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Rural Livelihoods and the Tourism Industry

## **Development of Responsible Tourism Guidelines for South Africa**

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**Final Report**

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This document and supporting documents are available on the following website <http://www.nri.org/NRET/nret.htm>

## ABBREVIATIONS AND GLOSSARY

B2B	Business to Business
BABASA	Bed and Breakfast Association of South Africa
DBSA	Development Bank of South Africa
DFID	Department for International Development, UK
DEAT	Department of Environmental Affairs and Tourism
FEDHASA	Federation Hospitality Association of South Africa
FTTSA	Fair Trade Tourism in South Africa
INR	Institute of Natural Resources, South Africa
IYE	International Year of Ecotourism
NGOs	Non-Government Organisations
NRET	Natural Resources and Ethical Trade programme, NRI
NRI	Natural Resources Institute, UK
RDP	Reconstruction and Development Programme
RLD	Rural Livelihoods Department
SANParks	South African National Parks
SMME	Small Medium and Micro Enterprises
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
USP	Unique Selling Propositions
WSSD	World Summit on Sustainable Development
WTO	World Tourism Organisation

## 1 BACKGROUND

DFID is committed to maximising the contribution the private sector can make towards its poverty reduction goals through encouraging responsible business practices. Responsible business embraces economic, social and environmental as well as financial responsibility. DFID's Rural Livelihoods Department (RLD) is supporting research on the policy and practice of delivering social and environmental added value through, for instance, the funding of Natural Resources and Ethical Trade programme (NRET) work on ethical trade and horticulture, and ethical trade and forest-dependent people. DFID is also supporting socially responsible business initiatives such as the Ethical Trading Initiative and the Social Dimensions of Responsible Business Resource Centre, and the role of business in development is emphasized in the new White Paper on Globalisation.

DFID promoted the concept of Pro-poor Tourism, which was successfully placed in the report of Commission on Sustainable Development 7 in April 1999 (Goodwin 1998). The World Tourism Organisation (WTO) and UNCTAD have taken up this theme. Harold Goodwin was commissioned to write the WTO's policy paper on *The Least Developed Countries and International Tourism* (WTO, 2001). Tourism has also been identified by the International Trade Centre in Geneva as one of the key sectors for its Export-led Poverty Reduction Programme. There has been increasing interest in government and in the tourism industry for some time in the idea of responsible tourism, which is a central plank of the South African government's 1996 White Paper on tourism. There has also been discussion of the possibility of a Tourism Stewardship Council (modelled on the Forest Stewardship Council). But we know of no examples of the development of guidelines and benchmarks that would offer a basis for the development of national and international policies in the sustainable management of tourism, including pro-poor aspects.

There is often legislation that in its wording and its intent is supportive of rural livelihoods and empowerment. A major problem has been the difficulty in translating the aspirational content of much of this government policy into practice on the ground. The nature, language and style of legislative documents often do not lend themselves to direct translation into action. This project aimed to address these shortcomings, through the development of Responsible Tourism Guidelines for the South African tourism industry.

### 1.1 South African Tourism and Policy Background

Tourism was not included in the African National Congress detailed planning when it achieved power in 1994. However, the 1996 White Paper recognised that tourism was one of the best opportunities available to South Africa in creating employment and livelihoods for the urban and particularly rural poor. In rural areas, other than agriculture, there are often no other opportunities for economic engagement other than tourism - both domestic and international. The 1996 White Paper on *The Development and Promotion of Tourism* identified the importance of tourism to the poor:

"Yet tourism, perhaps more than any other sector, has the potential to achieve the objectives of the Reconstruction and Development Programme (RDP) of the new government. Tourism creates opportunities for the small entrepreneur; promotes awareness and understanding among different cultures; breeds a unique informal sector; helps to save the environment; creates economic linkages with agriculture, light manufacturing and curios (art, craft, souvenirs); creates linkages with the services sector (health and beauty, entertainment, banking and insurance); and provides dignified employment opportunities. Tourism can also play a strategic role in dynamising other sectors of the economy - the agriculture sector that benefits from the tourism industry (increased demand for new agricultural products and services such as organic agriculture, farm tourism); the manufacturing sector (the supply of furniture and fittings, construction, linens, pots, pans, etc.) as well as crafts (wood-working, curios, fine art). Perhaps the weakest economic linkages with the tourism industry in South Africa exist in the services sector (entertainment, health and beauty services, banking, insurance)." (DEAT 1996)

The tourism sector is now the fourth largest generator of foreign exchange in South Africa and lies third, after manufacturing and mining and quarrying, in its contribution to the economy at 6.9%. Although South Africa attracted just 0.9% of the total world tourism arrivals internationally in 1998 it represents the economic sector with the most significant growth in the country. During 2001 South Africa received 5.8 million visitors, of which 1.48 million were from overseas. The average annual growth in foreign visitor arrivals to South Africa between 1994 and 2001 was 8% whilst the average annual growth in overseas arrivals during the same period was 16%. In 2000/2001 domestic tourism accounted for around 67% of the South African tourism receipts, contributing R16 billion of the R24 billion generated from the combined domestic and foreign tourism spend. Between April 2000 and May 2001 an estimated 34 million domestic trips were taken, during which 10.9 million people spent R4.5 billion.

However, the economic impact of tourism on rural and urban livelihoods has not been researched in South Africa but the Department of Environmental and Tourism Affairs (DEAT) has overseen a large number of projects that have sought to tackle poverty through tourism developments. The Responsible Tourism Guidelines lead on the economic dimension of sustainable tourism for this reason.

The *vision* of DEAT is to manage tourism in the framework of sustainable development in such a way that it contributes to the improvement of the quality of life of all South Africans (Matlou, 2001). In 1996 DEAT published the *White Paper on the Development and Promotion of Tourism*. It was developed through a lengthy and inclusive public consultation process that explored the advantages and constraints of promoting tourism development.

It pointed out that tourism had largely been a missed opportunity for South Africa, and noted that tourism planning had been inadequately resourced and funded, with inadequate environmental protection, infrastructure development, and little integration of either local communities or previously neglected groups (DEAT, 1996). The Department of Environmental Affairs and Tourism has only a very small professional staff dealing with tourism and they are seriously stretched.

