

## Review

# Craft routes for developing craft business in South Africa: Is it a good practice or limited policy option?

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Accepted 8 November, 2011

**The establishment of themed routes by packaging together geographically disparate tourism products is an important issue in tourism planning. New interest has been raised around the potential of craft routes. This article examines the utility of craft routes for developing the craft sector. In the context of South Africa it is argued craft development is promoted through a number of existing initiatives, including the establishment of integrated craft hubs and support for attendance at trade shows. The international and South African experience highlights several promising initiatives for craft sector development and suggests the establishment of craft routes offers only a marginal policy option for growing craft sector businesses.**

**Key words:** Route development, craft tourism, craft development, South Africa.

## INTRODUCTION

Craft is big business worldwide (Holder, 1989; UNWTO, 2008; Littrell and Dickson, 2010). In the development of tourism businesses Richards (1999a) observes "culture, crafts and tourism are rapidly becoming inseparable partners". More specifically, it is stressed that "local crafts are important elements of culture and people travel to see and experience other cultures, traditions and ways of living" (Richards, 1999a). Nevertheless, Robinson and Picard (2006) argue contemporary "models of tourism development which utilize culture tend to be limited" as they fail to maximize economic (and non-economic) benefits linked to developing the cultural supply chain. Crafts often represent an important element in the shopping activities undertaken by tourists (Timothy, 2005). As an integral part of 'culture', crafts can be a significant catalyst for local business development (Kamara, 2006; United Nations World Tourism Organisation, 2008). Of critical significance is for destinations to maximize opportunities from the important market afforded by (mainly international) tourists for developing

local crafts and souvenirs, which often draw upon local skills (Cohen, 1995). This is confirmed by recent findings from the State of Kelantan, Malaysia (Redzuan and Aref, 2011). Furthermore, tourism can be a critical boost to the local businesses of peripheral or marginal regions "because tourists want to purchase goods and souvenirs which are considered 'typical' cultural products of the region they are visiting" (Richards, 1999a). In addition, the fact that tourists travel to see local cultures and crafts can have the positive effect of building pride in local cultures (Robinson and Picard, 2006). Craft production can increase a sense of dignity and well-being among marginalized rural women and new craft skills enable them to redefine their roles as active members of society (Stephen, 1991; Janis, 2011). Tourism scholars suggest the maintenance of cultural heritage through local craft production represents a significant component of sustainable tourism (Timothy and Nyaupane, 2009).

In maximizing the developmental impact of 'craft tourism' growing interest surrounds the application of the concept of tourism routes. 'Route development' has been described as "the world's best hope to secure sustainability in travel and tourism" (ECI Africa, 2006) and in many countries the establishment of themed routes as

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tourist attractions recently has gained prominence. In this article, the discussion interrogates the extent to which the establishment of dedicated craft routes can be a means to stimulate and grow the South African craft sector by linking crafts to local and international markets. Specifically, the focus is to evaluate the effectiveness of 'craft routes' as a means to catalyze an existing craft sector. Core attention is upon the potential for craft routes to be a foundation for energizing South African craft businesses (Due-South, 2008). The context for this investigation is the South African government's identification of craft as a strategic sector because of its ability to contribute towards the objectives of economic growth and poverty alleviation. The Industrial Policy Action Plan for South Africa states that the craft sector will impact "particularly on rural economies, human resource development, provide a bridge between informal and formal employment and to the development of small businesses, particularly the formalisation of businesses in the 'second economy', provide innovation and design skills for other sectors such as clothing and textiles, furniture and jewellery, and contribute to nation building and moral regeneration through the expression of creativity and exploration of culture and heritage" (Department of Trade and Industry, 2010). National government aims to forge a market-driven craft industry based on design and innovation, quality products and nurturing linkages between crafters and markets, thus strengthening the value chain.

It is against this backdrop that the purpose of this article is to investigate critically the international experience of developing the arts and crafts sector and of its integration into mainstream tourism. The essential focus is assessing craft routes as a vehicle for linking crafters to local and global markets as compared to other forms of supportive policy intervention. Methodologically, the investigation involves a critical review and discussion of several sections of material. First is an analysis of the concept of route development and of route tourism. Second, attention turns specifically to investigate international research and best practice concerning the development, management and marketing of craft routes. The South African record on promoting the craft sector and of craft tourism is unpacked. Finally, a broader international analysis is pursued of good practice for creating strong linkages between crafters and markets. Overall, this paper represents a contribution to the limited existing volume of critical scholarship concerning craft business development and craft tourism.

## **ROUTE TOURISM: CONCEPT AND INTERNATIONAL EXPERIENCE**

Tourism route planning is anchored on the concept that "the clustering of activities and attractions in less developed areas, stimulates cooperation and partnerships between communities in local and neighbouring regions

and serves as a vehicle for the stimulation of economic development through tourism" (Briedenhann and Wickens, 2004). Essentially, the concept 'tourism route' refers to an initiative which is designed to bring together an array of activities and attractions under a unified theme and thereby to stimulate entrepreneurial opportunities in the form of ancillary products and services (Meyer et al., 2004; Clarke, 2005). Recently, route promotion progressively has assumed an economic or developmental goal such that it has been observed the development of themed routes as tourism attractions "has gained prominence in recent years" (Meyer et al., 2004).

Contemporary route tourism combines the tourism resources of a number of smaller centres and collectively markets them as a single tourism destination region, more especially for tourists travelling by road (Briedenhann and Wickens, 2004; Meyer, 2004; Lourens, 2007). In some parts of the world, the notion of rural trails, heritage routes or scenic road is used, particularly in the context of promoting rural tourism (Olsen, 2003; Denstadli and Jacobsen, 2011). One recent example of a heritage route under the sponsorship of UNESCO is the Jesus Christ Route, a flagship project in Palestine which aims to "mobilize a selection of cultural, religious and natural heritage resources (tangible and intangible) in the area to create internationally marketed and high quality tourism products" (Robinson and Picard, 2006). Cultural routes, according to Majdoub (2010), can be used as a development tool for "marginal or rural areas as they can help stimulate economic activity and to bring tourists into these areas".

