

Safari lodges and local economic linkages in South Africa



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ABSTRACT

The potential contribution of tourism to the wellbeing of rural communities is impacted by the development of local economic linkages. For development practitioners and policy makers the importance of evolving linkages between tourism and agriculture demands attention. This article provides an examination of the state of linkages in South Africa's luxury safari lodge tourism sector. The results reveal the existence of only limited linkages between safari lodge accommodation providers and local agriculture. Current supply chains are mainly organised by intermediary supplier enterprises which source required food mainly from urban markets with only minimal local impacts. Linkages represent a vital potential mechanism through which to achieve the objectives of pro-poor tourism and a first step to maximise pro-poor impacts and avert polarization is to understand why such linkages rarely materialize and to identify the necessary conditions necessary for them to do so. South African policy frameworks for strengthening linkages must be informed by local evidence and draw from international experience.

Keywords: Tourism-agriculture linkages, local impacts, supply chains, safari lodges, South Africa

1. INTRODUCTION

Several studies document that the growth of tourism and recreation activities can have critical impacts for local economies and can be especially important for leveraging economic and social development in marginal regions or rural areas (Hall 2007; Saarinen 2007). For marginal regions in Europe, USA, Australia and New Zealand, tourism promotion is viewed as a response to rural decline, the imperative for economic diversification, and of the corresponding emergence of post-productivist rural landscapes (McNaughton 2011; Hoogendoorn and Nel 2012). In many parts of the developing world tourism is expanding rapidly in rural areas where

often it represents the principal source of local income. The economic impact of tourism on rural areas, however, is radically constrained by the frequent occurrence of high levels of external leakage which refers to ‘the failure of tourist spending to remain in the destination economy’ (Sandbrook 2010a:125). The existence of such leakages supports the statement by Brohman (1996:50) that ‘in the absence of well-developed linkages between the external sectors and the rest of the economy, a limited and polarized form of development takes place that cannot act as a stimulus for broadly-based development’.

Levels of leakage are related to the absence of local capacity to provide necessary skills, food and other supplies which are demanded by tourism enterprises (Mitchell and Ashley 2010; Scheyvens 2011). The inability to link local economic activities to tourism is a consequence of the fact that ‘rural areas are typically unable to supply the tourism industry with the goods it needs to sustain itself at a competitive price’ (Lacher and Nepal 2010:82). A key challenge for tourism-led development strategies therefore is to reduce leakages and correspondingly to enhance the density of both intersectoral and local linkages by integrating tourism more closely into local, regional and national economic development (Lacher and Nepal 2010; Mitchell and Ashley 2010). The enhancement of such linkages is a critical foundation for increasing tourism multipliers and of spread effects within local communities (Lejarraga and Walkenhorst 2010; Mshenga et al 2010). Furthermore, it is argued that stimulating local entrepreneurs to engage with the tourism sector is an important factor in maximizing the potential of the sector to contribute to regional and local development (Mshenga and Richardson 2012). Overall, it is evident that tourism’s potential contribution to the wellbeing of rural communities hinges upon the development of economic linkages (Trejos and Chiang 2009:373).

Several scholars advocate now that ‘much can be done to boost linkages’, which is a potential productive focus for policy makers (Mitchell and Ashley 2007:2). The acceleration of local impacts and of enhanced local economic development is an outcome of linkage development (Rogerson and Rogerson 2010). Mitchell and Ashley (2006:4) point to the unexploited potential of linkages and suggest national tourism policies should pay ‘more attention on how to promote linkages in tourism’. The establishment and consolidation of local economic linkages is viewed as necessary for maximising tourism’s potential for achieving broadly based patterns of economic and social development (Scheyvens 2011). Tourism scholars acknowledge, however, that intersectoral linkages between tourism and other economic sectors often are minimal in the rural environment of developing countries. Leakages can be strong ‘in the case of luxury tourism where accommodation and service providers tend to be owned by non-local actors’ (Sandbrook 2010b:22).

