GeoJournal of Tourism and Geosites
ISSN 2065-1198, E-ISSN 2065-0817

Year XV, vol. 41, no. 2, 2022, p.343-353
DOI 10.30892/gtg.41202-836

RURAL TOURISM FIRMS IN THE COVID-19 ENVIRONMENT: SOUTH AFRICAN CHALLENGES

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Citation: Giddy, J.K., Rogerson, C.M., & Rogerson, J.M. (2022). RURAL TOURISM FIRMS IN THE COVID-19 ENVIRONMENT: SOUTH AFRICAN CHALLENGES. *GeoJournal of Tourism and Geosites*, 41(2), 343–353. https://doi.org/10.30892/gtg.41202-836

Abstract: One consequence of the COVID-19-induced changing consumer travel preferences is growing demand from urban residents for open spaces and the experiences of rural destinations. This re-focuses attention on the challenges of rural tourism firms and of issues of developing rural tourism destinations. In extant international scholarship only limited studies have been undertaken for sub-Saharan Africa. This paper contributes to research debates on rural tourism change in the Global South and more particularly around COVID-19 and the development prospects for rural tourism in South Africa. Using 25 qualitative interviews undertaken in the rural Thaba Chweu Local Municipality of Mpumalanga province it is shown that the challenges facing rural tourism relate to weaknesses in the local institutional environment that have existed for the past two decades. The core constraints on expansion on rural tourism surround issues of the local government mismanagement and corruption. The consequence has been limited provision of basic services and maintenance of critical infrastructure, most especially roads, water and power supplies, which are essential for successful rural tourism development. It is concluded that the leading challenges facing rural tourism firms in South Africa are markedly different from issues which are highlighted in scholarship concerning rural tourism in the Global North.

Key words: rural tourism, business challenges, rural firms, local government, South Africa

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INTRODUCTION

The problems surrounding rural tourism firms and the associated challenges for developing tourism in rural areas are leading themes in international scholarship over the past four decades (Page and Getz, 1997; Karali et al., 2021; Rosalina et al., 2021; Ruiz-Real et al., 2021). The significance of these issues has been magnified in the COVID-19 environment because of observed changes in consumer travel preferences which are the result of a paradigm shift in the psyche of tourists surrounding risk perceptions around safety, health and travel (Kock et al., 2020; Matiza and Slabbert, 2021). One outcome has been growing demand from urban residents for open spaces and the experiences of rural destinations (Rogerson and Rogerson, 2021a).

Traanman (2021) draws attention to the perception of rural regions as 'healthy spaces' and to their importance as 'therapeutic landscapes' or spaces of psychological healing. The United Nations World Tourism Organization (2020) sees tourism's role in rural development highly relevant in the context of the COVID-19 pandemic, maintaining that tourism in rural areas offers critical opportunities for recovery as tourists look for less populated destinations as well as open-space experiences and activities. It is against this background that the aim is to examine the challenges of rural tourism firms in realizing the new potential opportunities offered in the COVID-19 environment of South Africa. The niche of rural tourism has been recognized as a policy focus in South Africa for at least the past 25 years (Rogerson and Rogerson, 2021b). This said, only limited progress has been recorded in realizing tourism development at many rural tourism destinations because of the lack of implementation of government support measures (Briedenhann and Wickens, 2004; Rogerson and Rogerson, 2021b). The paper contributes to scholarship and debates on rural tourism change in the Global South and more particularly around COVID-19 and the development prospects for rural tourism. Further, the study extends an emergent body of South African research which examines tourism business adaptive responses to the COVID-19 environment (Rogerson and Rogerson, 2020; Giddy and Rogerson, 2021; Rogerson, 2021; Rogerson and Rogerson, 2021c; Rogerson et al., 2021; Booyens et al., 2022).

The setting for this study is one rural local municipality in Mpumalanga province. In terms of methods the research applies quantitative local level data on tourism trends in the case study municipality and analyses findings from 25 detailed qualitative interviews which were conducted in 2021 in the Thaba Chweu local municipality. Two major sections of material are given. The next section situates the study as part of international scholarship on rural tourism development and the challenges of rural firms. The subsequent section turns to interrogate the evidence from the South African local municipality case study.