In the White Paper government identified tourism as a sector which could provide the nation with an, ‘ . . . *engine of growth, capable of dynamising and rejuvenating other sectors of the economy.*’ This was due in part to tourism’s capacity to generate significant employment while creating considerable entrepreneurial opportunities and potential for linkages (DEAT, 1996). Tourism could also bring development into rural areas where the levels of poverty were highest (DEAT, 1996). The White Paper laid out how the government perceived the roles and responsibilities of different stakeholders such as the private sector and communities.

The White Paper foresightedly proposed to develop and manage the tourism industry in *a responsible and sustainable* manner in order that the South African tourism industry would become a leader in responsible environmental practices. Key elements of its strategy were identified as:

- assessment of environmental, social and economic impacts of tourism developments;
- monitoring of tourism impacts with open disclosure of information;
- involvement of local communities in planning and decision making;
- ensuring the involvement of communities who benefit from tourism;
- maintenance and encouragement of natural, economic, social and cultural diversity;
- sustainable use of local resources;
- avoidance of waste and over-consumption. (DEAT, 1996):

Subsequently the government’s *Tourism in GEAR* emphasized that tourism should be government led, private sector driven, community based, and labour conscious (DEAT, 1997). However, the government had not had the opportunity to convert the principles of the tourism White Paper into a formal system that could monitor and reward sustainable tourism practices. There have been some initiatives developed to address tourism grading systems in relation to consistency in hospitality levels of quality, health and safety standards, as well as some ethical environmental and social standards. Some of the larger private-sector tourism establishments subscribed to international certification programs such as Green Globe 21 and ISO 14001-based programs, but few applied for such certification.

## **2 AIM**

This project aimed to identify a system by which the aspirations laid out in a specific government policy document could be presented in a way that the private sector and rural communities can use it to manage business at the operational local level. The model aimed to demonstrate how civil society could use the new responsible tourism policy criteria that exist to structure management and leverage government support and to guide and benchmark the achievement against economic (pro-poor) social and environmental criteria. The project was designed to:

1. translate stakeholder agreed government policy into practical management guidelines for the whole tourism industry
2. develop, test and adapt the guidelines in the most directly relevant sector for rural livelihoods impact, that of nature based tourism - applicable across significant areas of South Africa and far beyond the boundaries of national parks.
3. pilot the guidelines as a system of monitoring against criteria and measurable indicators that have recently been developed by South African National Parks within the lodge concession leasing process.

## **3 OBJECTIVES**

The objectives of the Guidelines Development included the production of the following outputs:

### **3.1 Development of National Guidelines Framework**

Development of a set of national generic guidelines for responsible tourism based on an international review and national experience. These were to set out the framework for the development of more detailed implementation guidelines for each sub-sector of the industry. The objectives of the Responsible Tourism Guidelines were to:

- Provide national guidance and indicators to enable the tourism sector to demonstrate progress towards the principles of responsible tourism embodied in the South African 1996 Tourism White Paper.
- Define a baseline of acceptable practice for the industry against which it could be judged.
- Avoid false claims of responsibility.
- Achieve credibility for South African tourism internationally.
- Ensure transparency and accessibility.

It was proposed that the outputs would include both a paper document and a web-based information system, with an implementation strategy and monitoring framework. In addition, it was proposed that there would be a manual for responsible tourism.

### **3.2 Development of a Sub-sector Model**

Identify specific guidelines and quantifiable targets for rural and nature based tourism enterprises selected from the national generic guidelines and test the utility of these guidelines in assessing performance against the Responsible Tourism criteria.

### **3.3 Design of an Assessment System**

A model assessment system based on the monitoring of the current lodges and the tendering system used by SANParks in Kruger. These were to use the criteria and indicators already developed within the SANParks contracts with the lodge management to identify the critical measurable indicators, to identify areas where national objectives are not covered by current contracts and to assist in designing a monitoring system and auditing.

A fourth element (identified as Wrap Up in the original proposal) was envisaged comprising the writing of a manual of best practise to support the implementation of the guidelines and containing practical steps for the implementation of responsible pro-poor tourism for use by large and small-scale businesses, by communities and government at all levels with a process for quantifying results and encouraging improved performance and presentation at a pre-World Summit on Sustainable Development (WSSD) conference. DFID did not fund this element.

The reports in Appendices are Summative Reports, which contain The Responsible Tourism Guidelines and the Monitoring Framework for the Nature Tourism sector. They should be read in conjunction with this report.

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## **4 ACTIVITIES AND PARTICIPANTS**

### **4.1 Project Team and Timeframe**

Harold Goodwin: Team Leader and Pro-Poor/Responsible Tourism Industry Specialist (NRI)

Bill Maynard: Guideline and Monitoring Expert (NRET, NRI)

Anna Spenceley: Locally based team leader INR, South Africa

The work programme which was initially outlined at a Scoping workshop in South Africa in March 2001 is detailed in Table 1.



## 4.2 Development Process

The process of development and the outputs are summarised in Table 1.

