

REFLECTIONS ON PRO-POOR TOURISM IN SOUTH AFRICA: CHALLENGES OF POVERTY AND POLICY IN THE SEARCH FOR A WAY FORWARD

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This article argues that the promotion of entrepreneurship is important to achieve success with pro-poor tourism in South Africa. To promote entrepreneurship, a good understanding of the milieu in which poor communities find themselves is needed. Pro-poor tourism is discussed as an approach to development for the developing world, and South Africa in particular. The sustainable livelihood approach is indicated as a framework that provides an understanding of survival strategies in poor communities and can help to put pro-poor tourism in a better position and guide it towards successful implementation. While a useful legal framework exists, some improvements to policies and an integrated approach to implementation and management, is suggested. In some instances initiatives and support for economic development related to local economic development and pro-poor tourism are evident. The article concludes by noting that assets are available, beneficial policies are in place and some successful case studies illustrate what can be done. Strong leadership is, however, needed to make a success of pro-poor tourism and to bring all relevant elements in line and implement a coordinated and focussed effort to make the plan work.

Key phrases: pro-poor tourism; asset-based development; tourism policies; poverty alleviation; community; sustainable livelihood framework

1 INTRODUCTION

This article is not about the management of pro-poor tourism. If pro-poor tourism could be managed it would be easy: simply select theory X, assuming people do not want to work and must be controlled; or theory Y, assuming people want to work but need incentives (McGregor 1960). One could also use Maslow's hierarchy of needs to work out that different people need different ways of being managed (Maslow 1954), or you can agree with Drucker (1954) that the new paradigm on which management is based is that: "... *[M]anagement must define the results it expects to attain and then must organize the resources of the institution to attain these results*".

Yet the call by the White Paper on the Development and Promotion of Tourism in South Africa (South Africa 1996:par 6.6) on previously disadvantaged communities to "actively participate in and promote responsible tourism" cannot be operated and managed by an institution. It is true that government and all its institutions involved in

promoting tourism (specifically pro-poor tourism), must be managed towards the objective agreed upon. It is argued that the promotion of pro-poor tourism is not essentially a matter of management; but dependent on an understanding of the poverty context and the shaping of a coherent and integrated set of policies to guide implementation and management. The sustainable development livelihood framework, as is argued later, can help guide the process.

The authors' view is that pro-poor tourism will be well-served by the promotion of entrepreneurship. In order to promote entrepreneurship, a good understanding of the milieu in which poor communities find themselves is needed. Drucker (1998:13) views entrepreneurship as innovation: "... *the effort to create purposeful focused change in an enterprise's economic or social potential*" (Drucker 1998:3). The argument in this article is that innovation is required in the tourism sector, if pro-poor tourism is to be promoted. When applied to the promotion of pro-poor tourism, it can be agreed with Drucker (1998:7) that "*purposeful, systematic innovation begins with the analysis of the sources of new opportunities*".

The White Paper on the Development and Promotion of Tourism in South Africa (South Africa 1996) identifies opportunities for poor communities in tourism by providing services to the industry (e.g. tour operators, guides and booking services); act as suppliers to the industry (food, laundry, construction amongst others); and act as operators of tourism infrastructure (guest houses, taxis, shebeens to mention some). This article highlights the context of poverty in which opportunities are to be found – a context that impacts on the realisation of opportunities. Pro-poor tourism is considered as an approach to development for the developing world, and South Africa in particular. As a framework for the promotion of pro-poor tourism in South Africa the sustainable livelihood approach is suggested. This approach provides an understanding of survival strategies in poor communities and can help to place pro-poor tourism in a better position and guide it towards successful implementation.

Finally, policies – or the lack of them – can act as support or stumbling blocks to the achievement of an integrated and well-focussed pro-poor strategy. Once the environment of poverty is understood and policies that enhance entrepreneurship are shaped, management of the process needs to be fine-tuned. Having said this, it

must be conceded that policy formulation and management are interrelated and cannot be separated neatly in real life. This article therefore aims to describe some of the challenges that need to be considered when a pro-poor policy is adopted. The implementation of strategies to promote pro-poor tourism will pose challenges in need of proper management, an issue which is not addressed in this article.

2 POVERTY IN SOUTH AFRICA

Poverty is neither easy to measure nor easy to define. It is furthermore a relative concept, which may vary in meaning from one context to another. Swanepoel and De Beer (2011:3) argue that poverty is relative and may vary between individuals, families, communities and countries. Davids (2006:4) describes poverty as multi-dimensional: it touches on all aspects of human life.