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RURAL TOURISM CHALLENGES

Essential foundations for rural tourism are 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 and Kastenholz, 2015; Kastenholz et al., 2021: 601). In a Canadian study Joppe and Brooker (2013) isolated several challenges facing rural tourism including funding, variable demand, and the need for innovation as well as inter-enterprise collaboration. In seeking 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 widely deemed as critical for the success of rural tourism across many destinations (Dimitrovski et al., 2012).

At one level the challenges facing the development of rural tourism firms 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 inconsistences 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 et al., 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 et al., 2013; Kastenholz, et al., 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 et al. (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). Entrepreneurship and rural enterprise is clearly the lifeblood for rural tourism. In rural Scandinavia 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 et al., 2021). Yachin (2020) advances that in order to understand rural tourism one must appreciate the challenges that face rural firms. 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 and Carlson, 2000; Ateljevic and Doorne, 2003; Brouder, 2013; Yachin, 2019, 2021; Trip et al., 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 and 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 and Williams, 2004: 55). As is demonstrated from recent research in the Calabria region of Italy lifestyle entrepreneurs can be critical change agents for competitiveness in remote rural tourism destinations (Ciasullo et al., 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 and Williams, 2004; Ciasullo et al., 2019).

Within local economies 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 opens opportunities for certain areas. For Page and Getz (1997) a number of operational issues affect the establishment and development of rural tourism businesses. The following are noted: 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).

Small firm development in rural tourism is viewed especially significant for marginal and/or peripheral social, cultural and physical environments. In many cases (such as Australia) family-owned small firms dominate tourism in peripheral and rural areas (Peters and Kallmuenzer, 2018). 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 et al., 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". A distinctive sub-literature on rural tourism in developed countries surrounds the challenges of growing 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 and Robinson, 2011; Carson and Koster, 2015).

Policy support (especially at the local level) is viewed as vital for rural tourism enterprises. The international experience is, however, that the progress of rural tourism often has been limited by poor planning, lack of infrastructure and corruption (Dashper, 2014: 6). Based upon evidence from New Zealand Zahra (2010) points to institutional issues and the lack of understanding of rural tourism both by central government and local government as feeding into poor tourism policy implementation. In rural tourism development – especially in the Global South – there is often little common ground between different rural stakeholders which results in conflict and uneven development. It is observed that the interests of powerful stakeholders with more resources to invest take precedence over less powerful groups such as poor local communities. The centrality of power relationships in the shaping of rural tourisms is a theme re-iterated by George et al. (2009). As rural tourism development often is contingent upon and strongly influenced by the negotiation of power relationships between different stakeholders, including government, "this makes it somewhat problematic as a tool of regional development and poverty alleviation" (Dashper, 2014: 7). Arguably, this is most especially the situation in the setting of rural tourism development in countries of the Global South (Lenao, 2014), such as South Africa.

THE SOUTH AFRICA CASE STUDY – THABA CHWEU LOCAL MUNICIPALITY

Thaba Chweu local municipality is situated in Mpumalanga Province and was formally established after the December 5th 2000 local government elections in South Africa. Its four main towns are Mashishing (formerly Lydenburg), Sabie, Graskop and Pilgrim's Rest. The area's main economic sectors are forestry, agriculture, mining, business services and tourism. Essentially there are two sub-regions: (1) the area around Lydenburg which is dominated by agriculture and farming; and, (2) Sabie and Graskop where forestry and tourism are the main economic activities (Figure 1).