<b>Table 1: Process of development of the Responsible Tourism Guidelines and outputs</b>	
<b>Timing</b>	<b>Activity</b>
October 2000	<ul style="list-style-type: none"> <li>• Identification of gaps in responsible tourism policy implementation and lack of consistency in application of sustainable tourism practices</li> </ul>
March 2001	<ul style="list-style-type: none"> <li>• Scoping workshop with representatives of DEAT, the Natural Resources Institute (NRI) and the Institute of Natural Resources (INR).</li> <li>• 31 attendees representing 30 institutions including government, conservation agencies, NGOs, IGOs, the tourism private sector, and financing agencies.</li> </ul> <p>Official support from the South African Government for the process of developing national Responsible Tourism (Responsible Tourism) guidelines, and endorsement to approach DfID to finance technical support for the process.</p>
April 2001	<ul style="list-style-type: none"> <li>• Project proposal submitted to DFID</li> </ul>
July 2001	<ul style="list-style-type: none"> <li>• Funding agreed by DFID</li> <li>• Scoping meetings across South Africa with 39 stakeholders from 20 institutions including government, conservation agencies, NGOs, tourism private sector and financing agencies. The project was relaunched and renegotiated with DEAT.</li> </ul>
August 2001	<ul style="list-style-type: none"> <li>• Review of international best practice in sustainable and responsible tourism, including guidelines, codes of conduct and certification schemes (Spenceley, 2001b)</li> </ul>
September 2001	<ul style="list-style-type: none"> <li>• Technical Working Group to formulate of a proposed guideline development process and terms of reference for South African consultants to draft the guidelines with respect to the triple bottom line</li> <li>• 13 participants from 8 institutions including DEAT, consultancies, financing institutions, and civic society</li> <li>• Three South African consultants commissioned to develop draft responsible economic, social and environmental guidelines in relation to international best practice and the 1996 White Paper.</li> </ul>
October 2001	<ul style="list-style-type: none"> <li>• Technical Working Group convened to oversee consultant progress, including UNDP and Development Bank of Southern Africa (DBSA) representatives</li> <li>• Consultants present draft guidelines (Elliffe, 2001; GTKF, 2001; INR, 2001)</li> <li>• Draft responsible tourism guidelines report produced for discussion (Spenceley, 2001c)</li> <li>• Workshop with the presentation of the draft guidelines.</li> <li>• 37 attendees from 29 institutions, including government, conservation agencies, tourism trade associations, consultants, financial institutions, NGOs and civic society.</li> <li>• Discussion of draft and potential targets/indicators of responsible tourism at the workshop</li> <li>• Guidelines re-drafted in light of workshop discussions (Goodwin and Spenceley 2001)</li> </ul>
November 2001	<ul style="list-style-type: none"> <li>• DEAT distributed re-drafted guidelines to stakeholders, including 253 individuals, &amp; 195 organisations. Comments received from 20 organisations in South Africa (10.3% sample)</li> <li>• Technical Working Group convened to develop draft indicators and targets, with representation from tourism education, community based tourism, consultancies and World Summit company.</li> <li>• Workshop to review consultation results, draft indicators and targets.</li> <li>• 59 attendees representing 52 institutions including government, conservation agencies, tourism trade associations, consultants, financial institutions, NGOs, and civic society.</li> </ul>

	<ul style="list-style-type: none"> <li>• Presentation of by the Open Africa Initiative on responsible tourism routes and Code for Responsible Tourism for the Wild Coast.</li> <li>• Technical working group in National Workshop approved provisional national generic guidelines.</li> </ul>
January 2002	<ul style="list-style-type: none"> <li>• Trade Associations initiate development of sub-sectoral guidelines (e.g. Federated Hospitality Association of South Africa (FEDHASA); the Bed and Breakfast Association of South Africa (BABASA); Off Road-Tactix (4x4 group for Nissan); the Development Bank of Southern Africa)</li> <li>• Development of methodology to test application of national Responsible Tourism guidelines to the nature-based tourism sub-sector, with review by representatives of South African National Parks and DEAT (Spenceley, 2002d)</li> <li>• Consultant commissioned to implement 3 case studies to address terrestrial and marine nature-based tourism and to practically test national targets and indicators</li> </ul>
February 2002	<ul style="list-style-type: none"> <li>• Consultants reports on case studies undertaken at Jackalberry Lodge in the Thornybush Game Reserve (Relly &amp; Koch, 2002); Pretoriuskop Camp in Kruger National Park (Kalwa <i>et al</i>, 2002) and Coral Divers in Sodwana Bay (Spenceley <i>et al</i>, 2002).</li> </ul>
March 2002	<ul style="list-style-type: none"> <li>• Case study overview and implications report compiled (Spenceley, 2002b)</li> <li>• National conference to present progress on trade association sub-sector guidelines (FEDHASA, BABASA, Off Road-Tactix, The Mountain Club of South Africa, and the South African Boat-Based Whale Watching Association) and case study findings, with discussion of targets and indicators</li> <li>• 52 attendees representing 45 institutions including government, conservation agencies, tourism trade associations, consultants, financial institutions, tourism private sector, and NGOs.</li> <li>• Evaluation of commercialisation of South African National Parks in relation to the Responsible Tourism Guidelines, and development of an assessment methodology (Spenceley, Goodwin and Maynard 2002)</li> <li>• Peer review of guidelines by the World Tourism Organisation initiated.</li> <li>• Provisional Responsible Tourism Guidelines for South Africa published (DEAT, 2002)</li> </ul>

## 5 ACHIEVEMENTS AND OUTPUTS

The key achievements and outputs of the guidelines development process were:

- Facilitating wider ownership of the process within DEAT (to Ministerial level) and others for the process of developing Responsible Tourism Guidelines.
- Engendering active participation by South African stakeholders
- Allowing a continuous development process from the 1996 White Paper to provisional Responsible Tourism Guidelines.
- Facilitating wider ownership and buy-in from tourism industry and trade associations
- Completion of Case studies that tested application of the Responsible Tourism Guidelines to operational tourism enterprises.
- Evaluation of SANParks commercialisation process in relation to the Responsible Tourism Guidelines

## **5.1 Engaging Official Support from DEAT for the Process of Developing Responsible Tourism Guidelines**

Gaining and maintaining ownership by the Department of Environmental Affairs and Tourism for the Responsible Tourism Guidelines development process was critical to the process. This was necessary both to the process of sourcing funding from DFID to finance facilitation and technical support, and also in relation to key individuals who drove the process. Support from the Chief Director of Tourism Development in DEAT,<sup>1</sup> was critical at the initiation of the process. DEAT was seeking to present examples of sustainable development and poverty alleviation initiatives during the World Summit on Sustainable Development (WSSD) in August/September 2002 in Johannesburg. In addition, the International Year of Ecotourism (IYE) summit was to be held in Quebec during May 2002, and organised by UNEP and the WTO. Since nature-based tourism is a key South African market, this provided another opportunity for the government to present its proactive and responsible activities in an international forum. The Deputy Director of DEAT and national project leader<sup>2</sup>, played a key role in keeping the process moving forward in order to achieve the very tight timetable required if the project was to deliver on time.

