


**ECOTOURISM AS A CATALYST FOR PROMOTING LOCAL ECONOMIC
DEVELOPMENT: AN EVALUATION OF THE DEVELOPMENTAL IMPACTS OF
BULUNGULA LODGE IN NQILENI, EASTERN CAPE**

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WESTERN CAPE**

A faint watermark of the University of the Western Cape logo, featuring a classical building with columns and a pediment, is centered behind the supervisor information.
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KEYWORDS

South Africa; Eastern Cape; Nqileni; Rural poverty; Poverty eradication; Local economic development; Pro-poor tourism; Ecotourism; Sustainable livelihoods

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ABBREVIATIONS AND ACRONYMS

DBSA – Development Bank of Southern Africa
DEAT – Department of Environmental Affairs and Tourism
DFID – United Kingdom (UK) Department for International Development
GDP – Gross Domestic Product
IDP – Integrated Development Plan
LDC – Less Developed Country
LED – Local Economic Development
MDC – More Developed Country
NGO - Non Governmental Organisation
OECD – Organisation for Economic Co-operation and Development
OPEC – Organisation of the Petroleum Exporting Countries
PPT – Pro-Poor Tourism
PRS – Poverty Reduction Strategy
RDP – Reconstruction and Development Programme
SLA – Sustainable Livelihoods Approach
SLF – Sustainable Livelihoods Framework
SMME – Small, Micro and Medium Enterprise
TIES – The International Ecotourism Society
UMIC – Upper Middle Income Country
UN – United Nations
UNCSD - United Nations Commission on Sustainable Development
UNWTO – United Nations World Tourism Organisation
WTO – World Tourism Organisation
WTTC – World Travel and Tourism Council



ABSTRACT

Tourism is one of the fastest growing global sectors, with current international tourist arrivals exceeding 935 million, and projected arrivals to exceed 1 billion by 2020. Community-based ecotourism has been suggested as a possible avenue for poverty eradication and local economic development in South Africa's remote rural regions, which are characterised by undeveloped infrastructure, poorly functioning schools and few economic opportunities. This is especially true of the Wild Coast region in the Eastern Cape Province, which is characterised by the contrasting elements of abundant natural resources eminently suitable for tourism development, and abject poverty.

The central objective of this qualitative study is to evaluate the developmental impacts of the Bulungula Lodge and related initiatives, in order to assess the extent to which ecotourism can be used as a catalyst for local economic development. This includes the conservation practices employed by the enterprise, as well as its contribution towards conservation knowledge amongst community members. In addition, the study undertook to assess the extent to which the Bulungula Lodge and related initiatives has provided employment, and facilitated local participation in decision making and skills development in order to contribute towards sustainable livelihood outcomes.

The findings indicate that Bulungula Lodge and related initiatives contribute positively to the local economy through job creation, skills development and local collaboration. However, Bulungula Lodge is faced with a number of factors which constrain the attainment of development goals, such as an inactive local and provincial government, low human and physical capital stocks and an inability to expand without threatening the sustainability of the natural resource base.

In conclusion, the study provides numerous recommendations in order to increase the effectiveness of projects and employment within an environment devoid of government intervention. Among these are strategies for improving an understanding of conservation amongst community members, as well as strategies to improve adult education and the empowerment of women in the decision making process.

DECLARATION

I declare that Ecotourism as a Catalyst for Promoting Local Economic Development: An evaluation of the developmental impacts of Bulungula Lodge in Nqileni, Eastern Cape, is my own work, that it has not been submitted for any degree or examination in any other university, and that all the sources I have used or quoted have been indicated and acknowledged by complete references.

Full name: JANINE CAROL LANGE

Date: 25 NOVEMBER 2011

Signed.....



CHAPTER 1: INTRODUCTION AND BACKGROUND TO THE STUDY

1.1 Introduction

South Africa, although categorised as an upper middle income country (UMIC), has major inequalities, which are apparent in high levels of poverty and unemployment on the one hand, and immense affluence on the other (The Institute for Poverty, Land and Agrarian Studies, 2010; Central Intelligence Agency, 2010). Rural poverty is particularly pervasive, being mainly chronic in nature, with approximately 60% of rural inhabitants being poor, compared to 13% in metropolitan areas and 25% in secondary cities (Groenewald, 2010; Armstrong *et al.*, 2010; Gelb, 2003). Some of the factors exacerbating poverty in rural areas are lack of infrastructure and access to basic services, HIV/AIDS related deaths which lead to the loss of breadwinners, and insecure land tenure and inequitable land administration (Desai *et al.*, 2010; Hogan, 2008; Triegaardt, 2006).

The Mbashe municipal district, within which the case study is based, has the highest rate of poverty in the Eastern Cape Province, with over 90% of the population living on less than R1601 per household per month (Mbashe Integrated Development Plan, 2010). The Eastern Cape also ranked lowest in the country for literacy, direct water supply to households, sanitation and the highest infant mortality rate (Eastern Cape Department of Social Development, 2009).

