



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

FINAL REPORT

STIMULATING SECTOR DEMAND AND SUPPLY THROUGH NICHE TOURISM DEVELOPMENT: THE CASE OF RURAL TOURISM IN SELECTED PROVINCES

EXECUTIVE SUMMARY

The COVID-19 pandemic is catalysing changes in consumer demands as well as necessitating a paradigm shift for research on tourist behaviour and decision making. Demand is intensifying for safe spaces where social distancing is possible. The large group movement of people, and therefore the phenomenon of 'mass tourism', has been severely compromised as it imposes great health risks with travellers vulnerable to health hazards and points to opportunities in alternative niche forms of tourism. As a result of risk perceptions surrounding COVID-19, the tourism sector is projected to see an expansion in various forms of special interest or 'niche travel' which is driven primarily by the confidence of travelling in smaller groups and a less risk-prone environment. Arguably in the 'new normal' of a post-COVID-19 world consumers re-orient away from mass tourism experiences and instead search out what are termed as 'niche tourism' products and experiences. South Africa's diverse landscapes, rich natural and cultural heritage, and traditional knowledge can lay a breeding ground for the promotion of alternative tourism within the country. Indeed, niche tourism can play an ever more vital role in South Africa and is an opportunity to investigate tourism offerings in which smaller-scale, controlled and operated niche products can be established to satisfy the changing demands and needs of consumers. The pandemic further underlines the importance of developing interventions that are targeted to the requirements of specific niches. Research is therefore necessary to inform interventions that should consider the changing supply-demand situations of particular niches during and post COVID-19. Within the competitive world of tourism similarity is the enemy and niche products are a way to escape sameness. This points to the necessity for investigating supply and demand issues around different forms of niche tourism.

The aim of the study is to examine how niche tourism may be leveraged as part of the tourism sector's recovery plan to rejuvenate supply and ignite demand post COVID-19. One specific niche, namely rural tourism is investigated in detail.

The following broad objectives guide the study:

- To examine international research regarding niche tourism demand and supply.
- To examine international research regarding niche tourism demand and supply for one selected form of niche tourism, namely rural tourism.
- To examine the state of niche tourism demand and supply in South Africa with respect to one selected form of niche tourism, namely rural tourism.
- Analyse challenges presented by COVID-19 on tourism demand and supply with respect to one selected form of niche tourism, namely rural tourism.
- To analyse opportunities for leveraging niche tourism demand and supply as part of the tourism sector's recovery plan post-COVID-19 with the case of rural tourism
- To contribute towards development of a framework for strategic interventions to leverage niche tourism in South Africa using the case of rural tourism.

The following are the research questions that were under scrutiny:

- What are research debates applied in other countries to encourage and reignite niche tourism?
- What are international research debates regarding niche tourism demand and supply for the selected form of niche tourism, namely rural tourism?
- What is the state of niche tourism demand and supply in South Africa with respect to ONE selected form of niche tourism, namely rural tourism?
- What are the challenges (including presented by COVID-19) on tourism demand and supply with respect to the selected form of niche tourism, namely RURAL TOURISM?
- What are opportunities for leveraging niche tourism demand and supply as part of the tourism sector's recovery plan post COVID-19?

The report is structured into the following major sections of discussion:

- Theoretical background and literature review on niche tourism
- Niche Tourism in South Africa: Policy and Research
- Research Design and Approach
- Findings: Rural Tourism: International Literature Review
- Rural Tourism Policy in South Africa
- Context: Three Case Studies of Rural Tourism
- Findings: Three Case Studies of Rural Tourism

The theoretical background and literature review for this project as a whole presented a review of unfolding conceptual debates on niche tourism followed by an international policy and research overview. Arguably, the international literature reveals that there are no formal rules for what can, or what cannot be referred to as niche tourism with the result being uncertainty and considerable variation under this umbrella term. The broad consensus is that at one level niche tourism can be differentiated into a series of 'macro-niches' which are seen as relatively homogeneous market sectors. Examples of such macro-niches would be large market sectors such as cultural tourism, urban tourism or rural tourism; the category of environmental tourism is also often listed as another macro-niche. Of significance is that each macro-niche is capable of further segmentation into 'micro-niches' At the scale of micro-niches therefore niche tourism is focused on precise and small markets, examples would be gastronomy, geotourism or heritage tourism. Niche forms of tourism exhibit a life cycle of development which parallels Butler's tourism area life cycle model. It is demonstrated that over the past two decades there has been a continued expansion of international scholarship and debates concerning niche tourism

International policy debates are rising on niche tourism. There is emerging an extensive literature which maps out the experience of a large range of destinations – urban and rural - in which local tourism is firmly anchored upon particular niches such as the micro-niche of gastronomy. It is observed that the development of micro-niches can be a potentially valuable driver for tourism expansion in peripheral regions. Arguably, the concept of niche tourism is compelling for tourism policy makers and destination managers as a vehicle for promoting sustainable

development and inclusion. Indeed, the niche tourism approach appears to promise greater opportunities and a tourism that is more sustainable, less damaging and, importantly, more capable of delivering high spending tourists. Across several countries tourism policy makers have embraced the promotion of niche tourism and of niche tourism products. The UNWTO views niche tourism as more valuable for host communities than traditional forms of tourism because of greater spending in destinations. The COVID-19 pandemic further underscores the relevance of developing strategic interventions targeted to the requirements of specific niches and which are informed by an understanding of the changing supply-demand situations of particular niches in the post-/continuing environment of COVID-19. This said, it should not be assumed that a strategy for development of niche tourism is unproblematic.

In South Africa the policy review on niche tourism traces interest in its promotion and practices for the past two decades. Policy interest by government in niche tourism in South Africa is not a recent phenomenon and pre-dates the COVID-19 crisis. It is observed that over the decade of policy affirmations to niche tourism there has been little continuity in the particular forms of niche tourism to be prioritised. This said, the significance of strategic interventions for critical niches in tourism was emphasized in a 2020 Economic Survey report on South Africa produced by the Organization of Economic Cooperation and Development (OECD). A review is provided of existing South African scholarship on niche tourism. Overall, for successful niche tourism development in any country it is acknowledged there is a need for strategic intervention in the form of policy support (Jones, 2010) which, in turn, demands evidenced-based research in order to inform policy interventions. The COVID-19 pandemic further underlines the importance of developing strategic interventions which are targeted to the requirements of specific niches and informed by an understanding of the changing supply-demand situations of particular niches in the post-/continuing environment of COVID-19. This research study is premised on the argument that a comprehensive research programme is required in South Africa to support niche tourism policy development. In particular, such an initiative needs to address knowledge-gaps about the changing supply-demand situations of particular niches during and post COVID-19 to inform evidenced-based policy interventions, decision-making and strategy formulation in a post-COVID-19 tourism environment. The rest of the report addresses the above issues in respect of enhanced understanding of tourism sector supply and demand issues in relation to niche tourism and with a focus on rural tourism as its case study.

The following sets of research tasks were undertaken to inform strategic interventions and project implementation regarding niche tourism supply and demand in South Africa. International policy best practice reviews on the specific niche tourism of rural tourism was done looking at the international experience of the growth and challenges of rural to inform understanding of the demand for such a niche form of tourism. The supply-side issues related to rural tourism involved a set of interviews with enterprises in local municipalities in three selected provinces which were chosen in agreement at a meeting with Department of Tourism. The three selected provinces for case studies are Limpopo, Eastern Cape and Mpumalanga. The individual local municipalities were Greater Giyani (Limpopo), Thaba Chweu (Mpumalanga) and Raymond Mhlaba (Eastern Cape). Data collection methods vary for the different research tasks as described above that are to be undertaken. The

Table below summarizes how the research objectives of the study were achieved, research methods to address each objective and justification for the method used.

Research Objective	Method	Justification
Understand conceptual base and international debates on initiatives for niche tourism	Desk top review – sources through Google Scholar and search of reports by major international agencies	This is standard approach used in all international research
Review International Literature on Rural Tourism and impact of COVID-19 on DEMAND for rural tourism products	Desk top review – international policy and academic studies as indicated	Since March 2020 hundreds of thousands of individuals have responded to online surveys. This DEMAND-side analysis draws together the common findings emerging from this research with specific focus on rural tourism.
Analyse possible effects of COVID-19 on supply of products by rural tourism enterprises	Qualitative interviews from three case study areas	Content analysis of qualitative interviews is standard best research practice
Supply-side analysis of tourism enterprise challenges	Qualitative analysis of interviews from three case study areas	Content analysis of qualitative interviews is standard best research practice
Assess Opportunities for interventions to shape demand/supply nexus	Comparison of demand-supply findings in context of international good practice	This approach allows identification of potential opportunities for policy intervention

Source: Authors

Several key points and themes are highlighted in the international review of research on rural tourism. The review is structured into different sections of discussion around the following themes:

- Defining the scope of rural tourism
- Progress in rural tourism research
- The evolution of rural tourism
- Challenges of rural tourism development and rural firms
- Rural tourism in the Global South: African perspectives
- COVID-19 and the Demand for Rural Tourism

In terms of the definition of rural tourism, the concept is viewed as problematic and contested such that there is no clear agreement for the definition of rural areas or rural tourism and a variety of meanings can be attached to the terminology. Location remains the most common denominator and is the most widely applied defining

characteristic in all reviews undertaken of rural tourism scholarship. In the classic study by Lane (1994) it is argued that it be located in rural areas, be functionally rural and rural in scale in respect of being anchored upon small-scale enterprises, traditional social structures, ways of life, agrarian economies and natural settings. The UNWTO acknowledges rural tourism as “a type of tourism activity in which the visitor’s experience is related to a wide range of products generally linked to nature-based activities, agriculture, rural lifestyle/culture, angling and sightseeing”. Yachin (2019) maintains that rural tourism is manifested by small enterprises, who deliver tourism experiences that are rooted in local nature and culture. Important work by rural geographers suggests the need to acknowledge a rural-urban continuum and differentiate between places which are ‘remote’ (and sometimes exotic) as opposed to ‘fringe’ and a group of neglected ‘in between’ rural spaces. Arguably, therefore, there is a need – not least for purposes of policy formulation – to differentiate conceptually between these different rural tourism contexts.

Historically, academic attention to rural tourism commenced in the 1970s with the appearance of descriptive studies on tourism taking place in rural areas. Although an expansion in academic research response occurred from the 1980s during the 1990s rural tourism still continued to suffer from a neglect among tourism researchers and remained peripheral to the focus of tourism research. A ‘take-off’ in academic writings on rural tourism is most noticeable for the decade of the 2000s and accelerated in momentum since that time. Its growth from tourism researchers and practitioners in the past decades is as a result of the recognition of both its potential for enhancing rural development and of market trends making rural areas stand out as spaces particularly apt to accommodate new tourism and market demands. Key themes in research relate to sustainable development, the role of local communities, the importance of ‘experience’ for the rural tourism product and the challenges facing rural tourism development and more specifically for rural firms. The geographical focus of rural tourism scholarship has been uneven with important research destinations being the USA, the United Kingdom, Australia, Spain, Portugal, Romania and the Nordic countries and with a recent burst of writings on China. As a whole, the most undeveloped scholarship is for the global South with major knowledge gaps for Africa, much of Latin America and parts of Asia.

The evolution of rural tourism has had a number of contributions. Concerning the evolution of ‘modern’ rural tourism a useful starting point is provided by Lane and Kastenholz (2015) who periodise rural tourism in relation to Butler’s (1980) Tourism Area Life Cycle (TALC) Model. These authors broadly differentiate three phases in the development of rural tourism in Europe albeit with the caution that different regions could be in different phases and that in some cases the phases could exist parallel to each other. The first phase is described as that of ‘emergence’ and was recognizable in parts of Western Europe by the early 1970s. This was viewed at enterprise and national levels as rural tourism being a sustainable alternative to a declining agricultural economy which was unable to guarantee a livelihood to rural populations. The second phase was one of ‘consolidated growth’ and began to appear in parts of Europe by the mid-1980s and was a response to new market demands with tourism assumes a vital function in maintaining the viability and stability of rural localities. In respect of the role of rural tourism as a vehicle for local economic regeneration this period is marked by the attraction into rural areas of groups of new, often skilled migrants from cities – lifestyle entrepreneurs – who

began to transform rural societies and the character of rural tourism. Importantly, in this second phase there came the diversification of rural tourism activities such that it became a series of niche activities nested within the larger rural tourism niche. The third phase of the development of rural tourism have characteristic features akin to Butler's final phase of his TALC model namely that of decline or change to regeneration through product innovation. The slowdown of rural tourism in many areas is seen as a consequence of new competition emerging and in particular from the surge in urban tourism and the popularisation of city breaks in association with new attractions in regenerated urban areas.

The multiple challenges of contemporary rural tourism development and change in developed countries are well-documented in recent scholarship. Essential foundations for the prospects of rural tourism are issues of enhanced product and destination development in order to create well-coordinated, appealing and meaningful experiences as well as development opportunities which maximise endogenous resources or 'countryside capital' Entrepreneurship and rural enterprise is critical for the development of rural tourism. Typically, rural tourism firms are owned and managed by individuals who are highly involved in most aspects of the business and whose personal capital is at risk. Small tourism businesses in rural areas must be recognized as heterogeneous in character. A number of operational issues affect the establishment and development of rural tourism businesses, viz., accessibility issues especially in remote areas, the need for rural business owners to make arrangements for multiple land use and the integration of tourism businesses into the locality, the question of seasonality, high costs of running a business, labour supplies, retaining authenticity by preserving rural ambience, and potentially of infrastructural issues as regards both quantity (insufficient electricity or water) or of quality (roads, communication systems, internet connectivity). At one level the challenges facing the development of rural tourism can be differentiated into internal and external categories. The group of internal challenges relates to limitations of internal resources, especially of countryside capital and could encompass social and political barriers, limited quality workforce, poor planning and management resulting in an inability to capitalise local assets, lack of marketing strategies, inadequate financial support, limited physical amenities, and absence of sustainable strategies. The second group of external challenges relate to elements outside or apart from rural resources, such as unstable tourism demand, threats from competitors and potential conflict with external resources, such as investors outside the destination.

For various reasons the trajectory of rural tourism development in the Global South has been markedly different to that occurring in the Global North. The literature on the Global South often is dominated by issues of the dependency relationships that challenge rural areas. Several scholars underscore the need for the separate treatment and research issues of rural tourism in the context of the Global South. It is argued that the literature and debates about 'rural tourism' in sub-Saharan Africa underscore the problematic nature of the concept. Overall, for some authors rural tourism within the context of the global South might be interpreted perhaps as an ideological and development-oriented concept. It is within these parameters that a review of African rural tourism scholarship is presented centred on four countries, The Gambia, Botswana, Tanzania and South Africa. The South African experience provides a literature on rural tourism which indicates a greater variation in the rural tourism product than that observed in other countries of sub-Saharan Africa. In

addition, it exhibits a historical developmental pathway which can be likened to the evolution of European rural tourism with a substantial element of domestic tourists engaging in rural tourism. It was highlighted that the institution which is central to the success of rural tourism is local government but in South Africa there is lack of capacity at local government level to assume its responsibilities in the rural tourism space. The situation is worsened by inept management, and politics and corruption” which permeate municipal decision-making.

The COVID-19 pandemic has triggered a paradigm shift in the psyche of tourists which is linked to risk perceptions around safety, health and travel. One outcome has been a growth in consumer demand for open spaces and for rural destinations. Rural tourism is dominated by car travel and the pandemic clearly has accelerated the growth of automobilities and of drive tourism. A COVID-19 shift in the demands of urban consumers is away from ‘crowdedness’ and instead towards a search for open spaces, nature, and the tourist offerings of rural areas. The UNWTO is unequivocal that the role of tourism in rural development is more relevant than ever in the context of the COVID-19 pandemic. It argues that tourism in rural areas offers critical opportunities for recovery as with changing demands tourists look for less populated destinations as well as open-space experiences and activities. Several academic studies also point to the potential that the pandemic might provide new opportunities for rural tourism with changes in demand. In several countries there is clear evidence of a growing demand for the products of rural tourism destinations. The review shows the growing demand for the products of rural tourism internationally and more specifically in the context of Africa generally and South Africa in particular. At the close of the pre-COVID-19 era a fluid situation existed in terms of the directions for rural tourism policy and for rural tourism product development in South Africa. Of paramount importance is to recognise that debates on rural tourism development and policy formulation in South Africa are not taking adequate cognisance of the spatially differentiated nature of rural spaces and the varying opportunities as well as challenges of fringe rural spaces, remote/exotic rural spaces, and of in between rural spaces.

The COVID-19 crisis forces a renewed attention on both the potential opportunities and challenges of different spaces for rural tourism development in South Africa and of the need for evidenced-based research to inform future policy developments. This was undertaken in the three case studies of rural tourism in Limpopo Greater Giyani Local Municipality; in Mpumalanga Thaba Chweu Local Municipality and in Eastern Cape Raymond Mhlaba Local Municipality. In terms of the categories of rural spaces earlier discussed Thaba Chweu would fall into category of remote/exotic rural and the other two areas would be classic examples of in-between rural spaces. A profile of the three case study areas is presented based upon a review of local municipal planning documents, IDPs and the IHS Global Insight data base and available academic research. In terms of tourism trends between 2002-2019 Greater Giyani and Raymond Mhlaba exhibit stagnation especially in leisure travel with their tourism base dominated by domestic VFR travel. For Thaba Chweu there is a growth in tourism trips, a strong leisure economy and a substantial component of international travel to the areas scenic attractions around the Panorama Route and the towns of Graskop and Sabie. In all three areas the profile highlights core problems in the institutional environment with local governments classed as distressed or dysfunctional and in financial administration according to the Auditor General and

listings of the Department of Cooperative Governance and Traditional Affairs. All three case study areas recorded major shrinkage of tourism economies as a result of COVID-19 and a major reduction in the role of tourism to local Gross Domestic Product. Four key findings are observed:

- First, the material points to the geographical variations in relation to the character and challenges facing rural tourism. The contrasts are particularly stark between Thaba Chweu which is clearly a growing focus for rural tourism based on leisure as opposed to Greater Giyani, with its limited leisure travel and a tourism economy massively dominated by VFR travel as well as Raymond Mhlaba which is an example of a rural tourism economy which has been stagnant or in decline for the past decade and a half. These observations underscore the need to conceptualize and plan for rural tourism spaces at the minimum in terms of (at least) three categories of fringe, in between and remote/exotic.
- Second, is the poor and unsupportive institutional environment for rural tourism development in all case study local municipalities. The research points to an environment for rural tourism which is dominated by considerable mismanagement and local government shortcomings as is underlined by the fact that all three case studies are run by local governments classified by the Department of Cooperative Governance as “distressed and dysfunctional”. Issues of maladministration and corruption have been widely documented in some cases for a period of almost 15 years.
- Three, the devastating impacts of COVID-19 for the tourism economies of all three local municipalities are apparent. In all three local municipalities the largest absolute declines in tourism trips are accounted for in terms of VFR travel. Not surprisingly, the numbers of both leisure and business trips in each municipality was radically cut; in the case of Thaba Chweu a 70% decline in leisure travel was recorded. The significance of domestic tourism in all three local municipalities is shown, albeit in the case of Thaba Chweu the market of international tourism remains critical. The result of greatest concern is the dramatic reduction *within one year* in the contribution of tourism to local GDP because of COVID-19 impacts: in Greater Giyani from 3.1% to 0.8%, in Thaba Chweu from 12.3% to 4.8%, and in Raymond Mhlaba from 3.5% to 1%.
- Four, the findings underscore the imperative for stimulating a recovery in tourism into these areas for promoting local economic development. In addition, they point to the imperative for evolving a policy framework for rural tourism revival which is not a one-size-fits-all policy but is anchored on the nuances and challenges of (often) markedly *different* rural tourism spaces.

The findings of each of the case studies are presented separately and in detail in the report based on 25 interviews in each of Greater Giyani Local Municipality and Thaba Chweu and 20 interviews in Raymond Mhlaba. In the presentation of findings direct quotations from interview respondents are included in order to highlight the views of local rural tourism stakeholders as expressed in their own words. In each case study there is presented an overview of businesses, perceptions of tourism assets, perceptions of local government, issues of perceived opportunities and potential support needs.

In the case of Giyani, the discussion highlights the pre-eminence of the market of business tourism for local accommodation providers. Although the local area has a wealth of cultural and heritage assets currently Giyani is not a destination for leisure tourism and records only a small stream of such visitors. The impact of the pandemic for reducing business travel in South Africa as a whole is therefore a major threat to the local tourism economy. It was observed that local businesses have undertaken a range of adaptive responses as coping mechanisms. These included the diversification of their business operations out of tourism into agriculture as well as undertaking a range of adaptations to shore up the survival possibility of the existing tourism operations. The latter involved changing business practices for improved health and safety of visitors in line with COVID-19 protocols, re-purposing of properties, and the embrace of new digital technologies in order to promote the marketing of businesses. In terms of future prospects and opportunities for rural tourism, the respondents pointed to new developments occurring in and around Giyani which provide potential new business opportunities. Three issues were identified, namely the opening of a new gate into Kruger National Park, the re-opening (or discovery) of mining opportunities, and announcements of the potential establishment of a branch campus of Tshwane University of Technology in the town.

Beyond COVID-19 issues it is concluded that the major challenges facing the growth of rural tourism surround the chronic shortcomings of local government. Tourism business activities – existing, planned and future – are constrained by the infrastructural deficiencies which are experienced by these businesses. The failure of local government to address the improvement and basic maintenance of roads, local water supplies or provide street lighting and signage are fundamental issues of concern for stimulating rural tourism in this area. The local tourism businesses highlighted a number of interventions and support needs from government, such as financial support, improved marketing and enhancing the operations of the local Tourism Information Centre. Arguably, such potentially useful support measures can only be impactful if undertaken in parallel with or following addressing the infrastructural shortcomings which are as a result of the inadequate performance of local government.

In the case study of Thaba Chweu it was observed differences between the nature and responses of tourism businesses in the Mashishing (Lydenburg) cluster as opposed to the Graskop-Sabie cluster of tourism enterprises. The results provide significant and interesting findings for understanding the state of rural tourism in the Thaba Chweu Municipality and, importantly, issues affecting development of rural tourism in the region. It is clear that there are major issues with municipal management, both financially and structurally. The concerns over road maintenance were voiced unanimously across the entire sample of respondents. These concerns are of particular importance to rural tourism operations due to the fact that they are often relatively remote. However, broad issues of infrastructure management were raised include maintenance of power lines and the facilities within the tourism attractions. Furthermore, concerns over general service delivery were striking. Several noted that they are completely self-reliant for basic services such as electricity, water and refuse removal, even within the small-town environments. It is evident that there is a strong tourism business community in the area, with a great deal of resolve, who are committed to tourism development. This is apparent by the initiatives for development driven by many of the operators themselves, despite the

pushback or apathy from local government. Several have created their own initiatives to enhance tourism including marketing materials, promotion, clean-up projects and some even repairing some of the roads in the area themselves. This drive among operators is crucial for the sustainability and potential growth of tourism in the area. However, if the municipality does not assist, this initiative among businesses is not likely to last in the long-term and will likely result in detrimental consequences for future tourism in the Thaba Chweu Municipality. In terms of opportunities for rural tourism development these are impacted by serious challenges in the institutional environment and the inept performance of local government. The quality of the roads is a major issue which all 25 respondents mentioned at some point in their interviews. Rural tourism, in general but especially in South Africa, is highly dependent on road travel. Without sufficient roads, visitors are often unable to reach the destinations or if they are, under difficult circumstances. This will clearly impact visitor numbers going forward.

Another really important intervention needed is the refurbishing and maintenance of the attractions. There are clearly a large number and wide range of existing attraction in the area. Ensuring that these attractions are kept in good working order, with facilities which are continuously maintained is crucial for sustaining and developing tourism in the area. The area is dominated by nature-based tourism. Therefore, basic upkeep of the attractions is necessary to ensure visitors continue to come. The introduction of the glass walkway at God's Window would be an interesting development and likely enhance visitor experiences. Furthermore, existing attractions which are currently in disrepair or without facilities could be enhances and redeveloped to encourage tourism to a wider range of natural attractions, throughout the area. This was particularly apparent in the Lydenburg cluster, as it appears to have assets which could attract tourists but that they are not currently in a state to attract visitors. In addition, as mentioned above, increasing public spaces for the increased demand from weekend visitors would also solve many of the challenges faced by local tourism operators. This could include creating recreational spaces along the Panorama Route for braais and gatherings which tourists seek but few facilities are able to accommodate.

Finally, one of the components which has come out of this research is the significant growth in new domestic markets seeking nature-based tourism experiences. The Panorama Route seems to have become a popular destination for emerging nature-based tourists. However, some of the challenges in adapting to this new market need to be addressed. The first strategy is to conduct additional research to better understand the demands of this market. This could assist in developing a cohesive tourism management plan, at the municipal level, as mentioned above, but it would also assist tourism operators in adapting their products to meet this new demand. It is clear that any new tourism development in the area needs to consider this emerging market going forward. In addition, some of the concerns with the increase demand for domestic tourism, particularly during the weekend, also need to be addressed. Issues of inadequate facilities to accommodate the increased demand is problematic and causing ripple effects such as overcrowding and concerns over litter and other components of damage to these unique natural sights. More regulation and enforcement are needed to ensure these environments are protected while also ensuring the needs of the increased tourism demand are met.

In the case study of Raymond Mhlaba similar challenges were flagged in relation to constraints on local tourism development. This is a rural local municipality with a basket of potential assets for rural tourism development in relation to the area's history, heritage and natural scenery. The overwhelming issues for maximising these assets surround local government and its inadequate provision and maintenance of local infrastructure – especially roads – and service delivery. The issue of inadequate roads is a critical matter in the environment where opportunities are growing for drive tourism to support recovery of rural tourism destinations. The research discloses a lack of trust and confidence in local government on the behalf of local businesses which necessitates them to become self-reliant and fund their own local initiatives for tourism development. The lack of government support was evident as the majority of the respondents commented on their dissatisfaction of the local municipality. The Raymond Mhlaba municipality lacks the necessary support programmes that mitigate barriers to business development, the kind of support that many respondents alluded to included marketing and promotion of the area, funding opportunities, skills and training development, and awareness programmes.

In final analysis the report offers ten key conclusions and recommendations that emerge from this investigation.

1. In the post-COVID-19 era competitiveness and growth of destinations must hinge, at least in part, upon their capacity to understand and adapt to the new equilibrium at which tourism may reach (Assaf, Kock & Tsionas, 2021). Although the shape of that new equilibrium remains unclear a strong case can be made for the relevance of niche tourism development. According to Skryl and Gregoric (2022) post-COVID-19 tourism must focus on developing new tourism products in niche forms of tourism that emphasize tourist well-being, health, safety and security issues, and sustainability. Niche tourism development in South Africa has been mentioned as on the agenda of tourism policy makers continuously since 2000. With the rolling of the COVID-19 pandemic the significance of niche tourism is greatly heightened for tourism policy and planning as consumer demands shift from 'mass attractions' to smaller-scale forms of tourism. Arguably, if appropriately planned and developed, niche tourism can be an element for tourism recovery planning. **This reinforces the recommendation that the Department of Tourism support an extended research agenda to understand niche tourism and for investigations on critical micro-niches in order to provide an evidence base for informing appropriate policy interventions in South Africa.**
2. In terms of the (macro) niche of rural tourism the ramifications of COVID-19 on changing consumer travel preferences boost the demand for the current and future development of rural tourism. There is widespread international evidence of a pandemic-induced shift in the demands of urban consumers away from 'crowdedness' and instead towards a search for open spaces, nature, and the tourist offerings of rural areas (Laesser, Stettler, Beritelli & Bieger, 2021). Z. Li et al. (2021: 730) argue that "the pandemic has created high tourism demand for health and relaxation... rural tourism that is close to nature has excellent potential for development and will have benefits for human mental health". The upturn in consumer demand for open spaces and for the niche tourism offerings of many rural destinations places a premium on

understanding the evolution and dynamics of rural tourism. Arguably, rural tourism offers a major opportunity to satisfy the demands of post-pandemic tourists in South Africa who seek stress-relief and rejuvenation within a nature-based environment or engagement with physical and psychological well-being activities. **It is recommended that the Department of Tourism raise the awareness of local governments to the immediate opportunities surrounding rural tourism but at the same time be cautious not to raise unnecessary expectations that rural tourism is a panacea for local rural economic development. The caveat needs to be made clear that for successful rural tourism there is a need for a basket of local tourism assets and of essential operational infrastructure for access to and facilities for tourists.**

3. This radical new environment for the building of rural tourism in South Africa lends urgency for the Department of Tourism to initiate a comprehensive strategy for stimulating the niche of rural tourism in order to maximise the window of opportunity that exists in the COVID-19 environment and recovery phase. A critical step in this process is to recognise that the Department's existing policy frameworks for rural tourism are now ten years old, seriously outdated and out-of-touch in the radically changed environment of COVID-19. **It is recommended therefore that the Department of Tourism revisit and undertake a complete revision of the 2012 Rural Tourism Strategy.**
4. In terms of rethinking this strategy a strong case can be made for acknowledging the need for a differentiated strategy and policy development that is aware of the international best practice on the geographical delimitation of rural tourism. Although it has long-been recognised that the term 'rural' is contested with many definitions, **it is recommended as a starting point for rethinking policy development for rural tourism that the Department of Tourism accept the merits of differentiating at least three spaces of rural tourism: (1) the rural fringe, (2) exotic remote rural, and (3) 'in between' rural spaces.**
5. It is evident that each of these three different rural spaces exhibit different challenges and opportunities for tourism development. Accordingly, it is essential that these differentiated challenges be mapped out in evidence-based research to inform policy development rather than policy be anchored on a 'one-size-fits-all' approach to tourism in South African rural areas. **It is therefore recommended that the Department of Tourism undertake further research on the different prospects and opportunities for stimulating rural tourism in these three different kinds of rural spaces in order to inform interventions for a revised Rural Tourism Strategy.**
6. The changing consumer preferences in the COVID-19 environment provides a stimulus to automobilities and to drive tourism which offers opportunities for leveraging for rural tourism. **It is recommended that research be undertaken by the Department of Tourism on establishing the international best practice policies for stimulating drive tourism drawing on the experiences of Australia, Europe and North America with the goal of informing policy development for South Africa. This research would require also revisiting the potential and challenges of developing themed rural tourism routes as part of stimulating drive tourism.**
7. Our two cases undertaken concerning 'in between' rural spaces – namely Greater Giyani and Raymond Mhlaba - highlight a set of major challenges that

need to be addressed in such spaces for successful rural tourism development. There are opportunities in these rural tourism areas for further development of leisure tourism if the institutional environment can be addressed. Currently, however, these 'in-between' rural spaces can be characterised as spaces with visitor economies dominated by VFR travel. It must be recognised that in such areas that rural tourism might not be the most appropriate sectoral strategy to promote and instead that a greater development focus be upon other sectors, such as agriculture or agro-processing, which might yield greater returns for rural development, job creation and community welfare. **It is therefore recommended that the Department of Tourism be selective in interventions to support tourism development in 'in-between rural spaces' in light of the potentially greater returns that might be made by government resource support to other sectors.**

8. In the context wherein 'in-between rural spaces' are prioritised for support for galvanizing prospects in TVSD destinations it is essential that certain pre-requisites be in place before the Department of Tourism undertakes any project interventions. The findings from this research point to critical failings by local governments to maintain essential basic infrastructure – especially roads and water – that must be addressed before rural (leisure) tourism development becomes a realistic option. **It is recommended therefore that the Department of Tourism engage actively with initiatives for the roll-out of the District Development Model which is targeted to address service deficiencies and improve basic environment for all local businesses.**
9. The most problematic findings of this research surround the confirmation of the dysfunctional state of local government in many areas of South Africa, including in all three of our case study local municipalities. The 'best practice' international policies for supporting rural tourism are anchored upon the assumption that local government, the closest institution on the ground, is putatively neutral, working for the benefit of the wider community and capable of sound management and capacity for the implementation of policies to boost rural tourism. These basic prerequisites simply are not in existence across much of rural South Africa because of the state of rural local governance. The evidence in this study points to a record of local government mismanagement, inefficiency and corruption which militates against successful interventions for stimulating rural tourism. The number one challenges for rural tourism development in all three case studies surrounded infrastructural shortcomings which were the responsibility of local government. **In light of the resource-constrained environment in South Africa it is therefore recommended that in guiding its budget relating to project support for stimulating rural tourism that the Department of Tourism be informed by the regular reports of the Financial and Fiscal Commission and seek to reduce its engagement with those municipalities that have been declared as dysfunctional or in financial distress because those are "unable to provide basic services to their citizens in a satisfactory manner". Within a resource-constrained context it is recommended that the Department of Tourism ensure that its scarce budgetary resources are prioritised to focus more on supporting rural tourism primarily in those other municipalities that are not identified as problem municipalities in terms**

of governance by either the Financial and Fiscal Commission or the Department of Cooperative Governance.

- 10.** It is evident that the prospects for rural tourism in many parts of South Africa are inseparable from the fortunes of small towns. The challenges of strengthening governance for small town development are a major focus in the recently released strategy for small town regeneration which was released by the Department of Cooperative Governance. **It is recommended that the Department of Tourism enhance cooperation with the Department of Cooperative Governance in its roll out of the small town regeneration strategy and ensure that the specific issues that impact tourism and especially rural tourism are aligned for implementation as part of that strategy.**

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1. Background

1.1 Context of the Study

Trigger events are transformative moments in the evolution of destinations and can include natural hazards, terrorist attacks or pandemics (Prideaux, Laws & Faulkner, 2003; Laws & Prideaux, 2006; Wu, Xu & Wong, 2021). COVID-19 represents such a trigger event which is (re-) shaping destination development pathways across the world and garnering major attention in terms of tourism crisis management research (Wu et al., 2021; Booyens, Rogerson, Rogerson & Baum, 2022). As is observed by Gudkov and Alieva (2021: 142) the COVID-19 pandemic immediately represents “the biggest challenge for the tourism and hospitality sector”. The crisis of COVID-19 “has unexpectedly and significantly disrupted tourism” (Kwok & Koh, 2021: 386) with unprecedented negative consequences most especially for tourism and hospitality workers (Baum, Mooney, Robinson & Solnet, 2020). Globally, consumer anxiety associated with the spread of the virus alongside lockdowns and mobility/travel restrictions have placed the sector in a precarious position (Bhrammanachote & Sawangdee, 2021; Jones & Comfort, 2020).

The COVID-19 pandemic is catalysing changes in consumer demands as well as necessitating a paradigm shift for research on tourist behaviour and decision making (Brouder, 2020; Rogerson & Baum, 2020; Sigala, 2020; Assaf et al., 2021; Kwok & Koh, 2021; Rogerson & Rogerson, 2021a). Demand is intensifying for safe spaces where social distancing is possible (Kvirkvelia & Tsitsagi, 2021). The large group movement of people, and therefore the phenomenon of ‘mass tourism’, has been severely compromised as it imposes great health risks with travellers vulnerable to health hazards (Hall, Scott & Gössling 2020; Fotiadis, Woodside, Del Chiappa, Seraphin & Hansen, 2021). Recent evidence from China demonstrates that tourists’ destination preferences are significantly reshaped by the COVID-19 pandemic (Li, Gong, Gao & Yuan, 2021) with corresponding differential impacts for urban and rural destinations (Li., Zhang, Yang, Singer & Cui, 2021). Cooper and Buckley (2021) pinpoint the new importance which is attached in the context of leisure tourism to the maintenance of mental health, including for destination choice.

It is evidenced that overall “what was previously taken for granted may not hold anymore in the COVID-19 era” (Kock, Nørfelt, Josiassen, Assaf & Tsionas, 2020: 2). Indeed, certain researchers draw attention to “the all-new tourism due to COVID-19” (Gudkov & Alieva 2021: 142). Arguably, only those destinations that understand the new equilibrium at which global tourism might settle will be able to position themselves appropriately in a post-COVID-era (Assaf et al., 2021). Tourism scholars suggest that in a post-COVID-19 environment the sector is likely to see mobility patterns which are marked by a shift away from large group travel to a preference for smaller groups where the risk of catching an infection is reduced (Chebli & Said, 2020). As a result of risk perceptions surrounding COVID-19, the tourism sector is projected to see an expansion in various forms of special interest or ‘niche travel’ which is driven primarily by the confidence of travelling in smaller groups and a less risk-prone environment (Nair & Mohanty, 2021). One of many consequences of the pandemic therefore is that tourism destinations must re-examine their practices and reflect upon the potential of ‘alternative tourism’ which can assume a significant role in the recovery of the sector (Ioannides & Gyamóthi, 2020). Farsani and Jamshidi,

(2020: 93) asserts that within the pre-COVID-19 competitive environment of global tourism “similarity is the enemy and niche products are a way to escape sameness”. In the ‘new normal’ of a post-COVID-19 world consumers could re-orient further from mass tourism experiences and instead search out what are termed as ‘niche tourism’ products and experiences. Among others Nair and Mohanty (2021) point out that the COVID-19 pandemic appears to be creating (or re-creating) demand for several forms of niche tourism.

The global COVID-19 pandemic has resulted in a fall in international travel. Countries have shut down and implemented major restrictions on border crossings thereby virtually eliminating the tourism economy throughout the world. Mass movement of people, and therefore mass tourism, has been restricted as it imposes great health risks and therefore the travellers will be vulnerable to health hazards. As a consequence of the crisis, tourism destinations are forced to re-examine their practices and consider ‘alternative tourism’ which can play an important role in the recovery of the sector and protection of tourism stakeholders (Ioannides & Gyimothy, 2020). In a post COVID-19 world, it is possible that consumers might turn away from mass tourism experiences and instead seek out niche tourism products and experiences. According to Marques and Cunha (2010) niche tourism markets are made up of identifiable groups of individuals with similar interests, needs and wants, where specific products can then be tailored to meet the needs of particular market segments, and of varying sizes. For tourists, niche tourism offers a more meaningful set of experiences in the knowledge that their needs and wants are being met. Robinson and Novelli (2005) contend niche tourism is more sustainable - economically, environmentally, socio-culturally, favours the development of unique location-specific products and lends itself to small-scale operations, local community involvement and spreading of economic and other benefits of tourism. Globally, tourism experts suggest that the sector is likely to see patterns of travel emerge whereby people start travelling again in smaller cohorts or social bubbles where the risk of catching an infection is relatively lower. Accordingly, the sector is likely to see significant growth in niche travel driven primarily by the confidence of travelling in a less risk prone environment and smaller groups.

The significant policy ramifications of COVID-19 for changing demand and supply patterns for South Africa’s tourism industry are only beginning to be interrogated through the pursuit of evidence-based research (Rogerson & Baum, 2020; Rogerson & Rogerson, 2021a; Rogerson, 2021). Useful early contributions have appeared to highlight variously its implications for intentions to travel domestically and changing consumer demand (Bama & Nyikana, 2021), impacts for the hospitality sector (Sao Joao, 2021) and the hosting of events (Bartis, Hufkie & Moraladi, 2021), recovery prospects (Dube, 2021). and the role of new savings and payment schemes to nourish domestic tourism (Adinolfi, Harilal & Giddy, 2021). Another thread of research has focused on the uneven geographical impacts of the pandemic and most especially for tourism-dependent destinations (Rogerson & Rogerson, 2020a, 2021c, 2021d). Issues surrounding government policy response or lack thereof to the pandemic also have been explored (Nyawo, 2020; Rogerson & Rogerson, 2020b). Finally, a number of rich empirical studies have examined the adaptations introduced by tourism businesses to address the pandemic’s devastating impacts (Booyens et al., 2022; Giddy & Rogerson, 2021; Rogerson, 2021; Rogerson, Lekgau, Mashapa & Rogerson, 2021).

1.2 Rationale for the Study

South Africa's diverse landscapes, rich natural and cultural heritage, and traditional knowledge can lay a breeding ground for the promotion of alternative tourism within the country. In a recent innovative analysis of lighthouse tourism Nel (2021: 50) observes that “niche tourism and special interest tourism has begun to play an ever more vital role in South Africa following the economic decline that occurred due to the COVID-19 virus and associated lockdowns”. Indeed, COVID-19 introduces the opportunity to investigate tourism offerings in which smaller-scale, controlled and operated niche products can be established to satisfy the changing demands and needs of consumers. South Africa is viewed as fertile territory for the promotion of a wide range of different forms of niche tourism (South African Tourism, 2021). The 2020 Tourism Sector Recovery Plan recognises that reigniting demand requires a robust marketing strategy, the agility to respond decisively through an uncertain global re-opening phase and responsiveness to changes in consumer preference that require a focus on intrepid, experiential traveller segments. Therefore, supply-side interventions should focus on business continuity risks and aligning the value-chain to new standards and market access. The pandemic further underlines the importance of developing interventions that are targeted to the requirements of specific niches. Research is therefore necessary to inform interventions that should consider the changing supply-demand situations of particular niches during and post COVID-19.