The rationale for the production of the Guidelines is reproduced here from the Explanatory Notes that accompanied the Provisional Responsible Tourism Guidelines. With minor editing these explanatory notes became the introduction to the published guidelines.

## **5.2 Active Participation by South African Stakeholders**

The process of development of the Responsible Tourism Guidelines included 27 scoping meetings, 4 technical working groups, 3 national workshops, a stakeholder consultation incorporating 195 organisations, and a dissemination conference. In all, 176 individuals representing 121 South African institutions participated in the development of the guidelines. They represented all sectors of the tourism industry: government (including DEAT, the Department of Arts, Culture Science and Technology; and, the Department of Land Affairs), national and provincial conservation authorities; provincial and municipal tourism associations; tourism trade associations; the tourism private sector, community based tourism; NGOs; civic society; committed individuals and consultants. Although there was some disappointment in the level of support from individual private sector enterprises and the hunting fraternity, their interests were represented by the tourism trade associations.

The widespread and committed participation by a diversity of stakeholders, in addition to the continual support by key individuals throughout the process, was critical in providing an inclusive forum in which the unique issues of Responsible Tourism in South Africa could be addressed. The degree of buy-in from key stakeholders was not only critical to

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<sup>1</sup> Moeketsi Mosola, he is now working at SA Tourism as Chief Operating Officer

<sup>2</sup> Dr Johan Kotzé

the development of the Responsible Tourism Guidelines, but also vital to the continuation of the process and uptake by the tourism sector once the technical support for the development financed by DFID ceased.

## **Rationale for the National Responsible Tourism Guidelines**

Around the world, tourism destinations are facing increasing pressures on their natural, cultural and socio-economic environments. Uncontrolled tourism growth, often based on short-term priorities, invariably results in unacceptable impacts that harm society and the environment. This is not acceptable in South Africa. In 1996 the White Paper on Development & Promotion of Tourism in South Africa was produced with the following vision:

*“...to develop the tourism sector as a national priority in a sustainable and acceptable manner, so that it will contribute significantly to the improvement of the quality of life of every South Africa. As a lead sector within the national economic strategy, a globally competitive tourism sector will be a major force in the reconstruction and development efforts of the government.”*

Responsible Tourism is the key guiding principle for tourism development in South Africa. As was agreed in the 1996 White Paper, “Responsible tourism is not a luxury for South Africa. It is an absolute necessity if South Africa is to emerge as a successful international competitor”. The White Paper committed us to pursuing a policy of Responsible Tourism. Government, the private sector and communities are working together to practice tourism responsibly. The Responsible Tourism Guidelines identify specific ways in which these commitments can be realised. Each enterprise and association is expected to develop its own agenda for action – prioritising those issues where the particular business or group of businesses can make a significant impact by improving its product, the destination, or the livelihoods and quality of life of local people.

We recognise that a profitable tourism industry is essential to the sustainability of the sector and to the private sector’s ability to spread benefits. Everyone in the industry can do something more to make their product more responsible, and we want to maintain our position as leaders in this area. International trends in the market have moved further towards our responsible tourism agenda since 1996 when the policy was adopted. Our decision to adopt a responsible tourism approach was farsighted five years ago, and today it offers competitive advantage and a fresh approach.

Government and the private sector are committed to work in partnership with the people of South Africa to develop and market tourism experiences that demonstrate our social, economic, environmental, technical, institutional and financial responsibility. We are working together to develop domestic and international tourism, which contributes equitably to the economic and social development of all South Africans, which offers domestic and international visitors a quality experience, and which is environmentally sustainable. These generic national guidelines provide a framework within which responsible tourism is defined in South Africa and within which benchmark standards can be set for accommodation, transport, cultural and natural heritage and for operators and marketing associations. This approach is necessary to ensure that the tourism sector in South Africa keeps pace with international and national trends towards responsible business practice – a trend that is increasingly evident in our international originating markets and within our domestic market.

*Explanatory notes Provisional Guidelines for Responsible Tourism Management March 2002*

### **5.3 The Development Process: From the 1996 White Paper to Provisional Responsible Tourism Guidelines**

As described in Table 1, guidelines were developed through a process of research, animation, development, stakeholder consultation and review. The 1996 White Paper and the review of international best practice (Spenceley, 2001b) provided the basis for consultants to devise draft economic, social and environmental Responsible Tourism Guidelines for discussion. Through a series of technical working groups and workshops this expertise was used to draw up a provisional list of 104 guidelines (Goodwin and Spenceley 2001), addressing the triple bottom line of Rio in the context of South African socio-economic and environmental issues, and political objectives. Uniquely they provide a basis for transparent, quantifiable monitoring reporting of responsible tourism practices. These provide a basis to collate Responsible Tourism information at a regional or national level in order that DEAT can report on its progress towards implementing Responsible Tourism, as laid out in the 1996 White Paper. The 104 Guidelines, which were produced in October 2001, remained substantially unaltered going through a series of national workshops and review processes in March they were published as Provisional National Responsible Tourism Guidelines.

### **5.4 Buy-in from Tourism Industry and Trade Associations**

The guidelines were developed in order that marketing, trade and professional associations, and geographically based groups could use the guidelines to develop Codes of Conduct and Codes of Best Practice. It was envisaged that these Codes would place commitments on association members (which the associations themselves would monitor) and report annually on progress. It was not envisaged that associations would attempt to implement all 104 of the Responsible Tourism Guidelines, but rather that they would select those that were most appropriate to their business, geographical area or sector. They would do this by proactively examining sectors in which they could showcase responsible business practice through economic, social and environment initiatives that demonstrate commitment and which may secure them market advantage within the specific market segments that they operated in. Integral to the ethos of responsible business was the assumption that enterprises would comply with all relevant national legislation and regulations, in addition to accepting the principle that the “polluter pays”.