Nqileni village is located on the Wild Coast of the Eastern Cape, between Cweba and Coffee Bay. Two rivers run through the village, the Xhorha river in the West, and the Bulungula river in the East. Nqileni is bordered by the Indian Ocean in the South. The village itself is classified as part of Elliotdale in the Mbashe municipal district, within the Amathole municipal administration. Despite numerous upgrading projects by government, Nqileni village remains undeveloped in terms of basic infrastructure and services (Statistics South Africa, 2005). The population of this village is approximately 750, many of whom are young people below the age of 15 years. The level of unemployment is high, with those who are employed working mainly in the primary sector (Coles, 2011).

Tourism was earmarked as one of the sectors for development in the National Government's 1995 mandate to municipalities to implement Local Economic Development (LED), in order to achieve the two-fold goal of reducing poverty, and promoting economic growth at the local level (Hindson & Vincente, 2005). However, a major issue constraining the use of tourism development for economic growth and job creation at the local level is the gross lack of basic infrastructure, apparent in many remote rural areas. This situation, of sub-serviced rural areas, has lent itself to private sector-led niche market tourism development, such as ecotourism, which is able to rely on limited infrastructure, and aims to leave as small a carbon footprint as possible for environmental sustainability.

1.2 Statement of the problem

The main problem which this inquiry seeks to explore is to what extent the Bulungula Lodge is able to impact positively on the local economy. Despite efforts by government to reduce poverty and promote economic development in rural areas, through a realignment of local government towards poverty reduction in marginalized communities, as well as various Local Economic Development (LED) policies, high levels of unemployment and chronic poverty persist, and are still the hallmarks of South Africa's rural towns and villages (Delius & Schirmer, 2001). Rural development strategies need to move beyond a focus on agriculture, which although necessary, is not sufficient for poverty reduction, and needs to be complemented by livelihood strategy diversification. To this end, successful LED initiatives undertaken by government have been mainly in tourism. However, the infrastructure and consumptive focus of their LED strategy related to tourism has been found to be unsuitable for remote rural villages which do not have basic infrastructure (Rogerson, 2008).

Certain forms of consumptive tourism in rural areas could have serious implications for the environment and result in even deeper levels of poverty, due to the sensitivity of the ecosystem and the reliance of rural communities on already scarce natural resources, which are often used unsustainably due to lack of environmental education (Campbell, 1999). An additional burden on the environment would leave natural resources depleted and cause erosion. Furthermore, the enormous inputs which would be required for tourism infrastructure development is unlikely to occur in remote rural villages which consist mainly of small business enterprises, which often do not have the ability to contribute very much to the national GDP. Campbell (1999) suggests that it is problematic for governmental planning

to steer local economic development in tourism in remote rural communities, due to the inability of many less developed economies to invest in infrastructure development, unless the destination has the potential to generate significant foreign investment.

The Bulungula Lodge, the focus of this study, is a privately owned, ecologically sustainable lodge situated in Nqileni village, on the Wild Coast of the Eastern Cape province (figure 1.1), about two and a half hours drive south-west of Coffee Bay. The village is remote and without basic infrastructure such as tarred roads, electrification and piped water. The remoteness of the village means that it would probably be undesirable for many ‘high maintenance tourists’, but the lodge owner feels that this very characteristic is what allows the lodge to remain sustainable.



Figure 1.1: Map of the Eastern Cape Province, with arrow showing the location of Bulungula Lodge (Source: Adapted from www.places.co.za)

1.3 Aims of the study

The overall objective of the research is to evaluate the developmental impacts of the Bulungula Lodge in the Nqileni community regarding the nature and extent to which the

Bulungula Lodge has contributed to LED, in the form of employment, SMME development, and skills training. This will be done in order to provide insights into livelihood impacts made by the Bulungula Lodge, while identifying challenges and failures, and making recommendations to improve linkages and economic opportunities for community members. In addition, stakeholders could use the information generated to identify new avenues for development within the tourism and complementary sectors, thereby increasing livelihood diversification options, and decreasing poverty.

The specific aims of the proposed study are as follows:

- i. To analyse the operation of the Bulungula Lodge and related programmes offered by the Bulungula Incubator (a non-governmental organisation – NGO) as an extension of the reach of the Bulungula Lodge, using a combination of criteria based on the Eco-Lodge’s management principles, and the sustainable livelihoods principles (discussed in Chapter 4) as benchmarks.
- ii. To investigate the perceptions of various stakeholders, including Bulungula Lodge employees, community members, NGO employees and the NGO project participants around the role of Bulungula Lodge and related projects regarding various dimensions of LED, by exploring employment creation initiatives, skills development, community participation, and environmental conservation.
- iii. To assess the challenges faced by the Bulungula Lodge and Bulungula Incubator in promoting local economic development.
- iv. To provide recommendations based on the findings to the relevant role-players, including the Nqileni community, Bulungula Lodge and local government, in order to improve local linkages within the business operation of the Bulungula Lodge, to identify possible new enterprise opportunities and to improve communication between the community, lodge owners and government.