Meyer (2004) identifies several objectives that underpin the development of route tourism initiatives, *inter alia*, to diffuse visitors and disperse income from tourism; to bring lesser known attractions and features into the tourism business/product; to increase the overall appeal of a destination; to increase length of stay and spending by tourists; to attract new tourists and to attract repeat visitors; and, to strengthen the sustainability of tourism products. Arguably, one of the key benefits of routes is that "they can tie up several attractions that would independently not have the potential to entice visitors to spend time and money. Using a synergy effect promises to have greater pulling power" (Meyer et al. 2004). As a whole, tourism routes function so as to bring together a network of actors (municipalities, associations, and the local private sector) to work together and cooperate effectively in order to market a local destination (Michael, 2007).

Among the most successful international examples of tourism routes are the wine or food circuits, which exist in Western Europe, North America and Australasia (Telfer, 2001a, b; Telfer and Hashimoto, 2003; Correia, et al., 2004; Hall, 2005). In the Niagara Region of Southern Ontario, Canada wine routes are an integral part of a strategic alliance to promote agritourism among the region's food producers, processors, distributors,

restaurants as well as wineries (Telfer, 2000). The Niagara Wine Route in Canada links over 50 wineries in the region and is the foundation for wine tourism (Telfer, 2001a). This partnership for successful route tourism is indicative of the potential for the development of competitive advantage through local clusters (Telfer, 2001b). In addition to routes based upon wine and food, there are major European examples of route-based cultural tourism; the most notable is the *Camino de Santiago* which includes Spain and France (Murray and Graham, 1997). Denstadli and Jacobsen (2011) argue that the appeal of routes as instruments for tourism development is not only linked to large proportions of self-drive tourists in many areas but also is related to tourism as wanderlust – an interest in being on the move.

Tourism products can be packaged into “inclusive and coherent routes through the use of themes and stories (such as folklore, working lives, food and drink routes, religious routes) which help to move the tourist around geographically dispersed attractions” (Clarke, 2005). The international experience demonstrates that if well-designed and planned, tourism routes can generate several positive advantages for destinations. A route can enhance the overall attractiveness of a product “by presenting ‘new’ features to its visitors, thus providing a platform for revised marketing programs with the aim of increasing length of stay and total spending” (Meyer et al., 2004). Another critical advantage of routes is to act as stimulus for small business development within the local economy.

Although the business benefits of planning for route tourism have been acknowledged in developed countries, only recently the concept of route development gained recognition in Africa (Rogerson, 2009). Across various parts of Africa there is growing interest in the potential for developing tourism routes as vehicles for encouraging sustainable tourism development and for promoting local economic development (Rogerson and Rogerson, 2010a). The tourism route, it is observed, represents a “development tool that is increasingly employed for developing tourism and local economies in Africa” (Viljoen, 2007). In Africa, South Africa offers the most well developed application of routes to tourism promotion, business development and destination marketing (Rogerson, 2009). The country’s first tourism routes go back to the 1970s with the establishment of wine routes in the Cape Winelands (Nowers et al., 2002). In addition to the Western Cape wine routes, several other themed route tourism initiatives exist, the most mature is the Midlands Meander in KwaZulu-Natal (Mathfield, 2000; Rogerson, 2002a; Lourens, 2007; Rogerson, 2007a). Recent planning centres on establishing heritage tourism routes, most significantly the Liberation Heritage Routes in Eastern Cape (Snowball and Courtney, 2010). The South African record of route tourism planning has been mixed with only a few initiatives adjudged successful in terms of promoting expansion of tourism (Rogerson,

2002b, 2004; Lourens, 2007). The Midlands Meander is considered the showcase and ‘model’ of private sector driven route tourism initiatives (Lourens, 2007). It is the oldest African example of using routes as the basis for tourism-led LED. Briedenhann and Wickens (2004) and ECI Africa (2006) demonstrate the potential for appropriately planned and appropriately supported routes to act as stimulus for community-based LED in poorer communities and remote rural areas of South Africa.

Recently, growing interest has attached to the notion of ‘craft tourism’ and of utilizing South African craft as the basis for themed route development (Due-South, 2008). The promotion of arts and crafts is one element of a number of South African tourist routes, including the examples of the Crocodile Ramble, the Highlands Meander, the Midlands Meander and the Waterberg Meander (Rogerson, 2002a, b, 2004; Baber, 2009). In each of these cases, however, the attractions of arts and crafts constitute one element of a package of attractions that were marketed under the umbrella of specific tourism routes with the core objective of business growth and tourism promotion.

## CRAFT TOURISM AND CRAFT ROUTES

The concept of ‘crafts tourism’ is not well-defined and usually is interpreted as a sub-set of the broader category of cultural tourism. Richards (1996) defines cultural tourism as “movement of persons to cultural manifestations away from their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs”. Such a definition stresses “the role of learning about and experiencing different cultures and cultural products”, not least crafts (Richards, 1999a). Internationally, it is observed there is a shift away from ‘traditional’ forms of cultural tourism, such as visiting museums or monuments, towards a search for “more interactive forms of tourism, based on experiencing the way in which people live, and learning more about daily life as well as significant moments in history” (Richards, 1999a). The trend is thus towards combining traditional cultural products with elements of ‘living’ or ‘popular’ culture. A parallel shift is from passive consumption to active participation as cultural tourists are offered opportunities to become an integral part of the cultural production process or to experience cultural production for (and from) themselves. The international experience suggests that in developing crafts tourism “it is important that the crafts products are linked to the local culture, and form an integral part of the local culture” (Richards, 1999a). Moreover, the production of craft itself becomes an important element of the cultural tourism product and for tourists to learn about and see how particular crafts are made.

