

Living outside the fence: Opportunities for neighbouring communities to supply products and services to the Sabi Sand Game Reserve, South Africa

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Abstract

An evaluation was undertaken to understand opportunities for stimulating local enterprise development within the tourism supply chain, linked to a private game reserve in South Africa, the Sabi Sand Game Reserve, which neighbours the Kruger National Park. The study focussed on understanding the market demand for local products and services from commercial lodges, and the current local supply from enterprises and entrepreneurs in local communities. This article quantifies the value of current procurement spend by lodges on local products and services and estimates their potential future expenditure. The study matches these responses with the availability of products and services in the neighbouring communities. It also provides insights into relationships between private lodges, game reserves and local communities in South Africa. It concurs with previous research on tourism supply chains in rural South Africa, and also makes recommendations for the development of local businesses with higher technical capacity development.

Keywords: Tourism; communities; business development; South Africa, Sabi Sand Game Reserve, market study, supply study.

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Introduction

Since the end of apartheid in 1994 South Africa has become one of Africa's leading tourism destinations. Safari tourism in particular represents a "*form of high-value, low-volume accommodation that provides non-consumptive game viewing experiences in an atmosphere of luxurious hospitality*" (Rogerson, 2012: 480). Tourists pay considerable amounts to be surrounded by 'wilderness' resulting in lodges that are predominantly positioned within protected areas, neighbouring rural environments with low density populations and few private businesses. According to official statistics, the number of international leisure tourism arrivals increased by 12.7% between 2009 and 2010 to a total of 4.7 million arrivals who on average stayed for 8.4 nights (South Africa Tourism, 2011). For domestic travellers, there were 3.9 million holiday trips taken in 2010, with an average spend of R710 per trip (South Africa Tourism, 2011). In terms of activities undertaken on domestic trips in 2010, of the 6.8 million

overnight trips recorded, 1.9% included wildlife (e.g. game viewing) (Statistics South Africa, 2011).

One of South Africa's iconic wildlife safari destinations is the Sabi Sand Game Reserve (SSGR) (also known as the Sabi Sand Wildtuin in Afrikaans), which forms the focal destination of this study. It is a reserve that covers approximately 49,500 hectares, and lies adjacent to the Kruger National Park (KNP). The SSGR comprises 47 unfenced farms with different landowners. A veterinary fence between KNP and the SSGR was removed in the 1990s to allow wildlife to move freely between the areas. A number of upmarket lodges, private camps, and residences are located in the reserve (Holden, 2000; Pers. Com. SSGR management, 2012). At the time of this study, there were 39 commercial lodges in the SSGR, managed by 19 companies.

Within the SSGR all of the land is privately owned, with consortiums of individuals, companies, trusts and other legal persona holding the title deeds. The activities of the members of the reserve, who are unfenced from one another, are governed by a Constitution. The reserve's environmental management policy or philosophy states that they need to conserve their rapidly dwindling wilderness areas and provide a sanctuary for fauna and flora of their heritage (Scamander Properties (Pty) Ltd & African Cultural Tours (Pty) Ltd, 2000). The plan states that an important contributor to the long term sustainability of the reserve in light of socio-economic pressures is by employing people, earning foreign currency, paying tax and promoting *sustainable* tourism.^g It is on this basis that the study sought to determine the extent to which lodges in the SSGR were procuring locally, and whether this could be enhanced to in the future.

The Bushbuckridge Local Municipality (BLM) neighbours the SSGR. The BLM has a large population of about 509,970 (in 2007) people and it is expected to grow to over 530,000 by 2014 (Bushbuckridge Local Municipality, undated). The human population density in the Bushbuckridge region ranges from 146 people/km² to over 300 people/km² (High and Shackleton, 2000). Villages are usually densely packed, and have over 500 households (Giller et al., 2013). An estimated 25-50% of the population of BLM are unemployed, and it is among the three poorest municipalities in the country. Public sector spending is largely responsible for over 70% of gross value addition as the local economy is not self sustaining or based on commercial productivity (Bushbuckridge Local Municipality, undated). It is within this municipality that this study focussed on the occurrence of enterprises that could provide products and services to the SSGR lodges.