According to Landman, Bhorat, Van den Berg and Van Aardt (2003:4), lack of income is the crucial factor in determining what poverty is and determines the circumstances in which individuals, families, communities and countries find themselves. However, the deprivation trap as described by Chambers (1983:112) shows that poverty is more complex than simply a lack of income. Like a spider's web, poverty is a trap in which physical weakness, vulnerability, powerlessness and isolation interlink to keep people poor. It is a trap that keeps people caught below the breadline and below the minimum levels of living.

The Human Development Index (HDI) provides perhaps a more comprehensive picture of the well-being of people in a country. The HDI looks "*beyond Gross Domestic Product (GDP) to a broader definition of well-being*" (South Africa country profile 2011). It measures life expectancy, adult literacy, gross enrolment in education, purchasing power parity (PPP) and income. On the HDI, South Africa occupies position 123 out of 187, having fallen from a position of 0.644 in 1995 to 0.619 in 2010 (out of a possible 1.0). In South Africa life expectancy at birth is 52 years. Mean years of schooling for adults is 7.05 and gross enrolment ratio in education stands at 76.8%. GDP per capita for purchasing power parity stands at \$10140 in 2011 (South Africa country profile 2011).

In spite of the more comprehensive picture the HDI provides of poverty, income and employment remain important and are most often used as yardsticks for the level of development in a country. Based on the 2007 statistics from StatsSA, Oosthuizen (2009:9) uses a relative poverty line formula and calculates that 50% of South Africa's population lives below the poverty line. This figure closely correlates with the figure of 46% provided by De Beer (2004:15). According to Van den Berg and Louw (cited in Landman *et al* 2003) as many as 20,5 million of South Africa's population lived below the poverty line in the year 2000.

In his State of the Nation speech in 2006, former President Thabo Mbeki committed his government to work with the private sector to eradicate poverty (Mbeki:2006). At the National General Council (NGC) of the ANC in September 2010, President Jacob Zuma called for Government to pursue rural development as the major component of poverty eradication. According to Molewa (2010):

[Zuma] said that rural development is an idea crying out for urgent realisation and that poverty and human needs were most deeply felt in the rural areas. He observed that any hope for attaining the goal of poverty alleviation would thus depend on development of the rural areas.

The South African government's rural development focus can be substantially supported by a pro-poor tourism strategy, and by supporting investment and deploying other resources in rural communities.

3 PROMOTION OF PRO-POOR TOURISM IN DEVELOPING COUNTRIES

The concept of pro-poor tourism is relatively new in tourism studies. It was promoted for the first time by the British Department for International Development (DFID) in a report for the Commission on Sustainable Development in April 1999 (Goodwyn, Spenceley & Maynard 2002:4). In essence, the idea behind pro-poor tourism is to alleviate poverty through tourism activities or programmes. Such programmes aim to increase the net benefits for poor people or communities, not only by creating jobs but also by providing other developmental opportunities (Ashley, Roe & Goodwin 2001:viii).

Pro-poor tourism is not a niche or product in the tourism sector, but an approach to tourism development and management in poor communities or countries (Ashley et al 2001:viii). As an approach, pro-poor tourism becomes a vehicle for development that improves and creates linkages between tourism, businesses and poor people. Pro-poor tourism should contribute to the reduction of poverty by creating an opportunity for poor people and communities to participate in their own emancipation process. Monakhisi (2008:91) argues that developing pro-poor tourism is not the sole responsibility of the private sector, but that government also has a vital role to play in promoting it. Strategies, frameworks and policies need to be implemented by government not only to promote, but also to protect the rights of poor communities and of those in the private sector who invest skills, time and money (Ashley et al 2001:18).

Roe and Elliott (2006:53) argue that one-eighth of the world's poorest people depend on wildlife for their livelihood and food security. They state that, even though wildlife tourism is still underdeveloped, it presents a major source of future comparative advantages for some poor countries, including many in southern and eastern Africa. In rural South Africa land restitution holds promise for pro-poor tourism. In the case of the Blyde River Canyon Nature Reserve (the proposal is to rename this area the Motlatse Canyon Provincial Nature Reserve), three communal property associations and one development trust successfully claimed ownership of the land. However, while ownership of the land is transferred to the community and benefits from the conservation area will accrue to them, the land may not be sold or rented to third parties. Management of the conservation area will be done in collaboration with the Mpumalanga Tourism and Parks Board (MTPA) in terms of a co-management agreement. Ownership and joint management of the land gives the community access to various resources, employment opportunities and income. If the land transfer is managed properly, this type of restitution may become an example of the successful promotion of pro-poor tourism (De Koning & Marais 2009:75-76).