Research undertaken in Western Europe discloses important findings about who are the cultural tourists. The

profile that emerges is that cultural tourists are well-educated, often with a professional occupation and “stubbornly upmarket” (Richards, 1999a). Importantly, for destination managers, cultural tourists are a segment of tourism that is particularly attractive as they have a high capacity to spend. The cultural tourism market is therefore “an important potential market for crafts” (Richards, 1999a). That said, “in order to maximize the economic potential of cultural tourism, it is vital to provide the cultural tourism market with the products that it wishes to purchase” (Richards, 1999a). Nevertheless, the European experience demonstrates that there is no single ‘cultural tourist market’; instead, there exist a range of different cultural tourism markets each of which is articulated around different types of cultural production and consumption.

Typically, most ‘cultural tourists’ are what are described as ‘general cultural tourists’ rather than specific cultural tourists (Richards, 1996). Their most common leisure preference is for a sun/beach holiday or touring holiday in which culture might be incorporated as one element. The primary travel motives of these tourists (at least, in Western Europe) are for relaxation, curiosity and fun as their activity patterns contain a mixture of beach, rural and cultural tourism products. Craft purchases are mainly determined by the usefulness of the product for these tourists. This finding highlights that often “a cultural bridge needs to be formed between the local culture and the culture of the tourist” and that “craft products need to be based on the needs and wants of the customer – the tourist” (Richards, 1999a). By contrast, the dedicated ‘cultural tourist’ is seen as a minority market and akin to what others prefer to describe as ‘special interest’ or niche forms of tourism (Richards, 1999a).

One valuable insight from European research which has been undertaken in various peripheral regions is that “crafts producers in all project regions needed assistance with their marketing” (Van Oss, 1999) and correspondingly in need of a good marketing plan. A common recommendation is that in marketing for craft products “a good atmosphere” be created around products. In many cases this meant that if genuine local goods were made “it is good if the buyers can see how and by whom they are made” which adds ‘atmosphere’ to the selling process. Another critical finding was that a good regional marketing plan could be anchored upon the development of cultural craft routes (Van Oss, 1999). It is essential to understand the meaning of the term ‘cultural craft route’. In Western Europe the cultural route represents “a complete holiday route that includes the craft producers, of course, but also restaurants, hotels and interesting sites that can be visited along the way” (Van Oss, 1999). Further, it is made clear that in the planning of such cultural craft routes it is not necessary for tourists to travel along the whole route; in fact most ‘general cultural tourists’ would do only parts of any particular route. As Van Oss (1999) stresses “the complete route is just a

way to get attention and to attract the ‘special interest’ tourists”.

‘Best practice’ guidelines are offered as to various steps to take in the establishment of cultural craft routes based upon the European experience. Ten steps are suggested for craft route development (Van Oss, 1999):

1. Step 1: Research and identify all craft producers in the region.
2. Step 2: Undertake a logical inventory with geographical locations.
3. Step 3: Map the crafters – producers and retailers – in order to work out route(s).
4. Step 4: Determine length and duration of a cultural route with a recommendation (in Europe) that distance travelled per day should not be more than 200 km.
5. Step 5: Identify other attractions and sites to link into the route.
6. Step 6: Try and introduce visitors to local culture at the beginning of the route with a visit to a local museum that gives an overview of the cultural background of the wider region.
7. Step 7: Carefully choose hotels and restaurants to be incorporated into the route bearing into consideration that cultural tourists demand upmarket establishments.
8. Step 8: Package the entire route as a tour for special interest tourists and involve local tour operators and guides.
9. Step 9: Test the route, preferably with a special interest tour group.
10. Step 10: Launch the product, adapting the information assembled for the special interest cultural tourist to the needs of the general cultural tourist.

In several peripheral areas of Western Europe a number of ‘textile trails’ or craft routes” have been initiated. Three regions where initiatives have been pioneered are Crete (Tzanakaki, 1999), Lapland (Miettinen, 1999) and Northwest Portugal (Fernandes and Sousa, 1999). Of these initiatives, only limited progress has occurred in Northwest Portugal with the local textile craft trail which was, in part, the consequence of remoteness and inaccessibility of producers (Fernandes and Sousa, 1999). In Crete a ‘textiles routes’ brochure was designed to raise awareness of tourists visiting the island of local craft tourism products. In total seven routes are offered which combine cultural and craft heritage with the island’s natural beauty (Tzanakaki, 1999). Visits to craft producer workshops are combined variously with archaeological sites, Byzantine churches and monasteries; the proposed tour routes last from 1 to 7 days and thus encompass options for both the general cultural tourist and the special interest craft tourist. It is stated that tourists who “follow these ‘routes to the roots’” have the opportunity to meet local craft producers, to see how they weave, knit, embroider, produce ceramics, and carve wood objects” (Tzanakaki, 1999). The promotional efforts are targeted

at the groups of independent travellers and package tourists that are traditionally attracted to Crete. Special interest tourists, because of their potential high value, are further target markets (Tzanakaki, 1999).

Of the three Western Europe regions where craft routes have been pioneered, the most interesting and advanced developments have taken place in the region of Lapland. Here, a crafts travel route has been initiated as a seven day package route with the aim of introducing "crafts sites and Lappish cultural heritage to tourists" (Miettinen, 1999). The product is called "Nature and Crafts – Cultural Tour of Lapland". The package includes demonstrations of Finnish wood and metal working, workshops in felting and natural dyes, a visit to a heritage village, weaving workshop, silver workshop, craft shops and the iconic Santa Claus Village at the Arctic Circle. Importantly, the tour combines a core of craft attractions with non-craft tourism products, including the Santa Claus village. The initial results of launching this craft route have been positive as it was recorded that "cultural tourists were buying more than 'regular' tourists and they were also very eager to take part in making crafts" (Miettinen, 1999). In particular, the project is evaluated in positive light as it identified the needs of tourists and produced an appropriate product to match those identified needs. The marketing of local crafts has been expanded through crafts brochures distributed at local hotels as well as through the crafts route itself.

