainable tourism certification programme.
  - o Select suppliers who are involved in a community or conservation project.
  - o Select suppliers who have implemented sustainable tourism practices in their own business operations.
  - o Pressurise or encourage suppliers to operate more sustainably.
  - o Educate suppliers on sustainable tourism practices.
  - o Provide feedback to suppliers on non-sustainable practices.
  - o Avoid suppliers not operating sustainably.

- Animal interaction
  - o Avoid suppliers involved in animal mistreatment.
  - o Make use of SATSA's Animal Interaction Guidelines or FTT's Captive Wildlife Guidelines when selecting suppliers involved with animal activities.

- Contracting agreements with suppliers
  - o Sign written agreements with all suppliers.
  - o Make use of ground operators to negotiate with community leaders before entering a community or selecting a community to visit.

5.13.3 Sustainable destination management practices:

- Include sustainable tourism development as part of the decision-making process when selecting destinations to visit.
  - o Give preference to destinations operating sustainably.
  - o Avoid destinations that are sensitive to over-tourism.

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- Avoid environmentally and socially sensitive destinations.

- Ensure a positive impact on the local communities
  - Take clients to visit local communities.
  - Support local community projects.
  - Employ local tour guides.
  - Support suppliers involved in a local community project.

- Ensure a positive impact on the local natural environment
  - Support local conservation projects.
  - Support the national parks in South Africa.
  - Support suppliers involved in a conservation project.
  - Ensure that tour vehicles stick to the designated roads when driving in a national park to eliminate erosion and harm to any fauna and flora.
  - Collect and recycle recyclable waste while on tour.

- Destination Management Organisations (DMOs)
  - Engage with the local DMOs to support sustainable tourism development and to ensure a minimum negative impact on the destinations visited.

5.13.4 Demand-side of sustainable supply chain practices:

- Educate clients on sustainable tourism practices
  - Educate and promote sustainable tourism suppliers.
  - Educate clients on their impact on local communities before visiting a local community.
  - Educate clients on the current environmental issues before entering a destination.
  - Educate clients on sustainable tourism through marketing material.
  - Educate clients on animal mistreatment.

- Encourage clients to partake in sustainable tourism practices
  - Encourage clients to adopt environmentally sustainable behaviour such as waste management/recycling.
  - Provide self-driving clients with a brown bag to collect recyclable waste.
  - Provide self-driving clients with tips on how to drive more economically.
  - Provide clients with information on where to buy sustainably sourced fish.
  - Provide clients with information on safe drinking water so that they don't have to buy bottled water.
  - Encourage clients to make use of an aluminium water bottle instead of purchasing plastic water bottles.
  - Provide clients with the opportunity to purchase some of the supplies needed by the community before visiting a local community.
  - Encourage clients to support community or conservation projects present at the accommodation suppliers.
  - Encourage clients to support the organisation's internal community or conservation projects.

5.13.5 Government literature, sustainable/responsible tourism awards, and sustainable tourism certification programmes:

- Government literature
  - Become familiar with the National Tourism Sector Strategy (NTSS).
  - Make use of the former DEAT's Responsible Tourism Guidelines and the former DEAT's Responsible Tourism Manual both published in 2002, to aid with the implementation of sustainable tourism practices.
  - Use the Department of Tourism's National Minimum Standards for Responsible Tourism (NMSRT) published in 2011, as a benchmark to set sustainability policies, standards and goals.

- Sustainable/responsible tourism awards
  - Enter for sustainable or responsible tourism awards such as the WTM Africa Responsible Tourism Awards or the Imvolo Responsible Tourism Awards.

- Sustainable tourism certification programmes
  - Become certified by a sustainable tourism certification programme such as Travelife.
  - Become a member of a sustainable tourism certification programme such as Travelife or Fair Trade Tourism to receive sustainability training.
  - Make use of accommodation suppliers and activities/excursions that are certified by an accredited global or national sustainable tourism certification programme to avoid being influenced by greenwashing.

5.14 CONCLUSION

The findings should be evaluated, taking into consideration the limitations and scope of the study. All of the objectives of the study were successfully achieved and the research problem addressed. First, the study was able to identify many sustainable tourism practices that South African inbound tour operators are currently adopting and implementing into their business operations. A list of sustainable tourism practices was compiled which can be used by inbound tour operators globally to identify opportunities as to how sustainable tourism practices can be implemented in the different operational areas within their organisations.