An example of successful pro-poor wildlife tourism in South Africa is the Madikwe Game Reserve in the North-West province. Madikwe was created in 1991 and consists of 75,000 hectares. The uniqueness of this game reserve is that it is run as a joint venture between the state, the private sector and local communities. The aim of

Madikwe is to involve local communities in wealth creation through tourism, skills and training (The game reserve 2011:Internet). Local communities must benefit directly from wildlife tourism and become involved in the protection of the natural environment, thus creating a sense of ownership. The Madikwe Game Reserve has established the *Tau foundation* to fund community projects. The intention is to encourage overseas investors to contribute to this foundation.

In considering the Manyeleti Game Reserve as a case study of pro-poor tourism, Ashley *et al* (2001:8) observe that there is tension between pursuing pro-poor objectives and ensuring private investment, and "*the commercial attractiveness of the site is critical both to the scale of financial benefits and to securing pro-poor commitments from the private sector*".

4 THE SUSTAINABLE LIVELIHOOD APPROACH AS FRAMEWORK FOR THE PROMOTION OF PRO-POOR TOURISM IN SOUTH AFRICA

When examining the potential opportunities for pro-poor tourism development in South Africa, one must consider the framework within which such an endeavour may take place. The most probable approach for developing pro-poor tourism in developing countries would be a sustainable livelihood, asset-based approach. Chambers (1986:17) describes the sustainable livelihood approach as a people-centred paradigm that, unlike previous approaches, focuses on the environment and development to achieve sustainable development. The sustainable livelihood approach emphasises people's inherent capacities and knowledge and is focused on community level actions.

According to Chambers and Conway (1992:9):

A livelihood comprises the capabilities, assets (including both material and social resources) and activities required for a means of living. A livelihood is sustainable when it can cope with and recover from stresses and shocks maintain or enhance its capabilities and assets, while not undermining the natural resource base.

Chambers (1988:1) emphasises livelihood security, and says that it is important to recognise the necessity of focussing on the people, with the resources that they control, and using the knowledge and skills that they already have. Tao and Wall

(2009:91) argue that the sustainable livelihood approach provides a tangible way forward and is also useful in circumstances in which communities and individuals are sustained through multiple livelihood strategies. They further state that livelihood is a more concrete concept than development and is easier to discuss, observe, describe and even quantify.

The sustainable livelihood approach recognises that, in developing countries and particularly in poor communities, people make a living through multiple activities or piece jobs rather than following one vocation. Through innovative thinking and strategic management, these communities are potentially a hub with multiple talents which should be incorporated in the tourism sector (Scoones 1998). Along with rich resources in and around their communities, alternative approaches can turn a struggling poor community into a competitive ally for the tourism industry. Yet firmer legislation, as discussed below, can quicken the process.

The practical implication of the sustainable livelihood approach is illustrated by De Beer and Marais (2005:57). These authors use a case study to illustrate the importance and triumphs of community participation – a culinary experiment managed by the former Mpumalanga Parks Board (MPB) - predecessor of the MTPA. A catering project, the *African cuisine* project, was established by the MPB and managed by 14 women from the adjacent communities of Moremela, Leroro and Matibidi. This restaurant provides tourists with a taste of traditional African foods and, at the same time, empowers the participating women. The African cuisine project was a joint venture between the Mpumalanga Parks Board and the Motlatse Forum. The Motlatse Forum, which represents the communities listed above, is a Non-Profit-Organisation development. A very successful pilot phase was launched in 2001: the participating women cook, prepare and sell traditional African cuisine to tourists visiting the Potholes (natural viewpoint). Since the pilot phase, the project has evolved and the women are now running the kiosk at the Potholes, and regularly serve African cuisine to the tourists.

The success of the project may also be attributed to the fact that an asset-based approach was used to empower and develop the women and their community (see Mathie and Cunningham 2008 for a discussion on asset-based community development.) The project was asset-based in the sense that, before it was initiated,

the women had already displayed entrepreneurial abilities by applying their culinary skills to prepare and sell food to the workers of the Parks Board and to commuters who passed through the area. Projects like these are important for both the development of tourism and poor communities. De Beer and Marais (2005:50) argue that it is of vital importance to allow community initiative to be the foundation of any development project for it to become self-sustaining. Indeed, without self-sustaining community development taking place, any other efforts to enrich, conserve or sustain will simply be futile.

In summary, pro-poor tourism projects can grow from, for example, land restitution in rural areas, and should be built on local knowledge, skills and cultural practices. Such projects can, as a start, be integrated into the sustainable livelihood approaches followed by the poor in rural and low-income urban areas.