The question of tourism sector demand and supply can be approached from several different scales of analysis. At the macro-scale there is a tradition of research – mainly from tourism economics – that models the supply and demand for tourism in particular destinations using sophisticated econometric and mathematical modelling (e.g. Zhou, Bonham & Gangnes, 2007; Saayman & Saayman, 2008). Other macro-scale perspectives focus on the pricing of tourism products as a function of tourism supply and demand considerations (e.g. Camilleri, 2018). Although such works can be of value an underlying assumption of them is that ‘tourism’ is essentially a single phenomenon where the tourist role is pre-arranged and produced by a dedicated tourism industry and consumed by an unreflexive set of consumers. As is made clear by Farsani and Jamshidi (2020: 93) within the recent (pre-COVID-19) competitive world of tourism “similarity is the enemy and niche products are a way to escape sameness”.

The starting point for this analysis is that tourism can no longer be considered a singular phenomenon and that ‘tourism’ is a generic term to cover a broad continuum of travel-related practices. The tourism industry instead must be viewed as a fragmented (and fragmenting) industry. Accordingly, macro-perspectives on tourism supply and demand overlook the paradigm shift taking place globally from mass markets to what many scholars identify as “mass niches”. This proposal therefore shifts from macro-scale considerations for tourism sector supply and demand and instead focuses on **niche tourism** and on the issues around demand and supply considerations for specific forms of niche tourism. It is grounded on the view of Papathanassis (2011: 1) that in light of the increasing segmentation of the tourism sector as a whole “it would be imprudent to generalize about the development of the tourism sector”. This points to the necessity for investigating supply and demand issues around different forms of niche tourism.

1.3 The Purpose of the Study

The aim of the study is to examine how niche tourism may be leveraged as part of the tourism sector's recovery plan to rejuvenate supply and ignite demand post COVID-19. One specific niche, namely RURAL TOURISM, will be investigated.

1.4 The Objectives of the Study

The following broad objectives guide the study:

- To examine international research regarding niche tourism demand and supply.
- To examine international research regarding niche tourism demand and supply for ONE selected form of niche tourism, namely RURAL TOURISM.
- To examine the state of niche tourism demand and supply in South Africa with respect to ONE selected forms of niche tourism, namely RURAL TOURISM.
- Analyse challenges presented by COVID-19 on tourism demand and supply with respect to ONE selected form of niche tourism, namely RURAL TOURISM.
- To analyse opportunities for leveraging niche tourism demand and supply as part of the tourism sector's recovery plan post COVID-19 with the case of RURAL TOURISM.
- To contribute towards development of a framework for strategic interventions to leverage niche tourism in South Africa using the case of RURAL TOURISM.

1.5 Research Questions

- What are research debates applied in other countries to encourage and reignite niche tourism?
- What are international research debates regarding niche tourism demand and supply for the selected form of niche tourism, namely RURAL TOURISM?
- What is the state of niche tourism demand and supply in South Africa with respect to ONE selected form of niche tourism, namely RURAL TOURISM?
- What are the challenges (including presented by COVID-19) on tourism demand and supply with respect to the selected form of niche tourism, namely RURAL TOURISM?
- What are opportunities for leveraging niche tourism demand and supply as part of the tourism sector's recovery plan post COVID-19?

1.6 Organisation of Report

The report is structured into the following major sections of discussion

- Theoretical background and literature review on niche tourism
- Niche Tourism in South Africa: Policy and Research
- Research Design and Approach
- Findings: Rural Tourism: International Literature Review

- Rural Tourism Policy in South Africa
- Context: Three Case Studies
- Findings: Three Case Studies

2. Theoretical Background and Literature Review

The theoretical background and literature review for this project as a whole is presented in terms of a review of unfolding conceptual debates on niche tourism followed by an international policy and research overview.

2.1 Theoretical Background on Niche Tourism

In terms of its genealogy Weiler and Firth (2021) maintain that the term ‘special interest tourism’ (SIT) first emerged in tourist literature nearly three decades ago and it continues to be applied as a label by tourism scholars, researchers and educators. They aver that special interest tourism is most robust as a demand construct and with reference to special interest travel and special interest travellers. Lew (2008: 412) locates niche tourism as a response to the demands of the post-modern tourist living in a world of hyper-consumerism, market differentiation and increased specialization linked to rapidly fragmenting consumer markets. In the post-Fordist age of well-informed and demanding tourists, the industry response is a panoply of different products, often offering more personalized products to targeted niche markets, resulting in an accelerating fragmentation of the tourism sector (Marques & Cunha, 2010). For Ali-Knight (2010) the roots of conceptual debates and academic writings around niche tourism similarly can be traced back to the 1980s with discussions emerging around ‘special interest tourism’ viewed as the predecessor for niche tourism and setting the context for the identification of niche tourism markets.

A benchmark contribution to scholarship was the edited volume on niche tourism which was produced by Novelli (2005). At the outset this work sets out the concept of niche tourism as a counterpoint to mass tourism asserting that it constitutes a “more sophisticated set of practices” and further that amidst “a globalising world of increasing sameness, niche tourism represents diversity and ways of marking difference” (Robinson & Novelli, 2005: 1). Arguably, whilst the concept of ‘niche tourism’ has entered the lexicon of tourism scholarship it remains ‘fuzzy’ or ill-defined (Macleod, 2003; Ali-Knight, 2010). Its origins are rooted in marketing theory with the concept of ‘niche marketing’ building upon earlier notions of an ecological niche (Bunghez, 2021; Richards, 2021). According to Robinson and Novelli (2005) the discourse around niche tourism is constructed by the producers rather than the consumers of niche tourism. The industry response is to produce an array of products which offer more personalized products to targeted niche markets, resulting in an accelerating fragmentation of the tourism sector (Marques & Cunha, 2010). As highlighted by Kumar, Shekhar and Guleria (2019: 40) niche tourism creates distinct offerings to the consumer “new to their senses and unique experiences attached with the stories and tales that the destination has to offer along with the product”. It is viewed that the suppliers of niche tourism products escape intensified competition in mass markets by seeking a specific niche better suited to them than to their competitors (Richards, 2010, 2021).

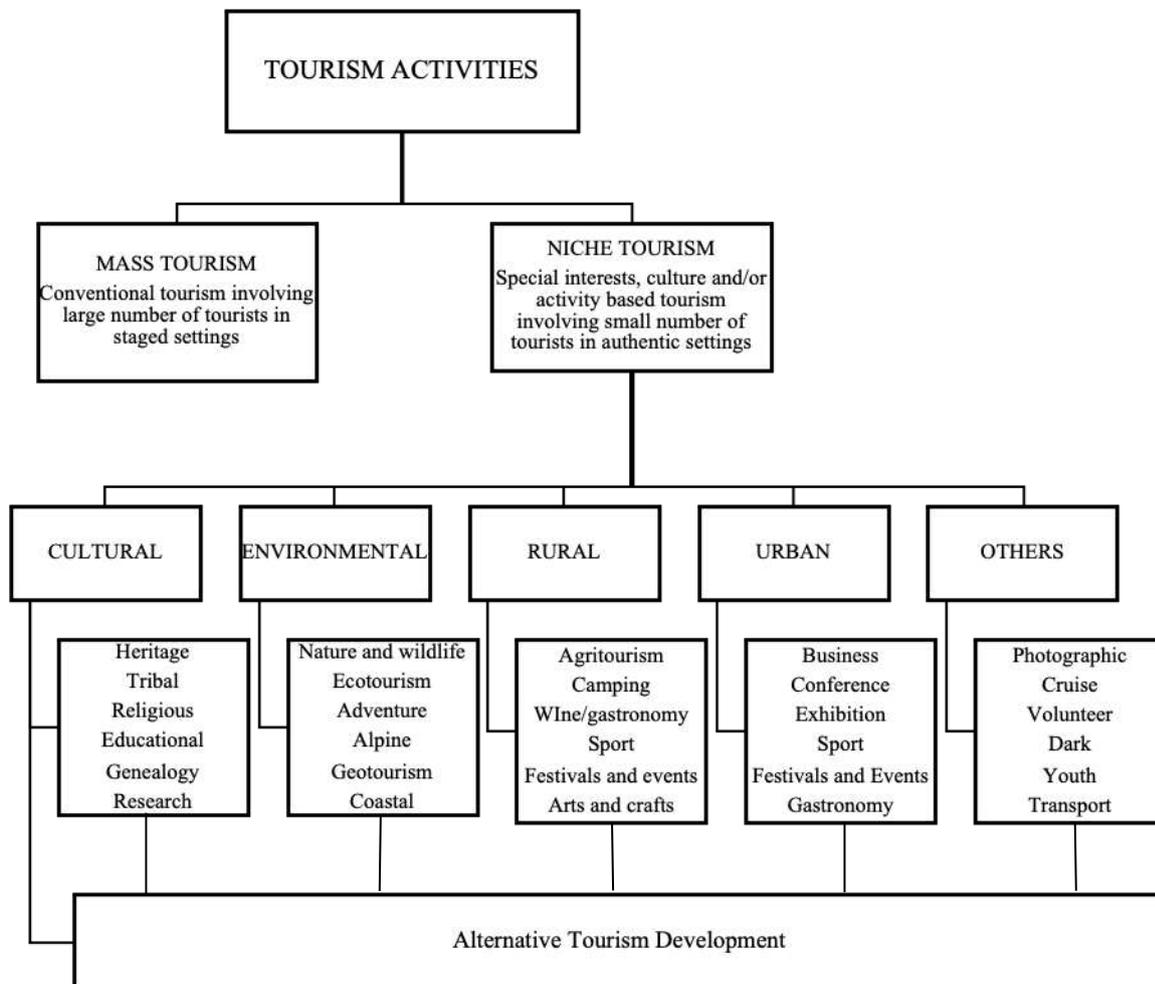


Figure 1: A product supply approach to niche tourism (Adapted after Robinson & Novelli, 2005: 8).

An important observation offered by Robinson and Novelli (2005: 5) is that there are “no formal rules for what can, or what cannot be referred to as niche tourism”. The inevitable consequence of this uncertainty is considerable variation under this umbrella term. The broad consensus as outlined by Ali-Knight (2010) is that at one level niche tourism can be differentiated into a series of ‘macro-niches’ which are seen as relatively homogeneous market sectors. As shown on Figure 1 examples of such macro-niches would be large market sectors such as cultural tourism, urban tourism or rural tourism; the category of environmental tourism is also often listed as another macro-niche. Of significance is that each macro-niche is capable of further segmentation into ‘micro-niches’ (Ali-Knight, 2010). Figure 1 shows a variety of micro-niches which can be recognised as falling under the rubric of respective macro-niches. At the scale of micro-niches therefore “niche tourism is focused on very precise small markets (Robinson & Novelli, 2005: 6). Cheese tourism is perhaps an illustration of a micro-niche that would be difficult to split in greater detail; it is a niche which in recent years has attracted a number of specialist research studies (Fusté-Forné, 2015; Forné, 2016; Fusté-Forné, 2020).

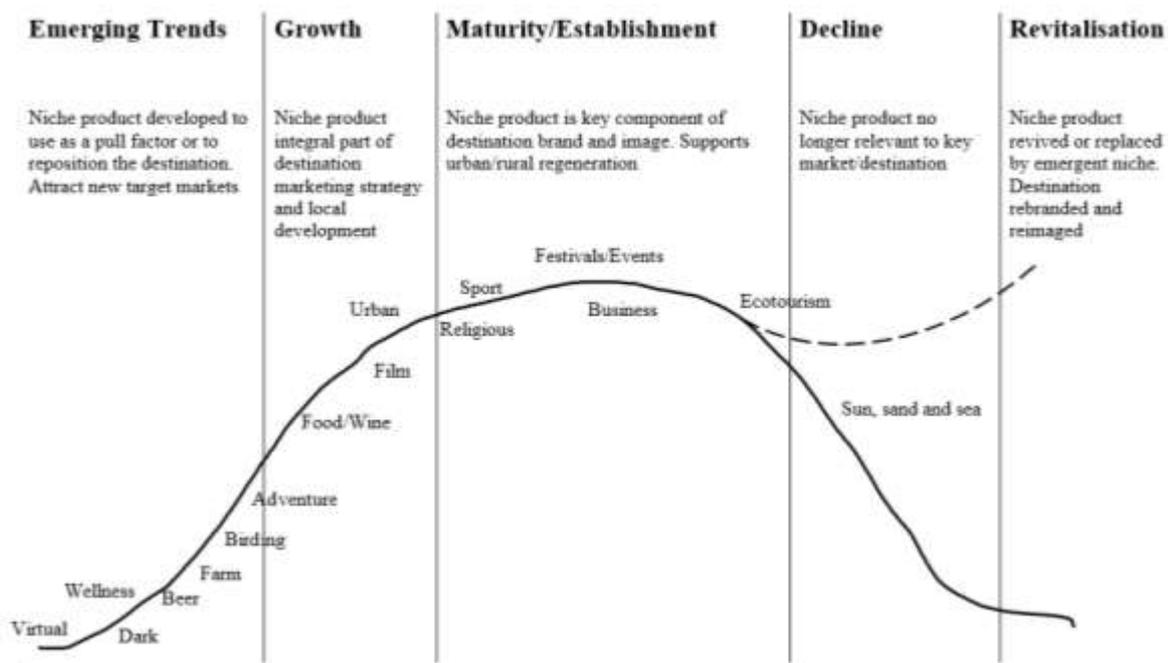


Figure 2: The Niche Tourism Lifecycle (Adapted after Ali-Knight, 2010).

In respect of destination development one critical contribution to scholarship on niche tourism is made by Ali-Knight (2010) who establishes the concept of “the niche tourism lifecycle”. Ali-Knight (2010) builds upon Butler’s (1980) seminal tourism area life cycle model to propose the niche tourism life cycle as shown on Figure 2. Five phases in the life cycle are differentiated which are a parallel with the Butler model (1980). In phase one – emerging trends – a niche product is identified and developed as an anchor or asset for a local destination. In phase two, a growth phase, the product becomes part of a destination marketing strategy. In phase three - a phase in which the niche is now established or mature – the niche product is a key basis for destination development and support for local economic development. In phase four the niche product is in a stage of decline which may be countered by initiatives for revitalisation. Through this model it is possible for policy-makers and destination managers to reflect upon the different phases or stages that particular niches may be in. For destinations the advantages of niche tourism policy development are flagged by Robinson and Novelli (2005) namely, that niche tourism is more sustainable - economically, environmentally, socio-culturally - and favours the development of unique location-specific products as well as lending itself to small-scale operations, local community involvement and the geographical spread of tourism’s economic and social benefits.

Over the past two decades there has been a continued expansion of international scholarship and debates concerning niche tourism (Kumar et al., 2019; Ma, Kirilenko & Stepchenkova, 2020; Bunghez, 2021). Of particular significance is the recent edited volume of contributions by Agarwal, Busby and Huang (2018) which identifies the almost interchangeability of the terminology of ‘special interest tourism’ with that of niche tourism. It is stressed that these concepts have “clear overlaps” and further “in truth there is little that separates them other than the latter is perhaps more production-centred whilst the former is driven by the consumer’s specific interest-

based motivations” (Agarwal et al., 2018: 3). Arguably, the traditional ways of conceptualizing niches have adopted a tourism product supply approach which focuses on an array of products – such as food, film, golf or wine – that might be developed and emerge as a ‘portfolio’ for particular destinations enabling them to differentiate themselves from competitors. An alternative ‘market-led’ approach concentrates upon the characteristics of special interest tourists – motivations, behaviour and consumption patterns – that would lead to the attractiveness of certain niches. Figure 3 offers a spectrum of special interest tourism which is founded upon issues of consumer motivation.

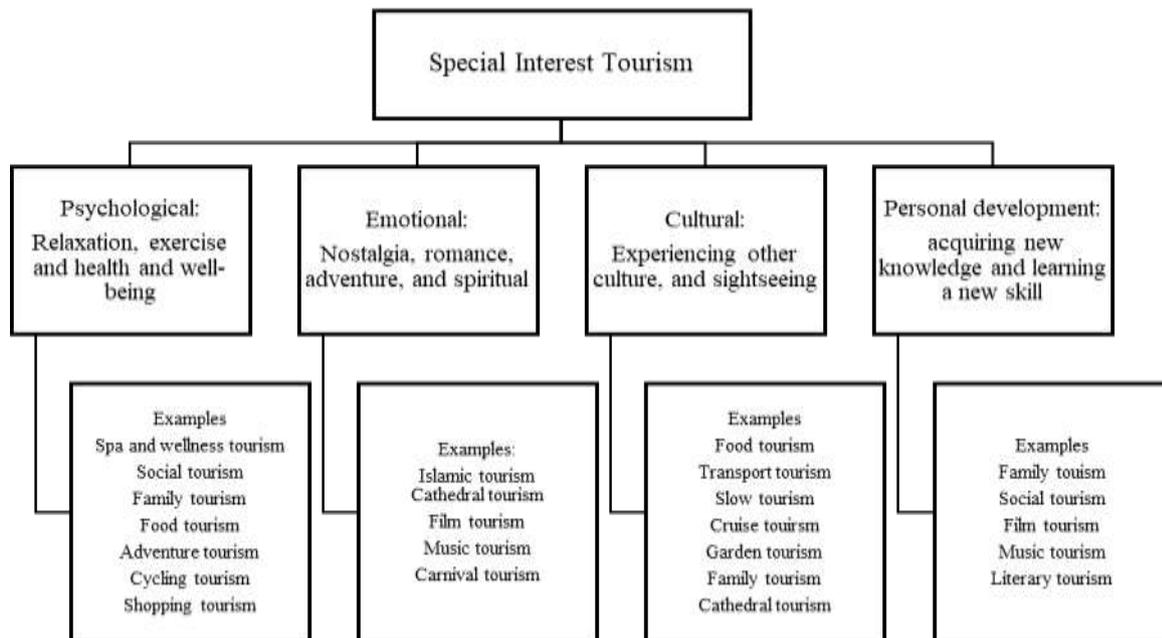


Figure 3: The Spectrum of Special Interests (Adapted after Agarwal et al., 2018: 5).

The most recent conceptual innovations in the scholarship around niche tourism relate to the application of the sociological concept of ‘neo-tribes’. Pforr, Dowling and Volgger (2021) maintain that use of the term neo-tribe allows a change in perspective away from special interest tourism being understood simply as the sum of similarly motivated individuals to instead a collective view of special interest tourists who share common characteristics (shared values, beliefs or mutual interests) and group structures. These authors assert that such a perspective shift affords a better understanding of groupings that are not unified by any common tourism motivation rather are brought together by conditioned commonalities in actual behaviour. Pforr, Volgger and Downing (2021) elaborate further that the term special interest tourism is now framed primarily as a demand concept, which is experiential and driven by special interests, whereas the term ‘niche tourism’ offers a supply perspective.

From the above standpoint many tourism niches can be reinterpreted therefore as consumer neotribes in which individuals are embedded and bound together, albeit often loosely (Pforr et al., 2021). Among several examples are those of geological tourists who are regarded as ‘geo-experts’ or ‘geo-specialists’ and often comprise professional or amateur geologists who possess a good understanding of geology.

For Dowling, Allan and Grünert (2021) this tribe have a strong desire to place geology at the centre of their travels. Likewise, Croy, Reichenberger and Benjamin (2021) pinpoint film tourists as a similarly motivated neo-tribe. Sporting activities are another arena for the emergence of neo-tribes. For example, Holt (2021) tracks the shift of surfing from a counter-cultural lifestyle into a mainstream sports activity and shows that surfing communities exist as tribes which are distinguishable by beliefs, values and history. The boom in cycling tourism including road cyclists, mountain bikers and trekking cyclists provides another example of a tourism tribe aligned to sport. Finally Steven, Rakotopare and Newsome (2021), whilst highlighting the diversity of the bird watching niche market and the variations in terms of the tourism experiences that they seek, stress the unifying theme for this neo-tribe that almost all avitourists expect to view groups of wild birds as opposed to captive species.

2.2 Niche Tourism: International Policy Debates

International policy debates are rising on niche tourism. For destination managers a critical issue is that “as well as niche tourism based around what tourists do, there is also a geographical dimension by which locations with highly specific offers are able to establish themselves as niche destinations” (Robinson & Novelli, 2005: 6). Ali-Knight (2010) contends that niche tourism is a response to the expansion of more sophisticated tourists demanding specialist tourist products and allows destinations to focus and differentiate their offerings in a cluttered tourism environment.

For Bunghez (2021: 1) niche tourism “can be linked to the particular natural and anthropogenic resources of a region” as well as to “the characteristic lifestyle of the tourists that engage in this type of activity and their social status and their financial resources”. One of the clearest examples of geographical differentiation is the emergence of gastronomic destinations which are anchored on localism, local foods and distinctive cuisine. There is emerging an extensive literature which maps out the experience of a large range of destinations – urban and rural - in which local tourism is firmly anchored upon the micro-niche of gastronomy (e.g. Chand, Dahiya & Patil, 2007; Beltrán, Cruz & López-Guzmán, 2016; Gálvez, López-Guzman, Buiza & Medina-Viruel, 2017; Privitera, Nedelcu, & Nicula, 2018; Bütün & Öncel, 2019; Othmani, 2021). It is observed that the development of micro-niches can be a potentially valuable driver for tourism expansion in peripheral regions (Fusté-Forné, 2015, 2020; Gálvez, Gallo, Medina-Viruel & López-Guzman, 2021). Richards (2021) advocates a consideration of niche markets for spurring tourism competitiveness especially in peripheral regions of the European Union.

Arguably, the concept of niche tourism is compelling for tourism policy makers and destination managers as a vehicle for promoting sustainable development and inclusion. Indeed, the niche tourism approach appears to promise “greater opportunities and a tourism that is more sustainable, less damaging and, importantly, more capable of delivering high spending tourists” (Robinson & Novelli, 2005: 1). In particular, for tourism policy makers concerned with ‘responsible’ tourism the attractions of supporting niche tourism are considerable more especially in light of its implied small-scale character and of the discerning and sensitive nature of niche tourists. In addition, niche tourism can contribute to the goals of an inclusive and sustainable economy. Across several countries tourism policy makers have embraced the promotion of niche tourism and of niche tourism products (Macleod,

2003; Blichfeldt & Pedersen, 2010; Marques & Cunha, 2010; Farsani & Jamshidi, 2020). Some of the best documented which have instituted policy initiatives for niche tourism development are Romania (Gheorghe, 2014; Gabor & Oltean, 2019), Malaysia (Sivadasan, 2017), Sri Lanka (Samarathunga & Gamage, 2020) and India (Prabakaran & Panchanatham, 2013; Kumar et al., 2019; Beigi, 2020; Bandaru & Kumar, 2021). In India Malik (2018: 80) records that the national Ministry of Tourism “has started an initiative to recognize, develop and foster niche tourism products”. In both India and Sri Lanka much policy interest surrounds niche tourism concepts such as wellness, yoga, tea tourism, Ayurveda and spiritual tourism (Malik, 2018; Samarathunga & Gamage, 2020).

According to the World Tourism Organisation and the World Travel & Tourism Council niche tourism is viewed as more valuable for host communities than traditional modes of tourism because of greater spending in destinations (Farsani & Jamshidi, 2020). Arguably, the concept of niche tourism is critical for tourism policy makers and destination managers as a vehicle for promoting sustainable development and inclusion. Indeed, the niche tourism approach appears to promise “greater opportunities and a tourism that is more sustainable, less damaging and, importantly, more capable of delivering high spending tourists” (Robinson & Novelli, 2005: 1). For tourism policy makers concerned with ‘responsible’ tourism the attractions of supporting niche tourism are light of its implied small-scale character and of the discerning and sensitive nature of niche tourists (Novelli & Benson, 2005). In addition, niche tourism is considered as having the potential to advance the goals of an inclusive and sustainable economy.

For Kenya, Misiko (2013) documents that niche tourism is viewed as one avenue for sustainable tourism product diversification. In Portugal, Dinis and Krakover (2016) identify the potential contribution of niche products for the development of sustainable tourism in small peripheral localities. Niche product development can be used potentially also to address problems of seasonality for destinations (Malik, 2018; Bandaru & Kumar, 2021). Richards (2021) maintains that a consideration of niche markets is critical for local and regional development futures as increasing competition in the pre-COVID era forced destinations to seek to specialize and differentiate themselves from others. However, for successful niche tourism development in any country the need is acknowledged for strategic intervention in the form of policy support which, in turn, demands evidenced-based research in order to inform policy interventions (Jones, 2010).

The COVID-19 pandemic further underscores the relevance of developing strategic interventions targeted to the requirements of specific niches and which are informed by an understanding of the changing supply-demand situations of particular niches in the post-/continuing environment of COVID-19 (Samarathunga & Gamage, 2020). One example of a form of niche tourism which is considered to be an ‘emerging sector’ in the COVID-19 environment is spice tourism. Nair and Mohanty (2021: 2) argue that “spice tourism could be expanded due to spices’ immunity-boosting properties – specifically Indian kitchen spices such as turmeric, cardamon, fenugreek, garlic and pepper”. The health benefits and immune-boosting properties of these spices are seen as core assets to be exploited for niche tourism. Overall, for spice-producing countries such as India, Sri Lanka, Guatemala, Mexico and Jamaica

the niche of spice tourism is considered a highly promising opportunity given the COVID-19 environment.

It should not be understood from the foregoing discussion that a strategy for development of niche tourism is unproblematic. A highly critical commentary of the challenges surrounding niche tourism is provided by O'Regan (2017). It is contended that the claims in respect of sustainability may be exaggerated as niche tourism remains burdened with the cultural, political and environmental concerns of the tourism industry as a whole. Indeed, as a niche attracts the attention of larger enterprises the danger exists that they may expand each niche to full potential by exploitative means (O'Regan, 2017). Finally, the local economic benefits of niche tourism development for destinations must be questioned. Arguably, niche tourism development in communities can be compromised if those involved lack the professional skills and experience to successfully attract and satisfy the demands of niche tourists. Overall, O'Regan (2017: 904) considers that niche tourism in many instances "may not offer a solution to those destinations seeking more sustainable tourism, or tourism more integrated to the real economy than mass tourism"

3. Niche Tourism in South Africa: Policy and Research

The aim in this section is twofold. First is to trace the development of policy interest in South Africa in the concept and practices of niche tourism. Second is to provide an overview of some existing studies on niche tourism.

3.1 Policy Development on Niche Tourism in South Africa

Within Africa the most advanced policy developments and statements regarding niche tourism have occurred in South Africa. Policy interest by government in niche tourism in South Africa is not a recent phenomenon. It pre-dates the COVID-19 crisis and observed that policy interest concerning niche tourism in South Africa goes back to 2004-5 with the work undertaken by the Tourism Unit within the Department of Trade and Industry (DTI) which formerly had responsibility for tourism development (Rogerson, 2011). With the establishment of a separate Ministry for Tourism in South Africa further interest has occurred by policy makers in niche tourism.

Prior to the establishment of a separate national Department of Tourism, the activities of the former Department of Environment Affairs and Tourism mainly focused on environmental issues and on poverty reduction associated with government supported tourism projects. From the early 2000s until 2009 therefore the DTI functioned as the lead Ministry for national tourism development and planning. By 2005 DTI had started a process for identifying strategic niche forms of tourism in the economy. The promotion of niche tourism markets was considered in the mid-2000s a vehicle for both increasing diversification of the country's tourism products as well as growing the volume of tourism. It was stressed that in order to complement the export marketing strategy of South African Tourism the DTI was "keen to understand high growth niche tourism segments" and thus engaged in ongoing discussions "with various stakeholders to identify niche tourism segments that should be prioritized for support" (Grant Thornton, 2006: 1). Within broader sectoral planning the DTI considered wide benefits could be obtained from the promotion of niche tourism to enhance tourism's competitiveness. Specifically, it

stated: “South African niche tourism can contribute towards the tourism sector’s objectives of increasing tourists’ length of stay, spend, geographical distribution, volumes, reducing seasonality and driving transformation in the sector” (DTI, 2007: 6). The DTI’s analysis was informed by existing international thinking on niche tourism. The definition of niche tourism used by DTI was that “Niche markets are core groups of people within a target audience who have similar occupational and/of lifestyle characteristics towards which a tourist product may be targeted” (DTI, 2007: 5).

The DTI’s approach towards policy development was ‘research-led’ and involved commissioning benchmark research investigations on potential niche markets in order to inform strategic policy interventions. During 2005 the DTI Tourism Unit isolated the initial three ‘niche segments’ and supported research investigations which were undertaken on business tourism, backpacker tourism and community-based tourism. The business tourism research mainly focused on boosting South Africa as a competitive MICE (meetings, incentives, conferences and exhibitions) destination. Its objective was to “provide practical recommendations (based on research) as to how the DTI could support the growth of business tourism” (Grant Thornton, 2006: 2). By contrast, the study on community-based tourism in South Africa centred upon the development of ‘routes’ as a vehicle to create opportunities for historically disadvantaged enterprises seeking entry to the mainstream tourism economy (ECI Africa, 2006a). The establishment and promotion of tourism routes was viewed as offering opportunities to community-based tourism enterprises in peripheral spaces thus bringing development to poorer localities with limited economic potential (ECI Africa, 2006a). The third study, involving research on backpacker tourism, was wider in scope and evolved into a broader set of recommendations for supporting this growing niche market through DTI interventions (ECI Africa, 2006b).

In many ways the research on backpacker tourism provided the DTI ‘model’ for evolving support interventions for niche tourism. Three key steps were envisaged. First was to examine the market size, value, growth potential and economic impact of identified niche sectors. Second, to package research findings and identify development opportunities to industry stakeholders and the third a process of strengthening relevant niche sectors through targeted support measures in particular through the channel of relevant niche tourism associations. The backpacker tourism investigation disclosed a vibrant sector that largely had been overlooked in policy support by government. It revealed that opportunities existed to boost youth tourism in a parallel to that of Australia and New Zealand which had well-established policy support structures to enhance their competitiveness in backpacking (ECI Africa, 2006b). The study pinpointed the existence of a series of ‘barriers to competitiveness’ for backpacker tourism in South Africa that needed to be addressed by policy interventions.

Although national government’s interest in promoting niche tourism continued to expand after 2006 a degree of policy confusion surrounded the definition of appropriate ‘niches’. Arguably, the problems in defining niches were experienced from the outset of DTI’s engagement with the concept. It is significant that following the completion of the detailed research investigations commissioned on both business tourism (Grant Thornton, 2006) and community-based tourism (ECI Africa,

2006a) no further mention is given in terms of DTI support for these 'niches'. Rather, government support for business tourism and community-based tourism was channelled through other tourism support programmes. DTI's continued endorsement of niche tourism was reflected in subsequent commitments made under the 2009-2010 Industrial Policy Action Plan (IPAP), a strategic set of interventions designed to raise the growth path of the South African economy through targeted government supported interventions (Rogerson, 2014). For the tourism sector, the DTI now committed to "the formulation of a Niche Tourism Development Framework" (DTI, 2010a).

The purpose of initiating this framework was to "guide niche tourism development in South Africa and identify high growth and high yield niches to be developed" (DTI, 2010a: 82). Once more the significance of niche tourism was reiterated: "Niche tourism offers the opportunity to diversify the tourism economy through creating new markets and increasing South Africa's competitiveness as a tourism destination. Niche markets could be smaller in size than mainstream tourism markets but generally offer higher yields in terms of foreign exchange earnings and consumer spending. In addition, niche tourism markets generally have greater growth potential than mainstream tourism" (DTI, 2010a: 82). However, consensus as to the definition of appropriate niches became ever more complex after the establishment of the separate department for tourism.

During 2010 the new Department of Tourism launched its National Tourism Strategy within which a role for niche tourism was isolated (Department of Tourism, 2010: 121-123). Accordingly, by 2010 a situation existed that two national departments were committed to support niche tourism in South Africa and both engaged separately in identifying priority niche segments for support. The two departments, however, selected different niche segments and no firm agreement between the two departments initially could be made about which niches to support. Inter-departmental meetings and cooperation arrangements were undertaken but by September 2010 the core responsibility for the initiative for identifying niches effectively had transitioned from the Tourism Unit of the DTI to the new national Department of Tourism (Rogerson, 2011).

A draft niche tourism development framework was issued jointly by the DTI and DoT in 2010 (DTI & Department of Tourism, 2010). This policy document sought to chart a pathway for niche tourism development in South Africa. It was admitted that whilst both departments had embarked on separate initiatives to stimulate niche tourism with a "common objective of achieving accelerated growth" such initiatives "were not coordinated" and "there was a risk of duplication of efforts, inefficient use of resources and ineffective implementation" (DTI & Department of Tourism, 2010: 3-4). Of central concern was the question that "there seems to be no clear strategic rationale that informs how niches are identified for development". By this time, the DTI had completed its investigations on backpacker tourism, business tourism, community-based tourism and avitourism (DTI, 2010b). In addition, it launched plans for work to be commissioned on accessible tourism and educational tourism for financial year 2010-11. By contrast the Department of Tourism had started its work on niche tourism with research commissioned on cruise tourism and medical tourism as well as initiatives for social and cultural heritage tourism described as "under way" (DTI & Department of Tourism, 2010: 4). Overall, there was agreement of the need

“for an overarching framework to guide niche tourism development in South Africa” (DTI & Department of Tourism, 2010: 3). In addition, a linkage was made with the imperative for the benefits of tourism development in South Africa to be spread more equitably in terms of their geographical impact.

Overall, the 2010 niche tourism development framework established a set of guidelines in terms of a ‘niche tourism value matrix’, a basis for “a more coordinated approach to niche tourism development in South Africa that sets out a broad structure in terms of the identification, research strategy formulation and implementation processes” (DTI & Department of Tourism, 2010: 4). Further endorsement for niche product development and support in South Africa came with the National Tourism Sector Strategy which appeared in early 2011 (Department of Tourism, 2011). Niche product development became associated now with the promotion of ‘rural tourism’. It was stated as follows: “There are a number of areas within South Africa that have the potential to be turned into tourism destinations, but many of these are not being developed. Such areas present opportunities to develop new and different tourism products to address the changing requirements of the market. Hence the need to also recognize rural tourism as an element or part of the niche product development” (Department of Tourism, 2011: 39).

Interest in niche tourism policy development was maintained following the Strategy’s appearance and growing influence. The clearest statement of the Department of Tourism’s policy focus on niche tourism was a speech made by Tokozile Xaza in 2015 in the promotion of the niche of heritage tourism. At the outset the Deputy Minister of Tourism acknowledged as follows: “Tourists are now looking for more niche markets” and quoted estimates from the United Nations World Tourism Organization that “40 per cent of all global tourists are in search of culture and heritage experiences” (Ministry of Tourism, 2015a). In an important statement it was made clear that “a key objective of the National Tourism Sector Strategy (NTSS) are (*sic*) to ensure that newly developed niche tourism products are developed in order to grow the tourism industry in support of its global competitiveness” (Ministry of Tourism, 2015a). The Deputy Minister viewed heritage tourism as “one of the important niche tourism products that have been identified in support of tourism growth” (Ministry of Tourism, 2015a).

In November 2017 the Department of Tourism issued its revised National Tourism Sector Strategy spanning the period 2016-2026. The vision of this strategic framework was stated for the making of a “rapidly and inclusively growing tourism economy that leverages South Africa’s competitive edge in nature, culture and heritage, underpinned by Ubuntu and supported by innovation and service excellence” (Department of Tourism, 2017: 16). Once again considerable recognition was accorded in this strategic document to the policy significance of niche tourism. For example, it was noted that “special interest tourism (niche tourism) accounts for many particular motivations of leisure and purpose travel, including birding, food and wine tourism, medical tourism, eco-tourism, science tourism and cruise tourism” (Department of Tourism, 2017: 9). In addition, niche tourism development was given a notable prominence in suggested policy interventions to enhance the visitor experience. It was proposed that provinces and the tourism industry players should provide the lead in order to “investigate and develop tourism niche market products with the highest ability to attract more travellers in line with the competitiveness of a

locality” (Department of Tourism, 2017: 27-28). Potential niche tourism products that were identified now included marine and coastal tourism, science tourism and adventure tourism. Of note is that the key deliverables were to include, *inter alia*:

- A priority list of niche market experiences to be developed;
- Prioritised niche tourism strategies in place; and
- Progress on the implementation of the prioritised niche markets (Department of Tourism, 2017: 27-28).

In 2018 the Department of Tourism’s transformation strategy for the tourism sector flagged the need for infrastructure development aligned to the development of niche tourism projects (Department of Tourism, 2018: 35). Further commitment of the Department of Tourism to niche tourism was reiterated in the preparation of a National Tourism Research Agenda circulated at the 7th National Tourism Conference held in 2019. Among a range of research topics that were identified was that of niche tourism with particular niches that were mentioned including those of ‘township tourism’ and ‘food tourism’.

It is observed that over the decade of policy affirmations to niche tourism there has been little continuity in the particular forms of niche tourism to be prioritised. This said, the significance of strategic interventions for critical niches in tourism was emphasized in a 2020 Economic Survey report on South Africa produced by the Organization of Economic Cooperation and Development (OECD) (Glocker & Haxton, 2020). The 2021 Tourism Sector Recovery Plan issued by South African Tourism is government’s major policy statement in response to re-energising the tourism economy in the COVID-19 environment (South African Tourism, 2021). It recognises that re-igniting demand requires a robust marketing strategy, the agility to respond decisively through an uncertain global re-opening phase and responsiveness to changes in consumer preference that require a focus on intrepid, experiential traveller segments which include niche tourism development. The pandemic further underlines the importance of developing evidenced-based research interventions that are targeted to the requirements of specific niches.

3.2. Existing Research Overview

This section provides a brief introduction to existing South African studies.

Table 1: The Landscape of Niche Tourism Research in South Africa

Type of Niche Tourism	Examples of Research Studies
Adventure	McKay, 2013, 2014, 2016, 2017; Giddy, 2018a, 2018b; Giddy & Rogerson, 2018; Giddy & Webb, 2018a, 2018b; McKay, 2018, 2020
Astro-tourism	Ingle, 2010; Jacobs, du Preez & Fairer-Wessels, 2020
Avitourism	Nicolaides, 2012; Rogerson, Simango & Rogerson, 2013
Beer	Rogerson & Collins, 2015a, 2015b, 2019
Coastal and Marine	Bob, Swart, Ngalawa & Nzimande, 2018; Rogerson & Rogerson, 2020c

Creative	Rogerson, 2006; Booyens & Rogerson, 2015, 2019; Drummond & Drummond, 2021
Cruise	Rink, 2020; Sucheran, 2021a, b
Dark	Proos & Hattingh, 2020
Film	Poole & Van Zyl, 2020
Gastronomy	Du Rand & Heath, 2006; Ferreira & Muller, 2013; Ferreira & Hunter, 2017; Naicker & Rogerson, 2017; Rogerson & Rogerson, 2021d
Gay	Visser, 2002, 2003; Rink, 2013
Golf	Tassiopoulos & Haydam, 2008
Halal	Bhoola, 2020
Heritage	van der Merwe, 2013; van der Merwe & Rogerson, 2013, van der Merwe, 2014; Rogerson & van der Merwe, 2016; van der Merwe & Rogerson, 2018
Lighthouse	Nel, 2021
Literary	Stiebel, 2004, 2010, 2013; Smith, 2013; Stiebel, 2019
Nudism	Blackmore, 2020
Off the Beaten Track	Opfermann, 2021
Polo	Daniels & Spencer, 2019
Volunteer	Stoddart & Rogerson, 2004; Rogerson & Slater, 2014
Wedding	Rogerson & Wolfaardt, 2015; Fitchett & Mahlangu, 2019

Source: Authors

The current state of niche tourism in South Africa is a subject that requires extensive investigation. In terms of the niche tourism cycle as proposed by Ali-Knight (2010) it can be argued that several of the earliest niches to be established and promoted in South Africa, such as business tourism, wine tourism and cultural tourism have now reached the phase of maturity. Events tourism would also fall into such a categorisation. In addition, it would be accepted that ecotourism is no longer an emerging niche except perhaps only in the context of urban areas (see Burton, Rogerson & Rogerson, 2020). In terms of the categories of emerging trends of micro-niches or those which are in a growth phase Table 1 provides illustrative examples of existing South African research studies. The listing of research examples cannot be claimed as comprehensive but merely indicative of the appearance of a research interest. Further, in the wake of COVID-19 impacts and changing mobilities the listing of certain micro-niches such as cruise tourism might be open to question.