Evidence of buy-in within the tourism industry and trade associations of South Africa came from initiatives that utilised the national Responsible Tourism Guidelines to develop sub-sector Codes. The Federated Hospitality Association of South Africa (FEDHASA); the Bed and Breakfast Association of South Africa (BABASA); Off Road-Tactix (4x4 group for Nissan); the Wild Coast Spatial Development Initiative and the Development Bank of Southern Africa (DBSA) are all developing specific guidelines for their use.

FEDHASA in association with the WSSD Greening Initiative has launched a Hospitality Industry Campaign for Responsible Tourism widening the agenda to adopt improved, social, economic and environmental principles. This represents a significant movement beyond the now well established green agenda in the hotel sector. FEDHASA has taken a strong lead by recasting its established environmental award to create the new **Imvelo Responsible Tourism Award** scheme. Through a series of 22 forthcoming workshops with its private sector members it is promoting the importance of triple bottom line Responsible Tourism to its members and using the DEAT Responsible Tourism Guidelines to do so. The winners of the Responsible Tourism award in 2002 will be announced at a ceremony during WSSD. The categories include best community involvement programme, and in addition to the environmental awards, best practice awards for accommodation establishment, restaurant and SMME. FEDHASA is asking members to sign a Statement of Intent committing them to implement a Responsible Tourism programme in line with the national guidelines. All signatories to the Statement of Intent are to be included in a Responsible Tourism Guide to South Africa to be published during WSSD by the Business Day and Financial Mail.

The Statement of Intent commits FEDHASA members to “compile and implement a Responsible Tourism Management Plan” for use in their establishment “as per the National Responsible Tourism Guidelines for the South African Hospitality Sector” (see box on previous page). The Statement of Intent requires those who sign to recognise their “responsibility, as a manager/owner of an accommodation establishment, to comply with, and implement, standards that will assist in addressing social, economic and environmental shortcomings.” Furthermore they commit to the requirement that these “standards must be measurable and sustainable”. FEDHASA has published a *Sample Responsible Tourism Management System*. (FEDHASA 2002).

FEDHASA’s National Responsible Tourism Guidelines for the South African Hospitality Sector reflects the strong emphasis on the environmental aspects of sustainable tourism, which has been a corner stone of the work of the International Hotels Environment Initiative and other schemes in the 10 years since Rio. Whilst it does not give equal weight to the social and economic dimensions of the triple bottom line there are significant commitments to supporting the local community through the use and/or promotion of their products and linkage programmes particularly with local suppliers and historically disadvantaged businesses. The policy is also very strong on the need for managers and owners to commit to taking responsibility for creating more balanced tourism. It will take time for the economic and social agenda to become as prominent as the environmental in the FEDHASA membership, but the process has been commenced and it has been stimulated – but not supported – by the DFID project.

Fair Trade Tourism in South Africa (FTTSA) awarded exhibitors for “responsible” and “fair” stands at INDABA across the full range of travel industry categories from tourism marketing, through provincial authorities, tourist attractions and transport.

The next stage of development has been initiated by the FEDHASA “campaign” with its extensive series of workshops around the country and as individual enterprises take up the challenge. There is still a good deal of work to be done in promoting the responsible tourism concept in South Africa and in implementing the changes required by the policy. The strategy is market driven as was made clear in the guidelines as they were published.

“The credibility of this national strategy will require transparency, the clear communication of particular responsible tourism objectives, and verifiable evidence of success in achieving targets. Responsible marketing is fundamental to the approach. One of the purposes of the guidelines is to avoid unsubstantiated claims of responsibility, of the sort that undermined the concept of ecotourism in the originating markets. They also aim to ensure a transparent framework within which trade buyers and tourists can judge the competing claims of enterprises and associations in the market place. As the operators in the originating markets adopt strong responsible tourism strategies they will need to be able to rely on the credibility of claims made in the destinations by enterprises, communities and government. Enterprises and associations must avoid raising expectations that cannot be realised.” (Goodwin & Spenceley 2002).



Responsible tourism implies a pro-active approach by the tourism sector to the promotion of balanced and responsible tourism. It is underpinned by sustainable environmental, social and economic principles, which include:

- Assessing environmental impacts as prerequisite to developing tourism
- Using local resources sustainably: avoiding waste and over-consumption
- Maintaining and encouraging natural diversity
- Involving local communities in planning and decision-making
- Ensuring that local communities derive economic benefits
- Assessing social impacts as a prerequisite to developing tourism
- Maintaining and encouraging social and cultural diversity

### **Responsible Tourism Guidelines for the Hospitality Industry**

#### **Air quality and pollution**

Managing and reducing, where possible, emissions into the atmosphere.

- limiting or reducing emissions into the air (e.g. cleaning air filters, exhaust systems, reducing odours)
- eliminating or minimising the effects of noise pollution (e.g. reducing vibrations, fitting silencers)
- ensuring quality air in public areas through air flow and purification

#### **Community and social involvement**

Managing and involving all stakeholders in the environmental programme:

- involving the local community and encouraging them to develop their own programmes
- providing resources and/or funds for local community health and environmental education
- supporting the local community through the use and/or promotion of their products
- linkage programmes with industry and SME enterprise
- advising stakeholders of environmental programme success
- ensuring the continuation of environmental programmes by management.

#### **Energy management**

Measuring and monitoring or appropriate long and short-term energy usage

- regularly monitoring all energy usage
- investigating the findings of adverse energy measurements
- fitting of energy saving technology and devices (e.g. power correction. time clocks)
- use of insulation on hot water pipes and tanks
- use of natural power e.g. solar power

#### **Health management and awareness**

Taking positive steps in the management and creation of awareness of the relevant health issues such as HIV/AIDS, tuberculosis, hepatitis and waterborne diseases:

- providing information campaigns for staff, guests and the community
- providing first aid training and facilities
- distributing protective items (e.g. condoms, gloves)
- offering aids counselling
- advising guests unfamiliar with our region of the relevant health issues such as the possibility of contracting malaria
- ensuring the promotion of health care facilities

#### **Procurement policies**

Conducted with minimal impact on the environment

- implementation of programmes to ensure the purchase of goods which have minimal negative impact on the environment – if possible, from local suppliers and historically disadvantaged businesses
- investigation into the environmental practises of suppliers
- use of natural and recyclable materials