^g Authors' emphasis

Safari tourism and local linkages

The relationship between luxury tourism destinations and their neighbouring communities is complex and, in the past, has been tense. One criticism has been that local communities do not necessarily experience the knock-on financial benefits of high-paying customers. Given the high unemployment levels and low levels of economic development in rural areas where luxury lodges predominantly operate in South Africa (Massyn & Koch, 2004), especially in rural areas, there is often a high dependence on the lodges as the main income generating opportunity.

The Government of South Africa has attempted to combat the above by developing National Guidelines for Responsible Tourism in 2002. These have placed increasing emphasis on the economic, social and environmental responsibilities of the tourism sector within South Africa to create an inclusive business environment in order to strengthen local community involvement in tourism value chains and establish new linkages. Local communities can be incorporated in tourism value chains either directly (e.g. employed staff, guides, or selling products and services directly to tourists) or indirectly by selling products and services to tourism establishments which then either sell on to tourists or transform into a value added product to tourists. An example of indirect participation would involve a local farmer selling fresh produce to a lodge which transforms the individual vegetables into a meal which is then sold to a tourist. Ashley and Haysom (2008: 130) argue that often local communities can earn as much from direct participation as indirect, and in certain cases indirect participation can be more profitable. Indeed, Ashley and Haysom (2008: 130) state that “researchers have typically paid more attention to assessing direct participation of the poor in accommodation, craft and cultural services, rather than supply chains” noting that an important exception to this is the work done on the procurement of fresh produce.

Ashley’s (2005: 12) evaluation of pro-poor tourism initiatives in South Africa found among a number of reasons why tourism establishments build linkages with neighbouring communities were to enhance their brand, diversify the product range to guests, publicity and marketing as well as gaining a ‘social licence to operate’. A social licence to operate focuses on acceptance by the local community institutions for their operation. This also becomes important in resolving community disputes and ensuring the safety of guests.

The University of Johannesburg conducted research on tourism-agriculture linkages in the SSGR’s accommodation sector between 2009 and 2012. These resulted in a number of pertinent statements from SSGR lodges on local procurement. The comments collated from the SSGR reveal a series of problems encountered by lodges procuring from local enterprises. These included

reliability, consistency, quality, communication, equipment, mismanagement, a lack of infrastructure and transport, and theft. By contrast, the lodges reported to find the service provided by established retailers located further away to be superior and preferable (Rogerson, 2012; Hunt, 2009).

Furthermore, analysis of data collected from the University of Johannesburg on local food purchases demonstrates the type of issues that were of ‘high’ importance in their decision not to purchase more food from local producers (see Table 1). Hunt (2009) found that the most frequently rated problems were lack of quality food produced, unreliable food supplies, lack of the specific goods they required, and that local farmers did not have the skills or capital to provide high quality food production (Hunt, 2009).

Table 1: Importance of reasons for lodge not having more food supplies from local producers in the SSGR (n =7)

Reasons	%lodges ‘High’ importance
Lack of quality food produced	57.1%
Unreliable food supplies	57.1%
Lack of specific goods that you require	57.1%
Local farmers do not have the capital to provide high quality food production	57.1%
Local farmers do not have the skills to provide high quality food production	57.1%
Your choice is restricted by your tourist's preferences (i.e. for European foods)	42.9%
Lack of any food goods available at all	28.6%
The area is unsuitable for any agriculture	28.6%
Transport logistics make it not cost efficient	28.6%
Animal-human conflict too high to allow agriculture to flourish	14.3%
Health and safety standards prevent you from buying locally	14.3%
Language communication barriers between you and local producers	0.0%
Prices of local produce are too high	0.0%

Source: Adapted from Hunt (2009)

The lodges’ experiences of procuring food products locally appear to be fairly consistent with problems relating to the quality, reliability, consistency and diversity of available products.

A study by Technoserve (2012) on opportunities for linkages with the SSGR found that high potential opportunities lay in fruit and vegetable production, craft, uniform production and upholstery, and laundry services (Technoserve, 2012). Technoserve, at the time of writing, is attempting to address linkages between agricultural producers and the lodges on behalf of the Africa Foundation. They propose to provide training support in farming practices and business management, and also infrastructure for irrigation, packing and

processing to improve the local food production. Rather than only concentrating on linkages to the reserve, they plan to link the farmers to major supermarket chains, including Boxer and Spar (Technoserve, 2012). Overall, this research intended to build upon the research of Rogerson (2012) and Technoserve (2012) and assess a broad range of products and services within the SSGR.