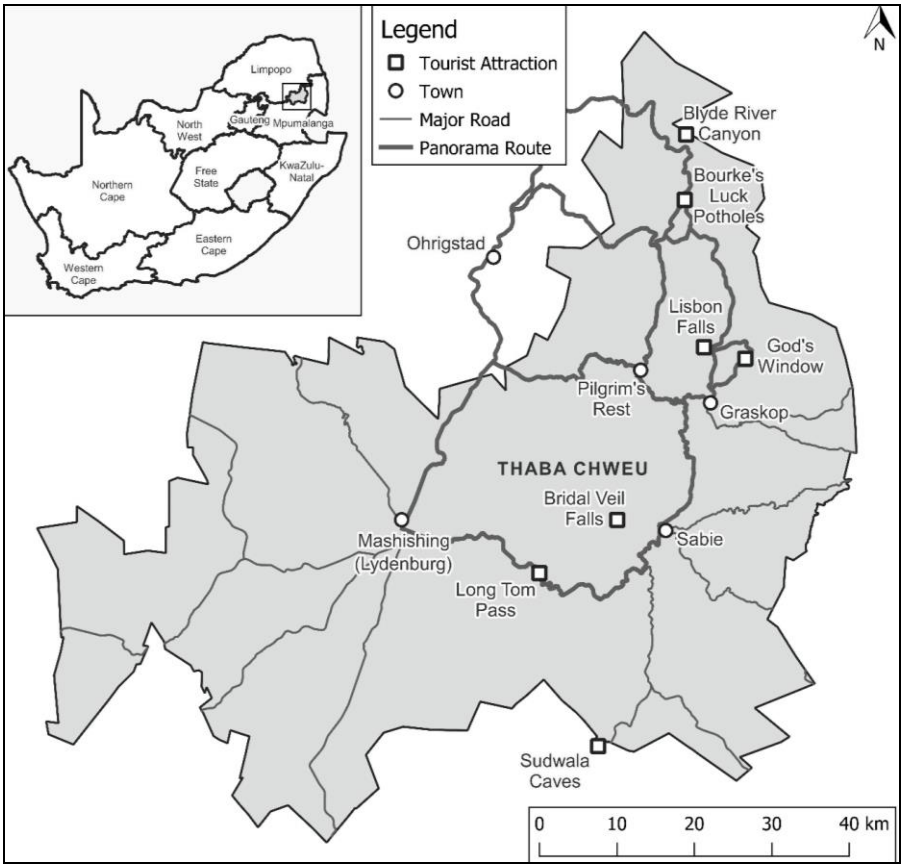

Figure 1. Location of the Thaba Chweu Local Municipality and Major Tourism Attractions (Source: Authors)

The case study material is organized into five sub-sections of discussion concerning: (1) the institutional environment; (2) the evolution of local tourism and recent tourism trends; (3) local businesses and perceptions of tourism assets; (4) rural tourism business challenges and COVID-19 adaptations; and (5) the role of local government.

Institutional Environment

The municipality is described as "plagued by high levels of unemployment, poverty and low skills levels (Koma, 2017). 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 local economic development "the municipality has not performed well" (Dube, 2018: 10). 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 officials 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, 2020: 62). Thaba Chweu appears on the list of 87 municipalities categorised as "distressed or dysfunctional" by the Department of Cooperative Governance and Traditional Affairs (2018). 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".

Local Tourism Evolution and Trends

The development of tourism in the area of this municipality can be traced back to at least the 1920s. As occurred across much of South Africa this "somewhat remote" region was made accessible to visitors by South African Railways & Harbours through its network of trains and motor coaches (Van Eeden, 2011: 608). The area gained the reputation of one of the most beautiful landscapes of South Africa. The attractions of this region were further supported by the introduction during the 1920s of special excursion tours from Johannesburg and Pretoria. By 1930 the region was styled both as 'the gateway' to Kruger National Park but also as a scenic 'wonderland' (South African Railways and Harbours, 1930). Tourism growth in the post-World War 2 period was boosted by the re-launch in 1947 of special tourist trains including 'Round in Nine' (days) which included Graskop and Sabie in the schedule alongside visits to Kruger National Park. Marketing publicity about tourism in the area surged in the 1960s. The Sabie Publicity Association produced pamphlets (in English and Afrikaans) proclaiming the town and its surrounds as 'the jewel of the Lowveld' (Sabie Publicity Association, 1965). During the 1960s, according to van Eeden (2011: 609) the tourism economy was boosted by construction of a government-sponsored resort "offering mass affordable accommodation for lower-middle-class white holiday makers". In parliament debates the Minister of Tourism flagged the generous government support as influential for boosting tourism to the Blyde River Canyon (*House of Assembly Debates*, 31 August 1970). The establishment and spread of caravan parks and camping facilities in the 1960s and 1970s provided further accommodation options for budget travellers to the area (Rogerson and Rogerson, 2021d). Throughout the 1970s and 1980s the market provided by white South African domestic tourists – mostly coming from the metropolitan areas of Johannesburg, Pretoria and the Witwatersrand – provided the anchor for developing the area's tourism economy.