It should be understood that Table 1 does not attempt to capture the large number of research studies which examine macro-niches of tourism in South Africa, such as urban tourism, cultural tourism, environmental tourism or rural tourism. Relevant rural tourism investigations will be captured and discussed in the literature review on rural tourism.

3.3 Conclusion

Overall, for successful niche tourism development in any country it is acknowledged there is a need for strategic intervention in the form of policy support (Jones, 2010) which, in turn, demands evidenced-based research in order to inform policy interventions. The COVID-19 pandemic further underlines the importance of developing strategic interventions which are targeted to the requirements of specific niches and informed by an understanding of the changing supply-demand situations of particular niches in the post-/continuing environment of COVID-19. This research study is premised on the argument that a comprehensive research programme is required in South Africa to support niche tourism policy development. In particular, such an initiative needs to address knowledge-gaps about the changing supply-demand situations of particular niches during and post COVID-19 to inform evidenced-based policy interventions, decision-making and strategy formulation in a post-COVID-19 tourism environment. The UJ project seeks to address the above issues in respect of enhanced understanding of tourism sector supply and demand issues in relation to niche tourism and with a focus on rural tourism as its case study.

4. Research Design and Approach

The core task in this project is to examine niche tourism supply and demand and to inform policy interventions, decision-making and strategy formulation for an inclusive and sustainable tourism economy including contributing towards the Department of Tourism's framework for strategic interventions to meet the needs of the tourism economy in a post-COVID-19 environment USING THE CASE STUDY OF RURAL TOURISM. The following sets of research work are undertaken:

First, is to conduct research on a policy review on niche tourism. This is presented in section 3 above.

Second, is to undertake research which critically examines the challenges for leveraging niche tourism for achieving the Department of Tourism goals for an inclusive and sustainable tourism economy and with due recognition to the demand/supply challenges resulting from COVID-19. The case study is RURAL TOURISM in selected provinces. This is ONE focused applied research investigation to interrogate supply/demand issues regarding ONE specific tourism niche namely RURAL TOURISM. The choice of this particular niche has been guided by its prior recognition as important by the Department of Tourism and recognised by a policy paper on in 2012 (Department of Tourism 2012a). The importance of promoting RURAL TOURISM was stressed in particular in the Report of the Portfolio Committee on Tourism towards the Transformation Charter in the Tourism Sector dated 13 October 2020 (Parliamentary Monitoring Group, 2020).

The following sets of research tasks are undertaken to inform strategic interventions and project implementation regarding niche tourism supply and demand in South Africa.

1. International policy best practice reviews to inform the specific niche tourism of RURAL TOURISM to be investigated in South Africa. More specifically it is proposed to review issues around the international experience of the growth

and challenges of RURAL tourism. The international review will inform our understanding of the DEMAND for such niche forms of tourism.

2. The SUPPLY-SIDE issues linked to RURAL TOURISM and the challenges for sustainability and inclusivity will be undertaken by interviews with enterprises in local municipalities in THREE selected provinces which were chosen in agreement at a meeting with Department of Tourism. The three selected provinces for case studies are Limpopo, Eastern Cape and Mpumalanga.

5. Data Collection

Data collection methods will vary for the different research tasks as described above that are to be undertaken.

- In terms of **TASK ONE** research material will be sourced through GOOGLE SCHOLAR, SCOPUS and internet searches. For the niche of rural tourism relevant international literature as policy context is sourced from research relating to sustainability and inclusion in economically peripheral or geographically disadvantaged rural regions.
- For **TASK TWO** the research will use a qualitative approach to examine the challenges and potential of sustainability and inclusion in these particular niches. The study is informed by the view of Yachin (2020: 22) that a starting premise to understand rural tourism is that “one must study rural tourism micro-firms”. In this research on rural tourism between 70-75 interviews be undertaken with tourism business stakeholders (accommodation providers, attractions). The interviews will be undertaken in one targeted local municipality in EACH of three different provinces, namely Limpopo, Eastern Cape, and Mpumalanga i.e. approximately 25 interviews in each of the three areas. A profile of the tourism economy in the three selected local municipalities will be drawn from data extracted from the IHS Global Insight data base.
- Themes to be investigated in the semi-structured interviews are (1) a profile of rural tourism businesses; (2) perceptions of challenges and opportunities for tourism development in the local area; (3) adaptations and responses of rural businesses to COVID-19 challenges; and (4) opportunities and support needs of rural businesses.

Data analysis is different for the different tasks and for different phases of the study. These will include literature review and analysis, descriptive data, and content thematic analysis of qualitative interviews.

Table 2 below summarizes how the research objectives of the study are achieved, research methods to address each objective and justification for the method used.

Table 2: Project Objectives and Methods: Summary

Research Objective	Method	Justification
Understand conceptual base and international debates on initiatives for niche tourism	Desk top review – sources through Google Scholar and search of reports by major international agencies	This is standard approach used in all international research
Review International Literature on Rural Tourism and impact of COVID-19 on DEMAND for rural tourism products	Desk top review – international policy and academic studies as indicated	Since March 2020 hundreds of thousands of individuals have responded to online surveys. This DEMAND-side analysis draws together the common findings emerging from this research with specific focus on rural tourism.
Analyse possible effects of COVID-19 on supply of products by rural tourism enterprises	Qualitative interviews from three case study areas	Content analysis of qualitative interviews is standard best research practice
Supply-side analysis of tourism enterprise challenges	Qualitative analysis of interviews from three case study areas	Content analysis of qualitative interviews is standard best research practice
Assess Opportunities for interventions to shape demand/supply nexus	Comparison of demand-supply findings in context of international good practice	This approach allows identification of potential opportunities for policy intervention

Source: Authors

6. Findings: Rural Tourism – International Literature Review

This section offers a literature review and context for the study of the niche of rural tourism. The review is structured into different sections of discussion around the following themes:

- Defining the scope of rural tourism
- Progress in rural tourism research
- The evolution of rural tourism
- Challenges of rural tourism development and rural firms
- Rural tourism in the Global South: African perspectives
- COVID-19 and the Demand for Rural Tourism

6.1 Defining the Scope of Rural Tourism

The term rural tourism has been styled as “a problematic concept” (Saarinen & Lenao, 2014: 365). Although it is not a new concept according to Roberts and Hall (2001: 1) rural tourism is “at best an ambiguous term, and most likely a chimerical

concept". Given its rising importance as a widespread form of tourism activity as well as for academic scholarship (Lane & Kastenholz, 2015; Ruiz-Real, Uribe-Toril, Valenciano & Gázquez-Abad, 2020; Karali, Das & Roy, 2021; Rosalina, Dupre & Wang, 2021), "it would be logical to assume that there is a commonly accepted definition of rural tourism" (Sharpley & Sharpley, 1997: 5). Arguably, however, a universal definition of rural tourism "lacks consensus" (Rosalina et al., 2021: 134). Lenao and Saarinen (2015: 204) confirm that there "is no clear agreement for the definition of rural areas or rural tourism". A variety of meanings can be attached to the terminology of rural tourism (Sharpley & Sharpley, 1997). Indeed, on occasion, scholarship about rural tourism has relied "on definitions of what it is not, that is to say, it is not mass tourism and it is not urban tourism" (Ruiz-Real et al., 2020: 3).

In a seminal paper Lane (1994: 9) probed the difficulties of defining rural tourism beyond the geographical observation that it represents "tourism which takes place in the countryside". Among several definitional challenges are the basic lack of agreement as to what constitutes 'rural areas' or of 'rurality' and that different kinds of rural tourism have emerged and continue to evolve across different regions (Sharpley & Sharpley, 1997; Yachin, 2019, 2020; Karali et al., 2021). Location remains the most common denominator and is the most widely applied defining characteristic in all reviews undertaken of rural tourism scholarship (Roberts & Hall, 2001; Gabor, 2015; Ruiz-Real et al., 2020; Rosalina et al., 2021).

According to Lane (1994) rural tourism should be located in rural areas, be functionally rural and rural in scale in respect of being anchored upon small-scale enterprises, traditional social structures, ways of life, agrarian economies and natural settings. Lenao and Saarinen (2015: 205) reinforce that preferably "rural tourism should also represent the complex pattern of the rural environment, location, history and economy". Drawing upon the European experience Lane (1994: 9) observed the phenomenon of rural tourism "is a complex multi-faceted activity" and "includes farm-based holidays but also comprises special-interest nature holidays and ecotourism, walking, climbing and riding holidays, adventure, sport and health tourism, hunting and angling, educational travel, art and heritage tourism, and in some areas, ethnic tourism". The United Nations World Tourism Organization (2020a) broadly acknowledges rural tourism as "a type of tourism activity in which the visitor's experience is related to a wide range of products generally linked to nature-based activities, agriculture, rural lifestyle/culture, angling and sightseeing". This said, because rural areas themselves are multi-faceted, rarely self-contained or free from urban influence, it must be conceded that "a working and reasonably universal definition of the subject is difficult to find" (Lane, 1994: 10). Two decades on, a similar conclusion is reached by Kastenholz, Fernández-Ferrín and Rodrigues (2021: 601) that rural tourism is "not consensual in its definition nor homogeneous in its manifestations or market profile".

Rosalina et al. (2021: 144) characterize rural tourism as a "fluid phenomenon, evolving with time and place characteristics". In unpacking rural tourism Lane (1994) suggests the merits of applying the concept of a 'rural-urban continuum' in order to differentiate those forms of leisure activities which are specifically rural (such as canoeing, climbing or landscape appreciation), an intermediate category of activities which may be rural or urban based (cultural festivals, general heritage, camping), and those which are usually specifically urban-based (such as shopping, city

sightseeing, urban heritage). Yachin (2021; 320) maintains that rural tourism “especially, is manifested by small enterprises, who deliver tourism experiences that are rooted in local nature and culture”. For Lane and Kastenholtz (2015: 1137) rural tourism must be understood as a phenomenon that is not static; instead, it has morphed “into a series of niche activities within a larger niche activity”, becoming “an umbrella concept, accepting of many forms, rather than tightly defined” and embracing “many specific niche types of tourism”. Overall, according to Kastenholtz, Carneiro, Marques and Loureiro (2018: 189) the activity of rural tourism is “driven by the search for unique and memorable experiences in particular settings”. Rosalina et al. (2021: 143) consider that redefining rural tourism within a specific country context might be feasible such that “a country specific definition may be more achievable”. One attempt at such a country-specific re-conceptualization of rural tourism was conducted for Malaysia by Nair, Munikrishnan, Rajaratnam and King (2015).

Rural geographers maintain that usually ‘rural’ is viewed homogeneously as places outside of cities or when differentiated, as places which are ‘remote’ (and sometimes exotic) as opposed to ‘fringe’ with minimal attention given to the ‘in between’ rural spaces (Koster, 2019). The record of experience is that there are critical differences in the opportunities and challenges that these different rural spaces confront and which often go unrecorded in academic literature or are taken on board by government policy formulation (Koster, 2019). Carson (2018) argues that ‘non-tourism places’ in rural areas are particularly under-researched. For lack of better terms Carson (2018) styles these as variously ‘non-tourism places’ as ‘boring’ or ‘in between’ places that are not attractive enough to establish tourism as a self-contained major local sector and “where the legacies of other economic and political priorities or broader population changes inevitably determine the nature and scale of tourism that is possible in those contexts”. Koster and Carson (2019: 253) point out that although case studies of ‘in-between’ rural places have been undertaken their particular characteristics and special circumstances are not explicitly considered. In the case of Peterborough, rural South Australia, however, Carson, Prideaux, Porter and Vuin (2019) show how the unique distinctiveness of an ‘in between’ destination created a ‘lock-in’ that constrained the town’s tourism’s prospects.

Arguably, therefore, there is a need – not least for purposes of policy formulation – to differentiate conceptually between these different rural tourism contexts. Koster and Carson (2019) maintain that at the outset an understanding of tourism issues in rural areas requires acknowledgement of the location in relation to key source markets and accessibility. Fringe rural spaces are located proximate to major urban centres with well-established road networks and often with air transport links which provide access to large markets, both domestic and international tourists. The supply of potential tourists from large metropolitan centres offers opportunities for rural communities within the fringe to establish attractions and products such as festivals, events, culinary, wine-based attractions or agritourism for urban visitors. A distance-decay effect would function in terms of the access to metropolitan markets for the potential for fringe rural tourism spaces (Koster & Carson, 2019). Remote rural spaces which have ‘exotic’ or iconic attractions are by their very nature situated distant from key markets with limited transport access. Accordingly, visitors must be willing to commit time effort and expense to reach these rural spaces in order to overcome their locational disadvantage and often this is through air transport. Other remote rural areas which are lacking in attractive tourism assets will remain only as

non-(leisure) tourism spaces and the local tourism usually dominated overwhelmingly by VFR flows of visitors.

The situation of 'in between' spaces contrasts to those of fringe rural spaces, remote/exotic rural spaces or of non-tourism spaces. Their limited linkages with and distance from major urban core regions, challenges of transport access and often their physical environment introduce a number of constraints on tourism development. Often these rural spaces are reliant on road transport and often situated 'on the way' to destinations which are more remote, more iconic and usually more developed as tourism spaces. In addition, Carson and Koster (2019) view these spaces as sharing distinct characteristics of 'peripherality' being disconnected from centres of power and accessible by road networks only. Koster and Main (2019) show in the case of Northern Ontario how far in between spaces their location far from urban markets and with many intervening opportunities for potential visitors puts a major brake on local tourism prospects. The central argument of Koster and Carson (2019) is that 'rural' is not a homogeneous tourism space but is in fact differentiated in sometimes obvious but other times nuanced ways that requires attention by tourism scholars and policy-makers.

6.2 Research Progress

Several systematic reviews of evolving international academic research concerning rural tourism have appeared (Page & Getz, 1997; Sharpley & Sharpley, 1997; Roberts & Hall, 2001). Among these reviews are included a number of works which have been produced in the past decade (Lane & Kastenzholz, 2015; Ruiz-Real et al., 2020; Karali et al., 2021; Rosalina et al., 2021). Together these recent systematic reviews on the state of the art of international scholarship on rural tourism show that it "has been a key research area over the last few decades" (Karali et al., 2021: 1).

Historically, academic attention to this field of study commenced in the 1970s with the appearance of descriptive studies on tourism taking place in rural areas (Lane, 1994; Fleischer & Pizam, 1997; Lane & Kastenzholz, 2015; Karali et al., 2021). Although an expansion in academic research response occurred from the 1980s Page and Getz (1997: 3) could assert during the 1990s that "rural tourism has continued to suffer from a neglect among tourism researchers" and "remained peripheral to the focus of tourism research". In charting four decades of rural tourism scholarship Karali et al. (2021) demonstrate that a 'take-off' in academic writings on rural tourism is most noticeable for the decade of the 2000s. This post-2000 surge of writings and research has accelerated in momentum since that time (Gabor, 2015; Karali et al., 2021; Rosalina et al., 2021). As was observed by Kastenzholz and Lima (2011: 62), "rural tourism has deserved increasing interest from tourism researchers and practitioners in the past decades as a result of the recognition of both its potential for enhancing rural development and of market trends making rural areas stand out as spaces particularly apt to accommodate new tourism and market demands".

The content of rural tourism research has matured and progressed beyond early descriptive case studies. For the period of the 1990s, however, Page and Getz (1997: 10) bemoaned the fact that with a few notable exceptions "impact studies has not been at the forefront of methodological and theoretical developments". Within the

emerging literature on rural tourism an array of themes and issues can be observed including certain social, cultural, economic and environmental impacts, research on different forms of rural tourism and the implications of rural tourism for rural areas (Fleischer & Pizam, 1997; Page & Getz, 1997; Sharpley & Sharpley, 1997; Roberts & Hall, 2001). By the 2000s academic writings now include debate on weightier issues such as management and conservation, resource control, economic regeneration, the influence of neo-localism and, on occasion, even the ramifications of climate change (Lane & Kastenholz, 2015; Ruiz-Real et al., 2020; Karali et al., 2021). The findings in the study of 1848 articles published since 2000 highlighted a major focus on tourism management, economic issues, environment/ecological issues and themes in broader regional development especially sustainability (Lane & Kastenholz, 2015).

In research conducted by Rosalina et al. (2021) across 218 studies on rural tourism the key macro-themes were identified as sustainable development, the role of local communities, the importance of 'experience' for the rural tourism product and the challenges facing rural tourism development and more specifically for rural firms. Across four decades of rural tourism scholarship the thematic investigation undertaken by Karali et al. (2021) strongly emphasized the issues of the impact of rural tourism, the role of stakeholders, and the performance (including challenges) and management of rural tourism. Other themes included marketing, market segmentation, tourist motivations, policy issues and technology. The nexus of technology and tourism was also stressed in the systematic review which was produced by Kumar and Shekhar (2020). Over the four decades maximum academic attention appears focused on impact studies, stakeholder issues regarding the host community, and performance related issues (Karali et al., 2021). In addition, Ruiz-Real et al. (2020) identify that since 2004 the impact and influence of rural tourism on economic development of rural areas has been a dynamic area for research.

The geographical focus of rural tourism scholarship has been uneven with important research destinations being the USA, the United Kingdom, Australia, Spain, Portugal, Romania and the Nordic countries (Helgadottir & Dashper, 2021; Coroş, Bode, Savan & Ciucioiu, 2021a, Coroş, Privitera, Paunescu, Nedelcu, Lupu & Ganuşceac, 2021b). In recent years a burst of writings has occurred on China rural tourism (Ruiz-Real et al., 2020; Karali et al., 2021; Rosalina et al., 2021; Zhang, Duan & Han, 2021). As a whole, Ruiz-Real et al. (2020) record the most undeveloped scholarship for the global South with major knowledge gaps for Africa, much of Latin America and parts of Asia. Within the global South a notable growth pole for rural tourism scholarship is work on India (Jha, 2021; Nair, 2021; Singh, Jamal & Ahmad, 2021; Sudheer, 2021). In India village tourism has been promoted by the national Ministry of Tourism in terms of the 'endogenous tourism project -rural tourism scheme' which aims "to promote the village as the primary tourism product" (Sudheer, 2021: 256). The core focus is to showcase village life, art, culture and heritage at select locations and to afford "opportunities to the guests to enjoy the unique culture of village life through participating in events, experiencing the local cuisine, and collecting the ethnic goods" (Sudheer, 2021: 356). One example is at Kumbalangi, a coastal village known as the first model tourism village in Kerala where the central attractions are boat building, local cuisine, traditional fishing and a coastal pastoral setting.

Overall therefore, it can be asserted that in recent decades “rural tourism is a field of activity and study that has attracted increasing attention” (Kastenholz et al., 2021: 601). Indeed, by 2020 for certain observers, rural tourism could be considered “a well-researched theme, which includes a series of literature concerning conceptualization, importance, limitations and interferences in its expansion worldwide” (Kumar & Shekhar, 2020: 737). One shortcoming is the tendency in certain discussions to treat rural tourism as homogeneous and neglect its differentiated character. An understanding of the trends in this growth of academic scholarship is inseparable from the international emergence and evolution of rural tourism.

6.3 The Evolution of Rural Tourism

A detailed account of the early development of rural tourism remains one of the many unwritten tasks in tourism history. Towner (1985) points to an interest in rural environments by many of the British upper classes going as far back as the mid- 16th century. Nevertheless, it is generally accepted that modest flows of the urban middle classes to the countryside was a phenomenon that commenced in the 19th century and often encouraged by the images portrayed by popular culture of the time such as Constable’s art and Wordsworth’s poetry (Roberts & Hall, 2001). Of great significance in the history of rural tourism in Europe and North America was the period beginning in 1840 of railways development which opened up easier and safer access to attractive and previously remote rural areas for recreational purposes (Sharpley & Sharpley, 1997). In addition, higher levels of incomes as well as increases in leisure time meant that the growing populations of industrial areas were able to visit the countryside. Another attraction for certain rural areas in Europe related to their perceived health benefits which meant that areas were visited by convalescing patients and those in ill health owing to the exceptional quality of their environments and more particularly their climates (Cavaco, 1995). As a consequence of such developments certain rural areas opened as new tourism spaces. By the close of the 19th century “many rural areas were benefiting from a thriving and established tourism industry” (Sharpley & Sharpley, 1997: 4). The early history of the opening of rural tourism in the English Lake District is recorded by Walton and McGloin (1981) and in greater detail by Wood and Walton (2016).

Concerning the evolution of ‘modern’ rural tourism a useful starting point is provided by Lane and Kastenholz (2015) who periodise rural tourism in relation to Butler’s (1980) Tourism Area Life Cycle (TALC) Model. These authors broadly differentiate three phases in the development of rural tourism in Europe albeit with the caution that different regions could be in different phases and that in some cases the phases could exist parallel to each other. The first phase is described as that of ‘emergence’ and was recognizable in parts of Western Europe by the early 1970s. This was viewed at enterprise and national levels as rural tourism being a sustainable alternative to a declining agricultural economy which was unable to guarantee a livelihood to rural populations. Swarbrooke (1999: 162) observed that in northern Europe rural tourism emerged “largely as a result of the desire of urban dwellers for countryside recreation” and subsequently “came to be seen by governments as a potentially valuable tool for rural development in many European countries”. Tourism was seen as a solution to the problems afflicting rural spaces and as a result this first period witnessed the growth of agritourism and farm tourism which

were boosted by government support initiatives (Cavaco, 1995; Swarbrooke, 1999; Lane & Kastenzholz, 2015). These activities involved staying on a working farm or making farm visits. In the industrialized and urbanized economies of Europe the countryside and rural areas were viewed “as lost worlds where life was simple and idyllic, which now provide playgrounds where urban dwellers can seek an antidote to the ills of modern urban living” (Swarbrooke, 1999: 61). Access to rural areas had been greatly improved by increased levels of car ownership and automobilities. In Spain rural tourism emerged as a leisure alternative to the tendency to concentrate on beach and sun destinations (An & Alarcón, 2021).

The second phase was one of ‘consolidated growth’ and began to appear in parts of Europe by the mid-1980s. The consolidated growth phase of rural tourism represents a response “to new market demands, some of which driven by a nostalgic quest for a ‘rural idyll’ as well as the need of actors in rural territories to find new sources of income and development and thus guarantee quality of life” (Kastenzholz et al., 2021: 601). Across much of Europe as a result of post-productivist transformations “rural areas are increasingly perceived as consumption rather than production places” (Eusébio, Carneiro, Kastenzholz, Figueiredo & da Silva, 2017: 197). This transition received support from the European Union and national governments in many parts of Europe (Ruiz-Real et al. 2020). Rural tourism seeks “to revitalise rural resources for local socio-economic benefits and environmental sustainability through active local community empowerment and involvement” (Rosalia et al., 2021: 127). Tourism assumes a vital function in maintaining the viability and stability of rural localities (Kataya, 2021). In the example of Portugal Cunha, Kastenzholz and Carneiro (2018) stress that tourism can be a tool for developing rural spaces which increasingly are impacted by the erosion of employment and livelihood opportunities and consequently afflicted by certain social problems such as depopulation and population ageing. Rural tourism is considered a development tool for rural areas with demand for local produce a stimulus for local economies and simultaneously a critical part of the tourism experience (Kastenzholz, Eusébio & Carneiro, 2016). In particular, tourism is perceived as a highly significant vehicle for development for marginal rural zones where “such developments are thought to appeal to a post-modern market seeking ‘unique’ experiences” which arise out of new locally embedded activities and themes (Kastenzholz, Carneiro, Marques & Lima, 2012: 207).

In respect of the role of rural tourism as a vehicle for local economic regeneration this period is marked by the attraction into rural areas of groups of new, often skilled migrants from cities – lifestyle entrepreneurs – who began to transform rural societies and the character of rural tourism. Among others Cunha et al. (2018) stress that rural tourism lifestyle entrepreneurs are a group of tourism business owners actively seeking a different lifestyle in rural spaces. These authors underscore the vital role of lifestyle entrepreneurs in rural tourism in Portugal. The impacts of their entrepreneurial activity are reflected variously in the maintenance of links between land and property, the preservation of traditional food, employment opportunities for entrepreneurs and their families, and above all the creation of ‘social capital’ which is essential to the sustainability of small and rural communities.

Importantly, it is argued by Lane and Kastenzholz (2015) in this second phase there came the diversification of rural tourism activities such that it became a series of

niche activities nested within the larger rural tourism niche. Among more specialised niches that appeared were rural volunteer tourism and wellness tourism. Above all, the diversification was marked by a growth in different forms of activity tourism, including walking, climbing and mountain biking. Adventure and sports tourism activities were another dimension of the diversification of rural tourism in many parts of the world with New Zealand the showcase example (Ryan, 1997). Arguably, whilst rural tourists are heterogenous, studies often observe common push factors of urban consumers as those of “seeking to refresh, relaxing away from the daily lives or escaping from a busy job as motivators for rural tourism” (Traanman, 2021: 3).

Further second phase growth has been driven through cultural and heritage tourism products in rural areas, one aspect of which was enjoyment of rural ways of life. Food and drink tourism (especially wine tourism) energised rural tourism development in many areas contributing added growth and diversity to the experience of rural tourism. Tourism business start-ups in such forms of activity tourism were driven variously by the imperative for economic diversification from agriculture, lack of local employment opportunities as well as the growth of lifestyle entrepreneurs (Yachin, 2020). For Lane and Kastenholz (2015) there are certain common denominators of second phase rural tourism including acknowledgement of the importance of the demand and supply sides of the ‘experiences’ which are special to rural tourism, the significance of personal contacts with local people, the relevance of physical activity and the environment and the capacity of entrepreneurs to invent new products from rural culture and heritage.

The third phase of the development of rural tourism according to Lane and Kastenholz (2015) is considered as evident in some parts of Europe and other advanced economies but not apparent in all destinations. Its characteristic features relate to Butler’s final phase of his TALC model namely that of decline or change to regeneration through product innovation. The slowdown of rural tourism in many areas is seen as a consequence of new competition emerging and in particular from the surge in urban tourism and the popularisation of city breaks in association with new attractions in regenerated urban areas. A further aspect of decline surrounds the need for renewal and re-invigoration of many rural facilities (museums, visitor centres, accommodation) as well as rural infrastructure which has suffered from a relative reduction in public funding allocations and support especially since the 2008 financial crisis. A critical additional issue has been the retirement of pioneer rural tourism entrepreneurs and that only a small number of rural tourism businesses stay in a family on the retirement of an owner (Lane & Kastenholz, 2015). As a whole it is contended that in this third phase of the evolution of rural tourism there has been a struggle with competition and of the need for change. The difficulties of third phase rural tourism include “its fragmented structure, its many small enterprises, its lagging infrastructure and its lack of governance systems” (Lane & Kastenholz, 2015: 1141).

The multiple challenges of contemporary rural tourism development and change in developed countries are well-documented in recent scholarship by Carson and Koster (2015), Carson and Carson (2017), Koster (2019) and Koster and Carson (2019). As is observed, however, in certain destinations there is a definite overlap between second and third phase rural tourism development. For example, in the potential of diversifying local rural economies through the development literary tourism has been a focus (Marques & Cunha, 2010; Yiannakis & Davies, 2012). In

Portugal the potential of using local heritage assets for tourism diversification and the repurposing of rural spaces recently has come under scrutiny (García-Delgado, Martínez-Puche & Lois-González, 2020).

6.4 Challenges of Rural Tourism Development and Rural Firms

The challenges of rural tourism development were earlier identified as one of the leading themes in international scholarship over the past four decades. As rural areas are largely overlooked by major infrastructural investments, rural areas necessarily rely on endogenous strategies which build upon local resources and assets, particularly for the advance of rural tourism. It must be acknowledged that not all initiatives to promote rural tourism have been a success in terms of catalysing rural development opportunities. Coping with seasonality issues and variations in seasonal demands is one of the perennial challenges of rural tourism destinations (Kastenholz & Lopes de Almeida, 2008). For maximising local development impacts an important challenge is to establish strong linkages between tourism and traditional regional and local knowledge and specifically between tourism and local agriculture (Fleischer & Tchetchik, 2005; Alves, Manso, Teixeira & Estevão, 2021).

Essential foundations for the prospects of rural tourism are issues of enhanced product and destination development in order to create well-coordinated, appealing and meaningful experiences as well as development opportunities which maximise endogenous resources or 'countryside capital' (Lane & Kastenholz, 2015; Kastenholz et al., 2021: 601). In seeking to secure the optimum destination-market mix for rural tourism destinations Kastenholz (2004) underscores the need for an informed understanding of (1) the destination, its resources and potential, and (2) the market, its profile, motivations and desires. The role of local government and of 'place leadership' is deemed critical for the success of rural tourism in many destinations (Dimitrovski, Todorović & Valjarević, 2012; Haven-Tang & Jones, 2012).

A distinctive sub-literature on rural tourism in developed countries surrounds the challenges of developing tourism as a tool for economic diversification in peripheral spaces that traditionally were reliant on exporting natural resources. The post-productivist transition has been shown to be often immensely difficult as many rural and remote communities in, for example, Central Australia or Northern Canada, are ill-prepared to diversify their economic base from extractive activities to tourism (Schmallegger & Robinson, 2011; Carson & Koster, 2015). The transition from resource-extractive activities to service-oriented activities such as tourism "is a very difficult process" (Carson & Carson, 2011: 373). Indeed, Carson and Carson (2017) pinpoint that tourism destinations in remote and sparsely populated regions often are subject to a set of distinct local development constraints that include distance to markets and decision-makers, lack of experience of the tourism sector, small and fragmented industry players, lack of community awareness of tourism's potential and a traditional dependence on external investment. Beyond these issues is the institutional environment that has consolidated around a traditional reliance on natural resource exports "tends to embed certain practices and attitudes that may present major barriers to effective tourism development" (Carson & Carson, 2011: 373). It is argued that the institutional environment seems to diminish the capacity of communities in resource peripheries to locally manage processes of economic change and to diversify their economic base (Schmallegger & Robinson, 2011;

Carson & Carson, 2017). What occurs is a situation of 'negative local lock-in' which contributes to a failure to pursue change. In place of resource-based path dependence a restructured institutional environment is required for local innovation and diversification to occur (Carson & Koster, 2015).

Entrepreneurship and rural enterprise is clearly the lifeblood for the development of rural tourism. In the rural Scandinavian context Brouder (2013: 28) affirms that rural and peripheral tourism business owners "are entrepreneurial because they manage to survive in what is a particularly unfavourable business environment". Korsgaard (2021, p. xviii) stresses the need to view rural enterprise and rural entrepreneurship "as an embedded activity, deeply influenced by and in intense exchange with the local spatial setting". The rural enterprise is not a well-defined construct as definitions of the concept are challenged (Leick, Gretzinger & Makkonen, 2021). Nevertheless, Yachin (2020) advances that in order to understand rural tourism, one must study and appreciate the challenges that face rural firms in tourism. This proposition is supported by the fact that across the international experience one of the essential characteristics of rural tourism is that it is mainly comprised of small-scale enterprises and micro-firms (Getz & Carlson, 2000; Ateljevic & Doorne, 2003; Akbaba, 2012; Yachin, 2019, 2021; Trip, Fagadar, Badulescu & Badulescu, 2021). Typically, rural tourism firms are owned and managed by individuals who are highly involved in most aspects of the business and whose personal capital is at risk (Yachin, 2021). In rural and remote areas of Australia it is evident that small tourism businesses are essential to the local economy and development and "particularly in regional and rural areas where a majority of these firms are located" (Perkins & Khoo-Lattimore, 2020: 184).

Small tourism businesses in rural areas must be recognized as heterogeneous in character (Yachin, 2020). As Yachin (2021: 320) stresses, tourism small firms "are not scaled-down versions of bigger businesses but rather embody an alternative manifestation of entrepreneurship". According to Ateljevic and Doorne (2007: 13), small tourism firms can be a dynamic agent of rural tourism development and growth as they "are normally associated with low levels of economic leakage, comparatively low barriers to entry and high levels of local networking, providing linkages between society and economy at the local level". Shaw and Williams (2004) provide several explanations for the proliferation of small firms and their dominant presence in rural tourism economies of most countries. Among the leading reasons are that tourism markets exhibit low entry barriers, the significance of 'lifestyle entrepreneurs' for whom the business return may be as much social- as profit-related, the impacts of post-Fordist vertical disintegration of production, and that "the intersection of spatial fixity with small-scale niche or localized markets" further encourages small firm development in tourism (Shaw & Williams, 2004: 55). As demonstrated by recent research in the Calabria region of Italy lifestyle entrepreneurs can be critical change agents for competitiveness in remote rural tourism destinations (Ciasullo, Montera & Pellicano, 2019). Lifestyle entrepreneurs in remote areas can be a springboard of tourism development as they act as captains of tourism who identify windows of opportunity in hostile business environments (Shaw & Williams, 2004; Ciasullo et al., 2019).

For Page and Getz (1997), a number of operational issues affect the establishment and development of rural tourism businesses. They note the following: accessibility

issues especially in remote areas, the need for rural business owners to make arrangements for multiple land use and the integration of tourism businesses into the locality, the question of seasonality, high costs of running a business, labour supplies, retaining authenticity by preserving rural ambience, and potentially of infrastructural issues as regards both quantity (insufficient electricity or water) or of quality (roads, communication systems, internet connectivity). At one level the challenges facing the development of rural tourism can be differentiated into internal and external categories. According to Rosalina et al. (2021) the group of internal challenges relates to limitations of internal resources, especially of countryside capital and could encompass social and political barriers, limited quality workforce, poor planning and management resulting in an inability to capitalise local assets, lack of marketing strategies, inadequate financial support, limited physical amenities, and absence of sustainable strategies.

The second group of external challenges relate to “elements outside or apart from rural resources, such as unstable tourism demand, threats from competitors and potential conflict with external resources, such as investors outside the destination” (Rosalina et al., 2021: 141). The issue of poor tourism demand is critical and relates to inability to appeal to large markets and dependence on seasonal arrivals. Uncertain demand creates a situation of economic inconsistencies which usually results in rural tourism becoming a supplementary income source. Page and Getz (1997) highlight therefore the importance of local leadership and the organization of resources for rural tourism planning. For the functioning of their businesses rural tourism entrepreneurs rely greatly on contacts in their vicinity, personal relationships and local networks (Yachin, 2020, 2021).

Another important ingredient especially for the success of small businesses in rural destinations has been demonstrated as that of “place attachment”, a concept that emerged out from environmental psychology (Silva Kastenzholz & Marques, 2021). It is an outcome of place experiences connected to positive emotions experienced in rural destinations and when a person attaches a meaning to a specific place (Silva Kastenzholz & Abrantes, 2013; Kastenzholz, Marques & Carneiro, 2020). ‘Place attachment’ is a result of people creating, developing and maintaining strong relationships with places and is viewed as a contributory factor to place loyalty and sustainable destination development (Silva et al., 2021). It is also the consequence of the activities of tourism firms which in many contexts “help to protect, maintain and communicate the essence of the place” (Yachin, 2021: 320). For the niche of food tourism, a widespread dimension of rural tourism products, Sidali, Kastenzholz, and Bianchi (2015) identify the vital role of local food in reinforcing personal identity and the challenges for rural entrepreneurs in attracting the post-modern consumer to rural regions. Seven dimensions are identified from the experience economy and an intimacy model that elevate food products to a culinary niche in rural areas, viz., “coherence, anti-capitalist attitude, struggle against extinction, personal signature, mutual-disclosure, rituals of spatial and physical proximity, and sustainability-related practices” (Sidali et al., 2015: 1179).

Small firm development in rural tourism is viewed especially significant for marginal and/or peripheral social, cultural and physical environments and “touted as the path for enhancing local economies and delivering more appropriate development” (Ateljevic & Doorne, 2003: 5). In many cases, such as Australia, family-owned small

firms dominate tourism most especially in peripheral and rural areas. Beyond entrepreneurial spirit a critical factor for flourishing small tourism firms in rural areas is identified as “community resourcefulness” wherein collective action and partnerships leverages agency and capacity to effect change from within (Qu, McCormick, & Funck, 2020). Collaborative networking is considered an important means to overcome the challenges of rural tourism enterprises most especially issues relating to seasonality of product offerings and often difficulties that arise in terms of securing qualified staff (Pilving, 2021). As is stressed by Yachin (2021: 319) for rural firms – and particularly for micro-firms – “networks constitute a potential to pursue opportunities and compensate for lack of resources, missing skills and relevant education”.

Within the local economy tourism rural businesses are unlike other businesses, such as grocery shops or service establishments, as tourism firms “do not cater directly to the local community” (Yachin, 2020: 84). Nevertheless, whilst the activities of rural tourism small firms are unlikely to disrupt dominant economic structures “these small-scale businesses may have a meaningful contribution to the economic, social and environmental wellbeing of the localities where they are situated” (Yachin, 2020: 29). This potential contribution to local economic development futures is threatened by the pandemic and yet at the same time potentially it can open opportunities for certain areas.

6.5 Rural Tourism in the Global South: African Perspectives

For various reasons the trajectory of rural tourism development in the Global South has been markedly different to that occurring in the Global North (Lane & Kastenholz, 2015). The literature on the Global South often is dominated by issues of the dependency relationships that challenge rural areas (Britton, 1981; Chaperon & Bramwell, 2013). Accordingly, several scholars underscore the need for the separate treatment and research issues of rural tourism in the context of the Global South. For example, Karali et al. (2021: 2) aver that “rural tourism of the developed and developing countries is required to be researched differently due to their unlike development and growth contexts”. Further, that “rural tourism has different contextual dimensions and issues in the developed and developing nations which are needed to be addressed with the help of case-specific studies” (Karali et al., 2021: 21). As noted earlier, the literature on rural tourism in the Global South currently is dominated by works on China and India. In this section the relevant writings and debates on rural tourism in sub-Saharan Africa are reviewed.

At the outset, it must be acknowledged that the literature and debates about ‘rural tourism’ in sub-Saharan Africa underscore the problematic nature of the concept (Lenao & Saarinen, 2015). Overall, it is seen often as “a replacement activity for threatened and possibly disappearing traditional rural economies or as an additional activity to be used for the diversification of rural economies and sustaining rural communities and ways of living” (Saarinen & Lenao, 2014: 365). In many African countries the most lucrative contribution from tourism in rural areas derives from the expansion of wildlife tourism or nature safari tourism in protected areas which could be either a replacement or diversification activity in parts of rural sub-Saharan Africa. Among others Mbaiwa (2021) argues that wildlife-based tourism is a key economic sector that assists rural and community development in many African countries,

including Uganda, Ghana, Rwanda, Botswana and Namibia. It sustains and generates benefits for the welfare of people living adjacent to such tourist destinations with rich biodiversity, many of which are located in remote and peripheral areas.

This critical form of tourism occurring in many rural areas of sub-Saharan Africa would not be categorised, however, under the umbrella term of rural tourism. As is shown by work conducted in Botswana the term is more conventionally applied in African studies to forms of rural tourism which are based on “local culture and heritage resources as well as local communities and their participation” (Lenao & Saarinen, 2015: 203). In addition, at least in the case of South Africa, it would extend to include agritourism and farm-based tourism activities as well as activity-based forms of rural tourism which are a parallel to the emergent and second phase forms of rural tourism observed in the Global North. Arguably, the positive feeling of visiting rural areas in sub-Saharan Africa for their cultural and heritage assets can enrich and give greater depth to tourist visits (Ezeuduji, 2015a). Overall, for Saarinen and Lenao (2014: 365) rural tourism within the context of the global South might be interpreted perhaps “as an ideological and development-oriented concept”. It is within these parameters that our review of African rural tourism scholarship is presented which is centred on four countries, The Gambia, Botswana, Tanzania and South Africa.