1.4 Contextualising the study

1.4.1 Global tourism development

With tourism being one of the fastest growing industries, at an approximate growth rate of 4.6% annually in developed countries, and 9.5% in developing countries, tourism is increasingly being sought as a development path for nations in the global ‘South’ (Roe, *et al.*, 2004; Mahony & Van Zyl, 2002; Binns & Nel, 2002; Nel, 2001; Turner, 2001).

Acknowledging the magnitude of this contribution to global GDP and potential for poverty reduction, in 2002 the World Tourism Organisation (WTO) launched the publication, *Tourism and Poverty Alleviation*, at the World Summit on Sustainable Tourism in Johannesburg, which argued that tourism presented a key development opportunity for the poor (World Tourism Organisation, 2002).

The ‘pro-poor’ tourism agenda, as it has come to be known, is a strategy which can be applied to any type of tourism, with the main aim being benefiting the poor through tourism (Mitchell & Ashley, 2006; Ashley, *et al.*, 2001; Kakwani & Pernia, 2000). In addition to the acknowledgement of tourism’s potential for poverty reduction, the UN Commission of Sustainable Development (CSD) designated 2002 as the International Year of Ecotourism, drawing on practical lessons from the sub-sector in order to improve implementation.

1.4.2 Community-based ecotourism

According to a study about the top five tourist destinations between 1950 and 2002, Europe and the Americas dropped from holding 71% of the market share to 35 % (Yeoman, *et al.*, 2006). This, coupled with the phenomenal growth of tourism in and to developing countries, goes some way towards making a case for the viability of using tourism for pro-poor growth within less developed countries (LDCs). A number of empirical studies on the effects of community-based ecotourism projects has suggested that ecotourism, when applied using pro-poor principles, could yield local economic benefits for the poor (Andrade, 2008; Gerosa, 2003; Scheyvens, 2002; Ashley & Roe, 2002). Studies in Brazil (Wallace & Pierce, 1996) and Malaysia (World Travel & Tourism Council, 2002a) have found that although limited, the local economic benefits from eco-lodges to host communities were increased as a result of linkages such as the procurement of local goods, and increased job creation in tourism.

‘Greenwashing’ (the phenomenon whereby companies pass off their businesses as being ecotourism products, even though they do not necessarily adhere to environmental sustainability or participatory principles), has become a challenge for the sector, with certain initiatives marketing themselves as ‘eco tours’, without actually implementing the responsible tourism practices espoused by the sector’s principles (Haroon, 2001; Ross & Wall, 1999). It is therefore in the measurement of impacts and community perceptions around these issues, that its legitimacy can be established.

1.4.3 Tourism and local economic development (LED) in South Africa

With South Africa's late arrival on the tourism scene due to apartheid-related sanctions, the tourism industry has done surprisingly well, growing steadily from approximately 297060 in the mid-1980s to over 10 million in 2010 (World Tourism Organisation, 2011). Based on the literature and the constitutional mandate towards developmental local government, tourism has been earmarked as a key sector for pro-poor economic growth (Spenceley & Seif, 2003; Mahony & Van Zyl, 2002). Despite having a policy base to support this, tourism benefits to the poor have been marginal and rural municipalities have largely failed at transforming their Integrated Development Plans (IDPs), and thus LED plans into reality, due to resource shortages and deep levels of community poverty (Rogerson, 2008; Nel & Goldman, 2006).

The Wild Coast, with vast stretches of untouched coastline and a variety of fauna and flora endemic to this area, has received much attention from academics (Cousins & Kepe, 2004; Kepe, 2001; Rogerson, 2000), who have noted that although the area has been identified as a Spatial Development Initiative area, the goals delineated in the Wild Coast Tourism Development Policy (Department of Environment and Tourism, 2001) have remained largely unrealised (Ashley & Ntshona, 2003). Rogerson's study in particular has pointed to the fact that local entrepreneurs are unskilled and their economic livelihood options are limited, largely by an inability to access markets, skills training and business information (Rogerson, 2000). This leaves much to be desired about the impact of government action, as well as private sector and community partnerships.

1.5. Research design and methodology

1.5.1 Research design

The study will be qualitative in nature and forms part of the phenomenological meta-theory, which is rooted in the assumption that meaning is derived from the perspective of the individual in a particular context (Giddens, 2006; Babbie & Mouton, 2001). Although qualitative research does not allow for generalisation in the way that quantitative methods do, it offers the advantage of gaining rich detail regarding a specific context, and provides insights that numerical data cannot express (Babbie & Mouton, 2001; Strauss & Corbin,

1990). The methods of data collection will include secondary data analysis, semi-structured interviews and simple observation.

1.5.2 Methodology and sampling

Secondary data analysis

Initially a literature review will be conducted in order to inform the researcher of the current academic discourse and debates related to the research problem, as well as laying the theoretical foundation for the research project to be undertaken. Information will be sourced from books, journal articles, and the internet, newspaper clippings, and other research done in the area, or on similar topics.