Second, the findings revealed that although many inbound tour operators prefer working with sustainable suppliers, limited pressure is being exerted on non-sustainable suppliers to implement sustainable tourism practices. The main reason for this lack of pressure, is the lack of pressure from their clients for sustainable tourism products and services. As sustainability is not considered as a key decision-making factor when building a travel itinerary, with price, location and quality being more important, sustainability remains dependant on inbound tour operators' motivation and willingness to participate and implement.

Third, the sustainability of visiting destinations is not a decision-making factor for South African inbound tour operators when selecting the locations for tour itineraries, as the destinations are rather determined by demand trends and requests from the clients. Some sustainable destination management practices are being implemented by inbound tour operators, through taking their clients to visit local communities and by supporting local community projects, providing sustainable travel tips, making use of local tour guides to educate tourists on the social and environmental issues present at the destinations, and paying entrance and visiting government-run national parks. Some inbound tour operators rely on their suppliers to provide an environmental or socially sustainable element or activity to their clients, or to encourage their clients to donate to either their suppliers' or their own environmental or social projects and initiatives.

Fourth, South African inbound tour operators do feel that there is a growing demand for sustainable tourism products and services, and does have a positive outlook towards sustainable tourism development. However, with no real pressure being felt from their clients, participation and implementation of sustainable tourism practices will remain slow.

Fifth, sustainable tourism certification programmes can contribute towards the development of sustainable inbound tour operators, but the cost of certification, the level of standards, the lack of South African sustainable tourism certification programmes, the lack of sustainably certified tourism suppliers, and the commitment from South African inbound tour operators to become certified, remains a major obstacle. Although indirect value was identified such as the sharing of information and best practices, setting of standards, the labelling of truly sustainable tourism suppliers, and the prevention of greenwashing, without direct value in terms of more bookings or extensive marketing, participation in certification will remain slow.

Last, the biggest barriers faced by South African inbound tour operators in becoming more sustainable are financial resources and time. Other barriers also identified were the lack of truly sustainable tourism suppliers, premium rates of sustainable suppliers, human resources and lack of education.

The biggest barrier present during all sections of the findings, touching each of the research objectives, was the lack of demand for sustainable tourism products and services. Although willingness to participate in sustainable tourism practices is abundant from inbound tour operators, accommodation and activity/excursion suppliers, with no pressure from clients requesting sustainable tourism products and services, the actual participation and implementation of sustainable tourism practices are limited.

Only if and when the demand for sustainable tourism products increases, will inbound tour operators feel more pressure to provide sustainable tourism product and service options to their clients, which may lead to inbound tour operators applying more pressure on their suppliers to implement sustainable tourism practices. This pressure may result in inbound tour operators as well as accommodation suppliers and activity/excursion suppliers starting to invest in sustainable tourism practices. To showcase their commitment to sustainability, inbound tour operators might seek to communicate their sustainable tourism practices and development to their stakeholders through CSR or sustainability reporting, or by becoming certified by an accredited sustainable tourism certification programme.

Ultimately, sustainability is interlinked with all stakeholders in the tourism industry. Every tourist, tourism supplier, tourism organisation, sustainable tourism certification programme and government department has a role to play in applying positive pressure, educating each other, and promoting the concept of sustainability. By creating awareness through marketing initiatives and campaigns, along with providing tourists with truly sustainable tourism products and services, direct value can be created for tourism organisations, while at the same time positively impacting the natural and social environment of host destinations.

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ANNEXURE A

DATA COLLECTION INSTRUMENT

Data collection instrument – Interview questions – Researchers' copy

Section 1: Sustainable **business operations** by inbound tour operators

1) Are you familiar with the concept of responsible/sustainable tourism?

Yes	No

2) Have you heard of the triple bottom line?

Yes	No

3) Are you familiar with the practice of CSR reporting?

Yes	No

4) Do you partake in any means of CSR reporting or report on your sustainability (non-financial reports)?

Yes	No

Comments/type of reporting:

_____

_____

_____

5) Do you have a responsible/sustainable tourism policy?