In terms of tourism development opportunities Thaba Chweu is the location for several of South Africa's major tourism attractions, many of which form part of the 'Panorama Route' (Figure 1). 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 and 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. 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". As regards ownership of businesses, the long-established tourism economy of Thaba Chweu is historically dominated by white entrepreneurs. Recent tourism trends in the Thaba Chweu local municipality can be 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 expansion for over 20 years until interrupted by the COVID-19 crisis. Figure 2 shows the pattern of total trips and origins in terms of domestic as opposed to international travel. Figure 3 gives a profile in terms of purpose of travel.

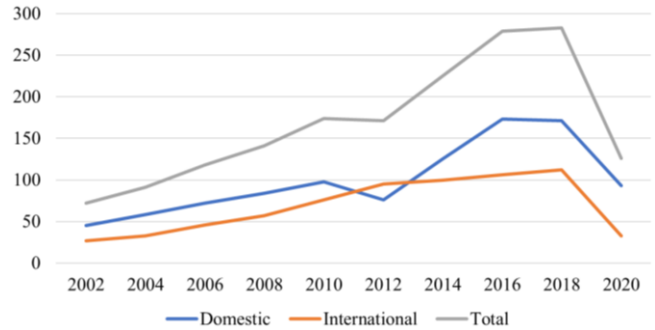

Figure 2. Thaba Chweu Municipality: Total Trips by Origin 2002-2020 (Source: Authors based on IHS Global Insight data)

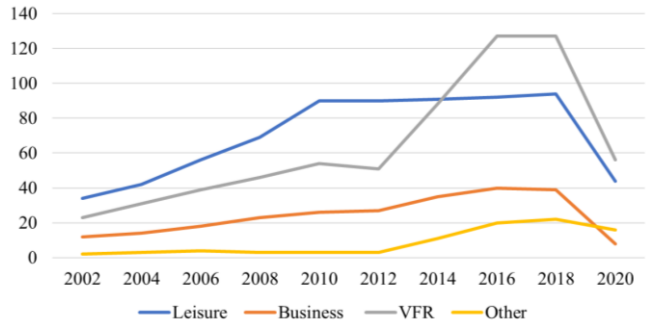

Figure 3. Thaba Chweu Municipality: Purpose of Trips 2002-2020 (Source: Authors based on IHS Global Insight data)

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 consistent growth of both domestic and international trips with the exception of the downturn in domestic trips in the period 2010-2012 (Figure 2). 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. For the period 2002-2012 leisure trips exceeded those of all other forms of tourism to the municipality (Figure 3). Since 2014, however, the largest number of trips is accounted for by the segment of visiting friends and relatives (VFR). Leisure trips in total grew 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 3 VFR travel trips spiked to over 100 000 in total from 2016.

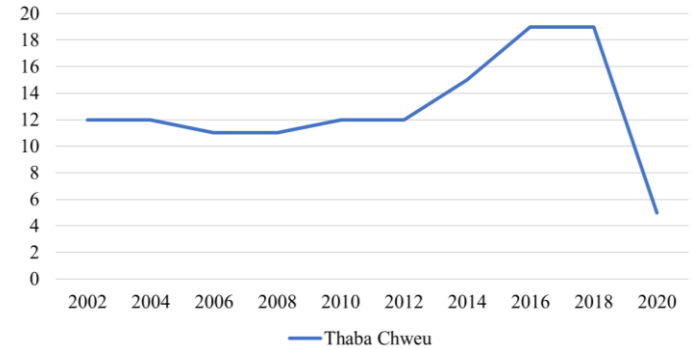

Figure 4. Thaba Chweu Municipality: Tourism Contribution to Local GDP 2002-2020 (Source: Authors based on IHS Global Insight data)

Table 1. COVID-19 Impact on the Tourism Economy of Thaba Chweu Local Municipality (Source: Authors extracted from IHS Global Insight data)

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

Thaba Chweu tourism was hit hard by the COVID pandemic impacts as leisure travel collapsed from the 2019 peak of 116 000 to 44 000 trips which put 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 sector for local economic development and job creation (Figure 4). 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 1 captures the COVID-19 impact of tourism for this municipality with a series of indicators.