In The Gambia tourism has been built up as a development strategy through ‘sun and beach’ activities and the overwhelming spatial focus is upon urban-based tourism (Rid, Ezeuduji & Pröbstl-Haider, 2014). Initiatives have been undertaken to spread the geographical impact of tourism development in the country by encouraging rural tourism. According to Ezeuduji and Rid (2011: 188) “‘rural tourism’ constituting visits by tourists to rural Gambia to experience the culture and natural environment of the local population is considered one of the strategies within the management portfolio of sustainable development”. In The Gambia local communities in partnership with non-governmental organisations started to organize themselves to offer rural tourism products and services in order to boost local incomes and livelihoods (Ezeuduji & Rid, 2011).

Based upon the Gambian experience Ezeuduji (2015b) offers a generic competitive strategy for rural sub-Saharan Africa through strategic analysis of rural tourism resources, the external environment of rural tourism development, and institutional stakeholders. An analysis was undertaken of segmentation by motivation for rural tourism activities in the country (Rid et al., 2014). This revealed a high latent market potential for rural tourism in The Gambia. It was concluded that an appropriate strategic focus would be events-based rural tourism wherein local communities stage events for tourists that will lead to forging a unique rural tourism experience (Rid et al., 2014; Ezeuduji, 2015b). Nevertheless, a critical issue for sub-Saharan Africa – not least The Gambia – is to manage carefully the transition of communities from traditional livelihood activities into rural tourism. Key issues for Ezeuduji (2017) are of enabling a rural community to highlight its skills and capabilities, sources of leverage and necessary knowledge in order to undertake a ‘change process’ and pursue tourism-led development. In particular, ‘cultural tourism’ products involving tourist visiting rural areas to experience local potential were identified as offering a potential to benefit local communities (Ezeuduji & Rid, 2011).

In Tanzania a segmentation analysis of market demand has disclosed also the potential for building rural tourism (Lwoga, 2019). The work of Lwoga and Maturo (2020) points to the fact that the rural tourism market is heterogenous and plural. The empirical evidence suggested that many “rural tourists in African villages are motivated by nostalgia for rural cultural life” (Lwoga & Maturo, 2020: 773). Other disclosed motivations were relaxing with friends and relatives, learning about local farming, enjoyment of nature, and contributing to the local community. Tanzania established in 1995 a cultural tourism programme – styled ‘come and visit the people’- which included the development of tourism in rural villages focused on integrating aspects of local culture and heritage. This generates what Timothy (2021) refers to as a democratization of the cultural past by promoting a form of rural heritage tourism that is focused on the heritage of ‘ordinary’ people rather than society’s elites. The villages of Tanzania attract many international tourists, particularly from Europe, who desire “to experience a traditional culture, heritage and way of life” (Lwoga & Maturo, 2020: 785). The village visits give tourists an opportunity to interact with the local community learn about local people’s culture in an authentic setting, including viewing traditional farming activities and obtain knowledge about how traditional food is cooked (Lwoga, 2019; Lwoga & Maturo, 2020). Overall, the Tanzania research emphasizes the marked differences of heritage tourism markets in the Global South to the mainstream heritage attractions in the Global North and provides evidence of Northern tourists wanting to experience authentic rural cultural life by partaking visits to African villages (Lwoga & Maturo, 2020).

Botswana provides another sub-Saharan African case of the growth and promotion of rural tourism through cultural and heritage product development. In the Okavango Delta of Northern Botswana Mbaiwa and Sakuze (2019) show how rural cultural tourism has promoted livelihood diversification by examining Gcwihaba Caves and XaiXai village. In the example of XaiXai village it is shown that communities have valuable local assets in the form of natural resources, (such as the geological formations at Gcwihaba Caves as well as local plants) which they can leverage to benefit from local cultural tourism development in the area. In addition, the residents of XaiXai possess vital cultural capital, particularly the skills they have for hunting and gathering as well as traditional medicine, which can be further maximised because of the village’s location within the wildlife tourism hub of the Okavango Delta. In another case study in Central Botswana Mbaiwa (2011) records tourism and cultural commodification taking place in the Goo-Moremi village, an emergent rural cultural tourism destination. The contested character and controversies surrounding the commodification of ancestral sacred spaces for rural tourism product development emerge as an important issue.

Finally, the South African experience provides a literature on rural tourism which indicates a greater variation in the rural tourism product than that observed in other countries of sub-Saharan Africa. In addition, it exhibits a historical developmental pathway which can be likened to the evolution of European rural tourism as discussed by Lane and Kastenzholz (2015) with a substantial element of domestic tourists engaging in rural tourism. As observed by Briedenhann and Wickens (2004a: 190) the concept and practice of rural tourism in South Africa “has a long history”. The beginnings of any form of rural tourism awaited improvements of infrastructure to access rural spaces initially with the railways and subsequently with road access

and extended car ownership. One of the first forays into the history of rural tourism in South Africa is Carruthers (2013) work on Royal Natal National Park, South Africa's first formal national park, which became popular for mountaineers during the first decades of the 20th century.

The first appearance of 'modern' rural tourism took place with the expansion of domestic tourism which occurred in the 1980s and accelerated following democratic transition. It took the form of the emergence of agritourism and the growth of farm stays. The market drivers for agritourism were typical, namely the stressors of urban life boosting the recreational value of rural landscapes for urban consumers. During the apartheid period rural tourism experienced slow growth and was manifested both for example in the growth of hiking, fishing and camping activities in the more prosperous areas well as the appearance in the Homelands of casino tourism which Briedenhann and Wickens (2004a) identify as an early form of rural tourism.

Among the pioneer innovators of rural tourism were the wine estates of Western Cape and the establishment of wine routes (Ferreira, 2020). On the supply-side agricultural restructuring increased financial stress on many small family farms which also took up tourism as an opportunity for income diversification. Overall, the popularity of agritourism encouraged its formal adoption in the local development strategies of at least 15 small towns across six of South Africa's nine provinces. It was observed, however, the spatial distribution of agritourism was uneven with major concentrations in the more prosperous rural regions of the country (Rogerson & Rogerson, 2014). The diversification of activities in agritourism included fishing (fly and trout), bird watching, horse riding among many others (Briedenhann & Wickens, 2004a; Nicolaidis, 2012; Rogerson, Simango & Rogerson, 2013; Rogerson & Rogerson, 2014). During the last decade activities relating to activity tourism – in particular sports and adventure tourism – have boosted further the mix of rural tourism products (McKay, 2016; Giddy, 2018a). A key driver for product diversification has been that of agricultural restructuring such that the “trend among agricultural enterprises to adopt tourism has gained significant impetus in rural areas, due to the additional source of income it provides” (Viljoen & Tlabela, 2007: 20). The product diversification of wine estates for tourism development is shown in works by Ferreira and Muller (2013), Ferreira and Hunter, (2017) and Ferreira (2020). In KwaZulu-Natal heritage was added to the list of rural tourism products that were on offer (Van der Merwe, 2014),

At least by the mid-2000s it could be observed that “the development of rural tourism is of growing importance in the changing rural landscape of post-apartheid South Africa” (Viljoen & Tlabela, 2007: 20). This said, the challenge was to address spatial inequalities in rural tourism as it was clear that the benefits of tourism needed to be more widely distributed (Briedenhann & Wickens, 2004b). With growing recognition and some policy support a further burst of product diversification in rural tourism has taken root with the initial development of rural cultural and heritage products which often are community-based products. Briedenhann and Wickens (2004a: 196) observed in the early 2000s that “the most fundamental change that has taken place in rural tourism has been the recognition that African culture and history are valid and sought-after components of South African tourism offerings” Studies have included the research by Ivanovic (2015) on cultural tourism in rural Limpopo and several recent works appearing on geotourism and heritage (Mukwada & Sekhele

2017; Chingombe & Taru, 2018; Chingombe, 2019; du Preez, 2019; Matshusa, Thomas & Leonard, 2021). In recent years the continued diversification of rural tourism in South Africa has been boosted both by its adoption in local economic development programmes and correspondingly by the opening up of several themed route tourism initiatives which have supported the progress of many rural tourism products (McLaren & Heath, 2013; Briedenhann & Wickens, 2004b; Van-Wyk-Jacobs, 2018; Jacobs et al., 2020).

It is evident there has been a growing body of research investigations concerning rural tourism in South Africa, particularly over the past decade. Indeed, in relation to the relative paucity of studies in the Global South, the growth of South African research is notable. Mnguni, Mtapuri and Gaimpiccoli (2020: 100) pinpoint that in South Africa “rural tourism is a key topic in contemporary discourses and literature”. This is a reflection of the observation made by Briedenhann and Wickens (2004a) that “South Africa has substantial natural and cultural resources on which rural tourism can be developed”. In relation to international debates concerning rural tourism an important focus in local research has surrounded the challenges of developing rural tourism and of spreading the benefits of a growing tourism economy into poor rural and remote areas. The unexploited potential of rural tourism in areas such as the Wild Coast was highlighted with particular challenges for tourism development of small, medium and micro-enterprises (Ndabeni & Rogerson, 2005). The potential of information and communication technologies to boost the growth potential of rural tourism enterprises in the Wild Coast had been isolated by Bourgooin (2002). In Limpopo, Mafunzwaini and Hugo (2005: 252) pointed to the constraint of a “lack of strategic guidelines for rural tourism development” with the challenge being “to reposition and develop the province into one of the best rural tourism destinations in Africa”. The roll out of tourism routes as a tool for the economic development of rural areas and as catalyst for rural tourism is applauded by Briedenhann and Wickens (2004b). Lack of political will to support rural tourism was an issue early identified by Nzama (2010) in research conducted in KwaZulu-Natal.

In an influential study Viljoen and Tlabela (2007: 6) stressed that in South Africa “rural tourism is viewed as a means to eliminate poverty and create employment opportunities in rural areas”. Nevertheless, as pointed out by Haywood, Nortje, Dafuleya, Nethengwe and Sumbana (2020), as an instrumental tool against poverty it is essential that rural tourism products be not only visible but also that they be sustainable. The essential challenges that confront the sustainability of rural tourism enterprises in South Africa were set forth by Briedenhann and Wickens (2004a, 2004b) over 15 years ago. It is argued that “the development and management of a rural tourism sector that optimises socio-economic benefits is contingent on the formulation of appropriate tourism policies and plans and the development of effective institutional capacity for their implementation”. The institution which is central to the success of rural tourism is local government but in South Africa “there is lack of capacity at local government level to assume its responsibilities in the rural tourism space” (Briedenhann & Wickens, 2004a: 189). The shortcomings of local government observed in the early 2000s are little improved nearly two decades later. In an investigation of rural tourism in the South Coast of KwaZulu-Natal province Mnguni et al. (2020) point to a host of negative issues surrounding the role of local government. Among the key concerns were the municipality was “unappreciative of

rural tourism development”; “lack of appreciation of tourism’s contribution to economic welfare”; “tourism is not prioritised in the local tourism development and planning”; “lack of cooperation across political boundaries is hampering routes”; “inadequate destination marketing by local municipalities”; “lack of business orientation in the local municipalities”; and, above all, “politics and corruption” which permeate municipal decision-making (Mnguni et al., 2020: 101). Lack of communication to create awareness of rural tourism projects is a further limitation that has been highlighted in KwaZulu-Natal (Mthethwa, Taylor & Tefera, 2020).

Beyond local government woes, other challenges surround the difficulties of community-based tourism in relation to dearth of entrepreneurial expertise, management skills, lack of networking and poor or ill-maintained infrastructure to support local tourism development. Arguably infrastructure development, especially improvement and maintenance of roads, is critical to improving the accessibility of rural tourism products for (especially) drive tourists. Lack of awareness and appreciation of potential local assets to support rural cultural and heritage tourism has been highlighted in KwaZulu-Natal (Nzama, 2010). Another important issue is that the questionable relationship of new rural tourism products to market demand (Briedenhann & Wickens, 2004a). As was evidenced by the disappointments surrounding the establishment of the Mehloping Hiking and Horse Trail in the Eastern Cape the success of rural tourism is threatened when it is supply-led instead of demand-driven, altruistic in motivation instead of anchored on sound business sense (Ndlovu & Rogerson, 2004).

Not surprising, therefore, are findings from perception studies that certain communities remain sceptical about the prospects of using rural assets, including culture and heritage, for tourism development (Nkwanyana, Ezeuduji & Nzama, 2016). Indeed, it is important to recognise that in certain cases opportunities for the development of rural tourism may not have the support of local communities. One excellent illustration is the case of a cultural heritage site which has been documented recently by Mafukata, Khan and Moseki (2021) for rural Limpopo. It is asserted by these authors that rural Limpopo is characterized by several untapped assets for cultural heritage tourism. The burial tombs of the royal houses of the Masingo at Swongozwi in the Soutpansberg are considered to be an important cultural tourism site. This potential is unrealised, however, as a result of significance local resistance towards tourism development from the royal house. Mafukata et al. (2021: 1272) argue the tombs of Swongozwi are closely guarded and there exists “negative attitudes and unwillingness by the Masingo royalty to open the site for tourism development”. Overall, this is viewed as a missed opportunity for rural cultural tourism as the opposition to tourism “is encouraged by the cultural significance ascribed to the site by its custodians, amongst which taboos, myths, respect for tradition and fear of the wrath of the ancestors that would result if the Masingo infringed on this ‘holy’ space and traditions” (Mafukata et al., 2021: 1272). The Limpopo example is a cautionary tale about the multiple challenges that surround the potential utilisation of local ‘sacred spaces’ for cultural tourism development.

Overall, in South Africa research on the geography of tourism shows that with the exception of the country’s protected areas for nature-tourism, rural spaces on the whole have not been major destinations for tourism development. Research on the

list of least visited areas of South Africa demonstrates that many remote rural spaces of South Africa are 'non-tourism spaces' with their visitor economies almost exclusively reliant on migrants visits to friends and relatives (Rogerson, 2017; Rogerson & Rogerson, 2019).

6.6 COVID-19 and the Demand for Rural Tourism

The COVID-19 pandemic has triggered a paradigm shift in the psyche of tourists which is linked to risk perceptions around safety, health and travel (Kock et al., 2020; Matiza, 2020; Matiza & Slabbert, 2021). One outcome has been a growth in consumer demand for open spaces and for rural destinations (Rogerson & Rogerson, 2021a). Based upon the experience in Nordic countries, Helgadottir and Dashper (2021: 66) maintain the "Covid-19 era poses many challenges for the tourism sector, yet rural tourism may become more appealing as tourists seek escape to remote areas, engaging with nature and keeping away from densely populated urban centres". Rural tourism is dominated by car travel and the pandemic clearly has accelerated the growth of automobilities and of drive tourism (Butler & Szili, 2020; Butler, Szili, Cutler, Hay, & Saikia, 2021; Juschten & Hössinger, 2021).

Arguably, and somewhat ironically, the impacts of the COVID-19 pandemic provide a potential springboard for a further regeneration of rural tourism not only in Europe but across many other parts of the world. With the global spread of the COVID-19 pandemic beginning in 2020 many everyday human mobilities were brought to a standstill and others were radically reorganised (Kock et al., 2020). As observed by Adey, Hannam, Sheller and Tyfield (2021) COVID-19 has not only severely interrupted tourism but has triggered a change in the entire apparatus of tourism, meaning that the practices of tourism are forced to change. One consequence has been a shift in the demands of urban consumers away from 'crowdedness' and instead towards a search for open spaces, nature, and the tourist offerings of rural areas. Laesser et al. (2021: 8) project that beyond the pandemic there will be both "an increasing interest in remote/uncontested destinations, avoiding crowded places and valuing nature experiences" as well as "a general desire for new experiences/living dreams especially related to nature, and shifting preferences for accommodation types securing social distance, which is clearly visible in a dramatically increased interest in camping and 2nd homes". Traanman (2021) draws attention to the perception of rural regions as 'healthy spaces' and to the importance of 'therapeutic landscapes' or spaces of psychological healing.

The United Nations World Tourism Organization (2020b) is unequivocal that the role of tourism in rural development is more relevant than ever in the context of the COVID-19 pandemic. It argues that tourism in rural areas offers critical opportunities for recovery as with changing demands tourists look for less populated destinations as well as open-space experiences and activities. Several academic studies also point to the potential that the pandemic might provide new opportunities for rural tourism (Buckley, 2020; Craig, 2020; Seraphin & Dosquet, 2020; Vaishar & Štastná, 2020; Craig & Karabas, 2021) most especially in protected and conserved areas (Spalding, Burke & Fyall, 2020; Spenceley, McCool, Newsome, Baez, Barborak, Blye, Bricker, Cahyadi, Corrigan, Halpenny, Hvenegaard, King, Leung, Mandic, Naidoo, Ruede, Sano, Sarhan, Santamaria, Sousa & Zschiegner, 2021). For example, Silva (2021: 1) argues that "scholarly literature has stated that the COVID-

19 pandemic has had a positive effect on rural tourism due to the “increase of tourists seeking for a safe/low-risk destination in scarcely populated areas”.

Rural tourism therefore offers a major opportunity to satisfy the demands of post-pandemic tourists who seek stress-relief and rejuvenation within a nature-based environment or engagement with physical and psychological well-being activities (Cavalheiro, Mayer & Luz, 2021; Cooper & Buckley, 2021; Rosalina et al., 2021). As a result of changing risk perceptions, it is anticipated that in the global North remote and rural destinations will likely be more attractive to tourists, in particular for domestic tourists. The importance of drive tourism in the leisure mobilities of Australians has been highlighted as a boosting factor for local rural tourism (Butler & Szili, 2020; Butler et al., 2021). Other ramifications of the pandemic might create an extra attraction for rural destinations. Moerman (2021: 4) points out that lockdown restrictions have resulted in people feeling “emotionally claustrophobic at home and that these emotional and psychological effects are mostly present among populations resident in dense urban agglomerations”.

Serbia provides one example of many destinations where, with the implementation of strict COVID-19 prevention measures, there is evidence of an upturn of interest in rural tourism (Batrićević & Stanković, 2021; Cvijanović, Pantović & Dordević, 2021). In Poland also leisure visits to agritourism farms, rural cottages and second homes have been growing because these were perceived as safe destinations by domestic tourists (Wojcieszak-Zbierska, Jęczmyk & Zawadka, 2020; Roman & Grudzień, 2021; Uglis, Jeczmyk, Zawaadka, Wojcieszak-Zbierska & Pszczola, 2021). In the Czech Republic the COVID-19 pandemic has been a stimulus for rural tourism with domestic tourists seeking out natural, gastronomic and local attractions (Vaishar & Štastná, 2020). For the Netherlands studies by Moerman (2021) and Traanman (2021) demonstrate how COVID-19 has influenced domestic travellers behaviour with an upturn in rural holidays. Likewise, the advantages of tranquillity, clean air, beauty of natural landscapes and of local heritage assets have been demonstrated by Coroş et al. (2021a, 2021b) to have boosted the potential for rural tourism in Romania. In Spain, using evidence from the province of Hueva, Vargas-Sanchez (2021) charts the opportunities for the development of rural tourism in a post-viral scenario. Importantly, in terms of strategic management for rural small firms, attention is drawn to issues of safety and hygiene, creativity and innovation, and ensuring support from local residents.

The most compelling demonstration of the positive potential of COVID-19 for rural tourism destinations in the Global North is from research which applies ‘big data’. In a study conducted in Spain de Aldecoa Fuster (2021) analysed geographical patterns of usage of credit cards in terms of three sets of destinations, namely urban, rural and coastal destinations. The research disclosed that the loss of tourism business in the less urban regions of Spain has been far lower than in traditional coastal destinations or cities. In certain rural regions overnight stays in rural tourism accommodation exhibited minimal change in an annual comparison. These findings lead to the conclusion that “rural destinations have emerged as the most attractive choice after the outbreak of the pandemic” (de Aldecoa Fuster, 2021: 1). In particular, the research confirmed that rural areas were a major alternative for those (mainly domestic) tourists wanting to travel whilst still maintaining a social distance.

For the global South the evidence from several Chinese studies on changing consumer preferences in the COVID-19 environment signals once again the mounting popularity of rural destinations (X Li et al., 2021; Z. Li et al. 2021; Wen, Kozak, Yang & Liu, 2021). Zhu and Deng (2020: 1) assert that within the context of the pandemic “rural tourism is expected to be the top choice for Chinese residents for relaxation and enhancing parent-child relationships”. Research conducted in Indonesia provides a further Global South case study of the effects of COVID-19 pandemic on consumer intentions to give greater preference to rural destinations (Utomo, Wulandari, Narmaditya, Ishak, Prayitno, Sahid & Qodri, 2020; Wachyuni & Kusumaningrum, 2020). For South Africa signals of an upturn in demand for rural tourism products have emerged out of recent research on COVID-19 impacts on consumer travel preferences (Bama & Nyikana, 2021). As in other parts of the world COVID-19 is generating a shift in the psychographic profile of domestic tourists in South Africa. The perceived physical risk induced by the pandemic leads to an increase in outdoor recreational pursuits with a corresponding upturn in demand for rural tourism (Matiza & Slabbert, 2021).

6.7 Conclusion

This section has reviewed international and local scholarship on the niche of rural tourism. It shows the growing demand for the products of rural tourism internationally and more specifically in the context of Africa generally and South Africa in particular. According to Koster and Main (2019) as rural economies continue to experience change over time tourism has progressively become an integral part of the economic development trajectories of rural places almost irrespective of their geographic location and local histories. Nevertheless, whilst tourism is often viewed as a panacea for the economic and social ills of rural areas the important point must be reiterated that both in the contexts of Global North and Global South it is “not appropriate in all rural areas” and that “its comparative advantage will vary considerably from one type of rural area to another” (Roberts & Hall, 2001: 3-4).

A vital point for policy development is the need for a more nuanced geographical differentiation in rural tourism between the prospects and issues that face different types of spaces. Rural destinations are diverse and a one-size fits all policy is inappropriate. A useful starting point for discussion is the categorisation put forward by Koster (2019) and Carson (2018) of fringe, in between, remote/exotic rural spaces and non-(leisure) tourism spaces. The institutional environment is demonstrated as critical in determining the prospects for rural tourism in peripheral regions (Carson & Carson, 2011; Schmallegger & Robinson, 2011). In addition, the discussion demonstrates that in the context of COVID-19 there exists a growing potential demand for the products of rural tourism. In maximising demand opportunities several challenges identified in this literature review relating to the development of rural tourism internationally and in the context of Africa and South Africa in particular. The following section provides an examination of the evolution of policy concerning rural tourism in South Africa.

7. Rural Tourism Policy in South Africa

Since democratic transition the issue of promoting rural tourism has been an item of escalating significance on the agenda of South African policy makers. With the new government seeking to redress the legacy of the apartheid past and improve the quality of life of the poor, issues of rural development as a whole came into prominence. In relation to tourism the first statements related to the 1996 *White Paper on the Development and Promotion of Tourism in South Africa* and *Tourism in GEAR* (Rogerson & Visser, 2004). These documents provided a foundation for new directions in tourism planning that included a commitment that tourism should be used for the greater benefit of rural communities (Viljoen & Tlabela, 2007). The late 1990s emergence of debates on pro-poor tourism and responsible tourism further escalated policy-makers interest and commitments towards the building of tourism in rural areas of South Africa.

By the mid-2000s, however, it was evident that only small steps had been taken to shift the balance of rural tourism away from the more prosperous rural regions such as the Western Cape. Viljoen and Tlabela (2007: 20) observed that what is “notable is that although rural tourism initiatives are still in their infancy, there is growing recognition in both the private and public sector that the benefits of tourism should be distributed in a spatially even manner”. These authors also highlighted the overlooking by government of certain types of tourism, most significantly of budget tourism, that “could be beneficial to rural tourism”.

During 2009 the Zuma administration launched the New Growth Path with its ambitious vision of creating five million jobs by 2020 and with a dedicated focus on a new more inclusive, labour-absorbing development path (Department of Economic Development, 2010). The New Growth Path aimed to address the structural ‘problems’ inherent in South Africa’s economy and launch strategies aimed at fighting against poverty, reducing inequality and tackling the challenges of rural development to create decent employment (Rogerson, 2014). The acceleration of rural development was one of the most critical interventions proposed in the New Growth Path as a vehicle to address the structural challenges underpinning both economic and spatial inequalities in the country (Department of Economic Development, 2010). Although it was acknowledged that rural development “is a cross cutting mandate” (Archary, 2011: 4) the central ministry tasked with dealing with the complex challenges around rural development was the Ministry of Rural Development and Land Reform (DRDLR) which was created in 2009. The establishment of the DRDLR was viewed a watershed for rural development as for the first time there existed a ministry dedicated to the economic and social development of rural South Africa (Rogerson, 2014). With the introduction of the New Growth Path the tourism sector was tasked to create 225 000 jobs by 2020. In a response to a request from The Presidency for strategies linked to rural development the growth of rural tourism became of increasing policy concern (Zikalala, 2011).

The 2011 National Tourism Sector Strategy emphasised that the Department of Tourism would focus on ensuring an improved spatial distribution of tourism (Department of Tourism, 2011). Tourism growth in rural areas would be supported for greater involvement of rural communities and with “a sustained effort in promoting informed investment in the development of rural tourism products that respond to

market needs” (Department of Tourism, 2012a: 10). Officials from the Department of Tourism made clear that at this time the core geographical focus for rural tourism initiatives would be around the former Homelands, the most deprived and poverty stricken areas of South Africa (Zikalala, 2011). In addressing the policy gap on rural tourism and in order to use tourism as a stimulus for rural development, the Department developed two policy documents, namely the Rural Tourism Strategy (Department of Tourism, 2012a) and the National Heritage and Cultural Strategy (Department of Tourism, 2012b). Both were issued in 2012 for the enhancement of rural tourism products and opportunities.

Arguably, the Rural Tourism Strategy must be recognised as South Africa’s most advanced policy statement concerning rural tourism. Its vision was the making of a “developed rural tourism economy” with its mission “to enhance the growth and development of tourism in rural communities, particularly in less visited provinces” (Department of Tourism, 2012a: 20). The strategy was aligned to the broad priorities of the New Growth Path concerning decent work and the stimulation of vibrant, sustainable rural communities. Recognising the definitional problems surrounding rural tourism it was stated that this form of tourism in South Africa “showcases rural life, arts, culture and heritage thereby benefitting local communities and enabling interaction between tourists and locals for a more enriching experience” (Department of Tourism, 2012a: 16). At the same time rural tourism was viewed as multi-faceted and encompassed “agricultural tourism, cultural tourism, nature tourism, adventure and ecotourism” (Department of Tourism, 2012a: 16).

At the outset it was recognised several constraints existed on rural tourism development, including inadequate funding, the limited involvement of rural communities, and that a number of major tourism attractions in rural areas, including World Heritage sites, were not garnering major benefits and contributing towards poverty alleviation. Opportunities for rural tourism were seen as in ‘untapped rural culture and heritage’, ‘unspoilt natural and rural tranquility’, indigenous knowledge systems, agritourism, sport, volunteer and adventure tourism. With greater political will for the support of tourism and rural development, the strategy sought to galvanize “informed investment in the development of rural tourism projects that respond to market needs” (Department of Tourism, 2012a: 10). It acknowledged that for the implementation of support of rural tourism several development needs required attention including training, raising tourism awareness and infrastructure upgrading, the latter singled out as a particular shortcoming. In addition, it pinpointed the critical role of local government “in providing leadership and the necessary planning to make sure that their communities and local businesses get the most out of tourism” (Department of Tourism, 2012a: 33). Overall, the geographical focus for planning would be concentrated on selected rural nodes which were “aligned to the principles of sustainability and responsible tourism” (Department of Tourism, 2012a: 67).

The second policy document that appeared in 2012 impacting rural tourism concerned the interrelated National Strategy on Heritage and Cultural Tourism which served “to guide and provide strategic direction for the development and promotion of heritage and cultural tourism” (Department of Tourism, 2012b: 10). As shown by van der Merwe (2019) the geography of heritage assets in South Africa is uneven and spans both urban and rural areas. This said, the national policy document

indicated that “a substantial number of heritage and cultural resources in South Africa, for tourism product development, are located in semi-urban and rural areas” drawing special attention to the rural location of six World Heritage Sites as well as the culture and heritage resources in Transfrontier Conservation Areas (Department of Tourism, 2012b: 12). The aims of the policy were “to unlock the economic potential of heritage and cultural resources ” for tourism and “to raise awareness of the ability of heritage and cultural tourism to contribute to social cohesion (Department of Tourism, 2012b: 10). Several challenges were identified for boosting heritage and cultural tourism, namely poor alignment of heritage and cultural resources into mainstream tourism, under-representation in tourism marketing, the value of this segment not being maximised often because of uninformed interpretations at tourist sites which compromised the integrity and authenticity of heritage and cultural tourism products.

Another critical barrier issue – common in other parts of the world – was that the heritage sector was concentrated upon heritage protection with “little commitment to socio-economic opportunities resulting from the uses of heritage resources” (Department of Tourism, 2012b: 29). The policy seeks to address these challenges and thereby unlock opportunities for the diversification of this niche segment of the tourism economy including both tangible assets (buildings, cultural objects, declared heritage sites, geological formations) as well as intangible assets such as oral traditions, cultural festivals and indigenous knowledge systems. Among its recommendations the strategy pointed to the imperative for further development of South Africa’s World Heritage Sites as well maximising the potential of projects such as the Dinosaur Interpretive Centre in Golden Gate Highlands National Park. South Africa’s provinces and local governments were recommended to identify and prioritise heritage and cultural products for tourism development (Department of Tourism, 2012a: 13). The spatial targeting of rural areas for tourism development remained a consistent policy theme. In a response given to a question in the National Council of Provinces the Minister of Tourism reiterated in October 2015 that the Department’s approach was “to prioritise spatial nodes that have the potential to stimulate growth of the rural sector in the country” (Ministry of Tourism, 2015b).

By 2017 a rethinking of policy towards rural tourism was under way. There was increasing discussion of the need for geographical targeting of rural tourism in so-called “villages, townships and small ‘dorpies’” (VTSD). The policy attention to improve lives in VTSD is an imperative that seems to have originated in North West Province as a component of the province’s repositioning and renewal strategy linked to radical transformation (North West Province, 2015). The revised National Tourism Sector Strategy took the position that in “an effort to meaningfully increase local benefits, particularly within host communities living in areas where tourism potential exists, effective business and enterprise development is required” (Department of Tourism, 2017: 37). The recognition of the challenges facing rural firms is significant and it was argued “developing rural areas for tourism needs a clear approach and understanding of the barriers that have restricted this to date” (Department of Tourism, 2017: 37). Based upon learning from the experience of both successful and less successful investments involving community partnerships in rural tourism businesses the NTSS suggested the need for “the grooming of a cadre of tourism entrepreneurs amongst neighbouring communities as opposed to the notion of community tourism which in most cases leads to infighting and subsequent

abandonment of great tourism infrastructure invested in communities” (Department of Tourism, 2017: 37). Overall, the revised NTSS recommended that the Rural Tourism Strategy “be revisited and updated to provide strong direction on implementation of a rural tourism programme taking into consideration these, and other factors” (Department of Tourism, 2017: 37).

During 2019 there was growing disquiet expressed in parliamentary committees about the slow pace of the implementation of the Rural Tourism Strategy (Parliamentary Monitoring Group, 2019). In addition, there is continual reinforcement of the disappointments about minimal marketing of rural tourism products as compared to game parks, game farms, well-known heritage sites or Vilakazi Street, Soweto. Greater efforts were needed to focus on villages, townships and small dorpias because of the poverty in these peripheral areas. Suggestions were made that the Department of Tourism should partner with the Department of Arts and Culture to get packages together on what was offered in VTSD destinations and so ‘make a difference’ to people’s lives there. In 2020 the argument of the need for greater attention to VTSD destinations was being made in relation to supporting transformation of the tourism sector (Parliamentary Monitoring Group, 2020). Concerning the limited implementation of the 2012 Rural Strategy the Department reiterated the position that “municipalities did not see the benefit of tourism in growing their revenue” (Parliamentary Monitoring Group, 2019: 24). In addition, for the Department of Tourism even to begin work in villages it was necessary that “other departments had to put basic services like water in place” (Parliamentary Monitoring Group, 2019).

At the close of the pre-COVID-19 era therefore it is apparent that a fluid situation existed in terms of the directions for rural tourism policy and for rural tourism product development in South Africa. Of paramount importance is to recognise that debates on rural tourism development and policy formulation in South Africa are not taking adequate cognisance of the spatially differentiated nature of rural spaces and the varying opportunities as well as challenges of fringe rural spaces, remote/exotic rural spaces, and of in between rural spaces. The COVID-19 crisis forces a renewed attention on both the potential opportunities and challenges of different spaces for rural tourism development in South Africa and of the need for evidenced-based research to inform future policy developments.

8. Case Studies

The three case studies selected for detailed investigation for rural tourism are as follows:

- In Limpopo Greater Giyani Local Municipality
- In Mpumalanga Thaba Chweu Local Municipality
- In Eastern Cape Raymond Mhlaba Local Municipality

A profile of the three case study areas will next be presented. This discussion is based upon a review of local municipal planning documents, IDPs and the I Global Insight data base. Available academic research relevant to the study areas is also drawn upon.

8.1 Greater Giyani Local Municipality

Greater Giyani Municipality is one of five local municipalities that comprise Mopani District Municipality of Limpopo Province. The other four local municipalities in the District Municipality are Greater Tzaneen, Greater Letaba, Ba-Phalaborwa and Maruleng. The Greater Giyani municipality is categorised as a Category B4 municipality in terms of the Municipal Structures Act 1998 because it is largely rural with only one semi-urban area being Giyani. The municipality has 10 traditional authority areas comprising 91 villages. The most recent population data indicates that the local municipality has a total population of 256 300 which makes it the second most populated in Mopani District Municipality (Greater Giyani Local Municipality, 2019, 2021a).

Giyani was founded during the 1960s apartheid period with its rationale as the administrative capital of the Tsonga people (Chekero, 2017). It was the location of forced population removals and the 'dumping' of relocated people under apartheid policies (Musehane, 2013). Officially established in 1969 Giyani functioned as the former capital of Gazankulu Bantustan. It was granted the status of an industrial growth point under the apartheid programme for industrial decentralization but failed to attract significant manufacturing investment with the consequence that the town evolved as a service centre for the surrounding regional area. Under apartheid therefore local development planning aligned with the ideology of Homelands development seeking to ensure that local inhabitants should make a living in the area and leave only to be a migrant labourer (van der Waal, 1991).

Currently, Giyani town is the administrative capital, the largest town and most densely populated settlement in the local municipality. It enjoys "the most employment opportunities as well as the best shopping and recreational facilities" (Mollel & Moyo, 2018: 1). Today it is the administrative and commercial heart of the Mopani district. Nevertheless, the municipality is categorised as a poor area with most of the local population dependent on social welfare grants as well as remittances received from family members working in other parts of South Africa. During the 2010s decade the recorded unemployment level for the municipality was as much as 47 percent. The economy of the municipality is underpinned by four sectors, namely agriculture, tourism, retail and transport (Greater Giyani Municipality, 2021a: 61).

The central goal of the local economic development (LED) strategy of Greater Giyani is to grow the economy through stimulating new employment opportunities and thereby to reduce the high levels of local unemployment. The local IDP asserts as follows: "Giyani municipality has a comparative advantage in the district because of its large tracts of productive land. The striking natural landscape and the major development corridor routes which pass via Giyani and our low crime rate can be a catalyst to serious economic growth" (Greater Giyani Local Municipality, 2021a: 65). This said, core challenges that the Giyani Local Municipality faces include; infrastructure development, lack of business investment attraction and retention strategies, lack of value chain, lack of enforcement of by-laws, budget constraints, lack of municipal property for economic development, distance to the markets. In addition, inadequate and dilapidated infrastructure for water and sanitation are challenges surrounding the poor delivery of basic services and infrastructure

development (Greater Giyani Local Municipality, 2019: 62). The 2019/2020 IDP noted a number of factors that impact negatively on economic growth in Greater Giyani. These include; geographical location (distance to markets), shortage of skills, poor infrastructure, climatic conditions and diseases (HIV and malaria).

The institutional environment for local economic development has been weak. There is a history of well-documented corrupt practices and maladministration in the local municipality around service delivery and housing, including in the allocation of Reconstruction and Development Programme houses with more than 50 beneficiaries being relatives of one ward councillor (Rikhotso, 2020). Greater Giyani was among a list of 87 municipalities classed as “distressed or dysfunctional” in the 2018 budget vote of the Department of Cooperative Governance and Traditional Affairs (2018). The Financial and Fiscal Commission (2020: 1) regards municipalities that have been declared as dysfunctional or in financial distress as those “unable to provide basic services to their citizens in a satisfactory manner”. Other research has disclosed major constraints on the growth of small, medium and micro-enterprises in the Greater Giyani municipality, namely “that business owners experience challenges, for instance, no entrepreneurial support is accessible to them and they struggle to get start-up capital for their businesses and as a result end up sourcing funds from micro-lenders” (Mnisi & Rankhumise, 2015: 72).

In a recent examination of the prospects for local economic development it was concluded that the sector of agriculture “has the greatest potential for stimulating growth and development in the Municipality” (Mollel & Moyo, 2018: 1). A drive to foster innovation-driven LED, the focus of national LED programming, would centre on increasing productivity in agriculture with spin-offs for the creation of new employment opportunities in agro-processing (Mollel & Moyo, 2018). In terms of agro-processing the primary business activity is value addition and post-harvest beneficiation of raw natural materials to produce commercial commodities that are sold to both domestic and international markets. Examples of local agro-processing are, *inter alia*, mopani worm processing enterprises, essential oils enterprises, beekeeping/honey production enterprises, oyster mushroom production enterprises, and small-scale commercial fishing and processing enterprises (Greater Giyani Local Municipality, 2021b).

Beyond the central role of agriculture and of agro-processing activities in the local economy there is growing interest in the potential for local tourism. The tourism potential of the area was investigated in the early 2000s by Henkens, Luttik, Tassone, de Groot, Grafakos and Blignaut (2005) as a joint research study conducted by academics at Wageningen University, The Netherlands and University of Pretoria. The study pointed to the existence of local potential surrounding culture-based tourism including cultural experiences in the villages. In addition, it drew attention to the potential for achieving greater linkages with the Kruger National Park if the existing ranger gate was changed to a tourism gate (Henkens et al., 2005). The potential synergies with Kruger National Park have remained an untapped opportunity for almost 15 years with the prospect that in 2021 the opening of Shangoni gate 40km from Giyani will attract more tourists. This gate has long been used by Kruger National Park employees and been planned as a public gate for some time. The Limpopo Department of Economic Development and Tourism announced plans to open the new gate and a tourism activity hub in the Kruger

National Park. The new entrance at Shangoni, situated between Giyani and Malamulele, will be an activity hub – with restaurants, fun parks and creativity centres that attract locals to visit (Sadike, 2021). The official municipal IDP views local tourism as enhanced by the area's striking natural landscape and close proximity to Kruger National Park which puts Greater Giyani "in a good stead to be a tourism destination of choice" (Greater Giyani Municipality, 2021a: 65).

Rural tourism in terms of local culture and heritage has been pinpointed as offering development potential across much of Limpopo (Mafunzwaini & Hugo, 2005). In the municipality's local economic development strategy issued for 2014-2016 it was stated that "the focus of Greater Giyani should be on cultural tourism with the 'Shangaan' brand as marketing tool" (Greater Giyani Municipality, 2014: 35). Notable potential cultural attractions were listed as the Baleni Camp, the Greater Giyani Jewellery Project and a heritage park. Giyani is included on one of the Open Africa route tourism initiatives, the Rixile Route, which includes a focus on cultural heritage attractions. The official municipal website portrays Giyani as in many ways still resembling "a friendly traditional village" with the people of Giyani known for "colourful folklore, which includes two recorded folktales, along with 1900 proverbs" (Greater Giyani Local Municipality, 2021b). Giyani is also viewed as rich in assets of cultural history, with royal families dating as far back as 1822 (Greater Giyani Local Municipality, 2021b). In addition, it is stated that the "municipality has potential for tourism and conservation development due to the existing natural heritage sites through the area (disused mines, abandoned farming schemes and processing of natural products such as Mopani worms and Marula fruit)" (Greater Giyani Municipality, 2019: 63). It is estimated that there are 700 tourist beds distributed amongst 50 bed and breakfast, lodges and a hotel in the municipality of which 70% are in or close proximity to Giyani. The Department of Water and Sanitation has concluded plans to maximize the use of the two dams as potential tourist attraction centres for water sports such as boating and fishing (Greater Giyani Municipality, 2021a: 66).