Semi-structured interviews

The researcher will interview a range of respondents involved with the Lodge, to generate the necessary range and depth of information required to answer the research questions. These will include Bulungula Lodge staff, who will be able to shed light on the operation of the Lodge and the various individuals and households it benefits, and respondents from local civil society organisations in the area. They will offer valuable insights into the relationships between key stakeholders and resource allocation. Non-probability sampling will be used, specifically the purposive method which is most commonly used with the qualitative paradigm and suits the type of information gathering needed for this inquiry (Babbie & Mouton, 2001; Marshall, 1996).

Direct observation

This type of observation is to be used by the researcher to document things that were seen during field research. The researcher will make notes, take photographs and do video recordings during her stay at the Lodge. This method of data collection will help to gain insights into the general lives of community members, on levels of participation by the community members, as well as power relationships among stakeholders.

1.6 Key terms and concepts used in the study

Tourism

The United Nations World Tourism Organisation (WTO) defines tourism as “*the activities of*

persons traveling to and staying in places outside their usual environment for not more than one consecutive year, for leisure, business and other purposes". (World Tourism Organisation, 2011). Tourism can be seen as a system with various interrelating parts which interact to produce a result. The tourism system comprises a number of interrelated elements, namely tourists, geographical elements (traveller generating regions, tourist destination regions, transit routes), and the tourism industry (all goods and services provided as part of the tourism experience) (Cooper *et al.*, 2008; Keyser, 2002).

Pro-Poor Tourism

According to the Pro-Poor Tourism Partnership, pro-poor tourism (PPT) is a broad approach to tourism, which accrues tourism revenues to the poor. Pro-poor tourism is a way in which to develop and plan tourism to benefit the poor. It aims at enhancing linkages between tourism ventures and local communities, with the intention of reducing poverty through livelihood benefits, both economic and non-cash benefits, which will allow poor people to exercise freedoms which they would otherwise not have (www.propoortourism.org.uk).

Rural Tourism

Rural tourism is tourism that transpires in infrastructurally underdeveloped areas, which are often mountainous and used for agricultural purposes (Keyser, 2002). According to the Organisation for Economic Cooperation and Development (OECD) (1994, cited in Keyser, 2002: 268), the distinguishing feature of rural tourism is the wish to give visitors personalized contact and a taste of the physical and human environment of the countryside, and, as far as possible, allow them to participate in the activities, traditions, and lifestyles of local people".

Ecotourism

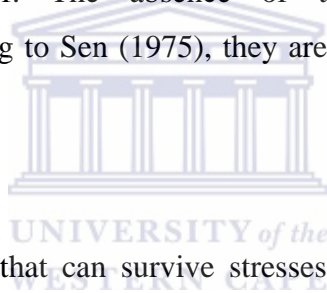
Ecotourism can be regarded as a micro-level, community-based pro-poor form of tourism which seeks to promote visitor appreciation of the natural environment (Mowforth & Munt, 2003; Ceballos-Lascurain, 1996; Boo, 1990), while simultaneously providing education about conservation to both visitors and the communities alike. In addition to these attributes, ecotourism principles also include the economic benefit to the host community from ecotourism initiatives, which provides a good basis for local economic development (Viljoen & Tlabela, 2006; Kirsten & Rogerson, 2002; Fennel, 1999).

Poverty

The sustainable livelihoods approach (SLA) conceptualises poverty as a dysfunctional relationship between a variety of factors, including different stakeholders, capitals, livelihood strategies and vulnerability to shocks, creates undesirable livelihood outcomes which are neither sustainable nor empowering (Overseas Development Institute, 1999).

Development

In this study, development can be viewed as positive social change which facilitates the empowerment of individuals to exercise certain freedoms, which allow them to make choices about their lives. Sen (1975) describes certain freedoms which need to exist in order for a person, community, region or nation to be developed. These freedoms include, but are not limited to political freedom and civil rights, economic freedom, including access to credit, social opportunities including healthcare and education, transparency from governance structures and protective security, including social safety nets such as grants, unemployment benefits and emergency relief. The absence of these freedoms will result in underdevelopment, and, according to Sen (1975), they are all equally important, rather than being hierarchical in nature.



Sustainable Livelihoods

A sustainable livelihood is one that can survive stresses and shocks and which does not jeopardise the livelihoods of others. It requires capacities and assets and is sustainable only if it can provide opportunities for future generations as well (Hoon, *et al.*, 1997). It focuses on livelihoods, which can be described as an activity or series of activities which allow one to make a living (Chambers & Conway, 1999), and environmental sustainability, which can be identified as the preservation of the land and its ecosystems for future generations.

Local Economic Development (LED)

LED can be described as a collaborative effort entered into by various stakeholders including community representatives, local government and private sector companies in the interests of building healthy economies for greater economic growth and employment generation (Central Intelligence Agency, 2010; Swinburn, *et al.*, 2006; Perret, 2001). It is focused at the local level and its principles include participation and social dialogue, it is based on territory and it entails the mobilisation of resources and competitive advantages to create and manage locally owned economic opportunities (World Bank, 2001).