Methodology

The approach used in the study incorporated a literature review, stakeholder interviews, data analysis, and a review process. Market demand questionnaires were designed for interviews with tourism lodges in the SSGR, and supplier questionnaires were developed for interviews with local enterprises. Existing questionnaires were used as a basis, using resources from the International Trade Centre (Ashley, Mitchell & Spenceley, 2009) and from Conservation International and George Washington University (Guitierrez, Lamoureux, Matus & Sebunya, 2005).

The interviews for the market demand study took place between 14 and 21 January 2013. Nineteen interviews took place with representatives of 16 of the 19 companies operating in the SSGR, who provided information on 35 of 39 lodges in the reserve that they operated. This sample represented 84% of the commercial lodges, and 90% of the lodge management companies present in the SSGR. Interviews were also done with three representatives of the SSGR management. Some of the interviews were done through face to face meetings, but due to unusually heavy rains that preceded the field work, not all of the reserve was accessible. Therefore, some of the interviews were done by telephone instead. The market demand study elicited the contact details of 35 suppliers, and the locations of another 16 suppliers, which were used to inform the supplier study.

Interviews with local suppliers were conducted between 25 and 31 January 2013. Within the Bushbuckridge Local Municipality, the Amashangana Traditional Authority (TA), the Jongilanga TA, and the local Community Development Forums (CDFs) were contacted. The purpose of the project was explained to them and they gave their consent for the study to proceed. All suppliers identified through the market demand study were contacted ($n=35$) but only 16 suppliers were available for interview during the study period. Of the 16, only 12 were willing to answer questions and provide financial information requested in the questionnaire. As with the market demand interviews, the supply study was constrained by heavy rains, which made some roads in local communities inaccessible. However, suppliers were reluctant to be interviewed by telephone. Furthermore, interviews often took more than three hours each to administer, and despite this the majority either did not have financial figures to share, or did not wish to share this information.

Within the market study, for each local product and service, lodges were asked to provide information on their minimum and maximum spending per month. However, not all lodges were able to provide the data, and therefore estimates were made for those lodges based on those who have financial information. The analysis employed the following steps:

- Step 1. Actual expenditure values of those lodges who provided data were converted into 'per bed' number, by dividing the value by the number of beds of that lodge.
- Step 2. An average 'per bed' value was taken using all of the 'per bed' values from Step 1.
- Step 3. The 'per bed' average was extrapolated to the number of beds of enterprises reporting to purchase the product or service, to provide an estimate for current procurement in the reserve.

In the absence of complete expenditure data from all of the lodges, or data on their occupancy levels, this approach assumes consistent occupancies among all of the lodges. It also assumes that the number of beds at a lodge can be used as a proxy for occupancy (i.e. for a bigger the lodge, a higher level of procurement would be expected). For example, if the lodges providing data had occupancies that were equivalent to the other lodges in the reserve, then the 'per bed' average would relate to that level of visitation.

Current procurement situation with the reserve

Of the 35 lodges that were represented in this research, 28 of them (80%) indicated that they purchased at least one product locally (i.e. from communities adjacent to the SSGR and within the BLM). Among the most frequently purchased products:

- Six lodges were purchasing fruit and vegetables locally, with an estimated total cumulative spend of just under R18,000 per month.
- Three lodges were also purchasing local craft, with an estimated total monthly spend of between R14,700 and R29,400 per month.
- Petrol, diesel and paraffin were bought locally by three lodges, with an estimated total expenditure of around R5,600 per month for petrol and diesel, and R1700 per month for paraffin.
- Firewood was also purchased by three lodges, with R7,650 worth of wood being purchased each month.

Other products purchased locally by at least one lodge included: building supplies (including glass, general hardware, stone, gravel and sand); gas and

wooden spoons for cooking; food items (including ice, bread, mopani worms^h, and traditional lunches), and gift soaps.

A total actual spend of between R36,438 and R41,822 per month on local products was indicated by those lodges that could provide expenditure figures. The estimated current total monthly spend of all the lodges buying products locallyⁱ was estimated between R56,310 and R73,514.