Local Businesses and Local Tourism

A total of 25 interviews were conducted throughout the Thaba Chweu municipality. The majority of interviews (24) were with local tourism operators; one was with the local ward councilor in Lydenburg who is responsible for the provincial tourism portfolio. A concerted effort was made to interview a geographic spread of tourism businesses. Most operators interviewed were lodges and other forms of accommodation. Since much of the area is remote and many operators are in isolated locations, accommodation was an essential component of rural tourism. Several businesses were getaway locations where activities, accommodation and food were all provided. Additional assets included restaurants, craft breweries, venues, and activities operators. An overview of some basic attributes of the businesses is given on Table 2.

Table 2 Overview of Thaba Chweu Businesses (Source: Authors)
Note: LM - Lydenburg/Mashishing, GPR – Graskop/Pilgrim's Rest, * - Staff reduced since COVID, FT - Full Time, PT - Part Time

	Location	Type of Establishment	Years in Operation	Number of Permanent Employees	Primary Income	Operates All Year
TC1	LM	Accommodation	30	4 FT	Yes	Yes
TC2	LM	Nature Retreat	Owned Property for 30 years	3 FT	Retired	Yes
TC3	LM	Venue/Accommodation	15	4 Ft/3 PT	Used to be - Also have farm	Yes
TC4	LM	Accommodation	17	9 FT	Yes	Yes
TC5	LM	Accommodation	2	1 FT/1 PT	Yes	Yes
TC6	LM	Brewery	7	3 FT/5 PT*	Yes - owners have several tourism businesses	Yes
TC7	LM	Brewery and Accommodation	13	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	7 FT*	Yes	Yes
TC10	LM	Nature Retreat	3	N/A	Retired	Yes
TC11	LM	Accommodation	20	9 FT	Retired	Yes
TC12	GPR	Resort	53	90 FT*	N/A	Yes
TC13	GPR	Restaurant	2	5 FT	Yes	Yes
TC14	GPR	Restaurant	7	1 FT*	Yes	Yes
TC15	GPR	Restaurant/Distillery	2	11 FT	Retired	Yes
TC16	GPR	Accommodation	4	2 FT/2 PT	Yes	Yes
TC17	GPR	Resort	New owner March 2020	43 FT/3 PT	No	Yes
TC18	GPR	Accommodation	12	1 FT/3 PT	No	Yes
TC19	GPR	Restaurant	4	13 FT	Yes	Yes
TC20	GPR	Restaurant	4	4 FT*	Yes	Yes
TC21	GPR	Activity/Attraction	4	42 FT/32 PT	Yes	Yes
TC22	GPR	Accommodation	14	12 FT/1 PT	Yes	Yes
TC23	GPR	Lodge and Restaurant	3	7 FT/2 PT	Yes	Yes
TC24	GPR	Accommodation	4	6 FT	Yes	Yes
TC25		Ward Councillor				

Differences are observed between the business profiles in the two sub-regions. The Lydenburg cluster consisted primarily of remote business facilities on large pieces of land. Many were on land owned prior to establishing a tourism business. Some businesses were established on existing farms which still operate for commercial purposes. Other 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 said: "*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). By contrast, in the Graskop cluster most businesses were developed specifically for tourism purposes; some are part of larger companies which manage several tourism assets. One of the lodges is part of the Forever Resort group of resorts and originally built as a publicly funded development (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 in the area. One respondent, an owner of three local restaurants, 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). Looking across both clusters certain similarities are discerned in business profiles. As seen in Table 2, the majority of tourism businesses have relatively small numbers of permanent staff, and many are owner-managed. A few remarked staff numbers decreased over COVID-19, but many were able to hire back staff who were previously let go. For most respondents the tourism business was the primary income, albeit some said this changed as a result of the pandemic. Another source of income was retirement pensions. Many businesses were post-retirement start-ups. Others cited additional tourism products as sources of income. Finally, some businesses are located on working farms which contributes additional income. Many respondents

flagged that COVID-19 made it difficult to rely on income from the tourism businesses which 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). An accommodation respondent in Lydenburg contended: "*There's not much of a 'season'. In the winter people come for fishing*" (TC11) in reference to the trout fishing in the area.