Overall, the European experience of craft routes and craft tourism offers certain positive lessons regarding the possible use of craft routes to link crafters to local and global markets.

In terms of the tourism market it was evident that benefits arose from marketing handmade products which the customer could see the production process (Richards, 1999b). Indeed, it is argued that "for tourists in particular, the producers need to be aware that the product they produce is part of a whole experience for the visitor, so what is being marketed is far more than a simple piece of cloth or a rug" (Richards, 1999b). Another lesson relates to the need to adapt products (which might be traditional products) to meet visitor needs. A strong message is that commercial tour companies are often unaware of the potential of crafts tourism and need to be 'brought on board'.

As it is considered unrealistic to expect crafts producers to develop their own tourist markets the distribution systems provided by the tourist industry need to be utilized to the full (Richards 1999b). Finally, differences exist between the general cultural tourist and the special interest tourist with the former the most significant consumer of craft products.

## **CRAFT DEVELOPMENT: THE SOUTH AFRICAN EXPERIENCE**

Across the experience of the developing world there are

only isolated examples that can be identified of the establishment of dedicated craft routes to support craft tourism and the building of the craft industry. Robinson and Picard (2006) point to UNESCO's role in establishing a "touristic handicraft route in the region of Masaya, Nicaragua". It is explained that this pilot project "came to life in recognition of the potentials of local craft traditions for the development of sustainable tourism economies, in particular for small and medium sized local enterprises, and the alleviation of poverty in Central America" (Robinson and Picard, 2006). One factor behind the limited focus on craft routes is pointed out by UNESCO (1997) that "many countries are not aware of the exact volume of sales to tourists" of craft goods. Accordingly, it is argued that with certain exceptions, "insufficient meaningful efforts" have been made in developing cultural tourism, including craft tourism (UNESCO, 1997). Nevertheless, in a number of recent investigations conducted in Laos and the Gambia, the importance of handicraft sales to international tourists was revealed (Ashley, 2006; Mitchell and Faal, 2007). It is evident from these findings that selling handicraft to tourists represents an important channel for destinations in the developing world to capture discretionary expenditures made by international tourists and thereby to maximize destination local impacts (Mitchell and Faal, 2007).

Craft production as a form of community-based tourism is considered as an important source of income throughout southern Africa (Janis, 2011), including some parts of rural South Africa (Rogerson and Rogerson, 2010a). This situation is confirmed by Miettinen (2007) and Janis (2011) for Namibia and by Spenceley (2008) for the region of Southern Africa as a whole. In South Africa recognition of creative industries began with the influential series of reports produced on 'cultural industries' for the (former) Department of Arts, Culture, Science and Technology by the Cultural Strategy Group (1998). In terms of the several segments of creative industries, the craft sector is considered particularly significant because it represents a potentially powerful means of offering job opportunities to disadvantaged and marginalised people, the majority of which are women (Marcus, 2000). Added interest in the potential for developing the craft sector in South Africa derives from its close linkages with tourism as demonstrated by recent studies (Rogerson and Rogerson, 2010b; Ndlovu, 2011). The opportunities for further development of arts and crafts SMMEs linked to the country's hosting of the 2010 FIFA Soccer World Cup have been another source of interest (Tourism Enterprise Partnership, 2008).

Since 2005 the Department of Trade and Industry (DTI) has become increasingly pro-active by supporting a number of initiatives for maximising the development impacts of the craft sector in South Africa (Department of Trade and Industry, 2007, 2008, 2010). Most recently, in the 2010/11-2012/13 Industrial Policy Action Plan the craft sector is viewed as "a strategic sector because it

has the ability to contribute to economic growth" (Department of Trade and Industry, 2010). The key areas for intervention are as follows. First, through the implementation of a network of integrated craft hubs which are designed *inter alia*, to facilitate access to markets, support local strategies for information exchange networking and access to market information; provide business and market-driven solutions to supply chain problems; to provide a bridge between the under-resourced rural craft enterprises, mostly second economy enterprises, in a way that is beneficial to the rural producer and meets market demand; and to ensure the 'market pull' for local craft enterprise development strategies. Second, through support for crafters to exhibit and participate at various trade shows through which crafters can gain further access to markets, albeit not necessarily markets that are linked directly to tourism (Bam, 2010). Nonetheless, these are relevant for craft tourism because some buyers attending trade shows may be from or linked to tourism establishments or involved in the decoration of tourism establishments, such as lodges or hotels.

Examples of trade shows which offer a link for South African crafters to these outside markets are One of a Kind (linked to Decorex), Beautiful Things (linked to the World Summit for Sustainable Development) and the South African Handmade Collection (linked to Decorex) (Department of Trade and Industry, 2008; Rogerson and Rogerson, 2010b). South African crafters also exhibit at other local and international decor trade shows such as Design Indaba. The positive impacts of trade shows in terms of linking a segment of crafters to buyers in home retail chains is discussed and documented by Rogerson and Rogerson (2010b). Third, under the DTI's Enterprise Investment Programme support is given to tourism businesses in order to stimulate job creation outside of the traditional tourism destination clusters. Potentially, therefore, this programme might be another vehicle for supporting craft tourism and craft development as it includes addressing the constraint of lack of access to finance which is experienced by many crafters (Bam, 2010). That said, the conditions of the fund suggest that no investments and support will be made available to arts and crafts facilities that are developed separately from tourism businesses. This fund can therefore be a potential support for craft tourism businesses which are specifically focussed on the tourism market but not support those other enterprises in which the craft is directed towards the home decor or other non-tourism markets.