Within the sample of 35 lodges, 32 of them of them (91%) indicated that they purchased at least one product or service locally (i.e. from communities adjacent to the SSGR and within the BLM). The services used by most lodges include:

- Community tours, with an estimated total cumulative spend of around R86,400 and R102,250 per month;
- Waste removal, with an estimated total spend of R37,860 per month;
- Thatching with a total spend of almost R20,000 per month; and
- Building maintenance, with an estimated total spend of R75,600 per month.

Other services used by one or two lodges included services for guests (i.e. traditional performances and spa treatments), temporary labour and security, maintenance (including for vehicles, TVs, electrics, upholstery, uniform alterations), and staff transport.

A total actual spend of between R367,752 and R385,386 per month on local services was calculated for all of the lodges that could provide expenditure figures. The estimated current total monthly spend of all lodges buying services locally^j is between R444,923 and R470,881, which is substantially higher than their purchases of products.

Previous procurement experiences

The majority of lodges interviewed (61%) had tried to purchase local products and services in the past, but for various reasons these had failed. Nearly 40% of respondents had attempted to purchase fruit and vegetables, while several others had bought craft (22%), chickens and eggs (11%). In addition attempts to procure services, electricians and sewing groups (11%), locally from were also unsuccessful.

^h A traditional, seasonal, natural food product.

ⁱ Using the average per-bed spend as a multiplier

^j It was not possible to gain reliable or consistent information on occupancy figures from lodges, as these is confidential corporate information. Therefore extrapolations were based on the number of beds, assuming occupancies are the same for all lodges, and that procurement is in proportion to the number of beds.

The reasons cited for unsuccessful procurement included inconsistent quality (reported by 44.4% lodges), inconsistent or unreliable delivery (22.2%), the supplier being unable to supply the required volume (16.7%), the company collapsed or ceased to exist (11.1%), it was an unreliable company (5.6%), and that the company had no transport with which to deliver goods or services (5.6%).

Interest in procuring in the future

All of the lodges interviewed stated that they would be willing to procure locally in the future if the required products and services met their standards. There were common requirements across all the lodges regarding the expectations they would have of any new products or services. These are outlined in Table 2. The most frequently reported requirements were reliability, transport (for the product or service), and consistency.

These requirements highlight some of the standard and important aspects of local procurement: consistency and reliability. However, some of the requirements identified are concerning simple business management practices such as being tax registered, being able to produce an invoice, having bank accounts (especially for lodges where payments are made centrally), and holding trade or health and safety certificates for insurance purposes. A number of lodges stated that insurance companies were extremely strict, and certificates to prove standards or competence would be essential, particularly for vehicle maintenance personnel and electricians.

There is a high value of future demand for fruit and vegetables (71% of lodges) and craft (31% of lodges), interestingly there were also a demand from 11% of lodges for local meat.

If the identified products were all available, then lodges giving values for their predicted purchases would spend between R508,363 and R548,256 per month in total. If all the lodges that wanted to buy products locally could, they would collectively spend an estimated R842,604 to R922,954 per month. If the desired products were available and producers were able to continually meet the lodges requirements then it could be suggested that sales could generate considerable income for the local entrepreneurs. For example:

- Fruit and vegetables could generate between R542,100 and R587,500 per month;
- Craft could generate R88,400 per month; and
- Meat purchases could generate up to R231,900 per month.

Other products that lodges were interested in buying locally were staff uniforms, housekeeping products, and food items such as milk and bread.

Analysis

The key findings of the study include that 80% of lodges represented in the study are currently purchasing at least one local product, while 91% of lodges are currently using at least one local service. The levels of current and future procurement are summarised in the table below. This indicates for future procurement could reach R996,500 per month for local products (a 1355% increase from current levels), and R805,200 on local services (a 171% increase from current levels). However, the supplier study indicates that the majority of local enterprises are not yet equipped to meet this demand.