The nexus of tourism and agriculture has attracted growing policy attention for linkage development (Torres and Momsen 2004; 2011; Mshenga and Richardson 2012). Questions around the linkages between tourism and local agriculture have been looked at in some research pursued in the Caribbean, Central America, Pacific Islands and Asia with special focus around beach resorts (Rogerson 2012a). For example, recent work on tourism-agriculture linkages in the Pacific has been undertaken to investigate both its role in poverty alleviation (Scheyvens and Russell 2012) and of how tourism can be better linked to the local economy in Small Island Developing States (FAO 2012; Singh, Milne and Hull 2012). By contrast, parallel tourism scholarship in sub-Saharan Africa is sparse with only a scatter of works so far produced on

beach resorts in Sierra Leone (König 2007), Kenya (Mshenga 2010; Mshenga and Richardson 2012) and Tanzania (Meyer 2011). The knowledge gap on tourism-agriculture linkages is most marked across southern Africa, an expanding tourism region of the global tourism economy, where researchers have devoted so far only limited attention to this important topic (Rogerson and Rogerson 2011). Against this backdrop the aim in this article is to analyse findings from a recent empirical investigation concerning the extent and depth of linkages between the tourism and agriculture sectors. In particular, attention is centred upon identifying constraints or barriers to linkages between tourism and agriculture, and correspondingly of isolating potential development interventions to address these barriers. The sectoral focus is, however, on nature tourism rather than beach tourism, which is the basis for much existing scholarship on tourism-agriculture linkages.

2. SAFARI LODGES: FOCUS AND RESEARCH APPROACH

In this research the focus is on a distinctive form of nature tourism that in recent decades has burgeoned across many of southern and east Africa's rural landscapes (Massyn 2012). In rural areas of South Africa the growth of the ecotourism sector has been one of the prime beneficiaries of democratic change and of the removal of Western tourism sanctions (Van Amerom 2006). Specific attention is on luxury safari lodges, which represent one of the main assets for contemporary tourism-led economic development throughout much of the region of rural southern Africa. Massyn (2012:1) views 'African Safari Lodges' as high-cost, low-volume accommodation establishments that offer tourists a combination of spectacular experience (usually involving wildlife, landscape or culture) with comfortable levels of hospitality, cuisine and accommodation. In South Africa and across the southern African region safari lodges are marketed as 'eco-tourism destinations' where wildlife protection, the maintenance of biodiversity, and community development are espoused as central values of the business model. The issue of developing local linkages is particularly relevant for safari lodges as these high-cost luxury tourism establishments operate in remote peripheral rural areas in close proximity to marginalized and poor (mainly) farming communities (Massyn and Koch 2004; Massyn 2012). More broadly, the fostering of local linkages can be viewed as an essential platform for responsible tourism, a key foundation for South African tourism policy in the post-1994 period (Republic of South Africa 2011).

The South African research involved a mixed methods approach using a combination of both qualitative and quantitative research techniques. Methodologically, the pioneering work of Torres (2003) underlines the need for a holistic approach to the study of tourism and agricultural linkages, which extends beyond the narrow examination of establishments purchasing patterns to capture the true complexity of their relationship. As she explained, 'research must draw on a diversity of voices' (Torres 2003:563). The initial stage of the investigation involved the development of a database during 2009 of all operating safari lodges in South Africa. For the purposes of this investigation the term 'luxury African Safari lodge' is used to define those accommodation establishments that offer non-consumptive game viewing experiences and charge a daily rate of over US\$200 per person per night. Other safari lodges that charged less than US\$200 per person per night were omitted from this investigation as the focus was on the impact of the luxury end

of the safari lodge market, a niche in which post-apartheid South Africa has seen considerable growth (Massyn and Koch 2004; Van Amerom 2006).

The establishment of this database drew on a number of sources, most importantly those of the Indaba tourism attendance listings (Hunt 2010). In addition, this source was supplemented by an internet search of safari establishments as well as of lodge marketing associations and provincial tourism organizations. To assess the potential for pro-poor benefits to be gained from lodge food supply chains a field survey was conducted with a total sample of 80 South African safari lodges extracted from the national population of 235 luxury lodges; the sample was structured to reflect the national spatial distribution of lodges (Hunt 2010). All selected lodges were approached by email to enquire whether they would be interested in participating in this research. A pilot questionnaire that included closed and open questions was developed and tested with a group of ex-food and beverage managers. With feedback from this exercise the final questionnaire was compiled. The questionnaire included a mixture of quantitative questions and qualitative discussion topics. The survey focused on determining existing patterns of food supply and demand, levels of linkages between lodges and local agricultural producers as well as identifying areas of potential for fostering linkages. Each interview was conducted either in person or by telephone. Additional interviews were secured with intermediary food supplier enterprises.