#### **Waste and pollution**

Collecting, storing and recycling of waste material and by-products

- sorting and separating different types of waste such as cans, glass and paper
- ensuring that no waste escapes, particularly liquids
- introducing schemes to manage waste, using local communities, thus empowering them to participate in recycling schemes
- recycling used cooking oil

#### **Water Conservation**

Measuring and monitoring water use and conserving this natural resource:

- regularly monitoring water usage
- implementing water saving programmes
- fitting water saving devices
- recycling water where appropriate

The expectations of individual enterprises were made clear in the explanatory note with accompanies the guidelines:

Individual enterprises will need to develop their own policies and make commitments within this national and sub-sectoral framework and report on progress. This is a market led initiative, and enterprises will want to seek to maximise their advantage through non-price competition, creating enterprise level policies which fulfil the requirements of any association of which the enterprise is a member and to develop Unique Selling Propositions (USP) to attract tourists and tour operators.

The guidelines contain an enabling framework within which people engaged in the travel and tourism industry can make a difference. Entrepreneurs in the industry can grow their businesses, while providing social and economic benefits to local communities and respecting the environment, creating better places for locals and tourists alike.

- Choose your criteria from the menu
- Identify standards and targets appropriate to your business (e.g. “local” can only be defined by those involved)
- Report progress in a transparent way which can be verified by the trade association
- Use responsible tourism as part of your marketing strategy

(Goodwin & Spenceley 2002).

Given trends in the UK, German and French originating markets there is considerable potential for B2B (Business to Business) supply chain linkages using the concept of Responsible Tourism and these are being explored in work stimulated – but not funded by – the DFID project. B2B linkages involves developing links between operators in the originating markets committed to responsible tourism and those in the destinations - particularly among South Africa’s emerging entrepreneurs - who are using responsible tourism policies at enterprise level to foster linkages.

### **5.5 Case Studies that Tested Application of the Responsible Tourism Guidelines to Operational Tourism Enterprises**

Sixteen of the 104 economic, social and environmental guidelines were selected to assess application to the nature-based tourism sub-sector. These guidelines were highlighted for testing due to:

- Their attractiveness and interest amongst consumers (tourists and tour operators);
- That they were objectively and transparently measurable and declarable (rather than qualitative or intangible issues that were open to interpretation);
- That they dealt with Responsible Tourism issues that could decrease costs for business, and improve marketability.

The assessment methodology built on doctoral research<sup>3</sup> undertaken in South Africa to develop a sustainable nature-based tourism assessment framework. The assessments were implemented using a previously prepared comparative methodological framework. This was provided to ensure consistency between the studies and the production of comparable data and reports, which would allow the performance of the operations to be transparently assessed and compared (Spenceley, 2002b).

The nature-based tourism industry was examined since it relies heavily on the integrity of an attractive environment to persist, and occurs in rural areas where the majority of South Africa's poor people reside. The study sites were chosen to illustrate the application of the guidelines to nature-based tourism operations in national and provincial parks and on privately owned land within three of South Africa's provinces. They were also selected to illustrate terrestrial photographic safaris and marine scuba diving. The study sites were Jackalberry Lodge in the Thornybush Game Reserve (Relly & Koch, 2002); Pretoriuskop Camp in Kruger National Park (Kalwa *et al*, 2002) and Coral Divers in Sodwana Bay (Spenceley *et al*, 2002).

Comparison of the case studies revealed that the level of interest and assistance from enterprise management staff had great implications for the level of success of the assessment. It was encouraging that the tests provided a stimulus for enterprises to consider ways in which the sustainable tourism agenda can be widened to reflect the triple bottom line rather than simply dealing with environmental issues (Spenceley, 2002b). The Comparative Report has laid the groundwork for a national reporting system, although further technical support would be necessary to create this.

Despite provision of a detailed methodological framework for assessment and reporting, it was found that there were difficulties in collating comparable data across enterprises. This has implications for the collation of progress within trade associations and government in monitoring and reporting Responsible Tourism, and clear assessment guidance would be required for future assessments. In addition, training in responsible tourism practices and evaluation would be valuable for assessors and businesses, as would the provision of a best practice manual. The manual would guide enterprises and assessors in designing and operating responsible tourism (Spenceley, 2002b)

## **5.6 Evaluation of SANParks Commercialisation Process in Relation to the Responsible Tourism Guidelines**

The application of the Responsible Tourism Guidelines to the SANParks commercialisation process provided another opportunity to test the guidelines, and also to determine whether the SANParks programme was in line with national policy. The evaluation of the bidding process in addition to concessionaire's empowerment and environmental proposals revealed that the commercialisation process had incorporated a

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<sup>3</sup> By Anna Spenceley – see references.

significant proportion of the Responsible Tourism Guidelines. SANParks had also developed a system of applying penalties for concessionaires failing to comply with their empowerment and environmental targets, including the last resort of losing their contracts (Spenceley, Goodwin and Maynard, 2002). The concessions policy could be operated with the National Responsible Tourism Guidelines much will depend upon how the next round of concessions is let and on the process of auditing used.

Media statement 13 May 2002, INDABA Durban, South Africa

### **MINISTER MOOSA UNVEILS INITIATIVES TO BOOST TOURISM.**

The minister of environmental affairs and tourism, Mohammed Valli Moosa, today announced tourism initiatives by the Department for Environmental Affairs and Tourism (DEAT) which will significantly contribute to tourism promotion and growth in the country. Minister Moosa launched a handbook on tourism funding for small, medium and micro enterprises (SMMs), unveiled a poster campaign against illegal tour guiding and released guidelines on responsible tourism.... The responsible tourism guidelines, developed during 2001, provide a national framework for the tourism industry to exercise its commitment towards the principles of responsible tourism. These principles are embodied in the 1996 White Paper on the 'Development and promotion of tourism in South Africa'.

The White Paper concluded that tourism development in SA had previously largely been a missed opportunity, and that the earlier focus on a narrow market had reduced the potential of the industry to spawn entrepreneurship and to create new services. (NP) "Responsible tourism is about enabling local communities to enjoy a better quality of life, through increased socio-economic benefits and aim improved environment. It is also about providing exciting holiday experiences for tourists, and stimulating business opportunities for tourism enterprises.