Beyond initiatives of the Department of Trade and Industry are other initiatives which link to support which is provided by the National Department of Tourism. South Africa's Tourism Enterprise Programme (TEP) represents an important initiative which focuses upon integrating SMMEs into the tourism value chain (Rogerson, 2007b, 2008). Importantly, the activities of TEP have moved

beyond simply direct tourism SMMEs to incorporate an element of support for enterprises in other activities in the tourism value chain, including arts and crafts (Tourism Enterprise Programme, 2008). During 2009 TEP launched African Hidden Treasures which consists of unique small crafts and tourism experiences that provide visitors with an authentic taste of South Africa's rich and varied history and culture. The Hidden Treasures initiative is to make South African craft available in the form of limited edition, unique hand-made South African craft pieces of a high quality standard that can be tailor made to requirement. Bam (2010) argues the work of TEP is highly relevant for the development of crafts tourism in South Africa and specifically for the linkage of crafters to markets, both tourism and non-tourism markets. The TEP is one programme that bridges the divide between crafts and tourism and has a strong record of supporting tourism SMMEs including with the facilitation of linkages with large well-established enterprises (Rogerson, 2008). Indeed, the TEP is a potential channel for assisting craft enterprises to expand business linkages with tour operators as well as large and small accommodation providers to broaden opportunities for crafts tourism. Although the TEP has been open to criticism for its neglect of survivalist enterprises and of SMMEs in remote areas where no viable tourism market exists, the programme offers important lessons for successful craft development, in particular in terms of the selection criteria used by TEP and its adoption of a demand-led approach to SMME development (Rogerson, 2007b; Bam, 2010).

Despite optimism surrounding craft, across much of Southern Africa researchers on craft have demonstrated that the majority of craft enterprises function at survivalist level and that few craft SMMEs show positive signs of enterprise growth and job creation (Hay, 2008; HSRC, 2008). As Janis (2011: 29) points out because of various structural challenges that face craft production "it mainly suffices to cover the costs of basic needs" (Janis 2011). Among these structural challenges are core issues of limited access to markets (Rogerson, 2000; Rogerson and Rogerson, 2010b). It might be argued that the South African experience of developing arts and crafts routes in the Midlands Meander and the Crocodile Ramble offer the best documented examples of 'craft routes' in the developing world. In both these routes the initial impetus for the route development was linked to promotion of rural arts and crafts. In the case of the Midlands Meander the formation of the route goes back to the mid-1980s when the major focus was on 'cottage crafts' produced by potters or artists in a country setting (Mathfield, 2000). Two significant points need to be made. First, that although route was established in the shadow of one of the strongest African clusters of handicraft production in South Africa, for its first 20 years of operation, the route was centred upon white crafters (Mathfield, 2000). As Lourens (2007) shows it was only in the mid-2000s as a result of local government support that pro-active

initiatives were undertaken to reach out and incorporate the talent of black or African crafters. Second, this incorporation of African craft occurred at a time when the initial focus on craft was much diluted with the addition of other tourism products, most importantly hospitality products, sport and events, which gave a new vibrancy to the route as a whole. Importantly, the success of the Midlands Meander was in many respects the outcome of strategic planning for diversification of product offerings and a move away from a narrow base of arts and crafts (Lourens, 2007).

A somewhat similar trajectory of development is recorded from the Crocodile Ramble which in part overlaps with the Magaliesberg Meander (Rogerson, 2007a). In this route, once again, the initial focus was upon tourism products which were the enterprise of white artists and crafters (Stoddart and Rogerson, 2009). But, the continued health of the route and of enterprises linked to it was again related to diversification of the product base. Accordingly, in both the cases of the Midlands Meander and Crocodile Ramble the historical trajectory of route development has been away from crafts tourism and the attraction of special interest craft tourists. Currently, for both routes the dominant hospitality enterprises cannot be classed as 'craft' enterprises and the growth of the craft sector no longer at the core of these two routes. Only in Limpopo province, in part of the Waterberg Meander - is there an existing tourism route which might be described as dedicated to the promotion of crafts tourism.

## PROMOTING CRAFT: CRAFTING OPTIONS FOR DEVELOPMENT

Over the past decade several high profile international development agencies and development assistance organizations have accorded considerable attention to the developmental possibilities associated with mapping and identifying the potential of 'creative industries'. Among the list of agencies with notable interests in the development of creative industries are included the International Labour Organisation (ILO, Sandee et al., 2002), United Nations Industrial Development Organisation (UNIDO, 2006a), United Nations World Tourism Organisation (UNWTO, 2008), and United Nations Educational, Scientific and Cultural Organisation (UNESCO, see Berriane, 1999; Robinson and Picard, 2006; Richard, 2007).

It is acknowledged that creative industries can be "a source of new employment and provide a medium through which an important contribution can be made to the revitalization of rural and depressed urban communities and to their significant participation in the economy" (UNIDO, 2006). From the sub-sectors included within creative industries, special attention is given to crafts which are viewed as "the depository of the traditional

skills and creativity necessary to penetrate or/and extend markets and can provide stable employment and income generation to the diverse communities and to those with different levels of education" (UNIDO, 2006a). Several international agencies draw attention to what Suzuki (2007) calls "the strategic alliance" between handicrafts and tourism. Here, two sets of material are examined. First, the synergies between tourism development and craft businesses are discussed. Second, the opportunities for expanding market linkages of crafters to wider markets are interrogated. Here the key issue is how "creative communities" can be linked potentially to international value chains.

### The strategic alliance between tourism and craft

Although a number of developing countries acknowledge the importance of 'creative industries' as a whole and handicrafts in particular, it remains that there is a "significant lack of data and literature on the craft sectors worldwide" (Richard, 2007). One undisputed fact is that the vast majority of handicraft production and sales across the developing world occurs only for local rather than national or international markets. Although some craft producers have captured a national market, beyond a narrow local focus, it is evident that "at present there is a dearth of export-oriented craft producers in developing countries" (Suzuki, 2007).