5 LEGISLATION AND ACTION PLANS

The tourism industry in South Africa has made considerable progress since the transition to democracy in 1994 (Rogerson & Visser 2004). International sanctions have been lifted and the government is proactively working alongside industry to develop the tourism industry (Rogerson & Visser 2004:5). According to the White Paper on the Development and Promotion of Tourism in South Africa (South Africa 1996), the vision of National Government is to develop the tourism sector as a national priority in a sustainable and acceptable manner, so that tourism will contribute significantly to the improvement of the quality of life of every South African. Since tourism is regarded as a lead sector in the national economic development strategy, the need was identified for nurturing a globally competitive tourism industry so that tourism would be a major force in the development efforts planned by the government.

The White Paper (1996:35-37) identifies the following objectives for tourism development in South Africa:

- Economic objectives, focusing on sustainable growth, aggressive development, community involvement and the promotion of tourism.
- Social objectives, focusing on cultural and gender equality, and providing appropriate tourism education and training. It also promotes pride in the

cultural resources South Africa has to offer, while encouraging community participation in the planning, development, implementation and management of tourism projects.

- Environmental objectives focusing on becoming a leader in responsible environmental development, and encouraging conservation and sustainable usage of tourism resources.

These specific targets are aimed at increasing tourism's contribution to the gross domestic product (GDP), and sustaining the increase in visitors continuing to benefit from their spending patterns. Job creation, the implementation of new tourism projects and the introduction of tourism as a subject in school curricula are listed as further priorities for action. In 1994, according to the White Paper (South Africa 1996:2), the contribution to GDP earned by tourism for the country was estimated at 2% and increased to 4% in 1995 after the Rugby World Cup. This figure is still low by any standard. During the preparation for the 2010 Soccer World Cup at the relaunching of the *Sho't Left* campaign in 2007, Mosola (2007:Internet) said that the industry was then contributing 8.2% of the national GDP, but aimed to push it up to 12% in 2010.

Since 1994, South Africa has gone from strength to strength in the development and implementation of tourism development and strategies. In the Global Competitive Programme for the tourism industry in South Africa 2005–2010, the government views tourism as a global commodity, identifies key barriers in the industry as a whole, identifies examples from other countries, and draws on its own experiences. On the basis of all this, an action plan has been developed to promote tourism development (South African Tourism 2005:31).

The 2002 document "*Refocusing Development on the Poor*" laid a foundation for Local Economic Development (LED) policies that specifically targeted the low-income and marginalised communities. Existing policies, strategies and mechanisms that support pro-poor development include the Integrated Sustainable Rural Development Policy (ISRDP), the Urban Renewal Programme, a LED fund, the Integrated Development Planning strategy (IDP) and the Municipal Infrastructure Grant (Goldman, Nel & Rogerson 2006:3).

The Department of Provincial and Local Government (South Africa 2006:36) identifies seven potential funding sources for LED, among them own resources from local government, Municipal Infrastructure Grants (MIG) and donor funding. Yet, in spite of the good progress made with formulating policy, strategies and action plans, and the endeavour by government to promote pro-poor tourism as part of its rural development strategy, a number of challenges and stumbling blocks still need to be surmounted.

6 POLICY RECOMMENDATIONS

Tourism potentially holds the key to combating poverty vigorously through pro-poor tourism activities that are sensible and are locally focused. In order to eradicate poverty and create more sustainable job opportunities, government and the private sector should explore and use the numerous opportunities that nature, people themselves and their abilities offer the tourism industry. It is a simple equation of supply and demand. The more tourists are attracted to a specific destination or region, the better it is utilised and income generated.

Apart from resources for tourism facilities, the government should develop and implement policies directed at promoting the development of pro-poor tourism activities. The further expansion of the tourism industry in South Africa, and specifically the pro-poor segment of it, will be much supported if government seriously addresses the issues discussed next.

6.1 Integration and coordination of various pro-poor policies, strategies and mechanisms

Earlier it was indicated that policies and strategies supporting pro-poor development include the ISRDP, the Urban Renewal Programme, an LED fund, IDP strategy and MIG. More recently government announced a comprehensive rural development programme. Phase three of this programme intends developing the rural industrial and credit financial sectors through SMME development (Rural Development and Land Reform 2011:Internet). All these measures, introduced after 2002, are useful vehicles for promoting pro-poor development.

Unfortunately, in spite of the IDP strategy, the available measures are neither coordinated nor integrated. Consequently, the advantages inherent in having these

measures are not being fully exploited. While many of these measures are supposed to be implemented and coordinated at municipal level, this level frequently fails to do either because of a lack of skills and infrastructure. Strengthening local government to enable it to implement and coordinate all these measures in support of pro-poor development, and especially pro-poor tourism, will benefit local communities.