Much enthusiasm was expressed by respondents in both clusters about the 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 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 stop-overs 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 accommodation service provider stated: "*Overseas visitors used to come as a stop-over to Kruger or as a gateway to the Panorama Route but not anymore*" (TC9). In recent years much local leisure tourism has been lost because of the bad quality of the roads and poor municipal services such as power outages and water shortages. The Lydenburg cluster attracts also a flow of business travellers linked to local mines.

Nature-based tourism is the primary draw for visitors throughout the municipality according to local tourism enterprises. As for specific attractions in 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 the Lydenburg cluster included the Long Tom Pass and numerous archaeological attractions, such as ancient stone circles, as well artefacts and sites from the Anglo-Boer War (TC2). In addition, there are numerous waterfalls scattered throughout the region which are attractions. Another important asset between Sabie and 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).

From field visits and observation, the state-run natural attractions in the Graskop cluster appeared better-run than those in Lydenburg. Several respondents in the Lydenburg cluster referred to the beautiful sights, such as the waterfalls, albeit 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).

Business Challenges and Adaptation

The COVID-19 crisis had a negative impact on most businesses and compelled adaptive responses of various kind. The evidence of adaptation was widespread: "*People got more innovative, they put a lot more effort in*" (TC16). Most businesses had to adapt their business practices during the pandemic, including the introduction of outdoor seating. Several businesses discussed the addition of the safety protocols with associated costs. The ways in which they did so were to reduce prices and offer more self-catering options. Certain businesses closed parts of their operations, particularly the restaurants and meal services. A small number of enterprises introduced new products. One establishment added quad bikes and off-road scooters which are "*very popular with local visitors from the area who come for the day*" (TC8). Some planned future upgrades variously to open a hospitality training programme (TC9), a teambuilding product for work retreats (TC10), and themed evenings, where groups come for a themed meal (TC18). One distillery, hit by alcohol bans introduced by government as a pandemic response, decided to redirect their efforts and started to produce hand sanitizers in order to generate some income (TC15). Many businesses adapted 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 adjusted their products and prices to meet the demands of the local market; one introduced flavoured vodka to their product line (TC7), the other added a form of "*spiked seltzer or sparkling water*" (TC6). Another respondent upgraded the camping sites to add more 'glamping' options due to the changes in the market demand (TC5). Certain businesses 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).

Most businesses adjusted their marketing strategies in response to changes in tourism demand and reworked their marketing to appeal more to local visitors. All had to adjust to changes in patterns of bookings, many of which are last minute, and mainly weekend visitors: "*we have record weekend that beat pre-COVID*" (TC19). Several respondents noted the changes in the tourism market. One said "*Business has maintained but the market has completely changed*" (TC21). The first shift has been growing reliance on domestic rather than international visitors. Although the Lydenburg cluster has long-suffered from poor infrastructure, which has all but eliminated the area as a stop-over for (especially international) tourists heading to Kruger Park, the Graskop cluster continued to serve as a stop-over. The towns of Pilgrim's Rest, Graskop and Sabie were often day stops or overnight stops for international tourists on their way to Kruger. These completely ceased because of COVID-19. In the interim these towns have seen a rapid growth in domestic tourism, particularly to the Graskop cluster. Another change with COVID-19 has been in the demographics of visitors. One respondent said there had 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 asserted "*the Black South African population really saved us, kept us going and is keeping us going*" (TC22). The racial change in tourist demographics has resulted in the need to adapt the tourism sector. This said, whilst many businesses wished to accommodate the new market, there is a lack of research and understanding of market demands of this group. One respondent noted that a need for specific facilities to draw the Black leisure tourism market: "*there is a growth in budget-tourists and day visitors. They want to relax, braai but there is currently no space to do this*" (TC21). Respondents pinpointed there were significant opportunities for developing tourism to meet the needs of this new emerging market. One indicated: "*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 same respondent further emphasized the need for more budget facilities offering aspects such braai facilities, satellite television, wifi and a swimming pool (TC18).