The international experience shows that core issues for handicraft enterprise development are the existence of small and insecure markets as a result of low rural incomes, seasonality, poor access to external markets and severe competition among producers (United Nations World Tourism Organisation, 2008). Many handicraft producers confront a number of market problems which make it difficult for them to achieve market size for bulk production or product quality (Rogerson, 2000; Redzuan and Aref, 2011). Often these problems are compounded by low entry barriers which precipitate severe levels of competition between local producers, causing reduced profits to the extent that it becomes difficult to generate surpluses necessary for reinvestment in improved productivity and growth (Giron et al., 2007). In addition, with enhanced rural road infrastructures, the markets of certain traditional rural crafts can become exposed to external competition from the products of larger, often urban-based, producers. In several developing countries, for example, factory-made furniture displaces its artisanal alternative or bags and hats made from synthetics may displace those produced from natural raw materials as a result of changing consumer tastes.

In works produced by the UNWTO and UNESCO clear linkages are made between the nexus of tourism and craft. One recent UNWTO (2008) publication explored in a cross-country investigation how the relationships

between tourism and craft could be deepened. In UNESCO studies it is argued “if there is one sector whose fate is intimately bound up with that of tourism it is clearly that of the craft industry” (Berriane, 1999). Another UNESCO study maintains “handicraft production in developing countries now depends in large part on the demand generated by the tourism industry and by the business activities of intermediaries” (Richard, 2007). With evidence drawn from a range of Arab countries, including Morocco, Egypt, Syria and Yemen, Berriane (1999) asserts the region’s craft sector benefits greatly from the demands of international tourists. For Morocco, it was claimed that as much as 54% of tourists’ total daily expenditure went on crafts (Berriane, 1999). Further, it was calculated that of the craft goods purchased within Morocco, 40% were made by tourists (Berriane, 1999).

The international record points to the need of rural handicraft producers for improvements in both access to markets and improvements in marketing (including design) of their products. Recent evidence from The Gambia, Laos and Thailand points to a need for strengthening the linkages between craft producers and tourism value chains as one promising sphere for policy intervention which would enhance craft producers access to markets (Ashley, 2006; Mitchell and Faal, 2006; Lacher and Nepal, 2010). The stimulus afforded by growing tourism to local craft has been widely recorded not only in Thailand (Cohen, 1995; Lacher and Nepal, 2010), Laos (Ashley, 2006) and The Gambia (Mitchell and Faal, 2007) but also in southern Africa (Spenceley, 2008; Janis, 2011). It can be argued that the types of interventions that have been used by South Africa’s Department of Trade and Industry in terms of integrated craft hubs and TEP provide international ‘good practice’ in terms of offering an approach to link crafters to tourism markets.

The retailing of craft to international tourists occurs through a variety of different channels (Timothy, 2005). Typically, however, many craft-producing localities are situated far away from major cities and tourist destinations, often occurring in remote rural areas. In different segments of the craft market a variety of marketing channels have emerged. Indeed, it is evident that “most craft producers sell only a fraction of their production directly to ultimate consumers, whether local or external; most business is mediated through a network of middlemen, traders, wholesalers and exporters” (Cohen, 1995). Although some of these key agents in the craft retail chain may be located in the craft producing locality itself, others (the majority) will come from outside the region of craft production either from major cities or regional centres. In leading cities specialized craft retail establishments are common throughout the developing world. Often high quality craft goods also are offered for sale in hotel shops as well as airports (Timothy, 2005).

A common phenomenon is the emergence of ‘tourism precincts’ or ‘tourism shopping districts’, including tourism

markets, where craft goods retail outlets would be clustered (Timothy, 2005). In the Middle East this takes on a particularly distinctive form as market expansion to tourists is driven though craft *souks* and bazaars in major urban centres and a network of craft villages in rural areas. Different retailing structures and configurations are recorded in other parts of the world. In Japan Suzuki (2007) draws attention to how Japanese traditional craft producing villages/towns/regions have integrated some elements of tourism in the community promotion programs as tourism specialists have recognized traditional crafts, traditional life styles of farmers and traditional processed food as an integral tourism element in many regions. Cohen (1995) points out that the phenomenon of the tourist craft ribbon development in Thailand is attributed to a shift in traditional craft marketing. Instead of craft groups selling to a local clientele or through intermediaries to the tourist market, with improved roads and growing motorization “outlets for tourist crafts began to relocate to the roadsides; thus tourist craft ribbon patterns emerged” (Cohen, 1995). Within these tourist craft ribbon developments “locally produced as well as imported craft products are sold to passing tourist traffic” (Cohen, 1995).

The development of craft routes might be considered a further innovative option for marketing crafts to tourists and further cementing the strategic alliance between tourism and craft. One of the obvious potential advantages for local producers and local economies of craft route development would be a potentially greater capture of revenue from craft production through direct sales to tourists. As has been pointed out in several investigations of craft value chains, rural women producers working in remote locations away from direct access to markets often receive the lowest return because of their position at the bottom of a buyer-driven trading chain which links them via intermediaries, wholesalers and retailers to the consumer (Hassanin, 2008). Subsequently, we review alternative options for craft development which build upon the strategic alliance with tourism but go further and seek links into wider markets.

### **Building craft – Tourism and beyond**

Arguably, the tourism market is a vital underpinning for the local craft economies both in developed economies (Creighton, 1995; Markwick, 2001) and more especially in much of the developing world (Holder, 1989; Stephen, 1991). The development of the international tourism market and further strengthening of linkages to craft producers is therefore an essential base for nurturing local craft economies. In supporting local craft development, however, a number of countries have sought to introduce policy interventions which go beyond the strengthening of the linkage of tourists to craft producers. In this study, alternative vehicles for stimulating the



markets for local craft producers are examined. The discussion draws from the lessons of international experience, particularly from Asia, and from recent innovative South African policy initiatives to expand market access of local craft producers.