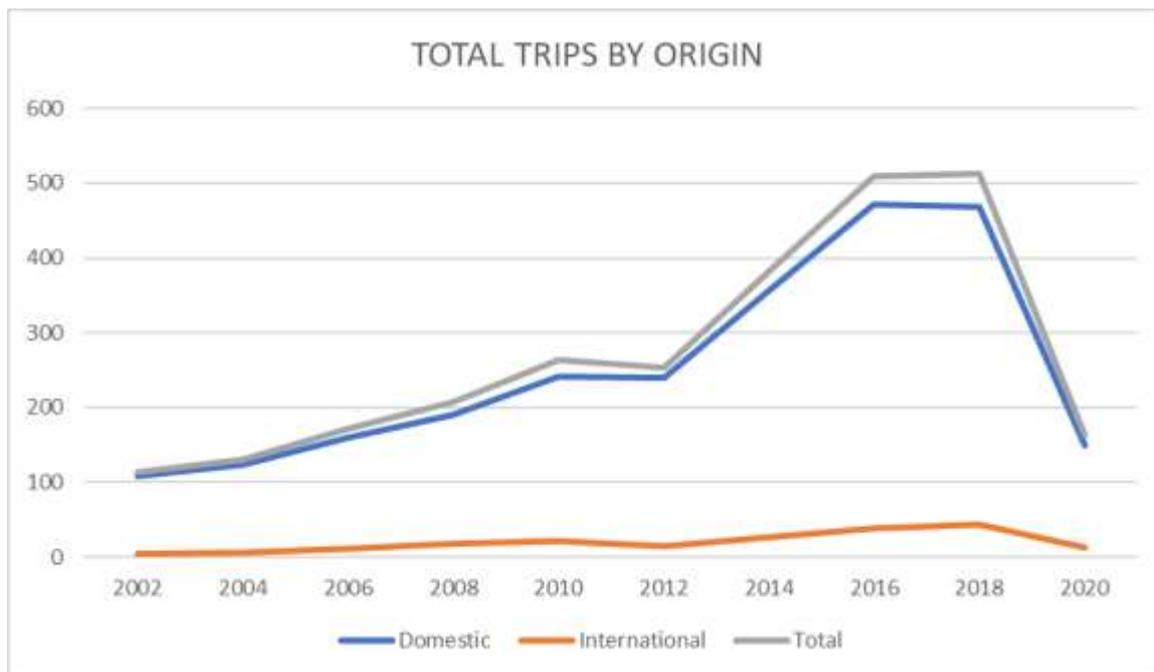


Figure 4: Greater Giyani Municipality: Total Trips by Origin 2002-2020 (Source: Authors based IHS Global Insight data)

Tourism trends in the local municipality can be tracked using statistics extracted from the IHS Global Insight data base for the period 2002-2020. The key finding that emerges from the analysis of the IHS Global Insight data is of the limited role of the tourism industry across the municipality. During a period marked by a considerable expansion as a whole of the tourism economy for South Africa the performance of the local tourism sector of Greater Giyani has been weak. Figure 4 shows the pattern of total trips and Figure 5 the breakdown in terms of purpose of travel. Although the number of total tourist trips recorded to Greater Giyani expanded from 114 000 in 2002 to reach a peak of 500 000 by 2018 the key cause of this growth was domestic trips for visiting friends and relatives. In Giyani this is to a large extent a reflection of lack of local employment opportunities which has caused a historical pattern of migrancy to search for work opportunities outside the Municipality. Throughout the period under investigation domestic trips accounted for between 76 and 90 percent of the origin of all tourism trips. The numbers of international trips is less than 20 000 until 2010 with a small upturn with the highest number of international trips recorded for 2018. Although no information is available on the country origins of visitors it is likely that the vast proportion of these international visits were VFR trips from surrounding African states especially Zimbabwe as Giyani is close to the border and has attracted a community of Zimbabweans (Chekero, 2017).

In reviewing the Giyani tourism data the most striking finding is the minimal leisure base for tourism development. Recorded numbers of leisure visitors first exceeded 10 000 in 2010 the year of the hosting of the FIFA World Cup. A small upturn occurred in the period 2014-2018. As the administrative capital for the local area Giyani receives a steady flow of small numbers of business travellers. Across all forms of tourism the COVID-19 has impacted severely the local tourism economy with downturns recorded most dramatically for domestic trips and for purpose trips for visiting friends and relatives. These trends are shown on Figure 5.

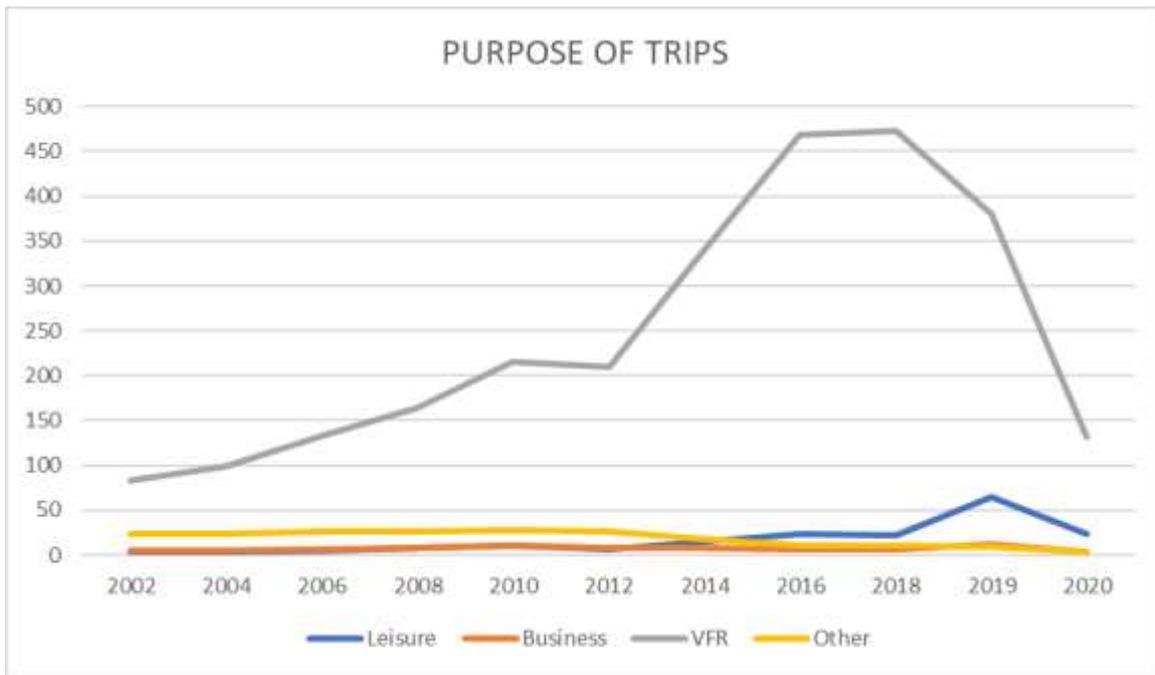


Figure 5: Greater Giyani Municipality: Purpose of Trips 2002-2020 (Source: Authors based on IHS Global Insight data).

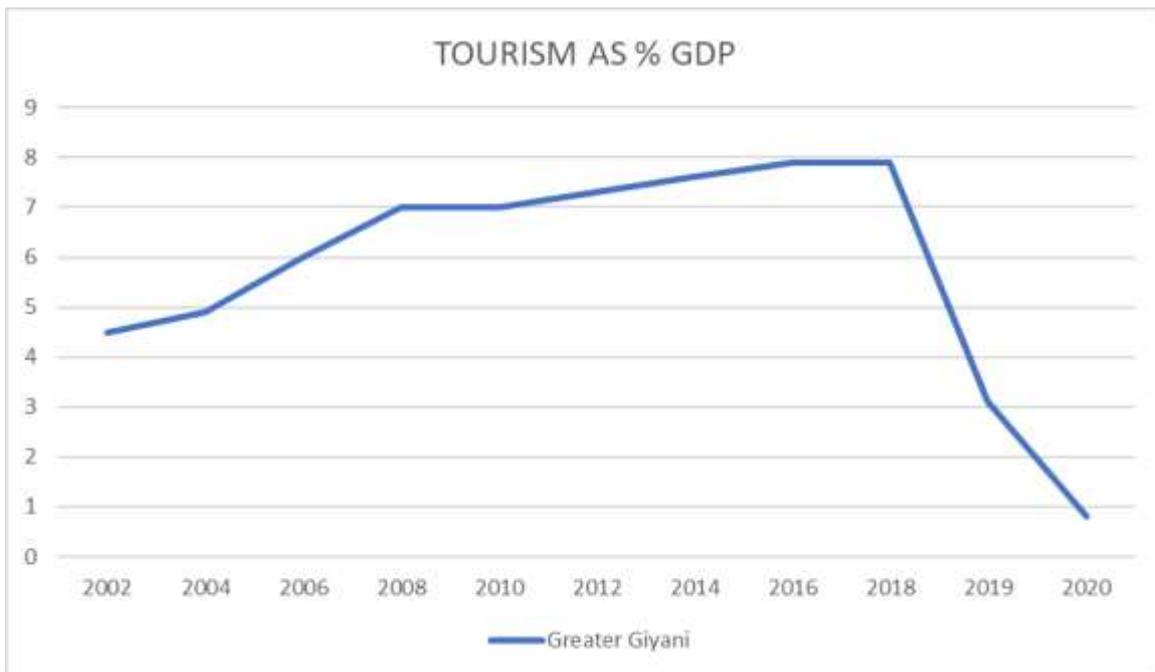


Figure 6: Greater Giyani Municipality: Tourism Contribution to Local GDP 2002-2020 (Source: Authors based on IHS Global Insight data)

The net impact of tourism spend in the Greater Giyani municipality as a proportion of local GDP is revealed on Figure 6. Accompanying the escalating numbers of VFR trips especially from 2006 the contribution of tourism increased which is perhaps a reflection of the underdevelopment of other sectors and general weakness of the local economy as a whole. By 2016 this had reached over 7.5% of local GDP with a boost in leisure travel which is evident from 2014. The devastation of the pandemic for tourism’s contribution to the local economy is evident by the indicators in Table 3

and most strikingly by the fact that by 2020 tourism contributed an estimated less than 1 percent of local GDP.

Table 3: COVID-19 Impact on Tourism Economy of Greater Gyani Local Municipality

Indicator	2019	2020
Total Trips	466 416	163 433
Leisure Trips	64 697	24 171
Business Trips	12 137	3 760
VFR Trips	380 624	132 264
Other Trips	8 958	3 239
Domestic Trips	425 989	149 987
International Trips	40 427	13 446
Total Tourism Spend (R'000 current prices)	586 214	160 492
Tourism Spend as % Local GDP	3.1	0.8

Source: Authors extracted from IHS Global Insight data

8.2 Thaba Chweu Local Municipality

Thaba Chweu local municipality is situated in the Mpumalanga Province in the Ehlanzeni District. It is one of four municipalities in the district and came into being after the December 5th 2000 local government elections (Thaba Chweu Local Municipality, 2017). Thaba Chweu was established as a Category B municipality following the phasing out of the former Lydenburg Transitional Local Council. Its geographic area includes the Lowveld escarpment in the far north-eastern part of the district and is bordered in the north by Limpopo Province. The municipality shares boundaries with Bushbuckridge local municipality in the east, Greater Tubatse Municipality in the north and the City of Mbombela Municipality in the south and Emakhazeni Local Municipality in the West. The municipality comprises fourteen wards and with four main towns of Lydenburg, Sabie, Graskop and Pilgrim's Rest. Lydenburg (now renamed Mashishing) is the largest town with 14 278 households, followed by Sabie with 5321 households, Graskop with 1 034 households and Pilgrim's Rest with 592 (Thaba Chweu Local Municipality 2019: 14). The municipality is the least populated in the Ehlanzeni District municipality. It is described as "plagued by high levels of unemployment, poverty and low skills levels (Koma, 2017). The main economic sectors in the municipality are forestry, agriculture, mining, business services and tourism. The area around Lydenburg is dominated by agriculture and farming activities whilst forestry is the main economic activity around Sabie and Graskop.

For nearly two decades the multiple shortcomings of local government have impacted negatively upon this municipality and its local development prospects in terms of the business environment. In 2004 the Mpumalanga Provincial Executive Council placed Thaba Chweu under the intervention of an administrator in terms of Section 139(b) of the Constitution (Koma, 2017). The administrator was mandated to examine financial mismanagement and maladministration which Councillors and official were alleged to be involved in. The administrator was appointed for 12 months. At issue were irregular granting of loans. In 2006 with local government elections a new Municipal Manager was appointed. In 2009 the municipality was again placed under Administration. The Provincial Executive Council in 2009 appointed an administrator as a "result of the violent public service delivery protest

that ensued and persisted for a few months and also the suspensions of the Municipal Manager and Chief Financial Officer over maladministration allegations and the removal of the Executive Mayor by the sitting Municipal Council” (Koma, 2017: 30). The administrator was appointed to turnaround the municipality regarding restoring basic service delivery and to improve institutional capacity. The issue of “flawed financial governance systems” was identified at the heart of the municipality’s troubles (South African Local Government Association, 2010: 1).

The governance issues in this municipality seemingly have been not resolved. During 2018 the Mayor’s report admitted the municipality faced many issues “amongst others being the slow pace of service delivery and unemployment” and in defence pointed to “this cumbersome task of reversing the legacy of colonialism” (Thaba Chweu Local Municipality, 2018: 5). In a 2019 report the mayor concedes that political and administrative leadership should provide “a vibrant local economy” but notes that “the day to day struggles of ageing and poor infrastructure and limited financial and human resources continues to place strain on the ability of Thaba Chweu Local Municipality to provide and improve its service delivery” (Thaba Chweu Local Municipality, 2019: 6). The Thaba Chweu Local Municipality has been listed amongst the distressed municipalities of Mpumalanga Province and placed under section 139 of the Municipal Finance Management Act on mandatory intervention emanating from financial crisis the municipality experienced in prior years (Thaba Chweu Local Municipality, 2019: 6). The 2019-20 report of the Auditor General on the state of local government audit outcomes in South Africa identified Thaba Chweu as one of a group of ‘worst case’ municipalities which were under administration which signalled that “there has been a total collapse of internal control, severe financial health problems, and a complete lack of accountability” (Auditor-General of South Africa, 2020a: 62). Thaba Chweu appears on the list 87 municipalities categorised as “distressed or dysfunctional” by the Department of Cooperative Governance and Traditional Affairs (2018).

Arguably, as observed by Dube (2018: 9) the economic potential of the municipality and its comparative economic advantages “have not been fully grappled with and actualized by the administrative and political leadership in the municipality”. In addition, as regards opportunities for LED “the municipality has not performed well” (Dube, 2018: 10). Koma (2017: 29) notes the deficiencies of local government must be set against the municipality’s strategic geographic position within Mpumalanga together with its various tourist attractions, agricultural, fly fishing and mining potential that could be turned into “profitable, beneficial and productive assets toward the creation of employment opportunities, poverty reduction and economic development”. In terms of tourism assets Thaba Chweu is the location of a number of South Africa’s major tourism attractions, many of which form part of the Panorama Route. Among the iconic attractions in the municipality are the Blyde River Canyon, Bourke’s Luck Potholes, God’s Window, Berlin and Lisbon Falls, Long Tom Pass, the heritage town of Pilgrim’s Rest, and Sudwala Caves. In addition, the Lydenburg area, the oldest settlement in modern-day Mpumalanga, is viewed as “a hub of heritage” where the famous Lydenburg Heads (dating back to 400 AD) were discovered in the 1950s (Thaba Chweu Local Municipality, 2017: 5).

The heritage assets of the municipality are concentrated also at Pilgrim’s Rest, the site of the first real gold rush in South Africa (Mabin & Pirie, 1985: 64). Arguably,

Pilgrim’s Rest, an open air urban museum, represents a “remarkable achievement in the field of public presentation of the past” (Mabin, 1994: 31). The tourism offerings within Thaba Chweu were recently strengthened by the opening of the Graskop Gorge Lift Centre which is now a major attraction in the area and a first such attraction in Africa. This major tourism asset was funded by the Thaba Chweu Local Economic Development Agency which was established following an agreement between the Industrial Development Corporation and Thaba Chweu municipality to “enhance and develop and create jobs within the municipal areas” (Thaba Chweu Local Municipality 2019: 66). The tourism assets of the area appeal to the market segment which is termed by Nduna and van Zyl (2017: 16) as ‘nature-escapists’ who search for “a peaceful, calming and pleasant aesthetic environment”. The long-established tourism economy of Thaba Chweu is dominated by White entrepreneurs. According to Dube (2018: 10) the progress of transformation is retarded by lack of financial resources and “lack of entrepreneurship and skills of historically disadvantaged groups to develop and implement cutting-edge marketing strategies or network with other organisations with the same objective”.

Tourism trends in the local municipality are investigated with the use of statistics extracted from the IHS Global Insight data base for the period 2002-2020. The major finding that emerges from the analysis of the IHS Global Insight data is that the Thaba Chweu local municipality ranks as one of South Africa’s few local municipalities where tourism has exhibited progressive growth consistently over the past two decades until interrupted by the COVID-19 crisis. Figure 7 shows the pattern of total trips and origins in terms of domestic as opposed to international travel. Figure 8 shows the analysis in terms of purpose of travel.

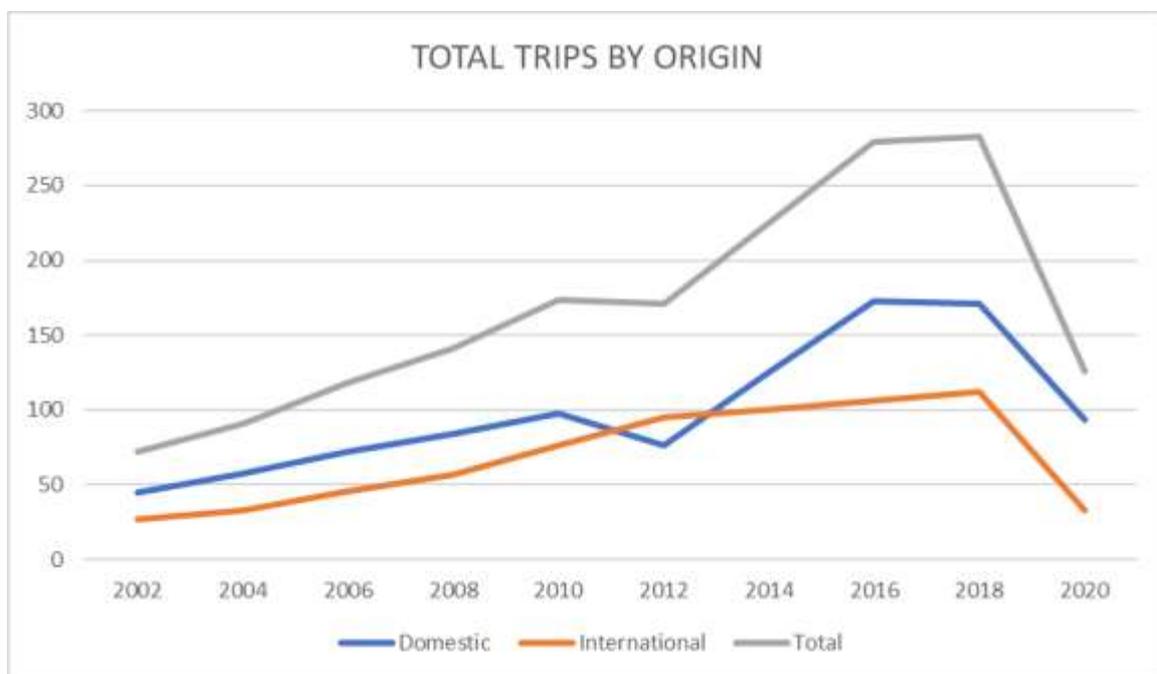


Figure 7: Thaba Chweu Municipality: Total Trips by Origin 2002-2020 (Source: Authors based on IHS Global Insight data).

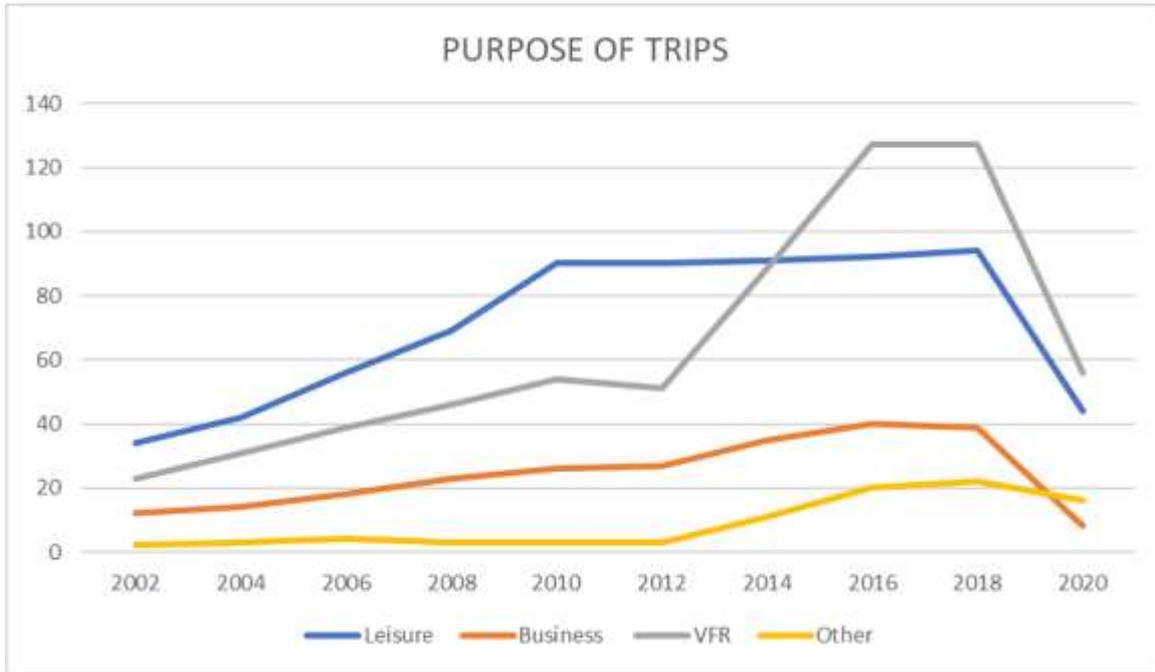


Figure 8: Thaba Chweu Municipality: Purpose of Trips 2002-2020 (Source: Authors based on IHS Global Insight data).

It is evident that between 2002 and 2018 the total numbers of all tourism trips almost quadrupled from 72 000 in 2002 to 283 000 in 2018 and as high as 324 000 in 2019 before the onset of the COVID-19 crisis. What is notable in terms of origin of trips is the consistent growth of both domestic and international trips with the exception of the downturn in domestic trips in the period 2010-2012 (Figure 7). International trips represent in most years at least 40 percent of all trips to the Thaba Chweu local municipality. The critical role of international tourists for the Thaba Chweu economy is underlined by bednight data differentiated by origin of trip which reveals that in 2016 international trips accounted for 69% of bednights a share which rises to 73% by 2018. Looking at purpose of travel the Thaba Chweu local municipality is distinctive in terms of rural tourism for the consistently high numbers of leisure trips and share of leisure trips in total trips recorded for the municipality (Figure 8). Since 2014, however, the largest number of trips is accounted for by the segment of visiting friends and relatives. Leisure trips in total rise from 34 000 in 2002 to 90 000 by 2010 and stabilised around that number until 2019 when they reached a new peak of 116 000 trips. As is demonstrated on Figure 8 VFR travel trips spiked to over 100 000 in total from 2016.

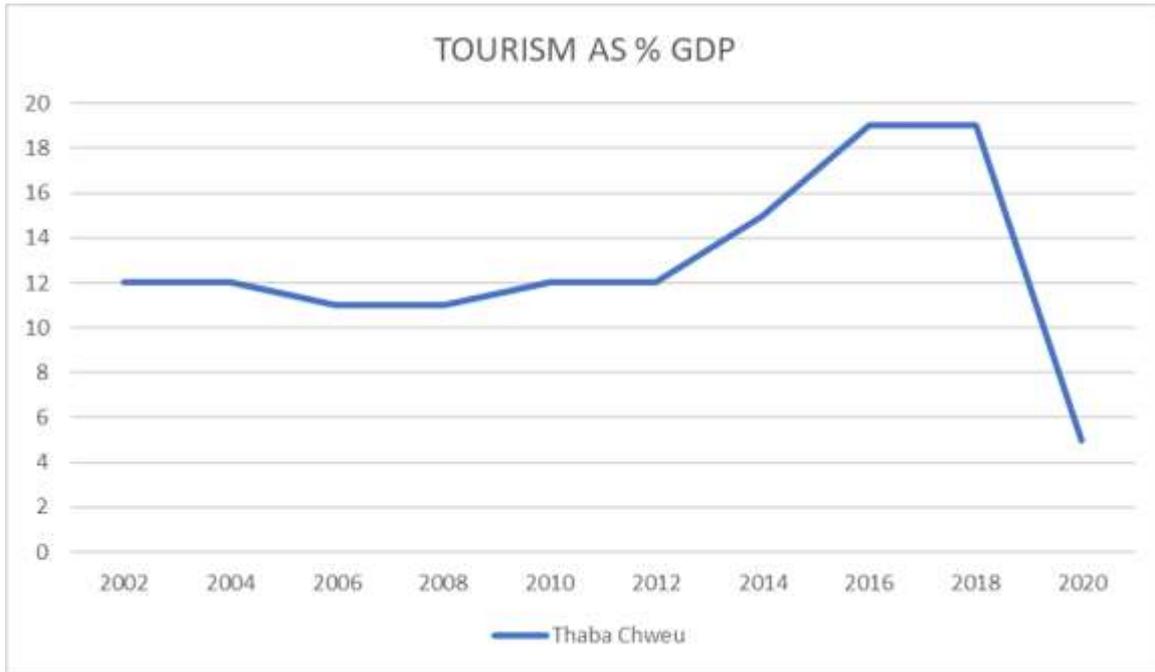


Figure 9: Thaba Chweu Municipality: Tourism Contribution to Local GDP 2002-2020 (Source: Authors based on IHS Global Insight data).

Thaba Chweu tourism was clearly hit hard by the COVID pandemic impacts as leisure travel collapsed from the 2019 peak of 116 000 to 44 000 trips which puts the leisure numbers back to 2004 levels. The COVID-19 decline is manifested in both the dramatic fall in both domestic and international trips; in the case of domestic travel from a 2019 peak of 228 000 to 93 000 in 2020 and from 96 000 to 33 000 for the international trip segment. The data relating to tourism’s contribution to local GDP highlights the vital role of the tourism sector for local economic development and job creation in this local municipality (Figure 9). With tourism contributing at least 11 percent to local GDP throughout the period 2002-2012 and growing to 19 % by 2018 Thaba Chweu must be classed in the category of a tourism-dependent locality. The ravage of COVID-19 for the local economy through the downturn in tourism is reflected in tourism’s share of local GDP falling precipitously to 4.8% in 2020. Table 4 captures through a series of indicators the COVID-19 impact of tourism for this municipality.

Table 4: COVID-19 Impact on Tourism Economy of Thaba Chweu Local Municipality

Indicator	2019	2020
Total Trips	324 910	125 773
Leisure Trips	116 263	44 824
Business Trips	24 843	7 988
VFR Trips	142 859	56 875
Other Trips	40 946	16 076
Domestic Trips	228 330	93 069
International Trips	96 580	32 705
Domestic Bednights	695 964	271 042
International Bednights	1069 454	370 119
Total Tourism Spend (R'000 current prices)	1609 295	616 919
Tourism Spend as % Local GDP	12.3	4.8

Source: Authors extracted from IHS Global Insight data

8.3 Raymond Mhlaba Local Municipality

Raymond Mhlaba Local Municipality is part of the Amathole District Municipality and is a category B municipality in the Eastern Cape. It is the largest of six municipalities in the District and was established by the amalgamation of Nkonkobe and Nxuba Local Municipalities on 3 August 2016. The Raymond Mhlaba Local Municipality is bordered by the Makana Local Municipality, Blue Crane Local Municipality, Amahlathi Local Municipality, Ngqushwa Local Municipality, Enoch Mgijima Local Municipality and the Buffalo City Metropolitan Municipality. It is described as a “countryside municipality that includes the imposing and majestic mountain range of the Winterberg” (Main, 2021). The municipality covers an area of 6 357 square kilometres with the main towns being Adelaide, Alice, Bedford, Fort Beaufort, Hogsback, Middelrift and Seymour. This small town and rural municipality comprises territory part of which was formerly in the Ciskei Bantustan.

The municipality endures an unwelcome reputation for poor governance which has impacted all spheres of service delivery and local economic development. The inability of local government to implement local development initiatives can be traced as far back as the 1990s (Nel, 1997). One recent study revealed the challenges faced by Raymond Mhlaba Municipality in implementing Back-To-Basics (B2B) Programme and highlighted corruption and mismanagement of funds, improper understanding of the municipality’s Integrated Development Plan and roles of the different government departments. The poor communication skills between members also revealed that the municipality had not done well in their implementation because of considerable evidence of water crises, empty promises, and unrealistic/fake promises. Such issues have constrained the municipality from undertaking socio-economic projects to tackle local poverty. The 2017 Parliamentary Monitoring Group stressed that “Raymond Mhlaba Local Municipality has failed a number of times in focusing their implementation of the B2B programme on procurement, planning and project management infrastructural delivery. Many other problems such as excessive or overspending on unnecessary projects, deception/fraud or dishonesty; poor budgeting maintenance, restoration and also the replacement of ageing organization have resulted in poor quality as well as service breakdown which have been seen as impediments (Zengethwa, Thakhathi & Oyelana, 2019: 119).

The Department of Cooperative Governance and Traditional Affairs (2018) identifies Raymond Mhlaba Local Municipality as a distressed and dysfunctional local municipality. According to the Financial and Fiscal Commission (2020: 2) this means at its broadest level that it “is therefore characterised by the failure to deliver expected outcomes and comply with key processes”. The municipality is named also in the 2019-2020 report of the audit outcomes of the State of Local Government produced by the Auditor General of South Africa (2020a). It is listed as a municipality “that disclosed significant doubt in their financial statements as to whether they will be able to continue operations in the near future” (Auditor-General of South Africa, 2020a: 19). This means effectively that the municipality does not have sufficient revenue to cover expenditures and that they owe more money than they have which means reliance on national government equitable share funding to continue operations. In addition, the Auditor-General of South Africa (2020b) points to a catalogue of financial funds mismanagement practices with allocated national funds being handled “in ways that are contrary to the prescripts and recognised accounting disciplines”.

In terms of the physical environment, the landscape and topography is mainly flat except in the northern Hogsback Region which has peaks of 1700-2000m above sea level. Most of Raymond Mhlaba is characterised as an “undisturbed and untouched environment, therefore the biodiversity in the area is very rich” (Raymond Mhlaba Local Municipality, 2021: 42). Agriculture is a leading sector in local economic development (Main, 2021). Nevertheless, tourism also is viewed as “one of the key sectors of economic growth” for Raymond Mhlaba Local Municipality (Raymond Mhlaba Local Municipality, 2020: 39). This is because the locality is “renowned for its rich heritage and history” (Raymond Mhlaba Local Municipality, 2020: 39). It is the location for the University of Fort Hare, Lovedale college, the Historical Adelaide Gymnasium High School and Healdtown with a historical mission station. In addition, the municipal area contains several tourism routes. Despite the potential assets for tourism development it is acknowledged that this “rich history and heritage, however, is not yet exploited” (Raymond Mhlaba Local Municipality, 2020: 39). The Hogsback area is the most popular leisure tourism focus in the municipality and since 2001 has hosted a winter festival ‘Christmas in July’ as a means to address seasonality issues (Mekuto & Tseane-Gumbi, 2017).

Tourism receives little discussion in academic investigations of the small towns and rural areas of Raymond Mhlaba Local Municipality (Nel, 1997; Xuza, 2005; Ntema, 2021). One exception is research on South Africa’s ‘least visited spaces’ for 2015 which identified the former Nxuba Local Municipality (centred around the towns of Adelaide and Bedford) as one of the ‘non-tourism’ spaces in the country. It was among the lowest ranked 30 municipalities in relation to a series of indicators concerning total tourism spend, total tourism trips and total bednights. (Rogerson, 2017). A profile of local tourism development for the period 2006-2020 can be charted from an analysis of data extracted which is from the IHS Global Insight data base; for the period 2006-2016 the data for the former Nxuba and Nkonkobe local municipalities is combined. The analysis reveals a tourism economy that manifests an overall steady decline since 2010. As is shown on Figure 10 the local tourism economy is overwhelmingly dominated by domestic tourists and, with the exception of the upturn in trips recorded for 2019, the tourism sector shows a constant decline

in visitor trips. International tourism is almost non-existent in the area which records only an average of 5000 trips on an annual basis throughout the period 2006-2020.

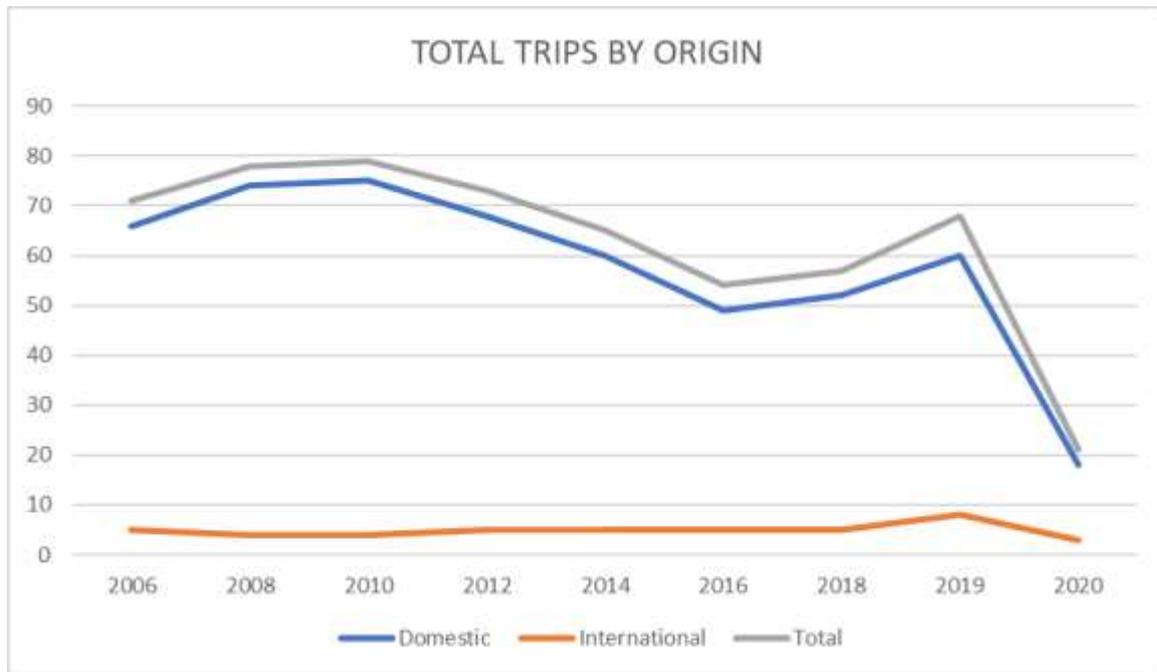


Figure 10: Raymond Mhlaba Municipality: Total Trips by Origin 2006-2020 (Source: Authors based on IHS Global Insight data).

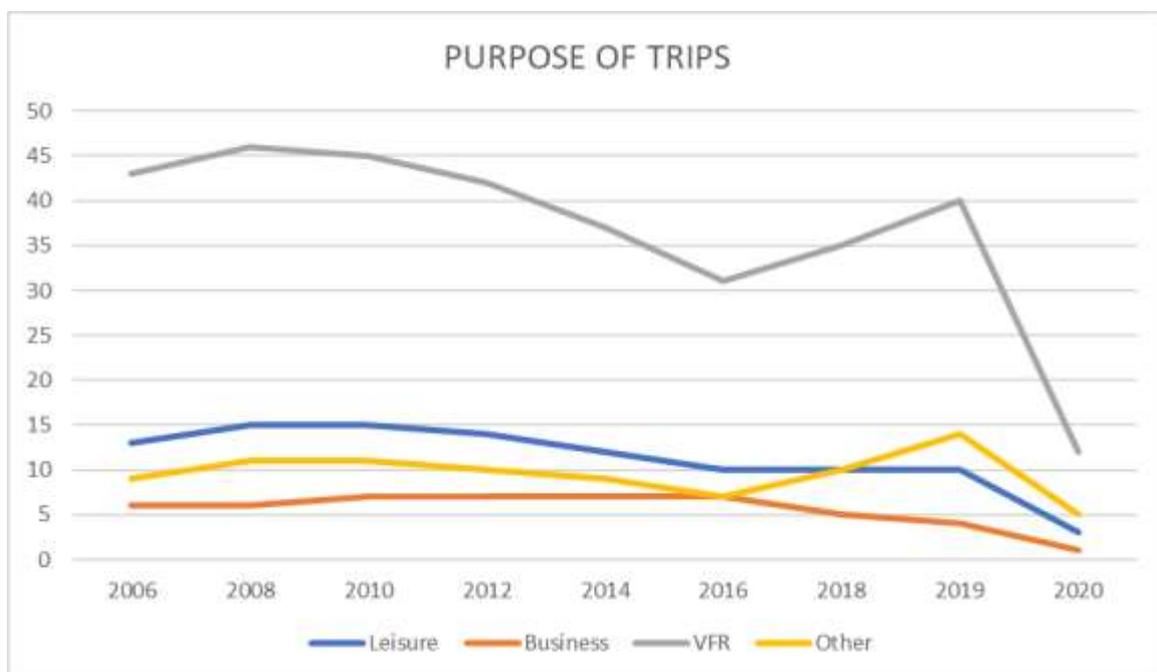


Figure 11: Raymond Mhlaba Municipality: Purpose of Trips 2006-2020 (Source: Authors based on IHS Global Insight data).

Figure 11 reveals that within the category of domestic tourism the greatest share of trips is accounted for by visits from friends and relatives. This is a consequence of migration histories which is typical of former Homeland rural areas with a high proportion of split or geographically stretched households. The sector of leisure

travel has only limited representation in the local municipality and exhibits a trend of stagnation and decline during the pre-COVID-19 period. Business travel is of minimal significance and in the period 2016 to 2019 the category of 'other' travel, mainly accounted for by trips for religious or health, exceeds even the numbers of trips for either business or leisure travel.

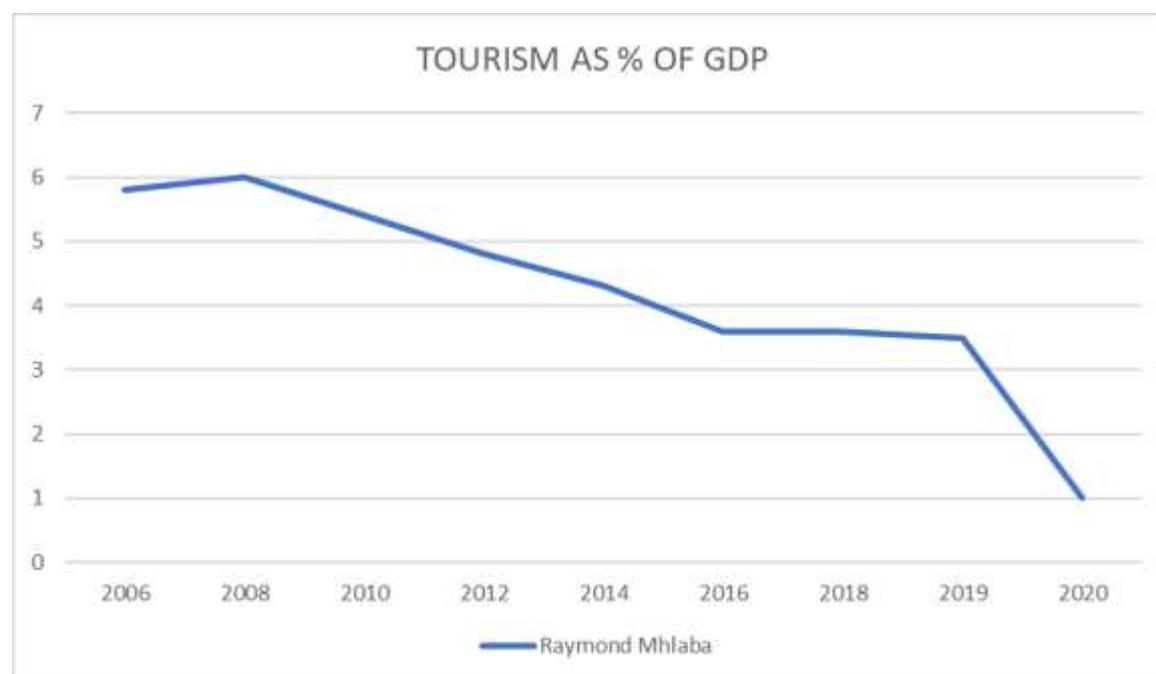


Figure 12: Raymond Mhlaba Municipality: Tourism Contribution to Local GDP 2006-2020 (Source: Authors based on IHS Global Insight data).