Finally, in-depth case studies were undertaken with established safari lodges which had reputations for engaging with responsible tourism practice and a willingness to improve their levels of local procurement. The lodges selected were derived from the results of the national survey audit. On-site visits were conducted for detailed interviews at the case study locales and in-depth interviews pursued with members of management staff, junior staff, responsible tourism programme co-ordinators as well as with fresh fruit and vegetable suppliers to these establishments. An overview of the national findings and the details of one case study lodge are analysed here following a contextual review of existing international research on tourism-agriculture linkages.

3. BUILDING LINKAGES: TOURISM AND AGRICULTURE

The building of local linkages is a core issue for advocates of pro-poor tourism who maintain that tourism offers considerable opportunities for assisting the upliftment of poor communities (De Beer and De Beer 2011; Scheyvens 2011). Participation in tourism value chains by micro- and small-scale entrepreneurs is considered an important vehicle for poverty reduction and enhancing rural livelihoods (Mshenga and Richardson 2012). As one of the central tenets of pro-poor tourism is increasing the economic benefits of the poor from tourism activities, by limiting leakages through use of local small producers and broadening linkages between tourism and the local economy, the output multiplier of tourism is increased (Mshenga and Ownor 2009:). As stated by Mitchell and Ashley (2006:1): ‘Strengthening linkages is a way to create “win-win” situations through harnessing the power of private business for the benefit of local development’. Arguably, one critical advantage of tourism for pro-poor development is its advantage of bringing the consumer to the product and ‘increasing opportunities for linkages that give the poor access to markets in which to sell their goods and services’ (Torres and Momsen 2004:297).

The supply of local goods and services to accommodation establishments therefore is isolated as one potential avenue of opportunity for communities and producers in close proximity with the tourism product. More particularly, Rylance et al (2009:14) maintained that ‘linking the potential supply from the local farmers to the tourism industry’s demand of food consumption is considered as a direct pro-poor tourism strategy’.

Tourist expenditures on food and beverages account for a considerable portion of total tourism spend, with some observers putting the figure as high as 30 per cent of total expenditure (Belisle 1984). According to pro-poor tourism scholarship, the linking of agriculture to lucrative markets such as tourism can have highly positive impacts in terms of income and employment expansion for small-scale farmers in the developing world (König 2007:11). Pro-poor tourism writings highlight key reasons why local farmers in developing countries might supply tourism enterprises with food products (Meyer 2007). In many developing countries tourism projects are situated in peripheral regions where the livelihoods of the poor are dominated by food production (FAO 2012). It is emphasized that the provision of food products involves utilizing the productive assets of the poor in terms of land and labour. Moreover, new skills learned in the production of food for tourism establishments potentially also might allow farmers to transfer such skills to other food supply chains. Other positive cultural and social impacts from linking agriculture and tourism are forwarded by Torres and Momsen (2004:302) who argue that it affords ‘an opportunity to build on the existing skills of the poor without requiring a major shift in economic livelihood strategy, lifestyle and tradition’. Among several potential benefits for tourism product owners of expanding local food sourcing are access to fresh foods, potential cost savings, and improved relationships with local communities (Torres and Momsen 2011). Another positive spin-off of local food sourcing for tourism accommodation establishments is the consequence of reducing ‘food miles’, which is an increasingly pertinent issue for the tourism industry amid concerns about global climate change and the making of low carbon tourism destinations (Gössling et al 2011; Steyn and Spencer 2012).