The international experience demonstrates that a number of different channels or approaches have been used which have been designed to strengthen the link between crafters and local and international markets. Under this category of intervention would be the types of policy support or vehicles that address the major constraining factors for craft development outside of market access. Issues of concern relate variously to raw materials costs/shortages, access to finance, technology, managerial weaknesses and lack of innovation, and limited institutional support systems. As argued by Suzuki (2007) the "successful promotion of artisan crafts needs coherent and appropriate government policies, effective support institutions and collective efficiency that would enable them to take advantage of business opportunities". Support is required to strengthen all aspects of the craft industries value chain: (1) inputs as regards creativity, skills and innovation, (2) manufacturing includes processing, technologies and production of crafts; and (3) marketing (UNIDO, 2006a). Commonly, the problem of shortages of certain raw materials can be an important constraint upon the development of handicraft enterprises (Panda, 2009). In many developing countries control of raw material supplies is linked to exploitative practices of intermediaries (middlemen and moneylenders) who frequently dominate the supply of raw materials to 'cottage industries' and handicrafts and thus determine the costs of raw materials.

From the international experience of rural handicraft enterprises it is evident that access to finance, and in particular finance as working capital, is often a major problem. This is evidenced from recent work on rural Malaysia (Redzuan and Aref, 2011).

The international experience demonstrates that in order to enhance access to micro-credit by rural craft entrepreneurs there is a need *inter alia*, to improve rural finance market performance as a whole, to improve the mobilisation of rural savings, to augment the competitiveness and institutional diversity of the financial market, and to increase the use of innovative financial structures. One example is from Thailand and the 'One Tambon One Product' Revolving Fund that was established "to promote cottage and handicraft creative industries by providing credit to community enterprises for business investment and job creation" (UNIDO, 2006a). Another constraint upon rural handicraft enterprise development surrounds access to technology. The international record shows that access to and application of appropriate technology is crucial for the upgrading of rural craft enterprise. The non-availability of appropriate technology in the form of suitable tools and equipment has been found to be a vital blockage for rural producers,

especially in Asia.

A further set of problems of rural handicraft producers, as reflected in the findings of the international experience, relates to questions of managerial weakness or capacity. The absence of management or business skills is a factor that exacerbates all other problems faced by rural producers as entrepreneurs lack the capacity to analyse situations and chart ways forward to minimise the adverse effects of other constraints upon their business. In Mexico when artists and crafters define success often they do not consider profits and financial growth; rather they consider their independence, creativity or cultural identity (Giron et al., 2007). Key policy issues for developing rural handicrafts are improved education and training for rural handicraft entrepreneurs for enhancing their ability to 'learn and compete', especially in external international markets (Kamara, 2006). Finally, weaknesses in institutional support structures can impact upon enterprise development. This last set of constraints relates to considerations of weak or absent institutional frameworks and inadequate support systems (Redzuan and Aref, 2011). In many countries there is still a lack of awareness on the part of the general public and policy makers regarding the importance of craft for rural livelihoods and rural development. Inadequate or fragmented support systems for enterprise development are a widely observed feature of the international landscape of handicrafts. It is argued that for the smallest size of handicraft enterprises that assistance can usually be most effectively delivered on a group basis. Although this requires that groups be well-organised and motivated, a common finding from the international experience is of the lack of organisation or the poor organisation of rural enterprises in a manner which might enable them to make effective use of available support services.

In addressing these non-market factors, there is widespread consensus in the international experience for applying a cluster approach to support handicraft development and to enhance the fundamental capacity of crafters to engage with markets, whether local or international. Recent work in both India and Indonesia in relation to handicrafts points to the critical importance of working with different clusters, not least in terms of promoting necessary dynamic innovation and response to market demands (Sandee et al., 2002; Perry and Tambunan, 2009). The growth of demand for Indian handicrafts is attributed to increased demand for ethnic or culture-specific goods as a response to a growth of global tourism as opposed to specifically a growth of tourism in India (Jena, 2010). It is argued that these demands linked to global spending on home décor and furnishing represent a reaction "to the homogenization of mass produced goods, not to speak of the growing preference for substituting goods based on synthetic materials with goods based on environment friendly raw materials" (Jena, 2010). Indian research challenges the 'hand holding' model whereby businesses will be upgraded in a

step by step approach with artisans first trained in quality production techniques then given adequate funding for product creation before providing support for market linkages (Sarkar and Banerjee, 2007). Suggestions are offered for a network approach to build the strength of clusters or of the 'sustainable demand-led' approach to cluster support as developed by the United Nations Industrial Development Organisation (2006b). Essentially within this UNIDO framework activities are generally skewed towards dealing with the critical business constraints of a handicraft cluster. The emphasis would include building relationships of trust in the cluster and working through a range of intermediaries (UNIDO, 2006b). Likewise, in Indonesia, it is observed that rather than relationships with overseas customers, most Indonesian clusters "tend to serve a variety of national markets or work through Indonesia-based intermediaries to reach export markets" (Perry and Tambunan, 2009). The majority of artisan clusters linked to handicrafts exhibit little inter-firm cooperation and are simply 'survival' clusters with no real economic dynamism. In common with India, Brata (2009) confirms the importance from the bamboo handicraft sector in Indonesia of "the development of social capital or collectiveness and conflict resolution among the cluster agents". It is argued that "producers with low social capital will experience limited innovation since social capital plays as one of the channels of new information that influence the innovativeness" of enterprises (Brata, 2009).

Beyond strengthening the inputs (creativity, design) and production processes (technology) for handicrafts, the question of markets and marketing is considered by UNIDO (2006a) to be the most critical component in the craft creative industries value chain. UNIDO (2006a) applies a range of different approaches to handicraft enterprises to support their integration into global value chains and procurement networks. First, is the consolidation and support for structural development clusters in recognition of the fact that individual SMMEs cannot compete for market opportunities that require large production capacities, homogeneous standards and regular deliveries. UNIDO (2006a) argues increased competitiveness can be obtained through the establishment of networks of enterprises within which each can make use of common support services which can enhance productivity and achieve scale economies. A second UNIDO (2006a) initiative is the Information Services Gateway or Gateway Initiative which is to support producers within UNIDO-assisted clusters to improve their marketing strategies and augment their opportunities for entering responsible trade distribution channels and associated distribution channels and global value chains.