6.2 Better support for SMME development

Small, Micro and Medium-sized Enterprises (SMMEs) were neglected in the pre-1994 dispensation resulting in missed opportunities and linkages with economic benefits that could have occurred earlier after liberation (Rogerson 2003:111). The post-apartheid government attempted to correct the mistakes of the past by introducing frameworks aimed at encouraging SMME development (Monakishi 2008:162). The White Paper on *A National Strategy for the Development and Promotion of Small Business in South Africa*, released in 2003, reflects the government's intention to facilitate greater income wealth and economic opportunities for all South Africans (South Africa 2003).

Although the government aligned itself with promoting SMME development in South Africa, the tourism-related process of SMME development is insufficient and more needs to be done (Monakhisi 2008:163). Since 1 May 2011 when the new Companies Act (Act 71 of 2008) was implemented no new close corporations could be registered. According to some analysts the new companies act makes provision for an improved level of financial reporting (Temkin 2009). However true this may be, the process of selecting and registering a business entity comparable to that of the close corporation is considerably more complex. Instead of registering a name and submitting the relatively uncomplicated CK1 form, the applicant now has to choose from a host of different companies and complete at least two more demanding forms. To aggravate the situation the response from the Companies and Intellectual Property Commission (CIPC) call centre is exceptionally slow.

Considering the importance of SMME development, it can be agreed with De Beer (2005:3) that:

The objective of public protection must be balanced by the importance of small business within our economy. If South African corporate law does not encourage entrepreneurs to establish small and medium-sized businesses, our socio-economic problems such as the need for job creation and skills development will never be adequately addressed.

6.3 Apply the basic conditions of employment act

In 1997, the Basic Conditions of Employment Act was introduced in South Africa to provide guidelines for employment conditions and to protect both employees and employers. Unfortunately, as with most legislation, there are always loopholes and shortcuts employers will attempt to exploit. While the rights of domestic workers in particular are well protected, employees in the tourism sector have the perception that they are not fully protected by the law, especially those in lower income brackets. More research needs to be done on the working conditions of the tourism sector and to determine how changes in legislation and policy can promote further growth in this industry (see De Beer 2011 for a detailed analysis).

6.4 Support claimant communities of conservation areas to establish enterprises

Land restitution holds promise for pro-poor tourism. However, instances where this has been successfully implemented are few and far between. Examples such as the Blyde River Canyon conservation area, where four communal property associations have successfully registered land claims, hold promise but require much more ground work to ensure success. Compromises need to be made in the interest of pro-poor tourism and this should guide land restitution and tourism development.

In the case of the Blyde River Canyon conservation area, a co-management agreement between the community legal entity and the Mpumalanga Tourism and Parks Board will be used for the management of the park. Yet, to become partners in the true sense, community members must receive relevant skills and management training, mentoring and, ultimately, the real benefits of being the legal owners of the land.

6.5 Promote partnerships between private sector and community-based concerns

Without the proactive involvement of the private sector in poor communities, pro-poor tourism development will remain rhetoric used in government strategies and reports composed by academics and consultants. The case of Madikwe Game Reserve and the Tau Foundation, where government, the private sector and the community cooperate in poverty alleviation and nature conservation, is an excellent example of pro-poor tourism in action.

For the private sector to become more actively involved in poor communities and the development of pro-poor tourism, the government needs to create the necessary policies which will make it attractive for the private sector to commit to pro-poor tourism development. Tax holidays or deductions to lure companies to support the government's decentralization policy will encourage private investment and joint ventures in the tourism sector.

7 CONCLUSION

South Africa has high rates of poverty and unemployment. It also has much potential for developing pro-poor tourism strategies, particularly in rural areas. In this article it is argued that an understanding of the context of poverty is needed to plan and implement pro-poor tourism strategies properly. It was shown that a sustainable livelihood approach provides a useful framework to guide such strategy; and policy issues that need attention to make pro-poor tourism strategies work were identified.

It is too soon to yet come to a definitive conclusion about whether pro-poor tourism in South Africa will make a substantial impact on development and on the plight of the poor. Assets are available, as noted in the discussion on land claims. Initiatives have been undertaken and support provided in certain cases for economic development related to local economic development and pro-poor tourism. Some policies might be beneficial to pro-poor development, but others hold very little prospect of making a positive contribution. The jury is still out on the final verdict. To conclude on an optimistic note, it may be pointed out that the ingredients for a successful pro-poor tourism strategy are present in South Africa. What is needed is strong leadership to

bring all relevant elements in line and implement a coordinated and focussed effort to make the plan work.

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