Table 2: Summary of current and future spending from lodges on products and services

	Total local spend by lodges		Total local spend by lodges plus total estimated spend for other lodges wanting to procure locally	
	Minimum (R per month)	Maximum (R per month)	Minimum (R per month)	Maximum (R per month)
Current procurement				
Local products	R36,400	R41,800	R56,300	R73,500
Local services	R367,800	R385,400	R444,900	R470,900
Future procurement				
Local products	R508,400	R548,300	R842,600	R923,000
Local services	R154,300	R166,800	R331,700	R334,300
Current + future procurement				
Local products	R544,800	R590,100	R898,900	R996,500
Local services	R522,100	R552,200	R776,600	R805,200

NB: Figures rounded up to the nearest R100

There had been experiences of unsuccessful procurement for reasons including inconsistent quality, inconsistent or unreliable delivery, inability to supply the required volume, the company collapsed or ceased to exist, or that the company had no transport with which to deliver goods or services. Suppliers confirmed problems in being able to sell their products and services to the lodges, and indicated that their ad hoc sales into the SSGR lead to uncertainty and hesitancy to invest in their businesses.

Despite previous problems, all of the lodges interviewed were willing to buy more from local enterprises, if they were made aware of the suppliers working

locally, and if those enterprises met a series of their criteria. The criteria included reliable service, transportation, consistency, tax and VAT registration, trade certificates, and quality. Suppliers also wished to improve their business with the lodges, and indicated that they would like to be able to provide high quality goods and services and maintain good relationships. Most of the suppliers interviewed met key business management requirements of the lodges. For example, 83% of the suppliers could issue an invoice and had a bank account. Both of these factors are particularly important when lodge companies have centralised payment systems and, for security purposes, do not keep large quantities of cash on the premises. Similarly, nearly 40% of lodges stated that they required local suppliers to have their own transport, and 53% of interviewed suppliers indicated that they did have transport to deliver their products or services directly to lodges.

The three local suppliers that provided financial information (two craft and one transport enterprise) each had viable prospects for the future. However, given the limited number of enterprises providing data, it is difficult to extrapolate these findings to other local suppliers in the sample, or amongst the others identified in the market study. One could assume that those enterprises that were unable or unwilling to provide financial information are not as profitable as those with financial data, but this cannot be confirmed.

Reflecting further on the type and level of information that was available from suppliers provides an interesting illustration of how they conduct their businesses. The lack of figures on their sales, and lack of information on the materials that they buy, illustrates that book keeping and stock records are not maintained. Where the reason for not divulging data may have been due to a lack of trust, then support will need to address improving the dialogue between the lodge procurement officers and the enterprises. Local enterprises need to understand how the lodge operates, the demands of their guests and the consequences of poor supplier service on their businesses. Furthermore, lodge managers need to better understand the financial, logistical and social constraints on local enterprises and factor these issues into their procurement strategies.

The research has found a number of examples where both suppliers and buyers want to conduct business together, but external issues make it difficult and bring about a stalemate situation. Examples include electricians needing certificates of competence and poultry farmers needing health standards certificates which are requirements of the lodge's insurance companies. However, due to the relatively high costs involved, suppliers indicated that obtaining professional certification would require higher value or more regular contracts with lodges to make it worthwhile.

The market research identified two lodges that were reluctant to sign contracts with suppliers due to poor previous experiences. They had signed contracts with

local enterprises who did not supply the required products and services but still requested payment as it was stated in the contract. Lodges were also willing to provide support to local enterprises, by recommending them to other lodges, providing technical support, marketing and promotional support, and to assist financially, through direct financial support (i.e. grants, loans from the lodge) or indirectly (i.e. through their NGO). There is a high demand among the local enterprises to receive support to building networks and relationships with the lodges so that they can negotiate contracts. This opinion was mirrored by the lodges. Communication and understanding each others business has been a bottleneck to collaboration in the past.

Viable Business Opportunities

Products and services identified to pursue in the future have been identified based on there being two or more lodges indicating demand with the potential to generate more than R100,000 annually, for the producer or service provider, if all lodges that had indicated an interest procured in the same quantities (in relation to their bed capacity) (see Table 3). This figure of R100,000 is taken as an estimate by the project authors for a basic level of annual turnover that would be needed to start a viable business.

Table 3: Products and services that are likely to generate >R100,000 p/a

Products	Services
Fruit and vegetables	Electricians
Craft	Laundry services
Meat	Air-conditioning / refrigeration repairs
	Staff transport

Whilst the research concurs with Rogerson’s (2012) assessment that fresh fruit and vegetables are in high demand by the lodges, it also emphasises the need for greater technical services to be offered to the lodges. Technical services include electricians, plumbers, air conditioning and refrigeration repairs and maintenance. At present, lodges have to contact contractors from nearby major towns, nearly 30km away. This results in a call out fee and time delay. Given the high rate paid by guests a broken air-conditioning unit in a bedroom means one less bed night purchased, a loss of often R10,000 per bed night. This cost has caused some lodges to employ full time technical staff. This service is inefficient as their time is not totally occupied but essential based on the alternative outcome. An opportunity may be to establish a technical training facility linked to the lodges to train and manage the development of local technical contractors that would service the reserve. However, one would also need to monitor the unintended consequence of the action, such as potential retrenchment of previously employed technical staff members.