A striking finding which contrasts to other research on the topic, including a study by Giddy and Rogerson (2021) on an adjacent local municipality, was the majority of respondents did not consider COVID-19 as the primary threat or concern facing their businesses. Overall, the issues that were most prevalent among this group of respondents related to those surrounding poor infrastructure development and maintenance. Most felt that whilst COVID-19 made survival difficult for the periods in which strict lockdowns occurred, that it was not their primary challenge. The core challenges facing their businesses, for the most part, were long-established and prevalent prior to the COVID-19 pandemic and subsequent government lockdowns. Indeed, it was evidenced that only one or two businesses in the local area had not survived the pandemic albeit a few businesses changed ownership or downsized. 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 closures were recorded as a result of underlying issues that existed prior to COVID-19 which was the "*nail in the coffin*" (TC3). Several respondents said in response to a 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). Questioned about what could be done to improve or expand visitor numbers the central issues all referred to the local municipality. The majority of responses indicated that the conditions of the roads were particularly problematic and a deterrence to 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 other mentioned additional issues of service delivery. One said "*Basic services affects tourism and we are not getting basic services*" (TC15). Another argued "*We are a resort. We are not built to operate on a generator*" (TC12). 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 the majority of attractions in the area are state-run the responsibility for maintenance rests with local and provincial government. Some examples of shortcomings 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. A restauranteur said "*We can't improve visitor numbers because there is ineffective town management in general*" (TC19). An accommodation service provider also noted that the first step is to develop existing attractions: "*Get the municipality to develop what's there*" (TC9). Improved marketing campaigns were also listed as a mechanism for increasing visitor numbers. One Lydenburg respondent 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).

Several specific challenges impacted individual businesses, notably financial concerns as a result of declining visitor numbers: "*We used to have big international groups who came on buses. That has not returned*" (TC17). Others noted that whilst the number of domestic visitors was strong that the business was not generating the same revenue "*We're not getting as much spend*" (TC21). An accommodation provider said "*Even if we did get the same occupancy rates we would still be struggling because of the reduced prices*" (TC11). Some noted challenges with staffing because of a lack of funding for full-time staff coming out of the pandemic lockdowns. Others said that last-minute bookings and drastic differences in week versus weekend numbers made it difficult to ensure enough staff are onsite. The resort respondent said that there is a "*big fluctuation from week to weekend*" (TC17). Other respondents highlighted the issue of staff mentality as a result of the uncertainty; the pandemic "*brought about a serious change in thought process about their jobs*" (TC19) with tourism businesses having difficulty in getting people to commit to a job because of the precarious character of employment in hospitality and tourism. The demands of the new domestic market proved difficult for certain respondents: one mentioned that their establishment is 'rustic' and issues arose with visitors who were not pleased with the facilities because there was no television or swimming pool (TC2). Another said that "*you have to work harder with local tourists. They're more demanding*" (TC8). The businesses located in the town of Pilgrim's Rest noted challenges unique to the heritage town. Serious problems surrounded maintenance of the town and its structures. The town is owned entirely by the Public Works Department which is responsible for the maintenance of the town and its buildings. From several reports it is apparent the government has not assisted with the town's upkeep particularly since the onset of the pandemic (albeit it was clear these issues existed pre-COVID-19). One interviewee 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 is despite payment of rent to the public works department for such services. Another local respondent indicated that even when some lockdown restrictions eased that they were unable to open their restaurant "*for 8 months because the Royal Hotel [across the road] became a quarantine facility*" (TC14).