Responsible tourism must become the key guiding principles for tourism development in South Africa. Government, the private sector and communities are working together to practice tourism responsibly, and the guidelines provide the mechanisms through which this can be realized," said Minister Moosa.

In the development of these guidelines, the different tourism enterprises and associations are expected to develop their own agenda for action, and to prioritise those issues that will make a significant socio-economic and environmental impact.

"This approach is necessary to ensure that the tourism sector in South Africa keeps apace with international trends towards responsible business practice. I hope the brochure on responsible tourism guidelines will continue to educate and create awareness to the tourism industry," said Minister (NP) issued by the Ministry of Environmental Affairs and Tourism.

## 5.7 Peer Review by WTO

Peer review by the World Tourism Organisation was included in the project in order to ensure that what was produced in South Africa would fit within the emerging international framework of governance. The review was undertaken by Dawid de Villiers deputy Secretary-General of the World Tourism Organisation who circulated the Provisional Guidelines to all heads of departments within WTO and collated the results and Eugenio Yunis, Chief of Sustainable Tourism, who commented separately.

Their comments were sought at the end of the process in order to address both the detail of the Guidelines and to allow discussion of dissemination. The specific comments were overtaken by the decision of the Minister to publish the Guidelines on May 13 2002 as the official national Responsible Tourism Guidelines, a decision over which we had no control. However, some of the questions raised by the WTO review are dealt with in the explanatory introduction, which formed part of the publication.

The review by WTO led to detailed discussion about the relationship between the concept of Responsible Tourism and Sustainable Tourism. Within the overarching framework of the World Tourism Organisation's Global Code of Ethics The World Tourism Organisation is contributing the time of Dawid de Villiers and Eugenio Yunis to the process of preparing a Draft Charter on Responsible Tourism in Destinations which is to be considered at the Cape Town Conference on Responsible Tourism in Destination in August 2002.

## 5.8 Project Outputs

The Outputs agreed with DFID are described in Table 2 below.

<b>Table 2: Outputs against Activities and Reports</b>			
<b>Outputs proposed</b>	<b>Activities</b>	<b>Outputs</b>	<b>File Name (<i>Italics</i>)</b>
<b>1. Development of National Guidelines Framework:</b>			
Identification of the framework and structure that the guidelines must fit into	See Table 1, July 01		
Identification of individual sub-sectors within the industry	See Table 1, July 01		
Identification of generic tourism objectives drawing on international best practice and the South African White Paper	See Table 1, August 01		Spenceley (2001b) " <i>GuidelinesLitRep</i> "
Draft Guidelines at a generic level	See Table 1, September 01 – January 02	A set of national generic guidelines for responsible tourism based on an international review and national experience. These set out the framework for the	Elliffe (2001) " <i>Social Guidelines – Final Draft 2</i> " GTKF (2001) " <i>GuidelineReptFramwk –</i>

		development of more detailed implementation guidelines for each sub-sector of the industry.	GTKF” INR (2001) “ <i>Environmental guidelines</i> ” Spenceley (2001c) “ <i>DraftGuidelinesRept</i> ”
Peer review by World Tourism Organisation	See § 5.7		de Villiers and Yunis 2002

## **2. Development of Sub-sector Model**

A methodology for assessing the application of the National Guidelines to specific sectors.	See Table 1, January 02		Spenceley (2002d) “ <i>ListGLtoassessMethod3</i> ”
Case studies to highlight how the National Generic Guidelines would fit the needs of one specific sector. (more than one if possible)	See Table 1, January-February 02	Tested, consensus built, specific guidelines & quantifiable targets for rural & nature based tourism.	Kalwa <i>et al</i> (2002) “ <i>Pretoriuskop Report – final revised (22apr02)</i> ” Relly & Koch (2002) “ <i>Jackalberry final final 17 March ed</i> ” Spenceley <i>et al</i> (2002)“ <i>CSReportCoral DiversFINAL</i> ”
A synthesis report	See Table 1, March 2002	Report on the case studies, community-private sector workshops and the replicable model of a process through which such guidelines could be realised and the poor empowered in planning and managing tourism.	Spenceley (2002b) “ <i>NRTGCaseStudies OverviewFin</i> ”
A national validation process to gain consensus on the Guidelines and how they should be used by the industry as a whole.	See Table 1, March 2002		

## **3. Design of Assessment System**

Review the SANP documentation, bidding process and tenders submitted. Identify the explicit management objectives and the measurable indicators that have been specified.	See Table 1, March 2002		
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Design monitoring system for measuring outputs against targets.	See Table 1, March 2002	A model assessment system based on the monitoring of the current lodges and the tendering system used by SANParks. This used the criteria and indicators already developed within the SANParks contracts with the lodge management to identify the critical measurable indicators.	Spenceley, Goodwin & Maynard (2002) SANParks Commercialisation Report
Identify areas within national objectives that are not covered by current contracts. Assist in audit with SANP.	See Table 1, March 2002	Audit not undertaken since SANParks not ready to undertake it and most of the concessions are still not operational.	
Lessons on how easy it is to identify tangible, measurable indicators,	See Table 1, March 2002		
Fieldwork methodology appropriate for the sector,	See Table 1, March 2002		
Identification of skills needed by auditors.	See Table 1, March 2002		

## 5.9 Report Outputs

### a) Literature Review

Spenceley, A. (2001b) *Development of National Responsible Tourism Guidelines and Indicators for South Africa: Literature Review: Principles, Codes, Guidelines, Indicators and Accreditation for Responsible and Sustainable Tourism*, Report to the Department of Environmental Affairs and Tourism, and the Department for International Development, August 2001 “*GuidelinesLitRep*”

Goodwin H (2001) *Responsible Tourism and the Market* International Centre for Responsible Tourism 2001

### b) Drafting Guidelines

Elliffe, S. (2001) Draft framework – Number two: Social guidelines for responsible tourism,  
10<sup>th</sup> October 2001 Ballygrooby Investments & Business Solutions ‘*Social Guidelines – Final Draft 2*’