1.7 Thesis chapter summary

Chapter 2

This chapter focuses on reviewing the literature related to tourism development, and the evolution of tourism as a sustainable development concept and the issues facing rural coastal communities in order to frame the assessment of Bulungula Lodge within its context and to highlight the major issues dealt with in this study. Furthermore, the chapter describes the theoretical framework that undergirds the study, by reviewing the relevant development theories which relate to the study, the most salient being the sustainable livelihoods approach, the pro-poor tourism model and the principles of eco-lodge management.

Chapter 3

This chapter focuses on the research methodology of the mini-thesis. A justification is provided for the use of the qualitative research design while providing a description of the origins and Meta theory that encompass this type of design. The rationale for using semi-structured interviews, secondary analysis and direct observation as data collection methods will be provided, as well as a description of the sampling type and techniques which include the non-probability sampling type and purposive and snowball sampling techniques.

Chapter 4

This chapter provides a detailed analysis and discussion of the operation and scope of the Bulungula Lodge and Bulungula Incubator as an extension of the lodge, based on a number of principles which include that of sustainable livelihood, pro-poor tourism and eco-lodge management guidelines, coupled with interviews with various stakeholders in the community to gauge to what extent the lodge and NGO have facilitated local economic development through various projects and initiatives.

Chapter 5

In this chapter, salient points of the study are discussed and drawn together with findings in the literature. The main relationships in the findings are discussed and the larger relevance of the study as well as the possible implications for various stakeholders.

CHAPTER 2: LITERATURE REVIEW AND THEORETICAL FRAMEWORK

2.1 Introduction

This chapter will focus on the proliferation of the pro-poor ecotourism agenda, which has become a dominant theme in recent years among academics, governments and tour operators for the dual purpose of encouraging economic growth, and eradicating poverty. Tourism has in recent years become a much sought after avenue to boost economic growth within developing countries, largely as a result of its success in developed countries in the early twentieth century and technological advancements, which have made international and domestic travel available to previously untapped markets.

In order to have a clear understanding of how ecotourism came to be seen as a source of economic development requires a focus on the major debates and evolution of the tourism industry as a whole. This chapter is divided into two sections. The first provides a broad overview of tourism-related events and debates of the last century which have culminated in the propagation of the sustainable tourism development paradigm, and more specifically ecotourism, as a catalyst for local economic development in the 21st century. Tourism in the post-apartheid South African context will be discussed with specific reference to ecotourism and local economic development in marginalised rural areas in the Wild Coast region of the Eastern Cape.

The second part of the chapter outlines the theoretical framework, which summaries the dominant theories in economics, development and tourism, and which provides heuristic scaffolding for the study. The main economic theories are described, with their relevance to

the tourism industry in South Africa, after which the humanistic paradigm on which this study is based is described.

2.2 The move towards sustainable tourism development

Ecotourism as a sustainable development concept evolved out of a need to make tourism less damaging to both the host environment and culture, while contributing economically to those directly affected by the industry. The following section is devoted to exploring the historical development of tourism in the past century and the move towards pro-poor, community-based ecotourism development and the sustainable livelihoods approach which undergirds this study.

Following the introduction of the personal automobile in the 1950s and more leisure time (due to decreased working hours, and paid leave from work), domestic tourism gained popularity in most developed countries (Burkart & Medlik, 1981). These advancements coupled with technical advancements in aviation and an increase in business travel and more leisure time due to paid annual leave, contributed substantially to the growth of the international tourism industry (Cooper, *et al.*, 2008; Mowforth & Munt, 2003; Keyser, 2002). Furthermore, the birth of the package holiday had significant impacts on receiving destinations, initially in the USA and Europe, and later in the twentieth century, was increasingly encouraged in developing nations (Shaw & Williams, 1994). International tourist arrivals increased steadily from 25.3 million to 455.9 million between 1950 and 1990 (World Tourism Organisation, 2003; Shaw & Williams, 1994).

Initially tourism exchange happened mainly between developed countries, with the USA, a number of European countries and Australia being the major players in the industry, but soon evolved into travel from the global North to South (or less developed countries). Tourism began to be viewed as a potential development tool for developing countries (Weaver, 2006), and in the Caribbean, the large cheap labour force and natural resources and the region's lack of financial resources, resulted in tourism being seen as an ideal sector to create an industrialised base for economic growth. An increase in demand for tourism among less developed countries (LDCs) led to the industry's expansion in the Caribbean, Bahamas, Fiji, Seychelles, with a number of other destinations being developed for the North American market (Mowforth & Munt, 2009; Weaver, 2006; Keyser, 2002).

Jafari (1990) dubbed this stage of tourism development as the ‘advocacy’ platform, which was unreservedly pro-tourism, without taking into account the potential socio-cultural or environmental costs. This platform has been associated with the modernisation paradigm (see 2.6) of thinking, and promoted widespread development of tourism in order to encourage economic growth through increased foreign direct investment, with the goal of mechanisation and further development in the host destination (Weaver, 2006; Jafari, 1990) in order to mimic growth paths of more developed countries (MDCs) with regards to the tourism sector.