Table 1: Factors Impacting upon Low Levels of Local Linkages

Type of Factor	Characteristics
Supply-related factors	Poor local growing conditions
	Lack of local production of types of food demanded by tourists
	Lack of high-end or value-added products
	Price of local products is too high
	Local farmers do not want to change traditional production techniques
	Inconsistent quality of products
	Poor economies of scale
	Wage increase due to tourism decreases production

	Property value increase due to tourism decreases production
	Undercapitalization of local industries
	Uncertainty of future land tenure
	Necessary natural resources are increasingly rare
Demand-related factors	Tourists' preferences for familiar products
	Tourists' fear of illness from food
	Tourists' desire for cheap products
	Seasonal variation in demand
	Chefs' desire for more sanitary products
	Chefs' inexperience with local food
Market-related factors	Locals' inexperience in marketing
	Locals' failure to co-operate with one another
	Locals are unable to purchase from large wholesalers
	Locals cannot educate themselves in marketing techniques
	Locals' inability to create strategic alliances with tourism industry
	Foreign corporations have strong links to overseas suppliers
	Predatory intermediaries
	Enclave tourism destination desire to keep expenditures in enclave
	Inability to compete with larger corporations
	Kickbacks paid to chefs by large corporations
	Local producers' inability to provide receipts
	Poor local infrastructure results in difficult transportation

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

Despite the several benefits from strengthening tourism-agriculture linkages and local food sourcing, the results from available existing research in the developing world show the existence of only limited linkages between the tourism and agriculture sectors (Telfer and Wall 1996; 2000; Torres 2003; Meyer, Ashley and Poultney 2004; McBain 2007; Rogerson 2011). Across international research a number of important factors have been identified as impediments to the development of local agriculture-tourism linkages. The important works of Meyer (2007) and Torres and Momsen (2004; 2011) isolate a range of restrictive factors that result in low

levels of local linkage occurring between agriculture and tourism. The critical limiting factors are summarised on Table 1, which is based on the work of Lacher and Nepal (2010:82). As has been revealed by existing international investigations, several demand-related, supply-side and marketing and intermediary factors can limit the extent and density of linkages between the tourism and agriculture sectors. Other constraints on the development of linkages between local agriculture and tourism relate to shortcomings with respect to policy oversight by national and local governments of potential linkage opportunities (Meyer 2007; Rogerson 2011, 2012a).

From international research the most common arrangement is shown to be for tourism establishments to source their food from wherever is cheapest, most reliable, most easily accessible, and of assured quality (Torres and Momsen 2004; Rogerson 2012a). Across the experience of beach resorts in the Caribbean, Mexico and Indonesia, it was disclosed that a high proportion of imported foods is served by hotels. Typically, the pattern is for high-end tourism accommodation establishments to source their required food from distant and mainly large suppliers rather than from local small enterprises or poor entrepreneurs. From research conducted in Indonesia, Telfer and Wall (2000) revealed that small non-star-rated establishments relied almost exclusively on local food products whereas the luxury hotels maintained strong linkages with non-local supply networks. In the opinion of Mitchell and Ashley (2010), the outcomes are disappointing from a host of initiatives and development projects that have been launched with the objective to expand local agriculture-tourism linkages. The implications of continued sourcing of food products from distant large-scale suppliers for local economies are of limited impacts for local development and most especially of reduced pro-poor development impacts (Torres and Momsen 2004; Meyer 2007).

The international evidence reflects ‘that the amount of agricultural-tourism linkages vary by tourist destinations, but, are hard to strengthen’ (Rylance et al. 2009:15). Pleumarom (2012:24-25) offered the caution: ‘If pro-poor tourism advocates believe that tourism can easily be linked to the agricultural sector so that poor farming communities can capture a share from the tourism income by providing their products to hotels and restaurants, experiences indicate the contrary.’ For the private sector, the business case against procurement by tourism establishments from small-scale producers usually rests on the multiple costs and risks associated with organizing supply from dispersed producers. Major challenges for buyers relate to quality, consistency, safety, compliance with standards, packaging, loyalty and negotiation time and costs (Torres 2003; Rogerson 2011, 2012a). Infrastructural shortcomings are often critical for facilitating ‘the development or improvements of linkages with local food suppliers’ (König 2007:36). In addition, smallholder producers frequently lack information and have limited awareness of what commodities are in demand, where, what volumes and prices, and quality requirements for tourism accommodation establishments. Other limiting factors for expanded procurement are the existence of dualistic farming structures, minimal producer collective marketing, lack of ‘non-land assets’ such as irrigation, or storage facilities, and the opportunities for using high quality non-local (and sometimes imported) agricultural goods (Torres and Momsen 2011; Rogerson 2012b).