Laundry services are one of the services which lodges would be willing to outsource to the local community. This would help reduce their direct water footprint within the reserve. Currently lodges either wash their linen in-house from borehole water or outsource to a company in Hazyview (approximately 30 kms away). Problems surround the supply and quality of local municipal water within Bushbuckridge. One lodge noted that they had tried a local laundry service before but their linen became stained. Again, given the amount guests are spending to stay at lodges in the SSGR this would not be acceptable.

Finally, in order to reduce the number of beds in the reserve (and therefore the extent of infrastructure development^k) many staff living in the communities adjacent to the SSGR travel to and from work rather than 'living in'. The reserve gate figures show that, on average, there are 550 staff members entering the reserve for work (and the same number of exits)^l. One enterprise was spending R50,000 per month transporting its staff using a local transport provider. Depending on the results from the supplier study, there may be an opportunity for either this enterprise to expand to provide the same service to more lodges, or for more operators to develop to do so.

The road network within the reserve and in the adjacent communities largely consists of dirt roads. This has implications for the type of vehicle that can be used to transport staff, and also for the level of wear and tear over time. The viability of such a business would depend on the profitability of staff trips per month in relation to the costs of purchasing and maintaining vehicles. These costs would be reduced if an existing local enterprise with vehicles were to be used.

Conclusion

This paper has attempted to establish the lodges' demand for a number of products and services from within the Bushbuckridge municipal area. The results indicated that whilst fresh produce was a viable business opportunity other technical, laundry and transport were also possibilities for entrepreneurs in the neighbouring communities to access tourism value chains within the SSGR. It also demonstrates that should the development of demanded businesses be promoted, along with the relationship building between the lodges and those identified businesses, the SSGR tourism economy would experience less financial leakage out of the local area. Although the expansion of those businesses would increase employment, it may result in a negative employment impact on the businesses currently providing services to the SSGR lodges from outside the BLM.

^k The SSGR constitution indicates that there should be no less than 35 hectares per commercial bed

^l SSGR data, 2013

In order to achieve the above, the lodges noted a series of strategic priorities to be implemented simultaneously with the development of local businesses. Whilst the underlisted points are specific to the location they also provide useful insights for other reserves in South Africa and beyond:

- Working together as a collective: A number of business opportunities available for the local community would only be financially feasible if a critical mass of lodges were able and willing to procure from them. If the lodges collaborated to support and develop certain businesses they would all benefit as a collective. The incentives for lodges are that they would increase their local procurement as well as reducing cost and risk by working together as a collective.
- Disjuncture between community development and business development: The philosophy on local procurement changes depending on with whom it is discussed. The perspectives of community development officers and procurement managers are notably different. Community development projects focus on poverty alleviation rather than business development. Although linked, business development directly leads to poverty alleviation but not vice versa. For example whilst a community garden is a good poverty alleviation project it is not necessarily a financially feasible business if it is not operated with a profit-making philosophy, as the emphasis is placed on sharing profit between members rather than reinvesting into the business. The development of business skills and understanding the requirements of lodges are critical to success of any local procurement initiative. Procurement and line managers are best placed to provide this exposure. Whilst the community development officers are a critical relationship building mechanism between lodges and their communities, the hard business skills of the managers within the lodges is essential. However, their time is precious and as a result any initiative would need to investigate innovative ways to transfer their knowledge without becoming too time consuming. In addition, procurement managers more involved with their communities are more likely to sign service contracts.
- Focusing back of house: Throughout the interview process lodges stated that they were more willing to procure products and services that could first be tested 'back-of-house'. This would allow for any challenges to be resolved without impacting the guests' experience or the lodge's reputation. Fresh produce, for example, could be provided for staff meals with certain products which displayed consistent quality and quantity later being provided for guests.

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