Sustainable development gained popularity among academics, governments and international organisations in the 1960s with an awakening of the collective consciousness that dwindling natural resources due to unsustainable use was becoming a problem. Major global organisations launched conferences to promote dialogue on the subject of sustainability and the uses of scarce natural resources (Mowforth & Munt, 2009; Cooper, *et al.*, 2008), while scepticism abounded among academics about the actual benefits that tourism might afford destination countries (Turner, 2001; Jenkins, 1997), leading to what Jafari called the ‘cautionary’ platform.

The ‘cautionary’ platform, linked ideologically to the dependency theory, argued that tourism perpetuated unequal trade relationships between the developed and less developed countries, by promoting the consumption of the periphery through mass tourism packages offered at the expense of the host cultures and natural environments of the less developed countries (Mowforth & Munt, 2009; Prosser, 1994; Britton, 1982). Butler’s 1980 work around the destination life cycle predicted the eventual decline in the tourism industry within host nations, should negative environmental and socio-cultural impacts of tourism development go unchecked (Cooper, *et al.*, 2008; Keyser, 2002).

Alternative tourism development was sought as a solution to irresponsible economic growth, which gave rise to sustainable tourism development. Questions relating to pollution, the destruction of rare natural areas and the levels of industrial and population growth led to talks around how these finite resources could be protected (Harris, *et al.*, 2002). For the tourism industry this meant the development of more thoughtful tourism practices which would benefit host communities as well as tourists. The shift in discourse around conventional, consumptive tourism practices developed rapidly in the wake of two Organisation of

Petroleum Exporting Countries (OPEC) oil crises in the 1970s and 1980s, the second of which led to a global recession, skyrocketing fuel costs and a slowing in international air travel (Keyser, 2002). These resulted in major developments in less consumptive tourism niche markets, better known as ‘alternative tourism’.

Jafari called this era the ‘adaptancy’ platform, and is linked ideologically to the cautionary paradigm, the principles of which promote equitable relations between tour operators and hosts, while benefiting hosts economically. Ecotourism, which is probably one of the most notable of the alternative tourism niche markets, has become the fastest growing sub-sector in the industry (World Tourism Organisation, 2011), and according to a number of authors (Sharpley, 2006; Jones, 2005; Wood, 2002; Pforr, 2001; Hassan, 2000), interest in this sub-sector is growing at levels of between 25% to 30% annually.

Sustainable tourism development became the dominant discourse among international development organisations, and in 1972 the United Nations held its first conference on the Human Environment which resulted in the employment of the World Conservation Strategy (WCS) in 1980, with its primary focus being on how conservation and development goals could be reached simultaneously. Following this the Brundtland Report in 1987 delineated sustainability goals (Cooper, *et al.*, 2008; Keyser, 2002).

The Earth Summit was held in Rio de Janeiro in 1992, which laid down an action plan for global sustainability known as Agenda 21 (Cooper, *et al.*, 2008). It was during this decade that the ‘knowledge-based’ platform, as Jafari (1990) called it, emerged through the realisation that alternative tourism alone could not solve all the problems which were caused by mass tourism. Since mass tourism was continuing to grow and unlikely to slow, tourism development needed a different approach. In 1999, the UN conference on Sustainable Development was held, reviewing development and tourism. The UN commission on Sustainable Development encouraged nations to maximise pro-poor tourism benefits to eradicate poverty, in partnership with all stakeholders (World Tourism Organisation, 2002). By the end of the 1990s however, the industry grew to a record high of 663 million arrivals and US\$453 billion (World Tourism Organisation, 2003).

Failure to implement any meaningful action following the Rio Conference in 1992 led to the follow up conference in Johannesburg, also known as Rio +10, in 2002, to consolidate the

vision for the original conference and to focus on the sustainable development of the tourism industry in which host destinations were to benefit economically while not bringing harm to their natural and heritage resources. In the face of the Millennium Development Goals, which seek to eradicate poverty, promote sustainability as well as partner in development efforts, sustainable tourism was encouraged as a medium of poverty eradication for the world's poorest people (Cooper, *et al.*, 2008; Mowforth & Munt, 2003; World Tourism Organisation, 2002).

Concurrently the pro-poor tourism (PPT) agenda (often used interchangeably with sustainable tourism development), which finds its roots partly in the sustainable livelihoods approach, gained recognition, and in 2002 the World Tourism Organisation launched the 'Sustainable Tourism – Eliminating Poverty' (ST-EP) campaign to promote social, economic and environmentally sustainable tourism, in order to eliminate poverty. This fell in line with the Millennium Development Goals set approximately a decade earlier (Cooper, *et al.*, 2008; World Travel & Tourism Council, 2002a; World Tourism Organisation, 2002). According to its principles, pro-poor tourism falls within the humanistic paradigm, leaning heavily upon consultation and participation (Rogerson, 2006; Ashley, *et al.*, 2001). The year 2002 was also designated as the International Year of Ecotourism by the United Nations, with the Commission on Sustainable Development (CSD) giving the UN Environment Programme (UNEP) and the WTO to document lessons learned from the field in order to work towards a best practice model in the field. These grassroots-based approaches, where communities are seen as participants rather than beneficiaries of development, with the ability to think critically, and identify and action their own development, influenced thinking with regard to community-based tourism practices (Dinbabo, 2003; De Beer & Swanepoel, 2000; Ashley, *et al.*, 2000; Smith & Frank, 1999; Hope & Timmel, 1984; Ferrihno, 1980).