4. PROFILE OF TOURISM-AGRICULTURE LINKAGES IN SOUTH AFRICA

In this section, the central findings from the national survey are reviewed before turning to explore in greater detail one ‘good practice’ case study of a safari lodge, which has introduced initiatives for strengthening local tourism-agricultural linkages.

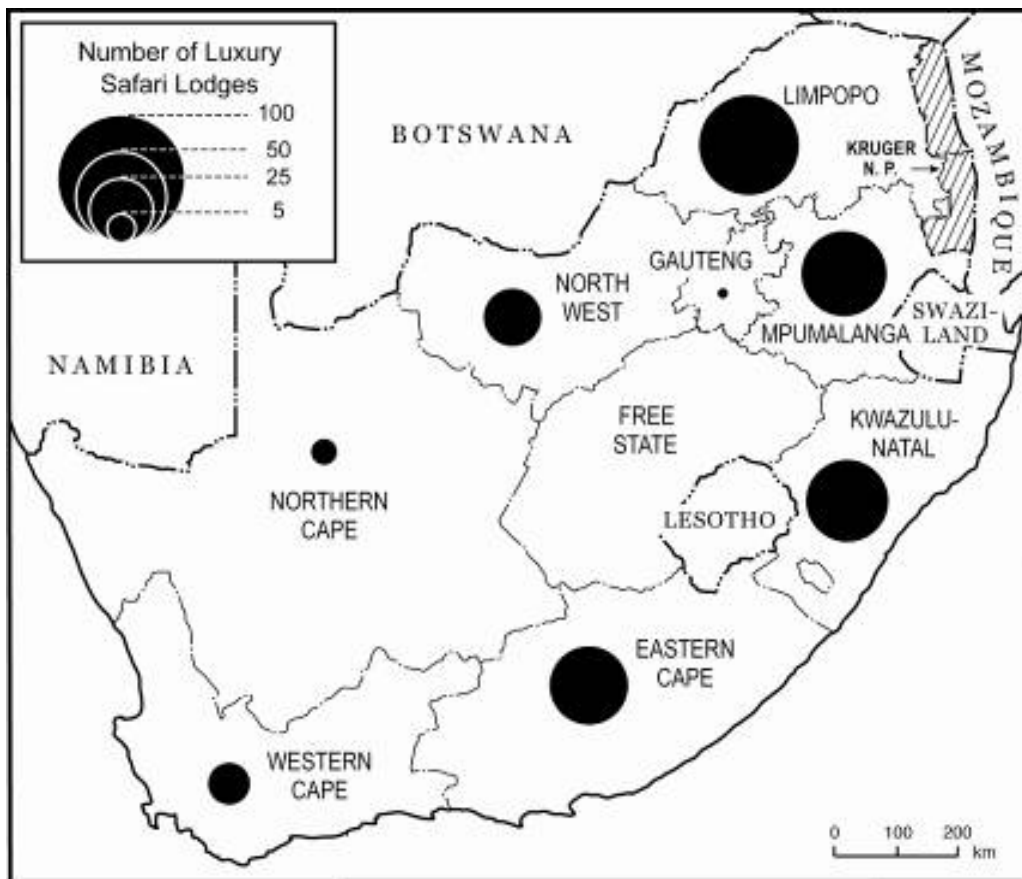


Figure 1: The geographical distribution of South African safari lodges, by province

The results of the national audit disclosed a total of 235 luxury safari establishments spread across South Africa. On a provincial basis as shown on Figure 1 the largest numbers of lodges are situated in Limpopo, Mpumalanga, KwaZulu-Natal and Eastern Cape. Luxury lodges are also found in North West, Western Cape and Northern Cape provinces. At a local level most lodges are clustered in and around the major protected areas such as Kruger National Park, the Waterberg and the Isimangaliso Wetlands (Hunt 2010; Rogerson 2012b). The largest individual clusters of luxury lodges are around southern Kruger National Park, Isimangaliso Wetlands, and Addo Elephant Park.