GTKF (Grant Thornton Kessel Feinstein) (2001) Framework for economic guidelines for sustainable tourism development, October 2001 “*Social Guidelines – Final Draft 2*”

(INR) Institute of Natural Resources (2001) Framework for the Environmental Guidelines for sustainable tourism, 8 September 2001 “*GuidelineReptFramwk – GTKF*”

Spenceley, A. (2001c) Responsible tourism guidelines for the South African Tourism Industry: Draft Guidelines for Discussion, Report to DfID/DEAT, October 2001 "*DraftGuidelinesRept*"

Goodwin H and Spenceley A (2001/2002) National Responsible Tourism Guidelines For South Africa and Explanatory letter to accompany them. DEAT November 2001. Finalised March, 2002 subsequently published as Guidelines for Responsible Tourism by DEAT, May 2002

### **c) Case Study Reports**

Spenceley, A. (2002d) Methodology for Case Study Assessments, Application of the Guidelines to the Nature-based tourism sector; National Responsible Tourism Guidelines Version 3: 26 January 2002 "*ListGLtoassessMethod3*"

Kalwa, R., van der Walt, W., Moreko, J., and Freitag-Ronaldson, S. (2002) *Case Study Assessment of Pretoriuskop Camp, Kruger National Park*, National Responsible Tourism Guidelines for the South African Tourism Sector, Application of the Guidelines to the Nature-Based Tourism Sector, Report to DfID/DEAT "*Pretoriuskop Report – final revised (22apr02)*"

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Spenceley, A. (2002b) *Overview report of three case studies: Pretoriuskop Camp, Jackalberry Lodge, and Coral Divers*, National Responsible Tourism Guidelines for the South African Tourism Sector, Application of the Guidelines to the Nature-based tourism sector, Report to DFID/DEAT, March 2002 "*NRTGCaseStudies OverviewFin*"

Spenceley, A. (2002d) Methodology for Case Study Assessments, Application of the Guidelines to the Nature-based tourism sector; National Responsible Tourism Guidelines Version 3: 26 January 2002 "*ListGLtoassessMethod3*"

### **d) Commercialisation of South African National Parks**

Spenceley, A., Goodwin, H., and Maynard, W. B. (2002) Commercialisation of South African National Parks and the National Responsible Tourism Guidelines, Report to DFID/SANParks, April 2002 CONFIDENTIAL **NOT FOR CIRCULATION**



#### **e) Peer Review by the World Tourism Organisation**

de Villiers D (2002) Comments on Draft Guidelines for Responsible Tourism Development in Destinations, WTO

Yunis E (2002) South African Responsible Tourism Guidelines, WTO

### **6 LIMITATIONS AND CONSTRAINTS**

This was a short term Technical Assistance Project and the time available for the project was not as originally planned, causing some difficulties, particularly at the commencement of the project. The elements of the initial project proposal, which were not funded by DFID, have been part funded by other agencies, but this has impacted on some of the outputs.

### **7 FUTURE ACTIVITIES**

- In Soweto there is an initiative to create a locally owned tourism product, which will provide opportunities for tourists to engage on a more equitable basis with the local community. This new product organised within the context of a Soweto Responsible Tourism framework will create a business structure which will enable Soweto based SMMEs to sell into the hotels in Sandton in time for WSSD, but more importantly to enable this new product to be sold through the hotels on an ongoing basis. FEDHASA is playing a major role in this initiative, as they are able to create the B2B linkages essential to sustainability.
- In Cape Town a new product is to be launched which will create another “must do” Cape Town activity to parallel the Wine Route. The Wine Route is actually a range of different tours but with sufficient in common to define a particular experience and one which tourists and business travellers recommend to each other. The emerging entrepreneurs are organising their own Responsible Tourism Association and will create a Code of Conduct for the tours. Through work with UK outbound operators links will be forged between the emerging entrepreneurs and the established inbound operators. Harold Goodwin is working on this with a core group of Africa operators. This strategy builds on DFID Tourism Challenge Fund work in The Gambia on improving access to the market for informal sector entrepreneurs.
- In August there will be a three day international conference held with the support of the World Tourism Organisation to test the South African Responsible Tourism Guidelines on field visits in the Cape Town area and to discuss a draft international charter on Responsible Tourism in Destinations. Harold Goodwin is drafting this Charter with assistance from WTO
- The national series of workshops planned by FEDHSASA to promote the guidelines is still underway. Anna Spenceley is closely involved in this process. Willem Fick of FEDHASA is working through the Tourism Business Council of South Africa to encourage the other trade association to place more emphasis on the creation of Responsible Tourism Guidelines.

- The Department for Environmental Affairs and Tourism is planning a series of further case studies to develop specific guidelines for other sectors of the tourism industry and to test the reporting criteria.
- The Department for Environmental Affairs and Tourism is funding the preparation of the Manual necessary to support the implementation of the Guidelines. Anna Spenceley is leading a South African team producing the Manual which will be placed on the International Centre for Responsible Tourism website.
- The South African data on the case studies will feature in a report on Tourism and Poverty Reduction being prepared by Harold Goodwin for the World Tourism Organisation. The Report is to be launched at WSSD.
- Ecotourism Management and Assessment, Diamantis D and Geldenhuys S will include a chapter by Spenceley, Goodwin and Maynard on The Development of Responsible Tourism Guidelines for South Africa. Publication is expected late in 2002.

## 8 CONCLUSIONS

The project has demonstrated that Responsible Tourism Guidelines can be created through a multi-stakeholder process and that they can assist in moving the issue of sustainable tourism beyond the relatively narrow green agenda. The objectives of the project were met and there is a good prospect that these national guidelines will be developed into a Charter for Responsible Tourism in Destinations encouraging more balanced and equitable tourism development and creating the basis for local management of an industry with the potential to generate significant benefits if the negative impacts can also be managed.

The monitoring and reporting methods are sufficiently robust to provide a means of verifiable reporting on the triple bottom line benefits of particular initiatives. However, this work needs to be developed if an adequate database is to be created which will allow standards to be ratcheted up.

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