2.2.1 Pro-poor tourism

Pro-poor tourism (PPT) as a model of development can be applied to any type of tourism, with the main aim being that tourism revenues are to accrue largely directly to the poor, that they participate in product development and that they are involved in decision making (Cooper, *et al.*, 2008; Ashley & Roe, 2002). For this study it is being applied to the operation of a community-based eco-lodge, which seeks to contribute toward the development of the Nqileni, rural village.

According to the Pro-Poor Tourism Partnership, the benefits of implementing pro poor tourism include economic benefits, non-cash livelihood benefits, and policy, processes and participation that support further development of tourism to benefit the poor (www.propoortourism.co.uk; Braman & Amazonia, 2001). The interest of this study is in all three of these categories, and how they feed into local economic development as part of sustainable livelihood outcomes.

As a number of authors have pointed out (Rogerson, 2004; Keyser, 2002; United Nations Environment Programme, 2002), there needs to be a supportive policy framework within which to work, in order to promote sustainable tourism development. Apart from the policy framework, governments, particularly local government, needs to create participatory partnerships with private sector stakeholders in order to maximise the benefits of tourism in poor communities.

The non-cash livelihood benefits include increased access to infrastructure and services, community capacity building and training, as well as mitigating negative environmental impacts. Although these are characterised as non-cash benefits, they impact directly on the economic capital of a community over time. If environmental degradation occurs, or community members remain only spectators of tourism instead of partners, eventually the tourism industry will cease to exist due to eventual decline in visitors and the collapse of the tourism economy in the area (Wall & Mathieson, 2006; Ross & Wall, 1999).

Economic benefits include boosting local employment, providing employment opportunities and contributing toward community income. These increased economic capital in turn, can work in order to boost savings in the community, as well as feed into other livelihood resources to assist community members to empower themselves beyond mere survival. The researcher will provide an analysis of what various stakeholders feel about the economic benefits of the Bulungula Lodge at a household level as well as community level.

The pro-poor tourism model is used in this study as a supplementary tool, within the sustainable livelihoods framework as part of the livelihood strategy and outcomes sections. The model is used to describe the areas in which benefits can be accrued to the Nqileni community in order to facilitate economic development. The benefits are not restricted to financial however, but include non-cash benefits and policy framework that either work

towards or hinder economic development.

Jafari argued that the world views put forward by the ‘advocacy’, ‘cautionary’ and ‘adaptancy’ platforms were inadequate to analyse a system that was becoming increasingly complex, and he suggested that a more holistic approach be used for the analysis of tourism development. The knowledge-based platform, which according to Jafari (2004), still prevails today, is thus closely linked to the sustainable livelihoods approach, which provides a systematic and systemic view of tourism, employing scientific data collection methods at each stage of analysis, to provide information regarding the relationship between stakeholders which would thus provide information regarding specific approaches to tourism development for specific areas (Scoones, 2005; Carney, 1999; Jafari, 1990). It is this platform that epitomises the present study of ecotourism as a catalyst for local economic development, as diversification in livelihood strategies to include tourism may produce sustainable livelihood options for the Nqileni community.

Based on fourteen case studies in Africa, Gerosa (2003) has defined certain advantages and disadvantages of implementing pro-poor tourism initiatives. Some of the advantages are that pro poor tourism takes into account the multi-faceted nature of poverty, it embraces non-economic impacts of tourism on livelihood resources, such as social and human capital, and it moves beyond the status quo toward a position of policy reform (Ashley, *et al.*, 2001). Other positive benefits include building the asset base, decreasing exposure to vulnerability and risk, and gains from taxation of revenues, provided governments are prepared to reinvest in infrastructure development (Gerosa, 2003).

Difficulties associated with pro poor tourism are mainly found in the measurement of its impacts as it relates to distribution of resources. Results have often been biased towards positive impacts, while neglecting the potential, and real, negative impacts (Ashley, 2000, cited in Gerosa, 2003). There are also issues around those who are already privileged benefiting from employment and new business opportunities, lack of market opportunities and lack of cooperation by conservation authorities (Gerosa, 2003).

2.2.2 Tourism in the 21st century

As previously mentioned, the industry as a whole has grown steadily, despite an increase in

security measures due to international terrorist attacks in Bali, London, Glasgow, Madrid, New York and Bangkok (Mowforth & Munt, 2009). It is estimated by the World Tourism Organisation that by 2020, international tourism would have grown to a staggering 1.6 billion visitors with estimated revenue of US\$2 trillion. China has been noted as becoming one of the leading tourist generating regions, along with India (World Tourism Organisation, 2011). Technological advances such as the internet and low cost airlines, especially in developing nations, have opened up air travel to new market segments (students and lower middle classes). The demand for niche tourism has grown considerably in the last decade, and recent trends suggest that tourists are becoming more environmentally conscious in their consumption of tourism resources. With an increase in the 'green' agenda, responsible, sustainable and 'greener' tourism packages are increasingly being sought after (Cooper, *et al.*, 2008).