International research confirms that for the establishment of linkages between tourism accommodation establishments and local agriculture it is essential to understand decision-making processes regarding food offerings and arrangements pertaining to food sourcing. Indeed, according to Torres (2002), tourist food consumption and preferences can be major drivers of hotel food purchasing in the developing world. In the case of safari lodges most enterprises frame their decision-making and procurement policies on the perceived demands of their high paying guests rather than on the results of any research on tourist food preferences. The majority of guests at South Africa's safari lodges are international tourists, mainly drawn from Western Europe and North America. The interviews revealed that for the high-paying mainly international clientele that frequented these luxury safari lodges, it was vital for lodge management that the food served be of the highest quality, be hygienic and contain a range of fresh produce. Lodge managers stressed that their guest preferences are for 'European-style' dishes, which necessitate that food decision makers access reliable sources of traditionally European-style high quality ingredients.

Table 2: Characteristics of Food Decision-Makers at Safari Lodges

Nationality:	82 per cent of the respondents South African nationals
Race:	96 per cent white
Language Proficiency:	80 per cent of respondents speak a language other than English and 29 per cent speak an African language (beyond Afrikaans)
Menu Decisions:	42 per cent by chef, 31 percent by chef and management and 23 per cent by management
Food Supply Decisions:	60 per cent management; 30 per cent chef and management, and 10 per cent by chef
Length of Time in Present Position:	70 per cent less than four years.

Based upon the results of the 80 interviews which were conducted with luxury safari lodges across South Africa Table 2 provides a profile of the characteristics of decision makers who impact on food provision and procurement. Of note is the critical role which is played by food and beverage managers in decisions relating to food procurement whereas chefs enjoy greater responsibility for menu preparation and food selection. Importantly, at South African safari lodges the vast majority of decision makers are local (mainly white) citizens whose background often includes catering training at either local institutions, in-house training through structured internships or at international institutions. The linguistic skills of decision makers and especially their capacity to communicate in local languages is observed as a positive attribute as it increases the level of potential communication between food decision makers and local communities. Nevertheless, this attribute is mitigated by the existence of high staff turnover levels of key decision makers at these rural safari lodges. The implications of staff turnover are highlighted in research on Indonesia where the appointment of a new manager (or chef) potentially had significant impacts on purchasing policies of hotels with the consequence that local supplier relationships and trust necessarily had to be rebuilt with the appointment of new personnel (Telfer and Wall 2000).

A critical set of results from the national audit relates to the geographical patterns of food sourcing, especially for supplies of fresh vegetables which are considered as offering the greatest opportunities for sourcing from local communities. At a national scale, it was found that the vast majority of food served at South African lodges was sourced from national suppliers, a finding which reflects the well-developed character of the country's agricultural sector. In South African lodges the extent of imported foods is negligible, mostly confined to small luxury items such as caviar or salmon. In terms of local food sourcing, the survey determined, however, that only 38 per cent of lodges sourced the bulk of fresh vegetables from within a 40km radius of the lodge location. The majority of lodges preferred to source their supplies through an intermediary supplier enterprise rather than purchase supplies directly from local producers. In effect, the general outcome was that intermediary suppliers purchased fresh vegetables and fruit supplies from the Johannesburg Fresh Produce Market, the largest national wholesale market, with these supplies delivered by refrigerated truck directly to the lodges. Local supply sourcing of fresh food from rural areas was limited with the greatest volume of fresh food sourced from urban markets. An essential role of determining and articulating food supplies is thus undertaken by the intermediary suppliers, which are preferred by lodges on grounds of assuring reliability and quality of fresh food supplies.

It was shown that patterns of sourcing were found to vary between the different spatial clusters as well as between different kinds of food products. For example, a much higher degree of local sourcing of fresh food supplies was evidenced from the cluster of safari accommodation establishments situated in Western Cape as compared with those around Kruger National Park, mainly because of their proximity to a well-established local and diversified agricultural sector supported by good local infrastructure. Overall, in terms of tourism-agriculture linkages the most significant indicator related to supplier relationships around fresh vegetables. A striking finding was that the overwhelming majority of safari lodges do not source the bulk of their fresh vegetable requirements from proximate local communities. Commonly, even in circumstances where local fresh produce is available, the majority of this local fresh produce is not sold directly to safari lodges but rather is channelled first to urban markets before returning back to the lodges via the intermediary supplier. This arrangement adds greatly to the carbon "foodprint" of these establishments and conflicts with commitments made to responsible tourism practices. Most commonly, the purchasing of local food is mainly either as 'top up' supplies for lodges or for use as staff rations. The results of the national survey revealed that only in isolated areas of rural South Africa, such as Madikwe and areas surrounding the southern Kruger National Park, has the safari lodge industry successfully stimulated groups of small local producers to service the food supply chain of lodges and thereby to maximise local benefits from tourism development. More generally, there are issues of mistrust by the tourism accommodation establishments concerning the reliability of local suppliers on the one hand and lack of information or knowledge about the requirements of the safari lodge sector from producers.