The emasculated state of the tourism sector is demonstrated most clearly in the data concerning tourism spend as a proportion of local GDP. This is shown on Figure 12 and points to a constant decline in the contribution of tourism to local economic development in the Raymond Mhlaba Local Municipality. For this rural municipality with its basket of heritage and natural assets for tourism development, the performance of tourism is unpromising as a potential sector for employment creation and poverty alleviation.

Table 5: COVID-19 Impact on Tourism Economy of Raymond Mhlaba Local Municipality

Indicator	2019	2020
Total Trips	68 430	20 452
Leisure Trips	9 592	2 640
Business Trips	4 404	1 058
VFR Trips	40 256	11 693
Other Trips	14 178	5 062
Domestic Trips	60 470	17 800
International Trips	7 960	2 652
Total Tourism Spend (R'000 current prices)	232 837	65 398
Tourism Spend as % Local GDP	3.5	1.0

Source: Authors extracted from IHS Global Insight data

Table 5 summarises the ramifications of COVID-19 for local tourism. Its negative effects are shown in total trips decline from 68 000 to 20 000, leisure trips down from 9500 to 2600 and net contribution of tourism to the local economy diminished from 3.5% to 1 per cent. Arguably, whilst Raymond Mhlaba does not fall into the group of tourism-dependent local economies these negative COVID-19 impacts on the tourism economy are concerns they are locally impactful.

8.4 Conclusion

Arguably, from the profile of the three case study municipalities, analysis of documentary sources and of available tourism data four key findings can be observed:

- First, the material points to the geographical variations in relation to the character and challenges facing rural tourism. The contrasts are particularly stark between Thaba Chweu which is clearly a growing focus for rural tourism based on leisure as opposed to Greater Giyani, with its limited leisure travel and a tourism economy massively dominated by VFR travel as well as Raymond Mhlaba which is an example of a rural tourism economy which has been stagnant or in decline for the past decade and a half.
- Second, the findings underscore the need to conceptualize and plan for rural tourism spaces at the minimum in terms of (at least) three categories of fringe, in between and remote/exotic as proposed by Carson (2018), Carson and Koster (2019), and Koster and Carson (2019). In our three case studies Greater Giyani and Raymond Mhlaba Local Municipalities exemplify rural spaces that are 'in between' and in many respects trending towards becoming 'non-tourism spaces'. By contrast, Thaba Chweu with its iconic attractions is akin to an exotic rural space and one with both good road and air transport accessibility for domestic and international tourists.
- Three, is the poor and unsupportive institutional environment for rural tourism development in all case study local municipalities. The research points to an environment for rural tourism which is dominated by considerable mismanagement and local government shortcomings as is underlined by the fact that all three case studies are run by local governments classified by the Department of Cooperative Governance as "distressed and dysfunctional". Issues of maladministration and corruption have been widely documented in some cases for a period of almost 15 years.
- Four, the devastating impacts of COVID-19 for the tourism economies of all three local municipalities are apparent. In all three local municipalities the largest absolute declines in tourism trips are accounted for in terms of VFR travel. Not surprisingly, the numbers of both leisure and business trips in each municipality was radically cut; in the case of Thaba Chweu a 70% decline in leisure travel was recorded. The significance of domestic tourism in all three local municipalities is shown, albeit in the case of Thaba Chweu the market of international tourism remains critical. The result of greatest concern is the dramatic reduction *within one year* in the contribution of tourism to local GDP because of COVID-19 impacts: in Greater Giyani from 3.1% to 0.8%, in Thaba Chweu from 12.3% to 4.8%, and in Raymond Mhlaba from 3.5% to 1%.

In final analysis these findings underscore the imperative for stimulating a recovery in tourism into these areas for promoting local economic development. In addition, they point to the imperative for evolving a policy framework for rural tourism revival which is not a one-size-fits-all policy but is anchored on the nuances and challenges of (often) markedly *different* rural tourism spaces. The following section turns to the results of the interviews which were conducted for this study to inform policy development.

9. Findings from Interviews

This section turns to a discussion and analysis of the findings from the interviews which were conducted with 70 tourism stakeholders across the three case study local municipalities. The 70 interviews relate to 25 at Greater Giyani, 25 at Thaba Chweu and 20 at Raymond Mhlaba. The results are organised separately for each of the three local municipalities. In the presentation of findings direct quotations from interview respondents are included in order to highlight the views of local rural tourism stakeholders as expressed in their own words.

9.1 Greater Giyani: Interview Findings

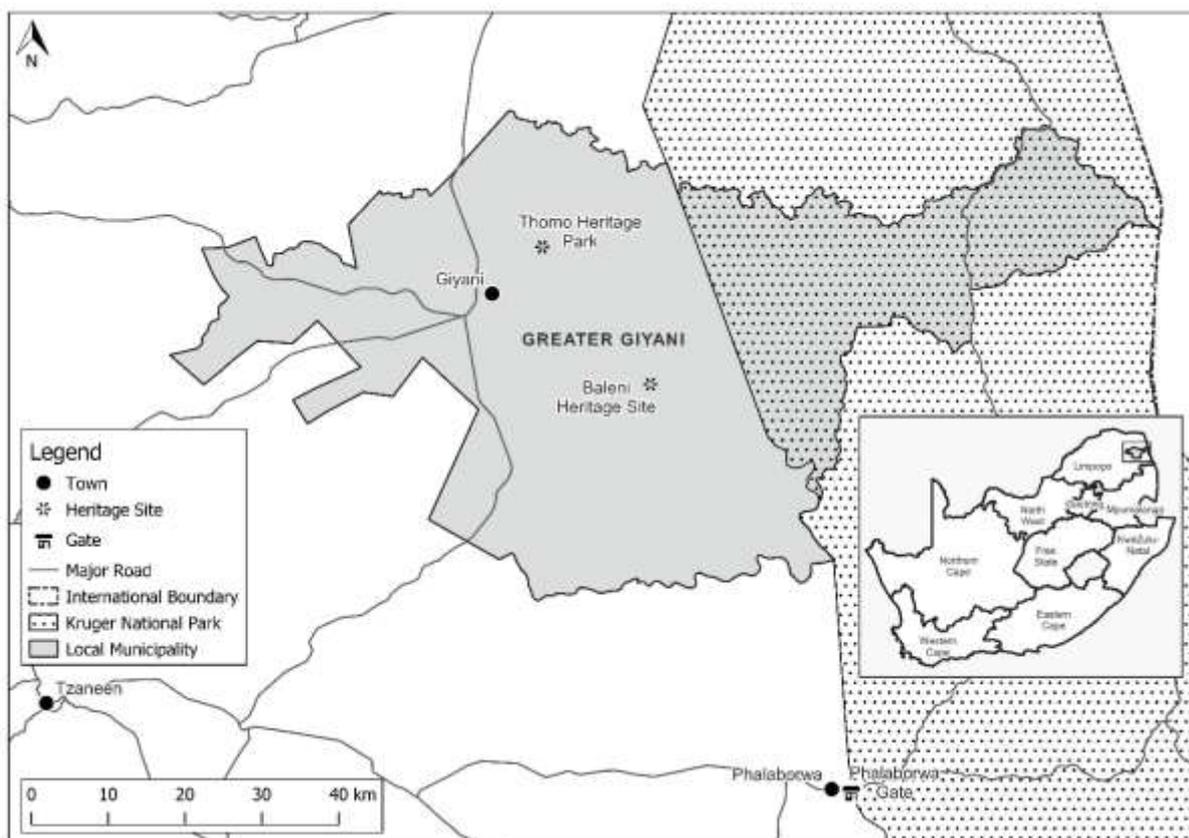


Figure 13: Location of Greater Giyani (Source: Authors)

9.1.1 Overview of businesses

For the study 25 interviews were completed in Greater Giyani municipality. The majority of these interviews – 19 in total - were conducted with accommodation establishments. In addition, three interviews were undertaken with attractions, including the Thomo Heritage Park, and three interviews with businesses that were involved with events. It was observed that the majority of the interviewed businesses were well-established; 22 businesses had been operating for at least 5 years and only three establishments had been in operation for less than two years. Of the cohort of accommodation service establishments 16 of the 19 had been operating for five years. It was observed that one of the most recent additions to the accommodation sector in Giyani is a boutique hotel with spa that had been in operation for just over one year. An overview of some basic attributes of the surveyed businesses is given in Table 6. It is evident that 21 of the 25 businesses would be classed as micro-tourism businesses as all had less than 10 employees. The largest employer in the sample of respondents was a newly established hotel (one year in operation) with 27 employees. The vast majority of the sample (24 of 25) operate their business on a full-time basis. Of the sample of enterprises 22 of the 25 would be classified as micro-enterprises which are typical in rural tourism.

Table 6: Profile of Giyani respondents

Code	Type of Business	Years in Operation	Number of Employees	Primary source of income	Operates all year?
G1	Accommodation	12	7	No	Yes
G2	Accommodation	8	6	Yes	Yes
G3	Accommodation	11	16	No	Yes
G4	Accommodation	14 months	5	Yes	Yes
G5	Accommodation	11	8	No	Yes
G6	Accommodation	6	3	No	Yes
G7	Accommodation	19	7	No	Yes
G8	Accommodation	7	5	No	Yes
G9	Accommodation	15	4	Yes	Yes
G10	Accommodation	6	5	No	Yes
G11	Accommodation	8	4	Yes	Yes
G12	Accommodation	9	3	Yes	Yes
G13	Accommodation	8	4	Yes	Yes
G14	Attraction	21	9	Yes	Yes
G15	Accommodation	14	8	Yes	Yes
G16	Attraction: Beads	14	10	Yes	Yes
G17	Accommodation	> 1 year	4	Yes	Yes
G18	Events	7	7	No	No
G19	Events	10	11	No	Yes
G20	Accommodation	24	5	No	Yes
G21	Accommodation	17	8	Yes	Yes
G22	Accommodation	1	27	Yes	Yes
G23	Accommodation	21	7	Yes	Yes
G24	Events	8	3	Yes	Yes
G25	Attraction	11	9	Yes	Yes

Source: Authors

All the tourism enterprises were owned by Black South Africans, a finding which confirms a pattern of their dominant ownership of tourism establishments in the former Homeland areas (Rogerson & Sixaba, 2021). When asked to state the reasons for starting a tourism business in the Greater Giyani Municipality all respondents stated that they saw a window of opportunity in the tourism industry. Common responses were *“I saw an opportunity”* and *“I needed to generate extra income”*. For 15 of the sample of 25 respondents the tourism business was the primary source of household income. Typical responses were: *“This business is my one and only source of income”* (G2) and *“This is my bread and butter...my only source of income”* (G13). For 10 of the respondents, however, tourism was part of a broader household income diversification strategy and not the primary source of income. One guest house owner stated *“I have two buses and a taxi that operate on a daily basis”* (G6) while another accommodation provider observed *“I have rooms I am renting out”* (G7). A lodge owner highlighted that *“We have other businesses...I also have a farm”* (G8). These responses indicate that for a considerable segment of tourism businesses in Giyani the tourism component is a means to supplement other livelihood activities in the region.

9.1.2 Perceptions of the Local Municipality

Giyani is the largest town in the municipality and the administrative capital for Mopani District, Limpopo. For the majority of the accommodation respondents Giyani was perceived overwhelmingly as a destination for corporate travel and business tourism destination rather than as a leisure hub. One lodge operator stated as follows: *“Since we started to run this guesthouse, we have realised that most of our guests come here for work purposes”* (G8). Another lodge which had been functioning for 17 years offered similar views: *“To do business. That is the number one, which is our main business is business”* (G 21). It was elaborated that many of the lodge’s clients were often either contractors working at the local mall or business which was associated with the local soccer matches and stadium: *“We’re fully booked with SABC, the broadcasting guys with their broadcasting vans and trucks”* (G21). Other respondents drew attention to business generated by the opening of new mines close to Giyani. The hosting of conferences and events – including political events - was seen as another significant element for local tourism. The lodge operator stated *“I would say in the past three months, we’ve seen a huge amount of revenue coming from conferences.”* (G21). Another focus for Giyani accommodation services has been linked to the hosting of delegates at political rallies with one lodge drawing attention for example to business derived from EFF meetings linked to elections. To support the further development of business tourism it was evidenced that a significant portion of the accommodation establishments have established conferencing facilities which range from large board rooms to small meeting rooms.

Beyond business tourism with Giyani’s location relatively close to Kruger National Park, many respondents highlighted the leisure opportunities in the area. It was observed, for example, that *“People mainly come to Giyani for work and they sometimes use this area as a by-pass to Kruger National Park”* (G 13) and that *“Over the holidays, people would come and spend time in Giyani on their way to Kruger National Park”* (G12). These findings point to Giyani as functioning as an ‘in-between’ location or transit stop for many tourists on their way to the national park. Indeed, the opportunity for stops along the route to the Kruger National Park had served as

reasons for the establishments of certain accommodation businesses. Only a handful of respondents perceived Giyani as a destination with significant assets for the development of leisure tourism. The general viewpoint was summarised by one respondent: *“Giyani is not much of a tourism place. Maybe I can say Giyani is used as a gate to Kruger but all in all Giyani doesn’t have attractions for tourists”* (G18).

The tourism assets usually mentioned focused on local culture and heritage. An accommodation establishment operator expressed the viewpoint that: *“Some of our major attractions are Thomo Heritage Park where tourists can get to learn about the local culture and history”* (G8). The importance of culture was reiterated in other responses: *“A lot of people come to Giyani to learn about the Shangaan culture”* (G7). Host communities in the Greater Giyani district still practice traditional ways, and the traits that distinguish them serve to create an appealing rural tourism experience for visitors to the municipality. Such assertions are corroborated by the following statements:

Well, one of the major attractions in this area, besides the Kruger National Park, is that we also have a heritage site that people can visit if they want to learn about the history of the Tsonga people. (G2)

We’ve got some dance groups, a couple of traditional artists, some local artists... we often host cultural activities. (G16)

Around this area, we have Baleni, a heritage site where old ladies manufacture salt in an indigenous way. They collect the salty sand from the river and extract the salt from there. It’s a long process, but in the end, they produce nice salt...the soft fine salt. There are also ladies who manufacture beads and also do some beadwork in the area, as well as clay pottery (G3)

The most significant locations around culture and heritage assets in Giyani that were discussed by interviewees related to the Thomo Heritage Park and the Baleni Heritage Park (Figure 13). Other potential leisure assets related to the attractions of artisanal local pottery, beadmaking, local artists and wood-carving, traditional natural salt and iron-making, and the hot springs at Baleni. The deepening of the culture and heritage products assets by the addition of museums and further activities such as story telling was viewed as useful.

Finally, the role of visiting friends and relatives tourism was acknowledged by at least one respondent who indicated that many tourists in the Greater Giyani district are celebrating important life stages with visits for family-related reasons: *“People just enjoy coming to Giyani for events like weddings, funerals and everything”* (G3). This shows an awareness that visiting friends and family is perceived as a notable segment of tourism in the region.

The respondents offered several suggestions on how Giyani might expand leisure visitor flows. A requirement for more facilities for the entertainment of tourists was highlighted by many respondents with comparisons often drawn with other towns offering a greater range of leisure activities. A typical response was as follows: *“The area needs more tourist sites to accommodate different age groups because currently there is not much to do and instead people go to Tzaneen for recreational*

activities" (G6). Another respondent bemoaned "*more needs to be done to make Giyani a tourist hub*" (G13). The need to diversify the range of local offerings beyond culture and heritage was expressed frequently (G9). One suggestion was the possibility of reviving and restocking a local nature reserve that no longer was functioning as well as for developing a local river for fishing. The issue of establishing local entertainment attractions for the youth market was pointed out as essential: "*Currently we have only a few activities in Giyani and the youth is not really into culture, so if we can get more activities they would not see the need to go to other destinations*" (G10).

9.1.3 Perceptions of Local Government

The majority of respondents were highly critical of the activities and role of local government. Overall, most respondents perceived that local government failed to fulfil its service obligations with the consequence of constraining tourism development in Giyani and the operations of tourism business owners.

Issues around the quality and lack of maintenance of infrastructure were flagged by many of the interviewees as constraints on local tourism development. One accommodation provider expressed the view that: "*Infrastructure is the biggest problem; in fact I can say it is the biggest stumbling block. The Phalaborwa-Giyani road is full of potholes. It is a disgrace*" (G1). Similar sentiments were common: "*Our roads are really bad and there is no distinction between tarred roads and gravel in some areas. Our municipality is really failing us because our guests become reluctant to return to Giyani because of the bad roads*" (G2). Likewise: "*The government is not helping us with infrastructure because they do not want to attend to the roads*" (G9). Poor signage is a further challenge for tourism development: "*The biggest challenge is infrastructure. When our guests arrive in Giyani and they lose their GPS signal they cannot easily get to us because we still don't have signage because of financial constraints*" (G3). Poor availability of water and lack of provision of street lighting (even in the middle of the town) were added municipal failings. Limited or poor quality maintenance was another issue raised in respect of infrastructure: "*Quality costs... I think our municipality buys cheap material so they can keep the rest of the money for themselves*" (G6). The financial losses imposed on local tourism businesses from the failure of local government to maintain basic infrastructure were noted by one accommodation provider: "*I have lost a lot of business due to lack of infrastructure. I had people who were willing to rent for five years but they changed their mind as soon as they came because of the potholes*" (G7)

In reviewing the role of the local government in the Greater Giyani, the majority of respondents confirmed the lack of assistance from local government for tourism businesses and also raised issues of municipal mismanagement.

Local government will support those small businesses, they call them 'small businesses', which were long established that's where the money goes. So that it gets channeled to come back to their pocket (G19).

We are on our own. I even had to ask my husband to pave the road leading to the lodge because it was full of potholes and that was affecting my business. Nothing was being done, maybe if they could be passionate about this tourism thing, maybe things would be different...but besides that ...we are really on our

own. but I guess they help where they can; I just don't think it's not enough (G3)

I noticed that we are not getting the support that we should be getting from the local municipality. The local municipality is the authority that should help and pick up each one in this area. But because of the problems of corruption where some individuals are being, you know, given services most of the time, so it's really not helping. (G2).

Several respondents reflected also on differences in how local government used to support tourism businesses and facilities in the past:

The local government is a big problem. They are no longer helping us in any way. Back in the day they used to take us to Tourism Indaba on a rotational basis, they would sponsor our transport, accommodation and meals for us to go and experience what we are also offering to other people, by doing that I personally got the opportunity to learn and benchmark my business... But now, things are different I think the majority just lacks vision (G9)

So, for example, Giyani had a functional library and a recreation centre, you know, the army had a functional Rehab Centre, had functional pools, had functional tennis courts, and so on and so forth. The politicians decided to neglect and not maintain over the years. So if those things [are] done, you will definitely get more people travelling, definitely get more people doing spontaneous things and things that will get them off their chairs, or their beds, and so forth. Now, because there wasn't any maintenance of different things, it's going to be a problem to get them to a point where they become attractions for people to look at and go to because even if you go to Phalaborwa, or someone says, 'Oh, we are in Giyani come here', the first thing that person will ask is, 'What am I going to drink? And the dining?' Why can't the government just maintain the existing structures? Because it the existing structure that supports this business, there is no way about there's no way around it. (G22)

Finally, the question of traditional land ownership emerged as a specific issue from certain responses. Indeed, in certain parts of Giyani, frustrations exist concerning land rights and their impact on services. These frustrations are expressed in the following statements:

The local government is a huge stumbling block ...I sometimes feel like these politicians want to see us suffer. For example, when I started this business, I was always questioned about my rights to occupy this area, little did they know that here in Giyani, things are done differently ...the chief is the one who makes decisions when it comes to land rights (G10)

To be honest, Giyani is not 100% owned by municipalities. It is [the] municipalities and the chiefs. So when the local municipality wants to build something, permission needs to be granted by the chief... this is a big challenge. (G4)

The role of traditional land ownership issues emerges therefore as a particular constraint on tourism development in Giyani that needs to be managed appropriately by local government. Overall, however, it is apparent that the majority of tourism business owners in Giyani perceive the local municipality in a highly negative way. The essential concerns centre around a cluster of issues mainly about infrastructure, lack of road maintenance, lack of engagement with the problems of tourism businesses and broad questions of governance and corruption.

9.1.4 The Influence of COVID-19

The study respondents were asked to describe the state of their business, in a word or phrase, before and since COVID-19. There was a consensus amongst respondents that in the pre-pandemic period their business performance had been 'great', 'sustainable' and 'flourishing' and since had experienced a massive downturn and a need for adaptive responses. For some respondents the pandemic caused them to shift into a new sector, with some stating that they had turned to farming in order to gain an income (and be able to pay their staff) since the pandemic. Some responses in this regard include:

I have added farming to my services, if I happen to accommodate domestic tourist, I also sell some of my produce from the farm, however it is not possible to do so with international tourists...instead I just take the to the farm for the experience (G9)

We are incorporating agritourism, agriculture is big here. So we can generate an extra income for us to be able to do the... to take care of the centre. Since there is no lockdown in agriculture, we have decided to do this farm-work, and do these lunch orders. We are working with the different departments. You need to be licensed to sell these. So we are undergoing that. So already, there are some white farmers in Polokwane who want to buy (G25)

It is important to note that the above statements were taken from tourism enterprises that have had tourism as their primary income and of necessity diversified into other sectors as a means to stay afloat with their business and closure of tourism activities (during the first couple of months of the pandemic).

In common with findings from other studies on crisis management the enterprises changed and adapted their offerings in the COVID-19 environment. Most respondents focused on implementing the COVID-19 safety protocols such as the regular sanitising of rooms, the requirement of masks before entry, and restrictions on the number of people permitted in the establishments.

We socially isolate our visitors by placing them in their en suites, fogging the area once a week, and ensuring that they sanitise and wear masks (G13)

We had to change from buffet breakfast to a la carte... and to ensure that the rooms are sanitised every day, when guests leave, we fog the rooms (G11)

We had to reduce the number of people we could accommodate in order to adhere to the COVID 19 regulations (G9)

We serve food only if there are events, but now they [events] are closed. Unless the next season... but now we don't serve food. And with the guests, they come here with their own food (G24)

In terms of adapting to COVID-19 some respondents indicated that they had converted and re-purposed their conferencing facilities into family rooms in order to generate income (G10). One establishment that opened only in early 2021 indicated that the pandemic's onset caused them to rethink their facilities so as to account for COVID-19 considerations on social distancing and gatherings:

Changing and adjusting would be, for example, our dining facility wasn't supposed to be where it is. It was just supposed to be where the kitchen is. So, because of the size of the dining facility that we thought it would be small more than now with COVID-19, we had to move into an area which was designated to be a hall and turn that the dining area we're talking about into the main kitchen. Now we are planning on building another dining area so that the area we're using as a dining can become what it was intended for (G22)

Increased marketing and discounting was a widespread response by local businesses especially for groups as well as individuals: *'We have increased the number of discounts and packages we are offering in order to attract more guests'* (G13). In addition to group discounts, the respondents affirmed a shift to online marketing. COVID-19 fast-tracked the adoption of technology, thereby necessitating tourism businesses, even those in rural areas, to adapt to the current digital environment: *"Given the current trends in tourism, the focus on 4IR. Currently we are just focusing on marketing our business online"* (G9). The importance of expanded marketing was seen as essential for the market of business tourism: *"Because most of our clients were corporate travellers, we had to focus on online marketing to remind our clients that we are open as some establishments have closed down"* (G8). The increased usage of social media marketing was in evidence: *"Yes, with digital marketing, digital marketing, we will reach more people"* (G16) and *"I am just marketing through Facebook. Through, social media, and people are aware of my business and they interested to visit because our business is on the road to Kruger"* (G19). A shift by accommodation service establishments to online booking platforms was observed: *"we had to resort to online marketing, for example we have registered or establishment with bookings.com, Trivago, Triplt and Flapp travel to increase our visibility online"* (G6).

Overall, adaptive responses by many of these rural tourism businesses to the COVID-19 challenges surrounded keeping up with the technological (or digital) trends within the tourism industry:

COVID has really opened my eyes and has proven that by using technology tourists are now going to save a lot of money, so it is up to us to make sure that our services are improved so that we can position our business as the best in the region through excellent customer service (G15)

COVID 19 has presented an opportunity for people to rethink their business strategies, for me it has really taught me the importance of using technology,

so instead of printing pamphlets like we use to, we are now using digital marketing (G10)

So we like to offer online performances to our customers, sell product (t-shirts) to our customers. We have established our brand 'Tsonga-self' which recently launched earlier this year, on Good Friday, we would like to sell it online this time. And when people go online, countrywide (G16)

COVID-19 underscores the benefits of technology to tourism businesses in Giyani, providing useful and cost-effective marketing solutions.

9.1.5 Primary Business Challenges

The core business challenges highlighted by enterprises related to their operating environment which was conditioned by the weaknesses of local government. Infrastructural shortcomings were widely cited once again by the cohort of respondents.

The biggest problem is lack of infrastructure, and although we are located in town, we still don't have streetlights, the roads are terrible (G12)

This is really a painful topic as I have lost a lot of business due to lack of infrastructure, I had people who were willing to rent out the place for 5 years because they were pleased with the facility, but they changed their minds as soon as they came, because of the potholes and even though you try to reach out to the municipality, it seems as if you want to tell them how they should spend their budget. It's really complicated (G22)

Further, the respondents explained the issue that the poor roads in and around the Greater Giyani meant poor accessibility to key attractions and several of the accommodation service establishments:

Currently, the biggest problem lies with the marketing of our businesses and infrastructure. But I think infrastructure is the most important one because it doesn't help people can't access the places. The potholes in the area are really a problem. (G6)

Accessing some of the attractions around Giyani is one of the greatest challenges, especially the ones located on the outskirts. You really need a bakkie since the roads are really bad. This has also been one of the main challenges when it comes to sustaining our business, as we are slowly losing customers and COVID just made things worse (G10)

Accordingly, while the marketing and greater exposure of Giyani's tourism offerings, is identified as a challenge, the interviewees maintained that this greater exposure would be relatively ineffective should tourists not be able to reach the accommodations and attractions. Indeed, two of the area's core attractions, the Thomo Heritage Park and the Baleni Heritage Site are situated on the periphery of Giyani town and require large cars to reach them.

In highlighting other major challenges existing in the Greater Giyani Municipality, the vast majority of respondents flagged the implications of poor service delivery for their business development. The negative impact on their establishments was widely expressed:

I should think because people don't like to visit an area when road conditions are bad, shortage of water, and you can't visit a place where there's not a sufficient supply of water? Those two are key. (G18)

There seems to be issues with lack of infrastructure and adequate water and sanitation. Obviously, for us as business owners, the first thing that you would do is to invest in a borehole, but what about our employees who reside in the villages? This has really created a lot of challenges because hygiene is everything in this industry and the pandemic just made things worse. (G11)

One of the impacts of the significant decline in travel consequent upon the pandemic has been the lack of operational cash flow for businesses with ramifications for staffing. Typically, it was observed by accommodation providers: '*Finance has been the biggest challenge. As a result, I had to employ my staff on a temporary basis*' (G15) and "*Most of our staff members are now employed on a temporary basis because we only call them when we have guests*". Similar impacts were evidenced in attractions: '*Finance has been the biggest challenge as we couldn't afford to pay our tour guides*' (G13). A further implication of the downturn was pointed out as: "*Another challenge is that you'll find that staff cannot come to work because they don't have transport money*" (G11). It was evident that for many enterprises the lack of cash flow and staffing issues compromised the service quality of establishments: "*Funding is a problem currently. Since this is my only source of income, it is really tough having to share the little income that comes in with the rest of the staff. As a result, I end up compromising on quality so I can have less staff on duty, just so we can share the income*" (G3). Labour regulations were cited as a further constraint for business operations with restrictions by national labour laws limiting their ability to bring back workers to their establishment. A manager of a heritage centre explained as follows:

For us, the challenge, is that we don't we don't have funding yet, for operations, the Department of Labour does not want us to have people we are not like paying minimum wages. If they are not UIF registered, since here is it's in the bush, they want these covers for employees. so that limits us. So what we do is that most our people work from home so that we are able to work well with these amendments.

COVID-19 restrictions functioned as a further brake on business development. Of particular concern was regulations that restricted numbers at gatherings with severe impacts for events and conferencing:

The main problem now is a shortage of work. Because of COVID, everything dropped. Government restrictions don't encourage events. (G17)

The most serious issue is that we have facilities that are not being used as a result of COVID-19 protocols, such as our conference rooms. We have also

recently expanded our establishment, adding more rooms, but due to COVID-19 that project has come to a halt, and I am unable to complete it due to financial constraints (G5).

Our conference facility is no longer working which really created a gap in terms of income, because we used it to host events ...also the COVID-19 regulations are straining us (G9)

Finally, most respondents observed the further challenges that compliance to COVID-19 safety protocols imposed additional expenses for their business:

Finance is the biggest challenge, as the pandemic has just come with its own expenses such as sanitisers, and fogging sprays (G3)

Now we must include extra things on the shopping list such as sanitisers. And having to think about it, it used to be the cheapest things in the shops, but currently, it ranked amongst the most expensive cleaning detergents (G9)

The bookings have gone down. There seems to be more expenditures, the pandemic came with its own expenses...I mean there is no way that you would not buy the fog spray and sanitisers...these things that one must have. Another thing is that because we also have mosquitos in the area, I have to constantly hire people to come and do pest control. It is just a lot of money going out and little money coming in (G8)

It was recorded that since the pandemic only one local tourism business – a conference centre – had closed down operations; the remainder of the Giyani tourism economy appeared to be surviving the COVID-19 environment. This said, as a whole the tourism businesses in Giyani have been negatively impacted both by the need to adapt their operations to COVID-19 protocols and wider issues relating to infrastructural shortcomings as well as problems surrounding inefficiency in the service provisions by local government.

9.1.6 Future Prospects and Opportunities

In terms of future prospects and opportunities for rural tourism, the respondents pointed to new developments occurring in and around Giyani which provide potential new business opportunities. Three issues were identified, namely the opening of a new gate to Kruger National Park, the re-opening or discovery of mining opportunities and announcements of the potential establishment of a branch campus of Tshwane University of Technology in the town.

At the time of the study several respondents indicated that the opening of a new gate to the Kruger National Park would greatly benefit their establishments. For example: *“Opportunities is the Shangani Gate to Kruger that I believe will be able to open more opportunities for other businesses (G2).* Another interviewee similarly viewed: *Yeah, there is huge potential because there will be a new gate that will be opened nine kilometres from here to the Kruger National Park so people are ready. Because people are also driving here, so if that gate is opened (G25).* The great optimism surrounding the potential of expanded leisure tourism opportunities was again evident in the following response: *“There is a change, because my business is*

around Kruger National Park. For my place, if they can open that gate, that one is a definite [pull] because its less than 5km from me. Which means I will benefit a lot. So if they can open that gate then that is in my area, I'll do much better". (G19). The opening of new mines in the surrounds of Giyani was also viewed positively for business travel:

People are talking about a resuscitating the mines... we have one on the western side of Giyani and the other one, is not far away from here....and to prove that it's something of worth. We see some people coming around to do some investigations and stuff like that. (G2)

We [have] got also a few gold mines as well, which are now being discovered. I think it was in the news a few days ago that gold has been discovered here. So yeah, so definitely business tourism for us is going to increase especially when the mining prospects and other people come through other attractions well. (G22)

Giyani is fast developing; we have realised that we have some mines here. We have realised so many mines there, so in these villages, there are mines there and people weren't even aware. So far, Giyani has discovered more than 5 mines. (G19)

Several of the tourism accommodation businesses expressed optimism concerning the announcement made in June 2021 that the former Giyani College of Education would be converted into a campus of the Tshwane University of Technology (Silaule, 2021). The establishment of a satellite university campus in Giyani would open up the prospects for the provision of student accommodation. The repurposing of existing accommodation to service this potential market as well as the construction of new accommodation were triggering responses from local accommodation service establishments. Typical responses were: *There's some developments and opportunities coming together, like very opening this Giyani college takes about 10,000 students (G23)* and *"We heard that there is a university that is coming to Giyani, so I have already started preparing for that in terms of accommodation...As you can see I am currently building 60 rooms which I believe will be able to accommodate those students" (G7).*

Beyond these changes occurring in the business environment of Giyani in looking at future tourism prospects several respondents reflected on the possibilities for diversification, expansion or improvement in the area's existing local cultural and heritage assets. The provision of additional attractions for family entertainment, and most especially for the youth, was noted. A typical response was: *"Number one we don't have enough attractions and facilities in Giyani, such as an entertainment area, like a lot of people mainly the youth want such things here around Giyani You can count a number of places that are safe and secure -you find people chilling along the roadside, which is not safe at all. So if we could have that [more entertainment] I think it would be better as a lot of people would come and visit the place". (G3).* The need for a wider range of leisure options was seen as essential to counter the competition of places such as Tzaneen (G11). In relation to culture and heritage certain respondents pointed to the importance of authenticity. It was stated: *"some visitors would want to do authentic cultural tours or combining wildlife with cultural tourism...*

So there is market potential, huge tourist potential.” (G4). There was also a call for greater incorporation of distinctive local history, customs, and resources into local tourism products. It was observed that an expansion of tourism visitors requires community participation and a collaborative approach: “Increasing visitor numbers requires people to work together with the government and the chief. Maybe we can seek permission from the chief together with the municipality to add more attractions in the region (G8). Greater development of leisure opportunities around a local dam was viewed as an option (G20).

The future possibilities for some recovery in future demand for Giyani tourism were viewed as inextricably linked to the need for a greater take-up of vaccinations: *“Of course things are going to be different, demand will increase if more people can get vaccinated” (G10). With the COVID-19 downturn and uncertainties, however, the opportunities for new investment for many tourism businesses remain limited:*

We’ve had to lower our prices just to stay afloat. And there will be no more upgrades, no more expansions, and no more monies allocated to, you know, the development of the company. So, really, it’s simply a matter of surviving (G7).

One of the major challenges when it comes to operations is the fact that there is a lot of uncertainties, in as much as we opened this business with the prospects of extending, we can’t do that now, due to financial constraints... we are operating yes, but the projections are not where we thought they would be, Hence, we need to be very careful with how we spend our income (G4).

Arguably, the focus for many businesses had been on ensuring basic survival, which necessitates increased control over the expenditure and close examination of budgets. It was evident that certain pre-pandemic plans for expansion were now either abandoned or on hold. The manager of the Thomo Heritage Park stated as follows: *‘We had planned on expanding and adding the interpretive site, there are still things that we would like to do but we are hindered by the unavailability of resources’ (G25).*

9.1.7 Required Support from Local and National Government

The above discussion has detailed the nature of tourism in Giyani, perceptions of business challenges, adaptive responses to COVID-19 and perceptions of future prospects and opportunities for local tourism. This provides the context to the nature of support required by local businesses from both national and local governments.

In respect of local government, the overwhelming message from local tourism businesses relates to the imperative for improvement of local infrastructure and most especially to the deteriorated condition of local roads which was a consequence of inadequate maintenance. A small sample of the typical responses is given below:

To improve on the infrastructure especially bad roads with potholes on the Phalaborwa-Giyani road (G1).

We need local government to focus on fixing and maintaining local infrastructure (G3).

It would be really nice to see local government taking a stand against corruption and attending to developing infrastructure (G5)

Can local government please do their job and attend to service delivery? (G7)

I think they must just fix these bad roads, street lights and water pipes (G8).

Other requests flagged issues around financial assistance and marketing. In respect of financial assistance several enterprises cited a potential reduction in rates and taxes by local government. In terms of marketing, many of the respondents affirmed the importance of national government to encourage and foster the travel culture amongst South Africans. For instance, one accommodation owner stated: ‘*By marketing and increasing the culture of travel*’ (G6). Likewise, another respondent was of the opinion: “*I think the most important thing would be to increase the culture of travel so the tourism economy can grow, by doing that I believe the financial struggles will be resolved*” (G3)

In terms of marketing two issues were flagged, namely the need to address the lack of market awareness for tourism offerings in Giyani and for national government to increase awareness of safety protocols in tourism establishments as a support for domestic travel.

Look, government needs to sensitise people to need to go out more... I think the government they don't... I feel like they don't do that much to [raise] that awareness like telling people about place this I think like the national government even the local government or the [national] government doesn't do that much apart from Sho't Left. Actually, there's nothing that the government does, there is nothing for small businesses. For tourism in general. (G16)

Other concerns raised by the respondents related to assistance of tourism bodies in the region, specifically the tourism association and the Giyani tourism information centre. It was noted that these two bodies had been treated as ‘white elephants’ and not effectively utilised to grow tourism in Giyani. On the matter of the tourism association, one respondent had underscored the need for government to offer structural support to the association:

But if we get to a point where there is a structure, but I think that with being involved with previous tourism associations and other structures. Even Tourism Association that is there, it doesn't have a dedicated support desk, which [it] needs to have, even if it's two interns that are employed by the municipality, but people who would sit with resources, for example, Internet, and the phone, to put out communications come up with ideas, to also help the association realise the ideas that they have. (G22)

Likewise, concerning the tourist information centre, respondents argued the need for greater information sharing between government and local tourism establishments in Giyani:

The biggest problem lies with the marketing of tourism facilities. We have a tourism information centre but only a few establishments are listed there (G5)

Local government, number one, we want information. Information is very, very, very important, if not informed... there is no information set. It's just a white elephant. They don't know, people just go sit there and go home and month-end they get paid. I was telling the one that district person 'what are you doing? You sent people to come and get the statistics of Giyani. What are you doing with it?' Because year in year out, we don't do anything (G21)

It was also disclosed that the information details of the tourism establishments provided by the tourist information centre were outdated with several no longer working.

A final specific request in terms of assistance to local businesses by local government related to the use of local providers. Respondents stressed the importance of supporting local tourism businesses, for meetings and other business events, as opposed to travelling to more established destinations:

And, the local government, if they can organise some activities [in Giyani]. They [should] stop taking people to go to Johannesburg to have their meetings. All the people are here; they take the people to that side. And then they drive some long distances and go and support that business there because it is theirs or is their friend or they promised them something. (G20)

The above points once more to mismanagement and corruption issues in Giyani local government processes.

9.1.8 Conclusions and Recommendations

This research has examined the development challenges of rural tourism in a local municipality which would be described as an “in-between” rural space. The discussion highlights the pre-eminence for local tourism businesses of the market of business tourism in the case of Giyani. Although the area has a wealth of local cultural and heritage assets currently Giyani is not a destination for leisure tourism and records only a small stream of such visitors. The impact of the pandemic for reducing business travel in South Africa as a whole is therefore a major threat to the local tourism economy. It was observed that local businesses undertook a range of adaptive responses as coping mechanisms. These included the diversification of their business operations out of tourism into agriculture as well as undertaking a range of adaptations to shore up the survival possibility of the existing tourism operations. The latter involved changing business practices for improved health and safety of visitors in line with COVID-19 protocols, re-purposing of properties, and the embrace of new digital technologies in order to promote the marketing of businesses.

Beyond COVID-19 it is concluded that the major challenges facing the growth of rural tourism from evidence in the case of Giyani surround the shortcomings of local government. Tourism business activities – existing, planned and future – are constrained by the infrastructural deficiencies which are experienced by these businesses. The failure of local government to address the improvement and basic

maintenance of roads, local water supplies or provide street lighting and signage are key issues of concern for stimulating rural tourism in this area. The tourism businesses highlighted a number of interventions and support needs from government, such as financial support, improved marketing and enhancing the local Tourism Information Centre. These are supported as recommendations emanating from this investigation.