The Role of Local Government

The role of government was a major issue for local enterprises. The core focus was upon local government as it was considered that national government neglected small towns: "*National Government doesn't do anything for small towns*" (TC6). Significant findings emerged relating to the role of local government in tourism development. All respondents had negative perceptions of local government, though to varying degrees. All stated that local government was a problem, with two stating that although local government was the major problem it had helped their businesses. One indicated that the government assisted with a grant to start-up their business (TC13). The other 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: "*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. An accommodation provider asked simply: "*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 across the municipality, related to basic service delivery and inadequate infrastructure maintenance and provision. The question of road maintenance came up amongst all respondents, with those in the Lydenburg cluster particularly emphasizing the poor quality of the roads. A lodge operator said "*The municipality is not helpful at all. Potholes in a small town like this? They can't get anything done!*" (TC23). The respondent for a long-established resort located along a municipal road further out of the town argued that: "*Visitors often can't get through to our resort because of the roads*" (TC12). At another resort it was highlighted that the state of local roads was giving the area a bad reputation: "*One client arrived here and exclaimed 'this is the last time we will visit the area' because of the bad roads*" (TC17). 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). It was evident that serious problems surround perceptions of the area: "*Word of mouth marketing is getting really bad*" (TC18). Likewise, an activity provider expressed the view: "*We are suffering reputational damage because of the roads. It's a hindrance to growth*" (TC21).

For the Graskop cluster, poor service delivery was 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 debt owed by the municipality to Eskom (the national electricity provider) which prevents consistent electricity supplies. Several businesses obtain their electricity directly through Eskom rather than through the municipality. One respondent observed: "*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). Beyond issues of access to power, only minimal maintenance had been done with the result inconsistent power supplies. Local businesses endure regular national loadshedding and these additional electricity outages because of powerline failures. Some businesses had taken it upon themselves to repair faulty powerlines because of 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 experienced issues with protest action along the roads in response to local communities' issues with poor service delivery (TC12, TC13). A Lydenburg accommodation provider gave 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 inadequate 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). Further concerns related to 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. Typically, when one respondent tried to file a complaint case at the police station it was not admitted as police knew the municipal employee in question and made clear "*the case would not go anywhere*" (TC9). Regarding all the above issues, it was evidenced that the local municipality does not engage with tourism operators on nearly 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). Overall there is little evidence of commitment from the local municipality to develop tourism: "*There's so much potential but the politicians need to get on it. We can't do it alone*" (TC3). Further, there is lack of transparency from the local municipality with the result that local businesses often feel neglected or ignored. A resort 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). Often the state of local roads was cited as evidence of a poorly-run municipality. It was considered that given the municipality was unable to even provide basic infrastructure and services, that they were incapable of running an effective tourism destination. An accommodation provider said pointedly that "*Tourism is limited because of experiences with bad infrastructure. And it's been that way for more than 10 years*" (TC22). Another reflected that "*We want Graskop to be a tourism destination but the infrastructure isn't there*" (TC23).

CONCLUSION

Kastenholz and Lima (2011: 62) observe that "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". In an international overview of progress made in rural tourism scholarship Ruiz-Real et al. (2020) record the most undeveloped literature is for the global South and point to major knowledge gaps in Africa. This paper contributes to the limited African literature by providing insight into the challenges faced by rural tourism firms in South Africa.

The results reveal that in the case of rural Thaba Chweu Local Municipality leisure tourism had been expanding for several decades because of strong local assets relating to nature, open space and scenic attractions. These assets suggest that amidst the COVID-19 environment of changing consumer travel preferences favouring rural destinations that a further expansion of rural tourism may occur. The challenges of rural firms disclose structural weaknesses which have existed in the local institutional environment for the past two decades. The central constraints on expansion on rural tourism in this area surround issues around mismanagement and corruption in local government. As consequence, a marked deterioration occurred in the public sector provision of basic services and maintenance of critical infrastructure, most especially roads, water and power supplies, which are essential for successful rural tourism development. The nature of the core challenges facing rural firms and the development of rural tourism in South Africa therefore is markedly different from issues pinpointed in scholarship concerning rural tourism in the Global North.

Acknowledgements

Arabella Rogerson is thanked for editorial inputs and Arno Booyzen credited for preparation of the map. At various times Robbie, Dawn and Skye Norfolk offered valued inputs. The Department of Tourism provided research funding.

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Article history: Received: 15.11.2021 Revised: 12.02.2022 Accepted: 11.03.2022 Available online: 01.04.2022