Yes	No

6) What type of policy?

Set of principles	Series of activities
Written code of conduct	Unwritten code of conduct
Other, please specify:	

_____

_____

_____

7) Does your company partake in or do any of the following:

   a. Measure and offset your greenhouse gas emissions (Office employees)

Yes	No

   b. Measure and offset your greenhouse gas emissions (Tourists)

Yes	No

How or/and which company?

_____

_____

   c. Have a staff member focussed on CSR or sustainability

Yes	No

   d. Have a waste management system in place (Recycle at the office)

Yes	No

How does this process work? Service provider?

_____

_____

_____

   e. Donate to charity (The organisation itself)

Yes	No

How does this process work? To who/whom do you donate?

_____

_____

_____

f. Employment of local people

Yes	No

Define local: _____

g. Employment of Previously Disadvantaged Individuals

Yes	No

h. Provide equal employment opportunities (Do not discriminate)

Yes	No

i. All employees are paid at least the minimum wage

Yes	No

j. Employees are provided with general training and advancement opportunities

Yes	No

Example:

_____

_____

_____

k. Provide training to employees on sustainable tourism practices

Yes	No

How does this process work? How often?

_____

_____

_____

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l. Partake in local community development projects

Yes	No

How does this process work? Time or money?

_____

_____

_____

m. Purchase local products

Yes	No

Example:

_____

_____

_____

n. Buy eco-friendly supplies

Yes	No

Example/type of supplies:

_____

_____

_____

8) Do you have a customer feedback system in place?

Yes	No

9) How do you monitor and manage your customer feedback system?

_____

_____

_____

10) Do you have a policy against commercial, sexual or any other form of exploitation or harassment, including child labour?

Yes	No

Own or third party policy?

_____

_____

_____

11) In what other sustainable **business operations** do you participate as a business or at the office?

_____

_____

_____

Section 2: Sustainable **supply chain management** by inbound tour operators?

Accommodation suppliers:

12) What do you generally take into account when sourcing your accommodation suppliers?

_____

_____

_____

13) Do your sustainable tourism practices form part of your decision-making process when selecting accommodation suppliers?

Yes	No

14) If yes, what type of practices?

_____

_____

_____

Social	Environmental	Economic

15) Do you put pressure on your accommodation suppliers to become more sustainable?

Yes	No

If yes, how? If no, why not?

_____

_____

_____

16) Do you feel that you are in a position to put pressure on your accommodation suppliers to participate in sustainable tourism practices?

Yes	No

Why/why not?

_____

_____

_____

17) Do you ever pressure or encourage your accommodation suppliers to become certified by a sustainable tourism certification programme?

Yes	No

Other non-accommodation suppliers such as activities, restaurants, excursions, etc.:

18) What do you generally take into account when sourcing your non-accommodation suppliers?

_____

_____

_____

19) Do their sustainable tourism practices form part of your decision-making process when selecting non-accommodation suppliers?

Yes	No

If yes, what type of practices?

_____

_____

_____

Social	Environmental	Economic

20) Do you put pressure on your non-accommodation suppliers to become more sustainable?

Yes	No

If yes, how? If no, why not?

_____

_____

_____

Section 3: Sustainable **destination management** by inbound tour operators

21) How do you decide on which destination/area/location to include in your itineraries?

_____

_____

_____

22) Does the concept of sustainable tourism development form part of your decision-making process when selecting destinations?

Yes	No

Explain:

_____

_____

_____

Examples may include: (Only seen by the researcher)

 a. *Select or suggest shortest/most resource efficient route*

 b. *Tourist impact assessment*

 c. *Sustainable destinations*

23) Would you say that you have a positive impact on the local communities?

Yes	No

24) Why and how?

_____

_____

_____

Examples may include: (Only seen by the researcher)

    a. Make use of local tour guides

    b. Encourage tourists to support local businesses

    c. Encourage tourists to purchase local products

    d. Support local entrepreneurs

    e. Support local communities

25) Would you say that you have a positive impact on the local, natural and cultural environment?

Yes	No

26) Why and how?