The underlying reasons for these food sourcing arrangements can be illustrated from the findings of one of the detailed two case studies. The case study is of Motswari Private Game Reserve, which is located in the Timbavati Private Nature Reserve and is a part of the Greater Kruger National Park Conservancy in Mpumalanga province. Motswari is a four-star safari lodge that hosts a maximum of 30 clients in 15 luxury appointed en-suite bungalows. It is a family-owned company with a strong record across a range of social and environmental initiatives and was

one of the first lodges in South Africa to achieve Fair Trade in Tourism (FTTSA) accreditation. Junior staff retention is high with employees stretching over three generations. Management is also consistent as the manager of the lodge has been employed at Motswari for a combined period of 14 years. The lodge is marketed as an 'original, traditional game lodge' that prides itself on its conservation and community development efforts and offering 'rich game viewing ... exquisite cuisine, award-winning wines and luxurious accommodation' (Motswari 2010).

In order to provide the lodge's 'exquisite cuisine' the sourcing requires high quality fresh ingredients. Motswari does not grow any of its own food produce because of animal disturbance, with baboons eating vegetables when these were attempted. The lodge spends approximately R2.5 million annually on food procurement from a total of 12 different suppliers, which arrange the delivery of their goods directly to the lodge. This direct delivery is a primary requirement in order to gain a supply contract with the lodge. A key issue when deciding which suppliers to source from is reliability of service delivery. Being situated in a remote area and serving such a specific clientele makes service delivery essential. It was made clear that if food goods arrive late, damaged or missing this can have disastrous consequences for Motswari's reputation. Matumi Dry, a dry goods distributor in Hazyview, is well aware of these high standards and is the lodge's preferred supplier.

Motswari is completely surrounded on all sides by proclaimed nature reserves operating in both the Timbavati and the Umbabat conservancies. Due its location and poor infrastructure, the nearest local community settlement is Hoedspruit in Limpopo province, approximately 90 minutes from the lodge. The settlement of Hoedspruit suffers from a very low level of community organisation and offers a minimal amount of goods and services. The local economy is made up of mostly large citrus farms, companies servicing the safari lodge industry and an air force base. The town workforce is a combination of migrant seasonal workers for the citrus farms and commuters from Acornhoek in Mpumalanga. Few inhabitants live in the town on a full-time basis. This absence of community drastically reduces the opportunities for backward economic linkages for this lodge.

The agricultural output that is produced in the Hoedspruit area by large commercial farmers is transported directly from the farms to the Fresh Produce Market in Johannesburg. No facilities exist in Hoedspruit for lodges to buy directly from these farms. At one time a local farmer did offer produce unpackaged at a reduced rate to the local Pick n Pay store in Hoedspruit. The supermarket bought the produce and displayed it for sale at a fraction of the cost of (similar) goods sourced from Johannesburg. Buyers from the lodges, however, feared that reduced price meant there was 'something wrong' with the produce and instead chose to purchase produce that had gone to the Johannesburg market and returned back at higher cost. Without the capital to fund sufficient marketing to overcome this misunderstanding, this initiative for strengthening local tourism-agriculture linkages faltered and ultimately collapsed.

It is notable that none of the employees at Motswari resides in Hoedspruit; all are from the next closest settlement of Acornhoek. The settlement of Acornhoek benefits from direct employment from the lodges and the multiplier effects of secondary spending. In terms of establishing local relationships with businesses at Hoedspruit, there are a number of small establishments that service Motswari. These include a specialised game meat delicatessen, a fruit and vegetable shop, a dry goods store, and a fruit juice company. Management at Motswari pointed out that supplies from the dry goods store were limited and that the quality and reliability of the fruit

and vegetable shop often were below the required standards. Overall, Hoedspruit receives an average of 14.8 per cent of the lodge's total procurement spend with the bulk of food produce (51 per cent) sourced in Hazyview, which has emerged as the central food supply location for most safari lodges surrounding Kruger National Park. More specialised goods, such as luxury delicatessen products, as well as some dried goods are sourced in Nelspruit, with meat products from White River.