Arguably, however, the above support measures can only be impactful if undertaken in parallel with or following the essential challenge of addressing the infrastructural shortcomings as a result of the inadequate performance of local government. The need for greater coordination between government departments has been stressed on numerous occasions in order to overcome the 'silo mentality' and to foster conditions for an improved business environment. It is recommended that based on the findings in this study that the Department of Tourism support the accelerated implementation of the District Development Model in Mopani District in order to improve service delivery and enhance the development prospects for all local businesses in the area, including of tourism businesses

9.2 Thaba Chweu: Interview Findings

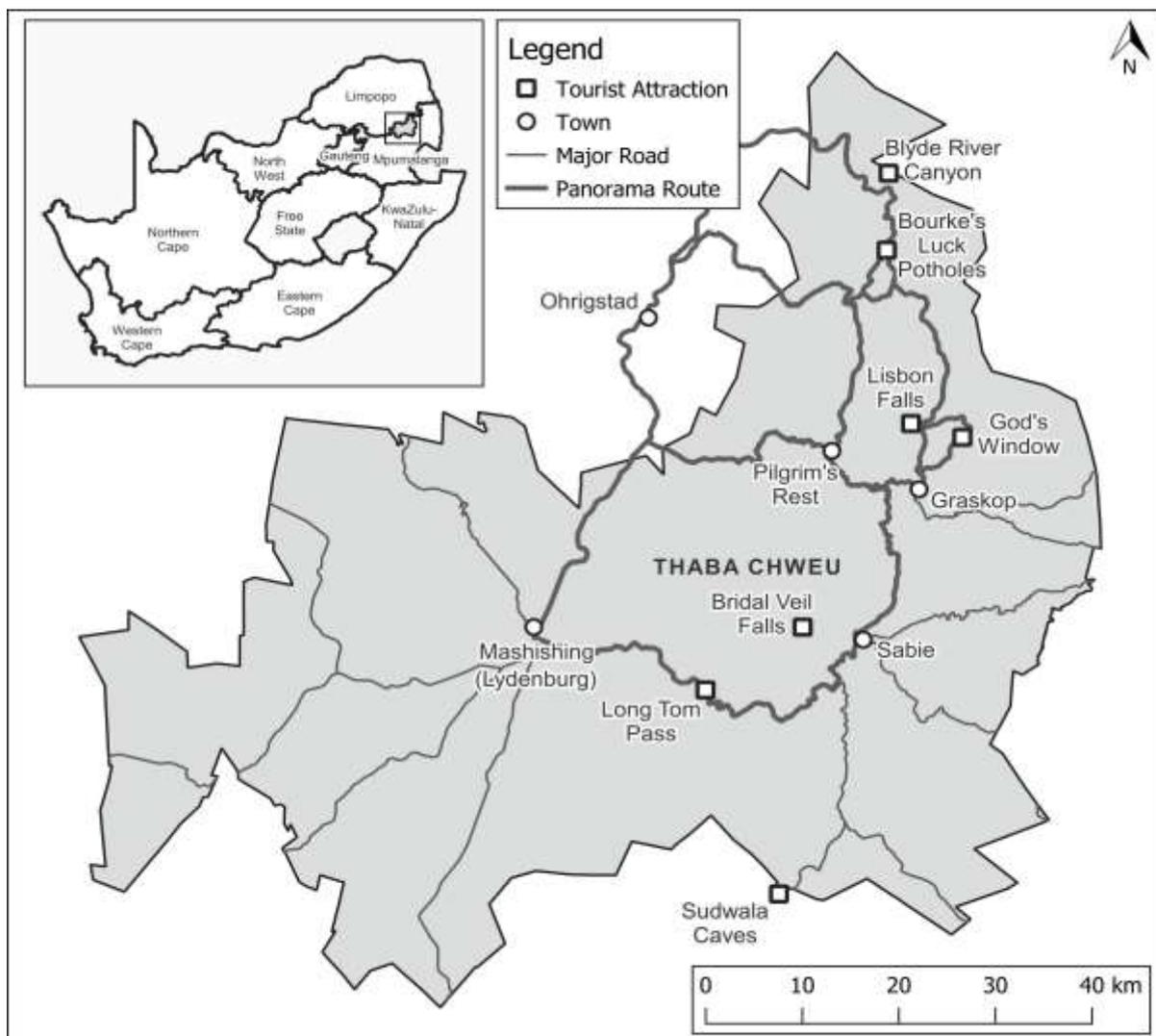


Figure 14: Location of the Thaba Chweu Local Municipality (Source: Authors)

This portion of the report focuses on the results from the Thaba Chweu municipality. As earlier discussed, it encompasses a number of well-known tourism destinations and attractions, most of which are along the famed Panorama Route (see Figure 14). The municipality has many scenic drives along the Panorama Route on top of the numerous attractions throughout. Importantly, there are two primary regions within the Thaba Chweu municipality, centered around two large towns. The first is the western portion of the municipality, centered around the town of Mashishing, previously known as Lydenburg. The area surrounding Lydenburg has a number of different economic activities but centers primarily around the adjacent mining industry. The other, eastern, portion of the municipality is centered around the town of Graskop. This is also the seat of the primary municipal offices. The town of Graskop is primarily dependent on tourism and the forestry industry which owns much of the land surrounding the towns of Sabie, Graskop and Pilgrim's Rest. The tourism industry in the area varies. Surrounding Lydenburg there are a number of remote tourism establishments in rural areas with an emphasis on nature experiences and trout fishing. In the Graskop region, the focus is much more on small towns tourism, as the forestry industry owns the majority of the land in between the towns.

This section focuses on the results of interviews with a wide range of tourism businesses in the Thaba Chweu municipality, with a focus, specifically, on rural tourism assets. The results below include an overview of the businesses which were interviewed, their perceptions of the local area, local tourism assets and the local municipality. It then delves into information pertaining specifically to their businesses, the implications of the pandemic as well as challenges facing rural tourism development in the area and in their businesses. It concludes with a discussion of the necessary government interventions to ensure the survival and growth of rural tourism going forward. The report then proceeds to a discussion of overall conclusions based on the findings and ends with a list of recommendations for improving rural tourism in the Thaba Chweu municipality.

9.2.1 Overview of businesses

A total of 25 interviews were conducted throughout the Thaba Chweu municipality. The majority of interviews were with local tourism operators. However, also included in the interviews is the local Democratic Alliance ward councilor in Lydenburg who is responsible for the provincial tourism portfolio in Mpumalanga. A concerted effort was made to interview a range of tourism operators from a geographic spread, since tourism operations vary significantly throughout the municipality, as mentioned above. Although the focus was primarily on rural tourism operators, some small-town operators were included to get a diverse range within the region but also due to the aforementioned difficulties in finding rural tourism operators throughout much of the municipality since a significant portion of land is privately owned by industry. Most operators interviewed were lodges and other forms of accommodation. Since much of the area is remote and many of the operators are in isolated locations, accommodation was an essential component of rural tourism. Several of the businesses were getaway locations where activities, accommodation and food were all provided. Additional assets included restaurants, breweries, venues, and activities operators. An overview of some basic attributes of the businesses are outlined below in Table 7.

Table 7. Overview of Thaba Chweu Businesses

	Location	Type of Establishment	Years in Operation	Number of Permanent Employees	Primary Income?	Operates All Year?
TC1	LM	Accommodation	30 years	4 FT	Yes	Yes
TC2	LM	Nature Retreat	Owned Property for 30 years	3 FT	Retired	Yes
TC3	LM	Venue/Accommodation	15 years	4 Ft/3 PT	Used to be - Also have farm	Yes
TC4	LM	Accommodation	17 years	9 FT	Yes	Yes
TC5	LM	Accommodation	- years	1 FT/1 PT	Yes	Yes
TC6	LM	Brewery	7 years	3 FT/5 PT*	Yes - owners have several tourism businesses	Yes
TC7	LM	Brewery and Accommodation	13 years	4 FT/2 PT	Yes	Yes
TC8	LM	Accommodation, Restaurant, Activities	Owned Property for 45 years	24 FT/4 PT *	Yes - owners have several tourism businesses	Yes
TC9	LM	Accommodation	20 years	7 FT*	Yes	Yes
TC10	LM	Nature Retreat	3 years	N/A	Retired	Yes
TC11	LM	Accommodation	20 years	9 FT	Retired	Yes
TC12	GPR	Resort	53 years	90 FT*	N/A	Yes
TC13	GPR	Restaurant	2 yeas	5 FT	Yes	Yes
TC14	GPR	Restaurant	7 years	1 FT*	Yes	Yes
TC15	GPR	Restaurant/Distillery	2 years	11 FT	Retired	Yes
TC16	GPR	Accommodation	4 years	2 FT/2 PT	Yes	Yes
TC17	GPR	Resort	New owner - March 2020	43 FT/3 PT	No	Yes
TC18	GPR	Accommodation	12 years	1 FT/3 PT	No	Yes
TC19	GPR	Restaurant	4 years	13 FT	Yes	Yes
TC20	GPR	Restaurant	4 years	4 FT*	Yes	Yes
TC21	GPR	Activity/Attraction	4 years	42 FT/32 PT	Yes	Yes

TC22	GPR	Accommodation	14 years	12 FT/1 PT	Yes	Yes
TC23	GPR	Lodge and Restaurant	3 years	7 FT/2 PT	Yes	Yes
TC24	GPR	Accommodation	4 years	6 FT	Yes	Yes
TC25		Ward Councillor				

*Note: LM - Lydenburg/Mashishing, GPR – Graskop/Pilgrim's Rest, * - Staff down since COVID, FT - Full Time, PT - Part Time*
Source: Authors

There was somewhat of a division in some of the business profiles between the two regions. As mentioned earlier, the Lydenburg cluster consisted primarily of remote facilities on a large piece of land. Many of these were on land that was owned prior to establishing a tourism business. Some were businesses which were established on existing farms which still operate for commercial purposes. However, a number of the businesses were built on properties which were originally second homes for the current owner(s), who in retirement or for a change of lifestyle decided to convert the property to a tourism business. One operator stated *“we bought the property as extra cattle grazing space but saw the opportunity for tourism in the area”* (TC3). Another stated *“We bought the property when we were living in Johannesburg as a holiday house, but it costs a lot to maintain so we decided to develop a business”* (TC11).

In the Graskop Cluster more businesses were developed specifically for tourism purposes and there were some businesses which are part of larger companies which manage several tourism assets. For example, one of the lodges is part of the Forever Resort cluster of resorts and therefore was built as a publicly funded development when it was established (TC12). Another is run by a group which operates numerous tourism businesses throughout the Lowveld. Some of the more recently established businesses developed because they saw missed opportunities for tourism development in the area. For example, one respondent, who owns three restaurants in the area, stated *“There was a lack of good all-around service for foreign tourism. We were looking to give an all-around South African experience with local food. That’s what made it popular”* (TC20). However, similarly to the Lydenburg cluster, several were also retirement projects.

Throughout both clusters there were some similarities in the profile of the businesses. As seen in Table 7, the majority have relatively small numbers of permanent staff, and many are managed by the owners. A few noted that staff numbers decreased over COVID-19, but many were able to hire back staff who were previously let go. The tourism business tends to be the primary income for most of the businesses, though some said this had changed as a result of the pandemic. Another source of income which was, interestingly, often cited is retirement pensions. As mentioned previously, many started the businesses post-retirement. Others cited additional tourism products as other sources of income. Finally, some of the businesses are on working farms which attributes for additional income. Many said COVID-19 made it difficult to rely on income from the tourism businesses, but that they had previously been the primary source of income. *“It used to be [our primary source of income] but right now we can’t live off of it. Luckily we are both retired and have pensions”* (TC2). Nearly all businesses operate year-round with minor exceptions for certain products (e.g. one of the wedding venues only operates in wedding season). One respondent said, *“There’s not much of a ‘season’. In the winter people come for fishing”* (TC11) with reference to the trout fishing in the area.

9.2.2 Perceptions of the Local Municipality

Respondents were first asked a number of questions about the municipality more broadly. This includes the primary purpose of most visitors to the area, tourism local assets, rural tourism development, challenges and the role of local government. There was a great deal of enthusiasm amongst respondents in both clusters about the vast and diverse tourism offerings and assets in the area. As a major tourism route and destination, it is not surprising that respondents, almost unanimously,

highlighted the range of tourism products available throughout the area. The majority of respondents focused on tourism products and assets related to nature-based tourism and the wide-range of natural attractions throughout the area. Many stated that typically tourists visit the area to spend time outdoors, outside of dense urban areas, for nature photography and for outdoor leisure recreation activities such as fishing, hiking and camping. *“People want to get into nature. Get out of the hustle and bustle of the city”* (TC2). Many also indicated that both regions are common stopovers between Kruger National Park and Johannesburg. However, many in the Lydenburg cluster mentioned that the area used to be a major stop-over to Kruger, but because of the increasingly bad quality of the road, many tourists bypass the area and opt for stop-overs in more accessible places such as Dullstroom or within the Graskop cluster. One respondent said, *“Overseas visitors used to come as a stopover to Kruger or as a gateway to the Panorama Route but not anymore”* (TC9). A great deal of tourism, particularly in the town, has been lost because of the bad quality of the roads and poor municipal services such as power outages and water shortages. However, in the Lydenburg cluster, they do have the advantage of business travellers to and from the mines. One respondent indicated that she has also provided a conference venue for the mines in the past (TC11). In the Graskop cluster, there appeared to be slightly more tourism related to Kruger National Park and stop-over visits. Despite this, nature-based tourism is the primary draw for visitors throughout the municipality according to local tourism operators.

As for specific attractions which draw tourists to the Thaba Chweu municipality, most respondents discussed sights along the Panorama Route. In the Graskop cluster, nearly all respondents named attractions such as God’s Window, Bourke’s Luck Potholes and the Three Rondavels. Those specific to Lydenburg cluster included attractions such as the Long Tom pass. Several respondents from the Lydenburg cluster noted the numerous archaeological attractions which are found in the area, such as ancient stone circles created by the Bakoni people as well artefacts and sites from the Anglo-Boer War (TC2). In addition, there are numerous well-known waterfalls scattered throughout the region which are also often a major attraction. The state-run natural attractions in the Graskop cluster appear slightly better-run than those in Lydenburg. Several respondents in the Lydenburg cluster referred to the beautiful sights, such as the waterfalls, but stated that visitors are deterred by the lack of upkeep surrounding these sights as well as significant safety concerns. One respondent said *“All the major attractions around Lydenburg are closed. No one attends to them. We have major historical sites, but they are not maintained, some have sewage running down them”* (TC9). Another important attraction, which is found between the town of Sabie and the town of Graskop, is the historical village of Pilgrim’s Rest. The entire town of Pilgrim’s Rest is a heritage site, preserved because of the long history of early gold mining which occurred in and around the town. One respondent in the town of Pilgrim’s Rest said *“People are drawn to the history of the town, the storytelling and the feel of the town”* (TC15).

When asked about what could be done to improve or expand visitor numbers, nearly all referred to issues with the municipality. The majority of responses indicated that the conditions of the roads were particularly problematic, deterring visitors. One respondent said *“The roads! Guests sometimes can’t get through to the resort”* (TC12). Another noted *“Even the roads next to the municipality have so much potholes. It’s embarrassing”* (TC23). Several others mentioned additional issues of

service delivery. One said *“Basic services affects tourism and we are not getting basic services”* (TC15). Several others reported issues with crime, stating *“Crime is a big issue, there is a lack of safety. Some tourists have been hijacked”* (TC13). Other concerns listed were related to issues of sanitation, the upkeep of attractions and litter. One said *“There’s rubble everywhere next to the roads. It looks terrible”* (TC12). Several noted that attractions need to be maintained and upgraded, particularly given the fees for entry for each attraction. As mentioned earlier, the majority of attractions in the area are state-run and so the responsibility for maintenance is up to the local and provincial governments. Some examples listed were a lack of ablution facilities, litter surrounding the sights, no regulation of visitor numbers (i.e. overcrowded), safety concerns, issues with basic maintenance of facilities, this in addition to general concerns over road quality and broad service delivery challenges. One said *“We can’t improve visitor numbers because there is ineffective town management in general”* (TC19).

One respondent, from the Graskop Cluster actually stated that they *“don’t want to expand visitor numbers. We want to educate the people who are coming”* (TC18). This was followed up with a discussion of the changing demographics of visitors, from international to local, and concerns over regulation and enforcement surrounding tourism attractions. Others also noted that the first step is to develop existing attractions with one saying *“Get the municipality to develop what’s there”* (TC9). Improved marketing campaigns were also listed as a mechanism for increasing visitor numbers. One of the Lydenburg respondents actually compared the area to the Graskop cluster, stating *“The trouble is that Lydenburg is not the place that people go to anymore. They go to Graskop or Sabie. Lydenburg needs a proper marketing campaign. Graskop has done much better with this”* (TC10) (NOTE: The Graskop marketing campaign was noted by other respondents and appears largely the work of local tourism businesses self-initiated marketing campaigns. It is not a government-run campaign).

In response to changes and opportunities which have come out of the COVID-19 pandemic, there were some interesting answers. Some stated the ways in which businesses had to adapt with one mentioning *“People got more innovative, they put a lot more effort in”* (TC16). There were typically discussions of transformations from international visitors to local visitors, noting that local tourists were more interested in rural destinations to *“get out of the city”* (TC2) or *“to get away from the hustle and bustle of the city”* (TC5). Some also noted that often families will have gatherings in rural areas, allowing them a space to reconnect after the pandemic in a safe environment. Many of these rural accommodation businesses offered an ideal opportunity for these ventures. Another responded that she saw a large market coming out of the pandemic saying *“as soon as we came out of lockdown, since then I’ve been full”* (TC5).

As expected there have been changes in the types of tourists who are visiting the area. Although the Lydenburg cluster has been long-suffering from challenges with poor infrastructure, which has all but eliminated the area as a stop-over to Kruger National Park, the Graskop cluster often served as a stop-over. Pilgrim’s Rest, Graskop and Sabie were often day stops or overnight stops for international tourists visiting the Lowveld on their way to Kruger National Park. These completely ceased as a result of COVID-19 and a few of these visitors are slowly re-emerging. In the

interim these towns have seen a rapid growth in domestic tourism, particularly to the Graskop cluster. Several businesses noted a transformation in the demographics of visitors. One said that there has been a major campaign to attract Black domestic leisure tourists to the Panorama Route, partially driven by the owners of the Graskop Gorge Lift. Another respondent stated *“the Black South African population really saved us, kept us going and is keeping us going”* (TC22). The transformation in tourist demographics has resulted in the need to adapt the tourism sector towards this group. Although many appear eager to accommodate the new market, there is a lack of data on the demands of this group. One respondent noted that we need specific facilities to draw the Black leisure tourism market, which are missing from the area. She said *“there is a growth in budget-tourists and day visitors. They want to relax, braai, etc. but there is currently no space to do this”* (TC21).

9.2.3 Perceptions of Local Government

There were significant findings related to the perceptions of local government from this group of respondents. All respondents had negative perceptions of local government, though to varying degrees. All stated that local government was a problem, though two stated that they thought local government is primarily a problem, it had helped in some ways. Of these two respondents, one said that the government assisted with a grant to start up their business (TC13). The other said that there had been some effort in the past month or so to initiate some repairs of the roads, though they attributed this to the upcoming local elections, which were just after the data collection period. One respondent said *“They started rehabbing roads because of elections but I’m sure it’ll stop when the elections are over”* (TC25).

Respondents typically, however, stated that the municipality is in complete disarray, having been in arrears for at least 15 years. One respondent said *“What local government?”* (TC1). It was clear from these respondents that they feel very little can be accomplished through the municipality and tourism businesses are suffering in a number of ways as a result. One respondent stated *“If they don’t do their job, we can’t operate our businesses”* (TC20). The biggest issues, noted by respondents throughout the entire municipality, were related to basic service delivery and infrastructure, as mentioned above. The issue of road maintenance came up amongst all of the respondents, with those in the Lydenburg cluster particularly emphasizing the poor quality of the roads. One operated said *“The municipality is not helpful at all. Potholes in a small town like this? They can’t get anything done!”* (TC23). Driving through the town this was apparent, with potholes which often took up the entire street. One respondent, whose business is located along a municipal road, though further out of the town stated *“Visitors often can’t get through to our resort because of the roads”* (TC12). Another mentioned that it was giving the area a bad reputation stating *“One client arrived here and exclaimed ‘this is the last time we will visit the area’ because of the bad roads”* (TC17). Several respondents, specifically in the Lydenburg cluster, said that it was giving the town a very bad reputation. Two specific instances were noted where visitors had made comments on review and social media platforms one saying *‘Don’t go to Lydenburg. Roads are awful. Never again!’* and the other *‘Lydenburg is filthy! Will never be back’* (TC25). One respondent went on to note that it is creating serious problems with perceptions of the area as *“Word of Mouth marketing is getting really bad”* (TC18). Another said *“We are suffering reputational damage because of the roads. It’s a hinderance to growth”* (TC21).

For the Graskop cluster, poor service delivery was even more prominent in discussions of the failure of the local municipality. *“Number 1 problem is service delivery. Service delivery is completely ineffective”* (TC19). Some of the major issues were the debt the municipality owes to Eskom prevents consistent access to electricity. Several businesses stated that they obtain their electricity directly through Eskom, rather than through the municipality. One respondent stated *“They charge us rates and tax but they don’t supply anything. We get our water and electricity directly. So what are they providing us?”* (TC3). On top of issues such as simply accessing power, there appears to be little-to-no maintenance of power sources, resulting in inconsistent power supplies. Therefore, they are not only subject to national loadshedding schedule, but also have regular power outages because of powerline failures. Some businesses said they had taken it upon themselves to repair faulty powerlines because there is both a lack of municipal maintenance staff and they are also often ill-equipped to deal with repairs. Along with issues of service delivery, two respondents, located further up the Panorama Route, near Bourke’s Luck Potholes, stated that they have had issues with protest action along the roads in response to local communities’ issues with poor service delivery (TC12, TC13). Another respondent provided the following vignette: *“We had a powerline which was damaged, just outside our guesthouse. We called for maintenance but it was difficult to get someone because no one is paid overtime. One guy did come eventually but he didn’t have any tools to fix the damage. Not even a ladder. My husband had to come help him and bring him tools so that we could get the repair done. It was a dangerous situation and they don’t have even the tools to be able to fix it”* (TC9).

A further problem raised was issues around policing. Several respondents noted that there have been incidents where tourists were victims of crime, highlighting inadequate policing. Another noted that they had been burgled during lockdown (TC4). This is echoed in the following statement:

The big issue is enforcement and regulation. Traffic cops don’t help with major traffic problems. On top of issues with crime, there are problems with litter in the most pristine natural space on the Earth. Public drinking, drinking and driving, noise and public indecency have all become prevalent” (TC19).

There were also major concerns listed with the misuse of funds by the municipality. Several stated that they are not aware of any resources which are being put forward by the municipality for tourism development. One said the municipality is *“unrealistic about budget. There are lots of underfunded departments with directors with very high salaries but no employees”* (TC22). Others cited issues of corruption within the municipality. One provided a long story in which signs she paid for, advertising her establishment, were taken down by a local municipality employee illegally. When she tried to file a case at the police station, she was told they would not file this complaint because they knew the municipal employee in question and said that the case would not go anywhere (TC9).

Regarding all of these issues, one important aspect which was evidenced is that the local municipality does not appear to be engaging with tourism operators on any level. *“Politics is killing towns. People are randomly appointed. No one who really cares about the town. Local government shouldn’t be politicized”* (TC25) There appears to be little to no commitment from the local municipality to develop tourism

with one respondents stating *“There’s so much potential but the politicians need to get on it. We can’t do it alone”* (TC3). There is lack of transparency from the local municipality and businesses often feel neglected or ignored. One respondent stated *“They are not involved. They don’t aid the situation at all. We were supposed to have a breakfast for tourism operators but the guys at the municipality just didn’t even show up”* (TC12) Many respondents, again, cited the roads as evidence of a poorly-run municipality. They felt that if the municipality cannot even provide basic infrastructure and services, that they are not capable of running an effective tourism destination. One said, pointedly *“Tourism is limited because of experiences with bad infrastructure. And it’s been that way for more than 10 years”* (TC22). Another said *“We want Graskop to be a tourism destination but the infrastructure isn’t there”* (TC23).

9.2.4 The Influence of COVID-19

Many respondents struggle to answer questions about the state of the business prior to COVID-19 versus the state of their business since COVID-19. Part of this hesitancy appeared to be related to the fact that they were unsure of the course of the pandemic, particularly going into the holiday season. Several stated that before COVID-19, their businesses were doing well, with some indicating their best years had been 2018 and 2019. Most of these were in the Graskop cluster with one restaurant owner stating that his business grew 140% in 2019 (TC20). However, several noted that they were experiencing issues prior to the pandemic which was affecting business. This was particularly evident in the Lydenburg cluster. Several respondents said in response to the question on the state of their business prior to COVID-19, that it was *“ticking along”* (TC1) or *“reasonable but already having issues because of the state of the roads”* (TC3) or *“there were issues before COVID”* (TC9).

In terms of the state of their business, since COVID-19, most felt they would survive but felt that there was a great deal of remaining uncertainty. Most responses included statements such as *“its coming right”* (TC4) and *“getting better”* (TC14) though most noted that they still have very few international guests. Some said they are still struggling to regain their numbers prior to the pandemic. All three businesses which produce alcohol said that they are struggling with the unpredictability of alcohol bans. One said *“stop and goes with every lockdown is hard. Not knowing if there will be another alcohol ban”* (TC7). This business said that it has really suffered during alcohol bans, as they produce their beer through natural processes which means that it goes off more frequently and so they have had to dump a great deal of product as a result of unexpected changes in regulations. Some noted the transformations in their businesses since COVID-19 including the changes in the tourism market. One said *“Business has maintained but the market has completely changed”* (TC21). Some of this has been in reference to the growing demand from the local leisure tourism market. Others mentioned the changes in bookings, many of which are last minute, and that they are largely dependent on weekend visitors, with one saying that *“we have record weekend that beat pre-COVID”* (TC19).

Most businesses had to adapt during the pandemic. Several businesses discussed the introduction of the safety protocols and mentioned the associated costs. Some of the ways in which they did so are to reduce prices and offer more self-catering options. One distillery, obviously hit by the alcohol bans, decided to redirect their efforts and used the distillery to produce hand sanitizers in order to generate some

income (TC15). Several had to close portions of their businesses, particularly restaurants and meal services. Others have reworked marketing strategies to appeal to more local visitors. Of striking note, and in contrast to other research on the topic, including a study by Giddy and Rogerson (2021) on an adjacent local municipality, the majority of respondents did not feel that COVID-19 was the primary threat or concern facing their businesses. The issues that were most prevalent among this group of respondents related to those surrounding poor infrastructure development and maintenance. Most felt that although COVID-19 made survival difficult for the periods in which strict lockdowns occurred, that it was not their primary challenge. The primary challenges facing the businesses, for the most part, were prevalent prior to the COVID-19 pandemic and subsequent lockdowns. Several actually stated that they were aware of only one or two businesses in the local area which had not survived the pandemic, though some mentioned that a few had changed ownership or downsized. This is surprising given the impact the pandemic has had on other parts of the country, and throughout the world. The Graskop Cluster, in particular, appeared to have survived COVID-19 relatively well, with several respondents unaware of any businesses which had closed. In the Lydenburg cluster a few were noted, but many stated that issues existed prior to COVID-19 and that it was the “*nail in the coffin*” (TC3).

9.2.5 Primary Business Challenges

A number of different challenges were cited in reference to those specifically faced by individual businesses. Some did mention financial concerns, which is expected. Several also discussed the fact that their visitor numbers have not quite recovered, with some referencing the return of international tourists. “*We used to have big international groups who came on buses. That has not returned*” (TC17). They also noted that although the number of visitors remains high, they are not generating the same revenue “*We’re not getting as much spend*” (TC21). Another said “*Even if we did get the same occupancy rates we would still be struggling because of the reduced prices*” (TC11). Others continued to mention the above challenges related to infrastructure and service delivery which, of course, cause a number of challenges for the businesses. One operator said “*We are a resort. We are not built to operate on a generator*” (TC12). These issues are addressed in detail in other parts of the report but there were listed as challenges faced by most of the individual businesses. Some noted challenges with staffing. Some of the issue was a lack of funding for full staff coming out of the pandemic. Others said that last-minute bookings and drastic differences in week versus weekend numbers made it difficult to ensure enough staff are onsite. One said that there is a “*big fluctuation from week to weekend*” (TC17). One respondent addressed the issue of staff mentality as a result of the uncertainty. Another said that the pandemic “*brought about a serious change in thought process about their jobs*” (TC19) saying that there was difficulty in getting people to commit to a job since employment in hospitality and tourism has been so precarious.

The businesses located in the town of Pilgrim’s Rest noted some challenges unique to the heritage town. Firstly, there were mentions of serious problems with maintenance of the town and its structures. The town is owned entirely by the Public Works Department, who is meant to be responsible for maintenance of the town and its buildings. From several reports, it is clear that the government has not assisted with much of the upkeep of the town, particularly since the onset of the pandemic, through it was noted that these issues existed even beforehand. One respondent

said *“The buildings are not safe and they’re not doing anything about it”* (TC15). They went on to discuss that despite the fact that business operators typically only have short leases (around 5 years) and none own their premises, they are constantly required to conduct their own maintenance in order to keep the facilities going. This despite paying rent to the Public Works Department for these services. Another mentioned that even when some of the lockdown restrictions eased, they were unable to open their restaurant *“for 8 months because the Royal Hotel [across the road] became a quarantine facility”* (TC14).

Some of the business challenges related to the transformation in demographics and patterns of visitors to the area, which is markedly different than the pre-pandemic visitors. This transformation has created a series of new challenges for business operators. Firstly, as one respondent stated *“we are struggling to understand how to serve this tourism market”* (TC22). Some made reference to concerns over visitor behaviour in protected areas. One noted that there were *“issues with the behaviour of locals particularly related to noise and alcohol abuse”* (TC16). A few said that there were major issues with increased litter and adherence to regulations within protected areas and natural tourism attractions. Another respondent discussed issues with traffic and parking, which had become problematic, because there is not sufficient parking available at the different sights. This creates a number of traffic problems (TC22). The respondents who focused on these challenges were mostly from the Graskop cluster, as the discussions focused on issues along the road and at the Panorama Route sights. *“There is no, ZERO control or regulation of development along the Panorama Route”* (TC18). The town has maxed. (TC18). A respondent in the Lydenburg cluster, which offers more remote rural tourism experiences, said that she found it difficult to explain to potential clients the camping facilities *“My biggest problem is that people don’t understand the products, especially camping. They expect a ‘glamping’ experience when what I provide is a camp site”* (TC5). Another mentioned that their establishment is very rustic and they had issues with visitors who were not pleased with the facilities because there was no television or pool (TC2). Another said that *“you have to work harder with local tourists. They’re more demanding”* (TC8).

9.2.6 Future Prospects and Opportunities

Most respondents indicated that they believe that their business will survive the ongoing pandemic. However, it will not come without challenges. Firstly, most continued to be concerned about the uncertainty in rules and regulations going forward. Any additional restrictions could significantly affect their ability to survive going forward. This uncertainty also relates to whether or not the international market will be as significant as it was prior to COVID-19. One said *“We don’t plan to do anything new until we know what market we get going forward”* (TC20). Some said they are not interested in adding new products with one saying *“We’ve got what we’ve got”* (TC1). Some also said that they are just starting to recover *“Everyone is just concentrating on getting back on our feet”* (TC15). Others did see opportunities for expanding their business or product offerings in the future, though many did not feel it was realistic in the near future as they continue to recover from the detrimental effects of the pandemic and various lockdowns with statement such as *“Yes, there are lots of opportunities but at this stage there’s no money”* (TC17). One said *“There are so many other things that we could do but not at the moment”* (TC8). Another said *“I see opportunities when borders open properly”* (TC2). A couple have added

new products. One establishment has added quad bikes and off-road scooters which are *“very popular with local visitors, from the area, who come for the day”* (TC8). Some have plans for future upgrades. One respondent wants to open a hospitality training program at her establishment as she sees a demand for proper hospitality training in the area (TC9). Another is looking at adding a teambuilding product for work retreats (TC10). Another is adding themed evenings, where a group can come for a themed meal (TC18). A few said that they have expanded outdoor seating.

Some businesses are adapting products to meet the demands of local tourists. One operator stated that they had created an informal takeaway restaurant to meet pandemic demands (TC21). Both breweries said that they are adjusting their products and prices to meet the demands of the local market. One is introducing flavored vodka to their product line (TC7) while the other is adding a form of *“spiked seltzer or sparkling water”* (TC6). One respondent said that she is upgrading her camping sites to add more ‘glamping’ options due to the changes in the market demand (TC5). Several have adjusted their marketing strategies in response to changes in tourism demand. Some are also only just bringing back products they had previously *“We’ve just been able to reopen the spa”* (TC4). Interestingly, there were a couple of businesses who were not interested in offering new products or expansion. One said *“Something that we don’t want to do is open for day visitors. We get lots of requests but there are lots of issues with day visitors and we don’t have the facilities”* (TC8).

Respondents were also asked about any tourism opportunities they feel might have been missed throughout the municipality to which there was more response. Several emphasized the fact that the potential is there, the attractions are there, they just need to be upgraded and maintained. She said *“we need to add security at attraction. We need to set up facilities at the attractions”* (TC3). Many also suggested that marketing strategies needs to be enhanced. One said *“Although we do our own marketing, we need proper marketing of the area”* (TC2). Some said that more attractions are needed *“We needed more attractions. More activities”* (TC13). Several noted that the Graskop Gorge Lift has been very successful and that similar attractions would be useful in attracting tourists. A few did mention that a new glass walkway is currently being developed at God’s Window by those who built the Graskop Gorge Lift. This was seen as something that will assist in growing visitor numbers and in enhancing visitor experiences, particularly after the success of the Graskop Gorge Lift. Interestingly, respondents did not see competition as a threat, one said *“We’re not scared of opposition. The more the merrier. The more attraction, the better”* (TC12).

Respondents also mentioned that there are significant opportunities for developing tourism to meet the needs of the new emerging market. One said *“Growth that needs to happen in this area is that products need to be increased to meet the demand of local Black South Africans”* (TC18). This respondent also emphasized the need for more budget facilities offering aspects such braai facilities, TV, Wifi and a swimming pool (TC18). One respondent noted an increased need for accommodation on weekend saying *“Most guesthouses are full on the weekend. There are very few proper, established hotels”* (TC23). Another said that there are some new operators who are introducing ‘glamping’ experiences for tourists to the Panorama Route, where all the set up and catering is taken care of. He saw this as a market which

could grow but also assist existing accommodation offerings by utilizing their campsites (TC22). Another said that the area needs more *“rain-friendly products. It rains here all the time but there’s not many options of things to do in the rain”* (TC18).

Others mentioned that local community tourism development might be useful, such as visits or stays in local townships. One said *“One of the worst things about tourism development is the lack of development in the rural areas. Particularly outside the towns”* (TC22). One respondent cited that this might enhance local investment in tourism stating that the problem is that many people *“couldn’t understand the value of tourism in the area”* (TC2). Several others mentioned some of the archeological sites surrounding Lydenburg as an area of potential development. A few respondents did, however, note that the attractions run by the Mpumalanga Parks and Tourism Association (MPTA) which encompasses many of the sights along the Panorama Route, could be packaged together. They are each run separately, and entry fees are required for each stop, ranging from ZAR15 to ZAR65. A package could be put together allowing access to all of the attractions run by MPTA. Most, however, emphasized the fact that tourism cannot grow if the major issues surrounding infrastructure and service delivery are not addressed.

9.2.7 Required Support from Local and National Government

Many of the challenges and concerns faced by these businesses, as discussed in previous sections of the report, are directly linked to local government. However, respondents were also asked, specifically, what interventions would assist their businesses going forward, both from national government and local government. In the case of local government, it has been discussed at length above and some recommendations are included in the recommendations below. The majority of requests for support were related to infrastructure development, namely the roads and service delivery. They also asked for more transparency in terms of municipal finances and spending. Coherent marketing strategies for the entire municipality were also suggested with an emphasis on packaging products. One important intervention which is not mentioned above, requested for the local government is to have operating and functioning tourism information centres with one saying *“we need a tourist information center in Lydenburg”* Some emphasized the need for intervention from provincial government saying *“Provincial government needs to get their act together with the roads and crime”* (TC11).

Respondents had varying responses for support from national government. Many of the issues concerned those related to local government such as infrastructure support. There was a sense, however, that national government is unable to assist other than financial, encapsulated in this statement: *“National Government doesn’t do anything for small towns”* (TC6). One of the key components which was listed as a support mechanism from national government is to enhance public transport options. Issues around transportation in rural tourism destinations is increasing. Both visitors and staff could benefit from increased public transportation. Some were concerned with the misuse of funds. More transparency on the allocation of funds to support tourism would be beneficial in addition to more support and oversight from national government of provincial government and provincial government of local government. One respondent said that they saw issues with the tender process, implying that it impeded permanent job creation saying *“Shutdown tenders. Get*

proper employment, permanent jobs for the services” (TC23). Others mentioned the need to increase enforcement and regulation of natural attractions with the statement *“They really need to up enforcement of environmental protection”* (TC18). In relation to this issue, others said that education is key to ensure that the natural attractions are not destroyed. This includes educating the staff and visitors alike about the natural environment and to ensure proper behaviour in fragile natural environments. One respondent stated *“We need education on becoming a responsible tourist”* (TC21).

Others said that the government needs to increase its support for tourism in the country and have a good marketing strategy, especially for encouraging people to travel within South Africa and to emphasize the COVID-friendly tourism destinations (such as Thaba Chweu). *“Telling South Africans to visit South Africa”* (TC1). There was an emphasis on the promotion and understanding of rural tourism itself stating *“We need information on what rural tourism is. We need better marketing of information on nature in the area”* (TC5). Another said *“It would be good if the government could help market natural resources”* (TC2). Another suggested that a longer tourism route is created and marketed *“something like route 66 in the Cape. Through Dullstroom up to the Panorama Route”* (TC11).

Training was also cited as a potential intervention from national government. Training in basic components of hospitality and small business management could assist both existing businesses, and those emerging as a result of increased demands from the domestic tourism market. One respondent suggested that the government facilitate training programs for students which connects potential students with businesses which require assistance, allowing both parties to benefit (TC17).

Overall, businesses are just hoping that they are not shut down again and that new regulations are not put in place to impede tourism. There was a major concern with the uncertainty of future government regulations and lockdown protocols.

9.2.8 Conclusions and Recommendations

These results provide significant and interesting findings for understanding the state of rural tourism in the Thaba Chweu Municipality and, importantly, issues affecting development of rural tourism in the region. Firstly, it is clear that there are major issues with municipal management, both financially and structurally. The concerns over road maintenance were voiced unanimously across the entire sample of respondents. These concerns are of particular importance to rural tourism operations due to the fact that they are often relatively remote. However, broad issues of infrastructure management were raised include maintenance of power lines and the facilities within the tourism attractions. Furthermore, concerns over general service delivery were striking. Several noted that they are completely self-reliant for basic services such as electricity, water and refuse removal, even within the small-town environments.

It is evident that there is a strong tourism business community in the area, with a great deal of resolve, who are committed to tourism development. This is apparent by the initiatives for development driven by many of the operators themselves, despite the pushback or apathy from local government. Several have created their

own initiatives to enhance tourism including marketing materials, promotion, clean-up projects and some even repairing some of the roads in the area themselves. This drive among operators is crucial for the sustainability and potential growth of tourism in the area. However, if the municipality does not assist, this initiative among businesses is not likely to last in the long-term and will likely result in detrimental consequences for future tourism in the Thaba Chweu Municipality.

From these results, it appears that the majority of businesses did survive the pandemic, which is unusual for an area so reliant on tourism. This is partially due to the growth in the domestic tourism market seeking rural destinations. However, it is also largely attributed to the emerging tourism market to the area, the growth of Black domestic tourists, particularly from Gauteng. This new demographic has not only sustained the area as the pandemic persists, but has actually created a number of new opportunities for tourism development. This is a positive trend, but needs to be investigated further in the future as so little research exists on this developing demographic, particularly in the nature-based tourism context.

In terms of recommendations this area clearly has many opportunities for rural tourism development, many of which are being explored and enhanced as we move out of the COVID-19 environment. However, there are serious challenges which the Thaba Chweu Municipality faces with regards to maintaining and developing tourism in the area, particularly rural tourism assets. Clearly the quality of the roads is a major issue which all 25 respondents mentioned at some point in their interviews. Rural tourism, in general but especially in South Africa, is highly dependent on road travel. Without sufficient roads, visitors are often unable to reach the destinations or if they are, under difficult circumstances. This will clearly impact visitor numbers going forward.