_____

_____

_____

Examples may include: (Only seen by the researcher)

    a. Energy conservation / Use of renewable energy

    b. Environmental education

    c. Environmental conservation – Wildlife + Biodiversity

    d. Waste management / Recycling

    e. Water conservation

    f. Conservation of historical sites

    g. Conservation of culturally sensitive sites

27) Do you engage with the local Destination Management Organisation (DMO) at the destinations?

Yes	No

How?

_____

_____

_____

28) Do you have agreements with the accommodations, communities, activities and excursions at the destination?

Yes	No
Written	Verbal

Comments:

_____

_____

_____

Section 4: **Demand-side** of sustainable **supply chain management** by inbound tour operators?

29) Do you perceive a growing demand for responsible/sustainable tourism?

Yes	No

30) Do tourists ever ask about your sustainable tourism practices **before** purchasing your product?

Yes	No

31) Do tourists ever ask about your sustainable tourism practices **after** purchasing your product?

Yes	No

32) Do **agents** ever ask about your sustainable tourism practices **before** purchasing your product?

Yes	No

33) Do you feel pressure from your demand-side to implement responsible/sustainable tourism practices?

Yes	No

How and why?

_____

_____

_____

34) Do you educate tourists on sustainable tourism practices?

Yes	No

How?

_____

_____

_____

Examples may include: (Only seen by the researcher)
   a. *Information about the natural and cultural areas visited*
   b. *Information on the appropriate behaviour in areas visited*
   c. *Provide guidelines when visiting natural sensitive sites*
   d. *Provide guidelines of captive wildlife facilities and animal interaction*
   e. *Provide guidelines on wildlife harvesting and trade*

35) Do you encourage tourist to partake in sustainable tourism practices?

Yes	No

36) What type of practices?

_____

_____

_____

Examples may include: (Only seen by the researcher)

   a. *Donate to charity*

   b. *Provide tips on responsible travel*

   c. *Recycling*

   d. *Support local communities*

   e. *Purchase local products*

   f. *Support Fair Trade/eco-friendly products/activities*

   g. *Give glass or tin bottles instead of plastic bottles*

37) Are all your tours universally accessible or do you at least have a few tours that are?

All	Some	None

Comments:

_____

_____

_____

38) Are there any other sustainable tourism practices that you participate in that have not yet been mentioned up until this point?

_____

_____

_____

Section 5: Value added by sustainable tourism **certification programmes**

39) Are you familiar with the Department of Environmental Affairs and Tourism's White Paper on Responsible Tourism published in 1996?

Yes	No

40) Have you read the Department of Environmental Affairs and Tourism's Responsible Tourism **Guidelines** published in 2002?

Yes	No

41) Have you read the Department of Environmental Affairs and Tourism's Responsible Tourism **Manual** for South Africa also published in 2002?

Yes	No

42) Are you familiar with the National Department of Tourism's National Minimum Standards for Responsible Tourism (SANS 1162) published in 2011?

Yes	No

43) Have you ever entered for a local or international industry award for responsible tourism?

Yes	No

If yes, which one?

_____

44) If answered yes to the previous question: Did you find it valuable?

Yes	No

Why/why not?

_____
_____
_____

45) Are you a member/associated/certified by any sustainable tourism certification programme?

Yes	No

Why/why not?

_____
_____
_____

46) Do you find certification programmes in general valuable in the industry?

Yes	No

Why/why not?

_____
_____
_____

47) What value, if any, does certification add to your own business?

Value	No value

Explanation:

_____
_____
_____

48) According to you: What role, if any, can and should certification programmes play in developing more sustainable inbound tour operators?

_____
_____
_____

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Section 6: **<u>Barriers</u>** faced by inbound tour operators concerning sustainable tourism development

49) What barriers do you face that restrict you from participating in sustainable tourism practices and becoming a more sustainable inbound tour operator?

_____

_____

_____

Examples may include: (Only seen by the researcher)

a. *Time*

b. *Money*

c. *Trained staff*

d. *Lack of demand*

Additional questions:

50) Overall, how do you feel about the concept of sustainable tourism?

_____

_____

_____

51) Do you think inbound tour operators can and will influence the industry to operate more sustainably?