The category of fresh fruit and vegetable produce is sourced from a supplier, Matumi Fresh Produce, which is based at Hazyview. This organisation supplies nearly 14 per cent of Motswari's total procurement spend and includes goods produced by small-scale producers, and herbs, which are supplied by a local social enterprise, Abundant Life Skills. The bulk of fresh fruit and vegetable supplies (86 per cent) is sourced from buyers at the Johannesburg Market. In turn these buyers source their goods from farmers all over South Africa as well as from international sources. It was calculated that 64 per cent of Matumi Fresh goods was sourced nationally, 21 per cent internationally and the remainder from the Hazyview surrounds.

Overall, there are missed opportunities for the expansion of local food sourcing and greater linkages with local producers. Because of increased supplier competition the lodge is in a position to place more pressure on their suppliers to source goods locally. Although they cannot force suppliers to source locally they can encourage them. It was disclosed that the lodge was increasing 'African fusion' cuisine on its menus, using, for example, bobotie spring rolls rather than Chinese spring rolls. In addition, as a result of accreditation with Fair Trade in Tourism South Africa the lodge menu is being influenced by what can be sourced locally with, for example, kingklip from the Atlantic being replaced by trout fillets sourced from within the province. Although these trends might be encouraged further, for small-scale producers wishing to enter the Motswari procurement chain, the essential considerations remain those of achieving reliable and direct transport delivery, customer care and the capacity to provide for goods that are ordered at a consistent quality level.

5. CONCLUSION

This paper has addressed issues relating to the limited local linkages that exist between the tourism and agriculture sectors. Arguably, Scheyvens (2011:153) asserted a need to ensure 'that national development plans highlight linkages between tourism and other economic sectors'. In observing this neglect of linkages, however, the World Bank (2012:59) pointed out that traditionally governments 'have put little emphasis on local production and supplies to serve the tourism industry'. In South Africa, despite rhetorical commitments made to responsible tourism, the building of linkages between tourism and other sectors of the economy is an issue that has attracted only minimal attention from national government and tourism policy makers. Instead the core policy gaze has centred on maximising tourism benefits from growing visitor numbers, expanding tourist length of stay or expanding total tourist expenditure.

Our analysis supports the viewpoint that linkages represent a vitally important potential mechanism through which to achieve pro-poor tourism objectives (Trejos and Chiang 2009; Mshenga and Richardson 2012). Arguably, the first step both to maximise pro-poor impacts and avert polarization is 'to understand why such linkages rarely materialize and to identify the

conditions necessary for them to do so' (Torres and Momsen 2004:296). This stance is reiterated in African research by Mshenga and Richardson (2012) that an understanding of the factors that constrain and facilitate linkages can inform policy development. The empirical outputs from this investigation of the luxury safari tourism sector show that local economic linkages are limited. Linkages are constrained by a host of demand-side, supply-side and market-related issues that mirror, to a large extent, several of the barriers as disclosed in international research. Government policy oversight is a further underpinning for missed opportunities relating to developing local supply chains. As a reflection of these issues, current food supply chains for most South African safari lodges are articulated through a network of intermediary suppliers, which source bulk of supplies from urban wholesale markets rather than local agricultural producers.

The reconfiguring of this established pattern of sourcing and the nurturing of a greater depth of tourism-agriculture linkages, including local sourcing, necessitates at the outset that national governments and the tourism private sector together must recognize the significance of encouraging backward linkages. A crafted and coordinated set of integrated actions will be needed in order to address the group of demand, supply and intermediary factors, which at present constrain the formation of local supply linkages in rural South Africa. A number of development interventions have been offered in parallel international research, which can provide a starting point for a policy review and local recommendations. The task of evolving a policy framework to enhance tourism-agriculture linkages must combine local evidence and understanding with an interrogation of policy 'best practice' from other tourism destinations in the developing world.

ACKNOWLEDGEMENTS

The University of Johannesburg is thanked for research support and Wendy Job for preparing the accompanying maps.

NOTES

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