Local government needs a complete overhaul. The major concerns over ineffective service delivery need to be addressed and rectified. This will minimize issues, not only for tourism operators, but also for local communities who often have to resort to protest action just to get their basic needs met. With increased service delivery, issues of protests and petty crime will also likely be less frequent which in turn assists tourism businesses. Rectifying issues in the local government should also include increased communication between local government and local tourism businesses as well as more transparency with the use of funds – both those allocated to tourism by the municipality but also the funds generated from tourism assets (i.e. those run by the MPTA). The municipality should be helping tourism businesses and facilitating local tourism development, rather than impeding it, particularly since tourism is one of the top employers in the region.

One step towards resolving issues within the municipality is to create a clear and cohesive tourism management plan. Local government needs to work directly with other stakeholders, most notably the various businesses chambers in the area and local tourism operators to understand the best approach going forward. Better links between the two clusters could also help facilitate increase tourism development and could potentially assist in carrying capacity issues in the Graskop cluster. Another important component of this would be to develop some kind of pass or package for visitors who want to visit numerous sights along the Panorama Route. Many of the sights are operated by the MPTA and so creating a package would not only assist in

potentially decreasing costs for visitors who visit several attractions, it would also greatly assist in facilitating and more efficient process of admission into each individual attraction.

Another important intervention needed is the refurbishing and maintenance of the attractions. There are clearly a large number and wide range of existing attractions in the area. Ensuring that these attractions are kept in good working order, with facilities which are continuously maintained is crucial for sustaining and developing tourism in the area. The area is dominated by nature-based tourism. Therefore, basic upkeep of the attractions is necessary to ensure visitors continue to come. The introduction of the glass walkway at God's Window would be an interesting development and likely enhance visitor experiences. Furthermore, existing attractions which are currently in disrepair or without facilities could be enhanced and redeveloped to encourage tourism to a wider range of natural attractions, throughout the area. This was particularly apparent in the Lydenburg cluster, as it appears to have assets which could attract tourists but that they are not currently in a state to attract visitors. In addition, as mentioned above, increasing public spaces for the increased demand from weekend visitors would also solve many of the challenges faced by local tourism operators. This could include creating recreational spaces along the Panorama Route for braais and gatherings which tourists seek but few facilities are able to accommodate.

Finally, one of the components which has come out of this research, and is really important, is the significant growth in new domestic markets seeking nature-based tourism experiences. The Panorama Route seems to have become a popular destination for emerging nature-based tourists. However, some of the challenges in adapting to this new market need to be addressed. The first strategy is to conduct additional research to better understand the demands of this market. This could assist in developing a cohesive tourism management plan, at the municipal level, as mentioned above, but it would also assist tourism operators in adapting their products to meet this new demand. It is clear that any new tourism development in the area needs to consider this emerging market going forward. In addition, some of the concerns with the increase demand for domestic tourism, particularly during the weekend, also need to be addressed. Issues of inadequate facilities to accommodate the increased demand is problematic and causing ripple effects such as overcrowding and concerns over litter and other components of damage to these unique natural sights. More regulation and enforcement are needed to ensure these environments are protected while also ensuring the needs of the increased tourism demand are met.

9.3 Raymond Mhlaba: Interview Findings

This section of the report turns to our third (and final) case study of a rural local municipality and of the challenges and potential opportunities for the development of rural tourism. The focus is the results of interviews which were undertaken in 2021 with a cross-section of tourism stakeholders in the Raymond Mhlaba Local Municipality in Eastern Cape province. The Raymond Mhlaba municipality is a local municipality within the Amathole District Municipality and is made up of ten towns and villages which include Fort Beaufort, Adelaide, Alice, Balfour, Bedford, Healdtown, Hogsback, Katberg, Middeldrift and Seymour (Figure 15). The area

covered by the local municipality is mainly rural, albeit with an important asset of historical towns that played a part in the development of the South African heritage, political and academic landscape.



Figure 15: Location of the Raymond Mhlaba Local Municipality (Source: Authors)

The discussion is organised in parallel to those presented for the two other case study municipalities with material relating to perceptions of tourism assets of the local municipality, the role of local government, COVID-19 and adaptive changes, the primary business challenges of rural tourism enterprise, future prospects and opportunities, support requirements and a conclusion.

9.3.1 Overview of businesses

A total number of 20 interviews were conducted across the Raymond Mhlaba municipality and specifically in Hogsback, Bedford, Alice, Healdtown, Elundini (Hogsback) and Fort Beaufort. This provided a broad perspective on issues as each town and village vary in terms how tourism is positioned. The interviews were conducted with mainly with tourism business owners engaged in provision of accommodation services, operation of restaurants and a brewery, tour guides, the operation of hiking and adventure trails and the running of events. In addition, the operators of a number of local historical attractions were interviewed – some of these were government employees – as well as representative of a local tourism information centre. Table 8 presents a summary of the respondents in the Raymond Mhlaba research.

Table 8: Overview of Raymond Mhlaba Tourism Businesses

Code	Location	Type of Establishment	Number of Employees	Primary income?	Operates all year?
RM1	Hogsback	Accommodation	36	Yes	Yes
RM2	Bedford	Farm Stall	20	Yes	Yes
RM3	Bedford	Accommodation & Restaurant	50	Yes	Yes
RM4	Bedford	Attraction	N/A	No.	No.
RM5	Healdtown	Attraction	N/A	N/A	Yes
RM6	Healdtown	Attraction	N/A	N/A	Yes
RM7	Fort Beaufort	Museum	4	N/A	Yes
RM8	Alice	Information Centre	2	N/A	Yes
RM9	Elundini	Backpackers	4	Yes	Yes
RM10	Hogsback	Horse Riding and accommodation	–	Yes	Yes
RM11	Hogsback	Accommodation; Hiking Trail; Wellness Centre; Entertainment	–	Yes	Closed in winter.
RM12	Hogsback	Restaurant	4	Yes	Yes
RM13	Hogsback	Tour guide	0	No.	Part-time
RM14	Hogsback	Accommodation	8	Yes	Full-time
RM15	Fort Beaufort	Accommodation	7	Yes	Full-time
RM16	Alice	Tour guide	0	Yes.	Full-time
RM17	Hogsback	Brewery	5	Yes	Full-time
RM18	Fort Beaufort	Tour guide	0	Yes, before covid.	Part-time
RM19	Hogsback	Accommodation; Events; Catering	13	Yes	Full-time
RM20	Hogsback	Adventure company	1	Yes	Full-time

Source: Authors

In terms of the group of tourism businesses most were managed and controlled by the owner in terms of operations. There exist a cohort of well-established businesses six had been in operation for more than 10 years and a further 4 for between 5-10 years. But there were a number of more recently established tourism operations including one accommodation establishment (backpackers), a brewery and a restaurant which were newly established since the onset of the COVID-19 pandemic or operating for less than two years. As is typical for rural tourism the majority of the businesses would be classed as small firms or micro-enterprises with less than 10 employees. There was observed a wide range in terms of how long tourism businesses had been in operation. The interviews revealed that some businesses had laid-off their employees as a result of the pandemic lockdowns: “*We now have four. There were initially 10 but due to no business during lockdown*” (RM9). It was disclosed that some owners devised strategies in order to retain their employees: “*We did not lay off, we just had shifts, they are all back full term now*” (RM15). Additionally, some owners had recently taken over the business, in this case the

previous owners sold or leased the business to new owners this is due to the impact of COVID-19. One of the respondents mentioned *“It’s been nine months - I took over this business during COVID-19”* (RM9). Likewise, another respondent had recently taken over the restaurant from the previous owner *“It’s been few months - just taken over the business”* (RM12).

The reasons for business establishment were investigated. The results reveal that the majority of the respondents were motivated by opportunity within the tourism market. A typical response was *“I was a backpacker, came to South Africa as a backpacker in the 1990s and I saw an opportunity”* (RM11). A tour guide offered the following response: *“I did this unofficially for two years, It was actually so grateful to find this skill. And it was that you'd find people are getting scared to get lost and scared to take walks on their own. So I had to jump in and grab that opportunity. So I got training for that - received training from the Phambili Tourism, under the Amathole district municipality. We started this as co-op”* (RM13). Other motivational factors included having to desire of fulfil a personal passion. Typical of passionate entrepreneurs was this respondent who indicated *“I am passionate about people, nature and change. Even the previous owner had a similar vision hence I took over, we are now on a lease agreement for 5 - 10 years”* (RM9). The respondents were asked if the tourism business is their main source of income. For the majority of business owners this was the case. In terms of business operations, the majority operate on a full-time basis albeit tour guides are part-time operations (due to COVID-19 restrictions) and at least one business only operates during the summer season.

9.3.2 Perceptions of the Local Municipality

The tourism assets of the Raymond Mhlaba municipality were reflected upon by the interview respondents. A range of tourism products available within the municipality were pinpointed with the majority of responses focused on tourism products related to the area’s history and heritage as well as nature-based tourism and events. In terms of the history and heritage the municipality has several attractions such as graves, forts, monuments and memorials mostly concentrated in the southern section of the district. Nature-based tourism which relies on assets such as scenic mountains, waterfalls are mainly within the northern part of the Hogsback district, which is also the location for several events. Of note also is that several of the area’s attractions which are situated along the Amathole Mountain Escape. This route starts from Bedford along the R63 to Middeldrift and into Hogsback village. The respondent from the local information centre provided an overview of the tourism assets of Raymond Mhlaba municipality:

Our area is known for its history. It has produced world leaders. It is unique in terms of attractions that you not going to experience anywhere else in the world for example the Martello Tower in Fort Beaufort. We have the institutions such as University of Fort Hare Healdtown and Lovedale which produced the first black nurse Cecilia Makiwane. We have natural attractions in Hogback such as the 33 steps, and the Madonna and child waterfalls. The heritage routes - the Maqoma route - encompasses all the heritage sites within Raymond Mhlaba Municipality - some of them are the Garden of Remembrance, James Steward, Maqoma caves, Chief Tyali Memorial, Dutch reformed churches, John Knox Bokwe grave, and local dams (RM8).

Hogsback village and Bedford are the main tourism foci within the municipality, Hogsback positions itself as a nature and adventure-based destination with its main attractions the local waterfalls. Other assets are opportunities for walks at the labyrinth, visiting a local brewery, chocolate shop, and hiking trails, most importantly the Amathole trail. Activities such as birdwatching and horse riding are packaged by local business operators. Bedford is an old English settler town known for garden tourism and for hosting an annual garden festival: *“When people think of Bedford they link it to the Garden Festival. Or they link to the settlers and the beautiful farms where somebody's family who lived here back then - so they would come back”* (RM2). The town of Bedford is notable also for its Township Open Garden Project which was initiated in 2007, the aim of which was to bring township gardeners into the mainstream economy of the Bedford Garden Festival. The local Hope Street hosts locally-owned shops such as art galleries and a locally-owned furniture factory.

The municipal centre of Fort Beaufort is a place of significance albeit with minimal tourism activity currently taking place within the town. Previously the Martello used to be a place of interest to tourist as it served as a fort for the British army during colonial wars; the tower is no longer an attraction due vandalism and lack of maintenance. The deterioration of this local tourism asset is detailed by one Fort Beaufort accommodation provider:

I mean we had people—from overseas that came to look at the Square, there is no more - because it is non-existent. They are revamping the museum so when its done I hope that will be a plus point for Fort Beaufort. The Martello Tower has not been maintained in years. You used to be able to go walk up and to view from the top of the tower. Now you can't - its been so vandalised. The museum that had all the history of the Martello before they made it the traffic department. I think its horrifying that they took over a historic building to make a traffic department (RM15).

In terms of events the annual Ngumbela Cricket Tournament which plays a role in developing the local economy of Healdtown village near Fort Beaufort was noted by two respondents as an important boost for the local accommodation sector: *“There are a lot of people who come that tournament, and they are being accommodated by the local people”* (RM 5). Other activities that were flagged include tourists visiting the Healdtown College, which was one of the influential schools that produced prominent political leaders such as Robert Sobukwe, Nelson Mandela and Robert Mugabe. It was stated that some international tourists would visit the Healdtown College to tour the school. The town of Alice is a historical town known for education institutions of Lovedale College and Fort Hare University, which were the first institutions of higher learning in South Africa catering for black students at the time and where several Africa leaders were educated. One respondent indicated *“University of—Fort Hare - which is a national heritage site and also Lovedale - these institutions bring in a lot of traffic with their events, especially during graduation”* (RM 8). The significance of business tourism for local accommodation providers was evident: *“It's mostly professionals that come stay with, but you get one or two that come for historical purposes, the one or two that go to Hogsback for the snow. Most of time it is business-related people that come stay here because of the citrus farms we have here and auditors come here for the small businesses”* (RM15).

The respondents were asked about what could be done to improve or expand local tourism. The responses varied some mentioned that visitor numbers can be improved by creating events that would attract people to the area. Others highlighted issues around the state of the towns and lack of government responsibility including for improving marketing and awareness campaigns. Several respondents highlighted the need for further events to boost local tourism: already the area hosts several events such as Christmas in July at Hogsback and the Bedford Garden Festival. One respondent asserted:

More events, specific events. Create more events for this area, not only musical events but maybe have a half marathon from Bedford to Adelaide, have it organised by real event planners. The events must not be only take place once a year that is not enough to keep the economy alive, if we could have two or three, even in the winter, I mean in Adelaide you already have the Vlakvark where come from all over South Africa come to hunt and people stay over those farms (RM2).

For expanding visitor numbers the imperative for local government to address issues of accessible roads, better infrastructure and improved service delivery was stressed. A typical response from an accommodation provider was as follows: “Government needs to improve on their responsibilities, in terms of municipal obligations, in other words roads, infrastructure, cleanliness, awareness amongst the people about the environment about not polluting” (RM10). Another tourism business owner made a similar comment about the lack of infrastructure particularly tourism facilities “I don’t think our municipality does anything for tourism in Hogsback, they used to do a little bit, but that’s a long story. I don’t think our municipality cares enough to stimulate tourism in the area. The roads were really bad. We don’t have a decent tourism information centre in town” (RM14). Also improving the level of skill and education amongst tourism government officials within the area issue was raised: “When we go to the government offices the officials they have no idea what is tourism. Even the mayor, managers and councillors they do not know the impact of tourism - even if you approach them enquiring about training and marketing opportunities and tour guiding workwear” (RM16). Lastly, some respondents mentioned creating tourism awareness campaigns amongst local people and marketing campaigns to promote the area one of the respondents affirmed “Maybe more awareness on what Hogsback has to offer and- marketing of Hogsback. A lot of people have never heard of it. Because some people who come here for the hike have heard of the Amatola trail and they always ask me but why have we never heard of Hogsback” (RM 11). A specific issue related to tourism awareness amongst the black community:

It’s so unfortunate that I would say - I have worked in the museum field for 11 years and would say museums are still predominantly known by the white communities, we still have a long way of reaching out to the black community in terms of museums, simply because they do not see the significance of the museum within the society which they live in and also they do not invest their time in the museum. So in terms of visitors you would international visitors mostly and former residence of Fort Beaufort, and these former residence are white people that were part of the formation of the museum (RM7).

Local missed opportunities for rural tourism within the area often surrounded the utilisation of natural resources and once again issues of infrastructural shortcomings. *“There are so many opportunities, but rural setup is abandoned. There is no proper infrastructure I mean its been 25 years of democracy but the situation its still like this. Here there is a beautiful forest you can even set up a reserve - but there has no proper development”* (RM9). Another participant shared a similar response *“I guess, as I said Hogsback is a magical place. Everyone is obsessed with the wildlife, if we can incorporate that into our things we can get a lot tourism nationwide and globally as well”* (RM12). The introduction of farm tours were flagged as another potential attraction. A local guide offered suggestions on local assets and the role of local government:

Promotion and providing awareness to local. There is a lack of knowledge on how to run a tourism business. There are many opportunities within the area for example we have fishing dams (Kat River) and we have the Tyume River for canoeing. And opportunity for abseiling at Fort Dyce, we can have horse riding along the villages to Hogsback and also cultural village around Hogsback. We have the Tyali grave - Xhosa prince - but no development is taking place around the area. We even have the Mgumbela Cricket Tournament which could be an opportunity for Sports Tours. Even if you have an idea the government would not assist you, they will ignore your proposal or takes time, the problem is that everything is politicised”(RM18).

9.3.3 Perceptions of Local Government

There were significant findings related to the local government many of which parallel those from the other two case studies conducted in Greater Giyani and Thaba Chweu. The majority of respondents stressed issues around the quality of local infrastructure. The issues of the deterioration of local roads and lack of maintenance was widely aired as well as poor service delivery.. For example one the respondent stated: *“Roads are very bad, if you go on our websites you will see people complain. Neglecting things like water and electricity is very bad for us”* (RM1). Another Hogsback respondent argued: *“Fixing up the roads would be a lot of help to us - and would be a lot easier getting up and down this mountain - wider roads as well - there are a lot of bendy roads and people generally don't do a speed limit and its very dangerous”* (RM12). Poor service delivery has been a failure of the local municipality: *“The service delivery issues can be improved very easily. There was a company that was commissioned to conduct a survey of the water supply here and it is repairable. We just need to get the government to do it, and it was laid out in a phased approach, the solution is there on paper, the report was done. And also just providing municipal services like cleaning the town”* (RM3). Additional problems surrounded inadequate electricity provision that hindered business and the powerlines that are not well maintained which impacts business communication: *“Electricity is a major problem we have a lot of illegal connections. Our internet signal is very on-and-off, and when the power if off there would be no signal at all and would be difficult to communicate with each other like if there is a rain storm then my staff can't call me”* (RM12). In the wake of local government inaction local business owners have resorted not to rely on government and instead to construct their own signal towers.

Lack of government support for tourism was raised as a matter of concern in particular the lack of marketing initiatives and the lack of funding programmes. One of the comments made indicated the need for marketing support *“I suppose more marketing, just getting out there, more brochures and maps”* (RM14). The lack of funding support from government institutions was also a hindrance in terms of business development (RM16). In this municipality where nature is an attraction the inaction by local government in relation to poaching was flagged as a threat to local tourism assets. Local government is not taking a stand on poachers or establishing anti-poaching programmes: *“The problems with the poaching - people hunting so now we will lose these baboons, monkeys. We have a Amathole toad which is very special to Hogsback but at the moment you'll be lucky if you find it and also our Cape Parrots - If these are not there, there'll be no tourists”* (RM13).

Red tape in local government was a major constraint on business development. For example, a farm stall operator argued: *“I think they should forget about the lot red tape and if there is funding work together with garden festival committee, give them the money they know how to do the marketing and advertising”* (RM2). It was evident that government bureaucracy is an impediment to the formation of strategic partnerships with private sector in order to develop the local community. This said, one government official revealed how local government was of help to local businesses and the kind of support programmes they had provided this is specifically in assisting local women in developing local homestays:

We create awareness programmes around the community, –e work with our ward councillors to inform community. We market - using word of mouth. When we developed the homestays we drafted forms which were di-tributed within the community for those who wan-ed to take part - the forms included that requirements/criteria - this was done with the Tourism Grading Council. There are 6 homestays in total and are all women owned. Though it is not a major buzz but there are a few guests. The support that we give are capacity building, trainings on housekeeping, customer care, we provided signage (RM8).

9.3.4 The Influence of COVID-19

When the owners were asked to describe their business before COVID some owners revealed that the business was doing relatively well *“When I said in my business slogan 'come walk with us' people were coming and we had good feedback. Business was good”* (RM13). Other respondents, however, recounted that their businesses were experiencing problems prior to the pandemic; an accommodation provider in Hogsback stated that their business was *“struggling”* (RM11) another that their business was *“adequate and not exciting”* (RM19). Many enterprises indicated the negative effects of the pandemic in relation to their business and the challenges they faced since COVID-19 particular with the loss of clientele: *“We lost a lot of close customers”* (RM1). Likewise, another owner shared the same sentiment: *“They do not come anymore, it's difficult”* (RM4). The banning of events had a major impact on local rural tourism. An operator of an attraction based in Bedford stated that before COVID *“We used to get tourists for the whole day during the festival”* (RM4).

Adaptive responses were critical for the survival of many rural tourism businesses in the COVID-19 environment: *“Thriving. Because I have made a lot of changes, in*

2018/9 international tourists were dwindling. We were a backpacker marketing directly at foreigners. Now, we are a nature lodge...so I moved to the domestic market, we have had 11 times more hikers than before COVID" (RM11). Certain respondents indicated on how they relied on essential workers to sustain their business during lockdown, the owner asserted "we did not have much business, but we had the essential workers, we had our 2 - 3 down months but after that it has picked up" (RM15). A Bedford enterprise highlighted how they coped: "We tried to be very creative. In the beginning of COVID-19 we planted vegetables to keep people busy and support the salaries and income" (RM2). Some accommodation service establishments were innovative by adding other offerings: "Increase in self-catering apartments, introduced food delivery into the rooms, expanded the outdoor area, and expanded the capacity indoor area" (RM19).

A common adaptive response was to diversify operations into other business areas. The local brewery had to respond to the alcohol ban:

We obviously had to close for the first lockdown, and it was an alcohol ban so during that time we perverted. But during that time I taught myself how to bake and sort of turned ourselves into a coffee shop. The alcohol ban affected our business massively - last Christmas for instance we did open and it was the 28th December the ban was implemented and that was our peak we were super busy - people associated us with beer so it was hard to get people to come in for the coffee shop. So I learned how to bake so I sold cupcakes and brownies - and I would to the local people - and sold at the local Saturday market. We could not trade during the lockdown (RM17).

There were adaptive responses to changing consumer demands linked to COVID-19 and domestic visitors motivated to travel to rural environment which is more linked to nature. One of the Hogsback respondents commented: "The hiking trail is busier than before COVID-19 because people want nature, beauty. We renovated - we did the rooms during the lockdown. And also, people are craving nature they do not want to be locked in, they do not want to be in cities all the time - they want to breathe fresh air, so Hogsback is very well placed to be the new normal, I mean the intake in hiking here - even the day hikes - people just want to get into the forest" (RM11). Likewise, one accommodation expressed the view that: "People in the city want to travel because they have been confined and under restriction. The local demand has increased" (RM19). It was recognised that there has been a growth of domestic tourists wanting to travel to rural areas because of its association with nature, a sense of freedom and less confinement. Other adaptive strategies included businesses taking the opportunity to refurbish their buildings: "We renovated - we did the rooms during the lockdown" (RM18).

Several respondents turned to new technologies for adapting their businesses in the COVID-19 environment. The government official from the museum reflected that: "We ventured in the use of technology. We made the museum virtual, sharing the photographs that we have of the museum. But we were not able to actually host on a website that would sort of take you on tour of the museum due to the lack of funds, because the museum receives so little funding" (RM7). In the same aspect one of the respondents indicated how the use of technology as a marketing platform has assisted their business - "As soon as the President eased - I started marketing on

WhatsApp, I also joined Instagram. I get bookings from social media" (RM13). This said some of the businesses could not cope with the impact of the pandemic with one of the owners of a local attraction stating, *"It has just a struggle for us, now we are just faced with poverty"* (RM4).

9.3.5 Primary Business Challenges

In respect of the key constraints that the businesses are currently facing in terms of operations a number of different challenges were highlighted by the respondents. The majority highlighted issues around infrastructural development, others mentioned concerns over the impact of COVID-19 on their business, others cited conflicts within different organisation versus government, and issues on land ownership, and some indicated challenges around lack of resources within the area.

The shortcomings around infrastructural development within the Raymond Mhlaba local municipality were the dominant concern for the majority of the respondents throughout the study, and the major constraint on rural tourism expansion within the area. One Bedford respondent reiterated the challenge of road infrastructure *"Infrastructure. The road to Grahamstown is actually deadly, people have written off their cars, people have died. The pot holes are huge. In the twelve years I have been living here there has been no effort to fix that road. I would imagine if the roads weren't as bad people would come here for Sunday lunch, but they actually do not like that road at all"* (RM3). Within the Hogsback area one of the respondents flagged the same challenge upon business development: *"Since we are on a mountain its so hard to get stock up here. We used have a butchery and-bakery, but getting things here is very financially challenging – its just too difficult to come here. The roads play a big part - there are pot holes everywhere. There are no roads"* (RM12).

The impact of COVID-19 has caused instability on the financial operations of the business as a result generating income was a major constraint and therefore it has been a challenging for some owners to retain employees. One of the owners identified this problem: *"At the moment we are not generating any income, that is the biggest challenge"* (RM9). In addition to this point another owner made a similar comment on the lack activity within the business made it difficult *"Keeping the employees as there was no activity"* (RM2). The brewery respondent indicated *"the lockdown has stopped me from employing more people - could not afford to keep staff if we not trading - so in a way that stops us from growing"* (RM17). The lack of resources was also a major hindrance for the business operations one of the entrepreneurs indicated the issue of having their own facility where they can conduct business *"I would love to have a shelter/office because it's raining the tourists cannot go on a tour - so if I have an office I show videos - virtual tour"* (RM13). Additionally, the lack of financial resources and other factors that are a constraint to business development were emphasized: *"It's lack of funding, lack of resources, under-staffed, lack of training"* (RM7).

9.3.6 Future Prospects and Opportunities

The study asked the respondents to comment on how they view the prospects of their business. Most participants showed optimism regarding the future of their business, they indicated that they believe that their business will survive the on-going pandemic. Typically: *"As I say things will get better, and I see this business championing the space we are in, we in competition with Hogsback, but I see us*

championing in the next few years because of the uniqueness and the authenticity” (RM9), similarly another owner added “I want to make it in the next five years” (RM13). A Bedford accommodation provider indicated that they hope that the local government will in the future provide support into developing the area and their businesses: “I do not think the municipality appreciates how important it is their role in our survival, I mean you look at the employment just here and how it is important our community, it’s a small community and supporting our business in any way they can should be a priority purely because of the fact that we are a big employer in town, and not just an employer we provide people with skills, computer skills, food and beverage skills, cooking skills that they can take anywhere in the world. So the government should be facilitating that in any way they can” (RM3).

Other points made by the respondents is the need to be innovative and learning to be self-sufficient: gave was *“Small town people must think about the strong points in that town, here its beautiful nature, farm gardens, it’s a lovely settler community. Places like Adelaide can do hunting. Every town think about what is your strength, what can you become popular for” (RM2). Another point that was mentioned was the transformation within the industry by establishing solid networks amongst tourism entrepreneurs. For example, the representative of the local tourism information centre maintained: “We would want the perceptions around tourism to change - that it is white dominated - to try mainstream tourism to local communities because we have the assets tourism can go a long way if can work together as people. For instance, you have your tour guide, accommodation establishment, tshisanyama, crafters” (RM8).*

9.3.7 Required Support from Local and National Government

The respondents were asked what sort of support or intervention would assist businesses in responding to the demand of tourists both from local and national government. Many issues were raised, though many respondents did not differentiate between local and national government in terms of response. In the case of local government respondents consistently raised issues around the incompetence of the local government and their lack of professionalism: *“Fix the municipality first, because that is where the root of your town starts and things will go better from there. If you have the right infrastructure, waterworks, and electricity and if you have stable roads more places can open. There is a very big lack of work ethic” (RM15). Regarding support, the majority of the requests were linked to business support, specifically in marketing, skills and training, awareness programmes. Several respondents mentioned the need for marketing support: “Assist with the marketing, to be included in government’s tourism websites. I would like to see government supporting small businesses, especially the black owned businesses” (RM13). Others mentioned the need for support regarding skills and training: “Give access to skill and training development, the important thing is the skill - if you do not have the skill there is nothing that you can do. My thing is give me a skill so that I pass on that skill to the next generation - that is one of the ways we can develop ourselves, you must equip those people who will train the next generation” (RM16). Among other support interventions were the need of a local information centre in the northern Hogsback area; The information centre was closed down that had been operated by the local government, it then later reopened and is currently managed and funded by local businesses of Hogsback. The need for awareness programmes was also mentioned by the respondents, particularly on*

educating local communities on tourism development *“I think awareness programmes are needed, encouraging people to participate in tourism activities”* (RM7).

Limiting red tape within government was also a required intervention as some of the respondents mentioned that the turnaround time in terms of government application processes was slow *“Limit red tape. The process take too long - sometimes things can be done over 24hrs takes a week”* (RM8). This also led to the discussion of incomplete government managed projects within the area for example one of the respondent mentioned a state funded project that has not been completed in over 6 years *“You would find some programmes are incomplete and now the government would want to embark on new projects and leave the other projects hanging. For example the Mthontsi Lodge which was funded by NDT –or R30 Million working with the local and district municipality - the structure–I would say is 70% - 80% completed, the chalets are constructed - the projected started in 2015 - the complications were with NDT”* (RM8). The lack of funding support especially for black owned businesses was raised as an issue. Some indicated that they did not receive the relief fund or the application criteria excluded them, other never received feedback *“We applied for the COVID relief grant but we never heard back”* (RM11). Another respondent made a similar comment *“We have tried to apply for the relief fund but no response. There so much I would require now we need funds to renovate the space, build more rooms, employ more people”* (RM9). From another–respondent: *“The criteria for the COVID relief fund was limited - it was unfortunate - our business is new - we just opened and then COVID hit, and we only managed to keep open because of the generosity of our landlord for the holiday rental payment”* (RM16). Further local issues related to conflicts between tourism and forestry: *“The conflict between tourism and forestry is the biggest constrain, government needs play a mediating role, constraints in terms of developing tourism in the area concerns around the land and accessing the space because of forestry private company - cannot create tourism packages without a permit”* (RM19). Beyond all the above it again must be stressed that the core concerns around infrastructure development were the dominant issues flagged for necessary intervention.

9.3.8 Conclusions and Recommendations

The results of this investigation provide significant findings for understanding the state of rural tourism in the Raymond Mhlaba Municipality and the structural factors impacting the development and underdevelopment of rural tourism. In reviewing the key findings the most dominant theme is the concern of local tourism businesses over poor infrastructural development and the lack of basic services. Issues of road maintenance were voiced unanimously throughout the entire sample of respondents with deadly roads that limit tourists visiting the area and correspondingly business growth. Other infrastructural issues that were raised included the lack of maintenance of electric powerlines which affected communication and network channels, and the lack of maintenance of hiking trails. Service delivery and cleanliness of the towns was a further as an impediment to business. The research discloses a lack of trust and confidence in local government on the behalf of local businesses which necessitates them to become self-reliant and fund their own local initiatives for tourism development. The lack of government support was evident as the majority of the respondents commented on their dissatisfaction of the local municipality.

The Raymond Mhlaba municipality lacks the necessary support programmes that mitigate barriers to business development, the kind of support that many respondents alluded to included marketing and promotion of the area, funding opportunities, skills and training development, awareness programmes and resources such as office facilities. Another issue that requires attention is the conflict between the private owned forestry company and local businesses, the government needs to play a mediating role to resolve such conflict, the clash between these two parties is an impediment to tourism growth. With regards to the impact of COVID on tourism businesses, whilst the pandemic was a major constraint to some businesses with some businesses closing down it has triggered adaptive responses by tourism businesses to ensure business survival.

In the final analysis it is concluded that the Raymond Mhlaba Local Municipality has leisure tourism potential and many rural tourism development opportunities. Severe developmental constraints must be addressed however to unleash the recovery potential and opportunities for business development for rural tourism. The issue of inadequate roads is a critical matter in the environment where opportunities are growing for drive tourism to support recovery of rural tourism destinations.

10. Ethical Considerations

Research was conducted as per the university of Johannesburg research guidelines and protocols.

11. Limitations of the Study

Delayed payments were a major constraint on the activities and progress of this project.

12. Final Conclusion and Recommendations

Overall, it is stressed from the international experience that “in no uncertain terms, the pandemic has forever changed the tourism industry as we once knew it” (Sin, Mostafanezhad & Cheer, 2021: 655-656). Niche forms of tourism have been recognized as exhibiting great potential in the COVID-environment. It is against this backdrop that the essential aim in this research report was to examine how niche tourism might be leveraged as part of the tourism sector's recovery plan in South Africa to rejuvenate supply and ignite demand post COVID-19. In terms of this aim our focus was upon a detailed investigation of one specific niche, namely that of rural tourism. This was pursued through three local case studies which involved 70 in-depth qualitative interviews with key stakeholders in the local municipalities of Greater Giyani (Limpopo), Thaba Chweu (Mpumalanga) and Raymond Mhlaba (Eastern Cape).

In final analysis, this research study has provided a wealth of empirical evidence that demonstrates the importance of the niche of rural tourism and how targeted strategic interventions may enhance the prospects of its further expansion. Arguably, the findings underscore the value of niche tourism as a whole for South Africa and that the potential of niche tourism might be leveraged and maximised within the broader context of a niche tourism development framework. Although the outlines of such a

framework were proposed over a decade ago the draft framework requires rethinking in the context of the changed environment for tourism as a whole. Niche tourism can contribute to tourism sector recovery in South Africa and there is an increasing need for a policy framework to guide its development. This study on rural tourism offers a starting point and highlights the relevance and the importance of undertaking detailed research on the potential and challenges of specific forms of niche tourism.

The following are TEN key conclusions and recommendations that emerge from this investigation.

1. In the post-COVID-19 era competitiveness and growth of destinations must hinge, at least in part, upon their capacity to understand and adapt to the new equilibrium at which tourism may reach (Assaf et al., 2021). Although the shape of that new equilibrium remains unclear a strong case can be made for the relevance of niche tourism development. According to Skryl and Gregoric (2022), post-COVID-19 tourism must focus on developing new tourism products in niche forms of tourism that emphasize tourist well-being, health, safety and security issues, and sustainability. Niche tourism development in South Africa has been mentioned as on the agenda of tourism policy makers continuously since 2000. With the rolling of the COVID-19 pandemic the significance of niche tourism is greatly heightened for tourism policy and planning as consumer demands shift from 'mass attractions' to smaller-scale forms of tourism. Arguably, if appropriately planned and developed, niche tourism can be an element for tourism recovery planning. **This reinforces the recommendation that the Department of Tourism support an extended research agenda to understand niche tourism and for investigations on critical micro-niches in order to provide an evidence base for informing appropriate policy interventions in South Africa.**
2. In terms of the (macro) niche of rural tourism the ramifications of COVID-19 on changing consumer travel preferences boost the demand for the current and future development of rural tourism. There is widespread international evidence of a pandemic-induced shift in the demands of urban consumers away from 'crowdedness' and instead towards a search for open spaces, nature, and the tourist offerings of rural areas (Laesser, et al. 2021). Li et al. (2021: 730) argue that "the pandemic has created high tourism demand for health and relaxation... rural tourism that is close to nature has excellent potential for development and will have benefits for human mental health". The upturn in consumer demand for open spaces and for the niche tourism offerings of many rural destinations places a premium on understanding the evolution and dynamics of rural tourism. Arguably, rural tourism offers a major opportunity to satisfy the demands of post-pandemic tourists in South Africa who seek stress-relief and rejuvenation within a nature-based environment or engagement with physical and psychological well-being activities. **It is recommended that the Department of Tourism raise the awareness of local governments to the immediate opportunities surrounding rural tourism but at the same time be cautious not to raise unnecessary expectations that rural tourism is a panacea for local rural economic development. The caveat needs to be made clear that for successful rural tourism there is a need for a basket of local tourism assets and of essential operational infrastructure for access to and facilities for tourists.**

3. This radical new environment for the building of rural tourism in South Africa lends urgency for the Department of Tourism to initiate a comprehensive strategy for stimulating the niche of rural tourism in order to maximise the window of opportunity that exists in the COVID-19 environment and recovery phase. A critical step in this process is to recognise that the Department's existing policy frameworks for rural tourism are now ten years old, seriously outdated and out-of-touch in the radically changed environment of COVID-19. **It is recommended therefore that the Department of Tourism revisit and undertake a complete revision of the 2012 Rural Tourism Strategy.**
4. In terms of rethinking this strategy a strong case can be made for acknowledging the need for a differentiated strategy and policy development that is aware of the international best practice on the geographical delimitation of rural tourism. Although it has long-been recognised that the term 'rural' is contested with many definitions, **it is recommended as a starting point for rethinking policy development for rural tourism that the Department of Tourism accept the merits of differentiating at least three spaces of rural tourism: (1) the rural fringe, (2) exotic remote rural, and (3) 'in between' rural spaces.**
5. It is evident that each of these three different rural spaces exhibit different challenges and opportunities for tourism development. Accordingly, it is essential that these differentiated challenges be mapped out in evidence-based research to inform policy development rather than policy be anchored on a 'one-size-fits-all' approach to tourism in South African rural areas. **It is therefore recommended that the Department of Tourism undertake further research on the different prospects and opportunities for stimulating rural tourism in these three different kinds of rural spaces in order to inform interventions for a revised Rural Tourism Strategy.**
6. The changing consumer preferences in the COVID-19 environment provides a stimulus to automobilities and to drive tourism which offers opportunities for leveraging for rural tourism. **It is recommended that research be undertaken by the Department of Tourism on establishing the international best practice policies for stimulating drive tourism drawing on the experiences of Australia, Europe and North America with the goal of informing policy development for South Africa. This research would require also revisiting the potential and challenges of developing themed rural tourism routes as part of stimulating drive tourism.**
7. Our two cases undertaken concerning 'in between' rural spaces – namely Greater Giyani and Raymond Mhlaba - highlight a set of major challenges that need to be addressed in such spaces for successful rural tourism development. There are opportunities in these rural tourism areas for further development of leisure tourism if the institutional environment can be addressed. Currently, however, these 'in-between' rural spaces can be characterised as spaces with visitor economies dominated by VFR travel. It must be recognised that in such areas that rural tourism might not be the most appropriate sectoral strategy to promote and instead that a greater development focus be upon other sectors, such as agriculture or agro-processing, which might yield greater returns for rural development, job creation and community welfare. **It is therefore recommended that the Department of Tourism be selective in interventions to support tourism development in 'in-between rural spaces' in light of the potentially**

greater returns that might be made by government resource support to other sectors.

8. In the context wherein 'in-between rural spaces' are prioritised for support for galvanizing prospects in TVSD destinations it is essential that certain prerequisites be in place before the Department of Tourism undertakes any project interventions. The findings from this research point to critical failings by local governments to maintain essential basic infrastructure – especially roads and water – that must be addressed before rural (leisure) tourism development becomes a realistic option. **It is recommended therefore that the Department of Tourism engage actively with initiatives for the roll-out of the District Development Model which is targeted to address service deficiencies and improve basic environment for all local businesses.**
9. The most problematic findings of this research surround the confirmation of the dysfunctional state of local government in many areas of South Africa, including in all three of our case study local municipalities. The 'best practice' international policies for supporting rural tourism are anchored upon the assumption that local government, the closest institution on the ground, is putatively neutral, working for the benefit of the wider community and capable of sound management and capacity for the implementation of policies to boost rural tourism. These basic prerequisites simply are not in existence across much of rural South Africa because of the state of rural local governance. The evidence in this study points to a record of local government mismanagement, inefficiency and corruption which militates against successful interventions for stimulating rural tourism. The number one challenges for rural tourism development in all three case studies surrounded infrastructural shortcomings which were the responsibility of local government. **In light of the resource-constrained environment in South Africa it is therefore recommended that in guiding its budget relating to project support for stimulating rural tourism that the Department of Tourism be informed by the regular reports of the Financial and Fiscal Commission and seek to reduce its engagement with those municipalities that have been declared as dysfunctional or in financial distress because those are "unable to provide basic services to their citizens in a satisfactory manner". Within a resource-constrained context it is recommended that the Department of Tourism ensure that its scarce budgetary resources are prioritised to focus more on supporting rural tourism primarily in those other municipalities that are not identified as problem municipalities in terms of governance by either the Financial and Fiscal Commission or the Department of Cooperative Governance and Traditional Affairs.**
10. It is evident that the prospects for rural tourism in many parts of South Africa are inseparable from the fortunes of small towns. The challenges of strengthening governance for small town development are a major focus in the recently released strategy for small town regeneration which was released by the Department of Cooperative Governance (2021). **It is recommended that the Department of Tourism enhance cooperation with the Department of Cooperative Governance in its roll out of the small town regeneration strategy and ensure that the specific issues that impact tourism and especially rural tourism are aligned for implementation as part of that strategy.**

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