_____

_____

_____

ANNEXURE B

INFORMED CONSENT FORM

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**Faculty of Economic and
Management Sciences**

Informed consent for participation in an academic research study

Division of Tourism Management

Investigating South African inbound tour operator participation in sustainable tourism practices

Research conducted by:

Mr. I.L. Steyn (13072278)

Cell: 079 31 20 451

Dear Participant

You are invited to participate in an academic research study conducted by Ignatius Ludolph Steyn, a Masters student from the Department Division of Tourism Management at the University of Pretoria.

The purpose of the study is to investigate whether or not, and how, inbound tour operators in South Africa participate in sustainable tourism practices. In addition, whether inbound tour operators feel pressurised by the demand-side to implement sustainable tourism practices and whether or not inbound tour operators put pressure on their supply-side to implement sustainable tourism practices. This study will also assess the value that sustainable tourism certification programmes add to the development of sustainable inbound tour operators.

Please note the following:

- This study consists of an in-depth interview, making use of an interview schedule. Your name will appear on the interview schedule, but a generic name will be used in order to discuss findings.

- However, you will have the option to decide whether or not you want to be listed as a participant in this research study.

- Your participation in this study is very important to us. You may, however, choose not to participate and you may also stop participating at any time without any negative consequences.

- Please respond to the questions asked by the interviewer as completely and honestly as possible. This should not take more than 1 hour of your time.

- The results of the study will be used for academic purposes only and may be published in an academic journal. We will provide you with a summary of our findings on request.

- Please contact my supervisor, Prof. F. Fairer-Wessels, on tel. +27 12 420 4374 (e-mail: felicite.fairerwessels@up.ac.za) if you have any questions or comments regarding the study.

In research of this nature the study leader may wish to contact respondents to verify the authenticity of data gathered by the researcher. It is understood that any personal contact details that you may provide will be used only for this purpose, and will not compromise your anonymity or the confidentiality of your participation.

Please sign the form to indicate that:

- You have read and understand the information provided above.
- You give your consent to participate in the study on a voluntary basis.

_____   _____

Participant's signature   **Date**

ANNEXURE C

ETHICAL CLEARANCE BY THE RESEARCH

ETHICS COMMITTEE

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UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Faculty of Economic and Management Sciences

19 November 2018

Prof FA Fairer-Wessels
Tourism Management Division

Dear Professor Fairer-Wessels

The application for ethical clearance for the research project described below served before this committee on 16 November 2018:

Protocol No:	EMS163/18
Principal researcher:	**IL Steyn**
Research title:	Investigating South African inbound tour operator participation in sustainable tourism practices
Student/Staff No:	13072278
Degree:	MCom (Tourism Management)
Supervisor/Promoter:	Prof FA Fairer-Wessels / Dr A Douglas
Department:	Tourism Management

The decision by the committee is reflected below:

Decision:	Approved
Conditions (if applicable):	
Period of approval:	November 2018 – May 2019

The approval is subject to the researcher abiding by the principles and parameters set out in the application and research proposal in the actual execution of the research. The approval does not imply that the researcher is relieved of any accountability in terms of the Codes of Research Ethics of the University of Pretoria if action is taken beyond the approved proposal. If during the course of the research it becomes apparent that the nature and/or extent of the research deviates significantly from the original proposal, a new application for ethics clearance must be submitted for review.

We wish you success with the project.

Sincerely

pp PROF JA NEL
CHAIR: COMMITTEE FOR RESEARCH ETHICS

cc: Dr A Douglas
        Student Administration

Fakulteit Ekonomiese en Bestuurswetenskappe
Lefapha la Disaense tša Ekonomi le Taolo

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ANNEXURE D

CONFIRMATION OF LANGUAGE EDITING

KNG LANGUAGE EDITING SERVICES
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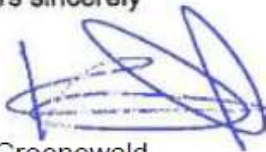
To Whom It May Concern

CONFIRMATION OF LANGUAGE EDITING OF A MASTERS DISSERTATION:

INVESTIGATING SOUTH AFRICAN INBOUND TOUR OPERATOR PARTICIPATION IN SUSTAINABLE TOURISM PRACTICES

Herewith confirmation that the abovementioned dissertation, by Mr Ignatius Steyn, has been language edited.

Yours sincerely

K.N. Groenewald

Sustainable tour operators

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