As recently documented by Littrell and Dickson (2010) a not insignificant share of global handicrafts is marketed through the network of 'responsible trade distribution channels'. Many of these responsible trade channels

apply or require adherence to certain social and environmental standards and codes of conduct for suppliers; examples would be Fair Trade and eco-labelling. In the USA, UK, the Netherlands these kinds of 'responsible' retail channels are particularly significant for craft goods sales (Littrell and Dickson, 2010). The role of UNIDO's Gateway Initiative is to get partners at the local and international level to stimulate cooperation, to help establish an information platform on the internet, to provide tailored assistance to clusters to address collective needs in marketing and design for preparation for export, and to facilitate the participation of cluster members in international trade shows and study tours. Overall, the Gateway initiative is designed to "bring buyers into the cluster development by emphasising the introduction of international buyers to UNIDO clusters, thus strengthening the position of their products in a variety of markets" (UNIDO, 2006b). The caution is offered, however, that market conditions for new entrants into fair trade/responsible trade channels are limited. As UNIDO (2006a) acknowledges: "Fair Trade marketing agencies are characterised by a high degree of loyalty towards their existing clients: they maintain the relationships with groups of producers over relatively long periods of time and thus opportunities for new entrants rarely arise, particularly if demand is not growing" (UNIDO, 2006a).

The Gateway initiative is seen as a more promising initiative than simply the establishment and promotion of Business to Consumer e-commerce. In research conducted in Egypt it was stressed that ICTs are not the entry point for women artisans to modern markets (Hassanin, 2007). Likewise, it is argued by UNIDO that the sale of craft goods through the internet via B2C "has not been successful" (UNIDO, 2006a). Barriers to B2C commerce have included that negative consumer reaction has been "you can see but not touch, feel or smell", the fact that digital photographs are not colour accurate and consumers were reluctant to disclose personal data when purchasing craft goods (UNIDO, 2006a). Better value can be obtained, however, by maximising opportunities for B2B commerce promoting on-line catalogues, video and access to market information (Dobson et al., 2010).

Thailand represents an example of a country that has deployed the internet effectively to support its 'One Tambon One Product' handicraft industry. Indeed, more broadly, the UNIDO (2006a) asserts that "developing countries willing to take advantage of their cultural heritage and of the traditional skills and creativity of communities to produce crafts to serve known local and export markets, will find the OTOP project to be a very useful example". This creative industry/craft project uses traditional skills and creativity "to penetrate or/and extends local and external markets" (UNIDO, 2006a). Since 2001 the project has promoted handmade products of farmers and fisherfolk who are guided to use free time

from seasonal work to increase incomes by producing and marketing crafts using local knowledge and skills. A key principle is of the development of 'One Tambon, One Product' which applies distinct local knowledge and skills to produce craft that attains necessary product standards and product quality and promoted by continuous innovation. The private sector participates with communities in local product development through providing information on market demand as well as ensuring that the Thai identity is maintained. The marketing of products operates through a network of centres/retail outlets (handicraft exhibition centres and craft villages which provide a link to tourism), exhibitions at trade fairs and with support from national government's global network of export promotion offices. The importance of a careful scrutiny of the OTOP scheme is underlined by the conclusion that it is furnishing "support and opportunities to rural communities" which "have extended their activities and some have become entrepreneurs, producing crafts in the food and non-food sectors that are reaching export markets" (UNIDO, 2006a). Indeed, UNIDO concludes "through innovation, market knowledge and entrepreneurship", creative craft SMMEs "can be linked to national and export markets as was illustrated by the OTOP case study" (UNIDO, 2006a).

## CONCLUSION

The international review of tourism route scholarship discloses the developmental potential of the packaging of tourism attractions into organized and themed clusters or routes (Meyer, 2004). From the experience of tourism route development in developed countries as well as from the South African experience there is much evidence to support the contention that well-conceptualised and managed themed routes can be useful tools for tourism growth (Rogerson, 2009). None the less, it must be appreciated that not all tourism routes are successful and that the setting up of a so-termed 'tourism route' offers no guarantee of tourism growth and local development. The international experience of establishing craft specific routes is much narrower than that of tourism routes in general. It is argued there are few documented experiences in the developing world apart from South African tourism routes such as the Midlands Meander and Crocodile Ramble. The 'best practice' in terms of lessons on establishing craft routes is, however, from a number of peripheral regions of Western Europe where positive initiatives have been pursued to develop craft tourism through the notion of a craft route (Richards, 1999b).

In developing the craft sector the international record points to the significance of coherent and coordinated initiatives to enhance the collective efficiency and learning of creative crafts through cluster development. Support must be provided at all tiers in the craft value chain. On the input side, support is required to promote

innovation, creativity and skills. In terms of production, issues of micro-credit and technology to enhance production processes are of critical concern to build crafters to the point that they might enter/extend their participation in local and international markets. Good practice from the international experience derives from UNIDO (2006a, 2006b) cluster support programmes. One aspect is the consolidation and support for structural development clusters in recognition of the fact that individual SMMEs cannot compete for market opportunities that require large production capacities, homogeneous standards and regular deliveries. In final analysis it is concluded that notwithstanding the successes attached to many tourism routes, currently the planning for craft tourism routes represents a limited option in terms of the broader international and local landscape of developing craft enterprises. Arguably, for catalyzing the craft sector in South Africa a range of other options exist, in particular concerning integrated craft hubs and support for trade shows, policy initiatives which already have demonstrated promising results for linking crafters to markets (Rogerson and Rogerson, 2010b).

## ACKNOWLEDGEMENTS

The revised paper benefited from comments from referees and inputs made by Teddy and Skye Norfolk. Thanks are offered by both authors to the University of Johannesburg for research funding support. Usual disclaimers apply.

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