Despite widespread criticism of traditional tourism (Rogerson & Visser, 2004; Reid, 2003; Scheyvens, 2002; Sharpley & Telfer, 2002), general studies in over twenty countries on the economic impacts of tourism on developing nations (Brau, *et al.*, 2007; Sugiyato, *et al.*, 2002; Page, 1999; Tonamy & Swincoe, 2000), using various methodologies, found that tourism in general had positive impacts on growth, that tourism ownership was largely local and the 'leakage' argument, which states that large corporations absorb all the profits from tourism to the detriment of local communities, is unfounded. This goes some way towards making a case for the viability of using rural tourism for pro-poor growth.

2.3. International rural tourism development

Rural tourism, which involves travel to remote, often sparsely populated areas, which characterises the area under investigation, is a fairly well-established industry. European rural tourism, which has existed for over fifty years, has revolved mainly around agri-tourism. The French have used farms as places of accommodation, also offering various activities, since the 1950s. In the United Kingdom the industry has been going since the 1970s, with generating regions being mainly urban travellers seeking solace from city life and an unpolluted environment in which to relax (Viljoen & Tlabela, 2006; Keyser, 2002). In this context rural tourism is being used as a conservation tool to protect rural areas. In Italy rural tourism and agriculture are separated by legislative acts, which regard rural tourism as tourism which protects rural areas and all its accompanying cultures, environments and

resources, and agri-tourism as accommodation and restoration services provided by agricultural operators.

In Asia, the Indonesian rural tourism industry has been based largely around the plantation areas of Java and Sumatra (Iwantoro, 1998, cited in Viljoen & Tlabela, 2006), while in Japan rural tourism revolves mainly around immersion experiences (Arahi, 1998). In Korea rural tourism has focused on benefiting farm workers through livelihood diversification through using farm land for home-stays, and providing leisure resorts for urban dwellers (Choi, 1998, cited in Viljoen & Tlabela, 2006). The Malaysian government has spearheaded agri-tourism around education and recreation as well as a small ecotourism sector (World Travel & Tourism Council, 2002b).

In Africa the focus of rural tourism has been on alternative forms of tourism in order to protect the natural environment while cashing in on the economic benefits. Ugandan rural development policy has focused largely on a bottom-up approach to tourism development, with an emphasis on community-based tourism and large-scale local participation in cultural tourism (Holland, *et al.*, 2003). In Morocco rural tourism has focused mainly on cultural and village based tourism in an attempt to rejuvenate local culture, while South Africa has focused on local economic development brought about by alternative tourism with the aim of alleviating poverty through Broad Based Black Economic Empowerment (BBBEE) (Viljoen & Tlabela, 2006).

This does not mean that tourism is a panacea for poverty eradication (Mitchell & Ashley, 2006). On the contrary, some tourism initiatives, particularly in the new 'green era' could do more harm than good if not conducted in a manner that seeks to be genuinely sustainable, since it is on the micro-level where the impacts of tourism are felt by communities in host destinations. Alternative forms of tourism development, such as ecotourism, might be a more appropriate route for sustainability, but as the literature suggests (The International Ecotourism Society, 1990; Mehta, *et al.*, 2002), a number of businesses passing themselves off as 'eco-tour' businesses have come to the fore, which has made it necessary to distinguish between nature-based tourism, which can either be run sustainably or not, and genuine ecotourism which is managed sustainably in order to promote environmental integrity, as well as collaborate with the host communities regarding tourism practices, profit sharing and

decision making. The following section will focus on ecotourism literature and its contribution towards local economic development in rural areas.

2.4. Community-based ecotourism

There are a number of ways in which ecotourism can be defined, with a plethora of contributions to this cause. Based on research undertaken by Ross & Wall (1999), there seems to be a growing disparity between the theory and practice of ecotourism, due to a lack in standardized definitions and the abuse of the term by certain operators in order to maximize profits. A number of case study research projects indicate that the value-laden goals of the ecotourism concept have not been realized and academics suggest that the lack of standardization and its openness to interpretation is causing problems for site-specific implementation (Lindberg, *et al.*, 1997, cited in Ross & Wall, 1999; Bottril & Pearce, 1995; Nelson, 1994; Scace, 1992; Reid, 1991). Nevertheless, conceptual issues aside (to be dealt with in the theoretical framework part of this chapter), ecotourism has common principles, as espoused by Ceballos-Lascurain, who, it is claimed, coined the term, as well as The International Ecotourism Society (TIES), who agree that ecotourism is tourism to natural areas that involves respect for local cultures, educates both tourists and locals about conservation issues, as well as provides revenues to local communities and towards conservation efforts (Ceballos-Lascurain, 1996; The International Ecotourism Society, 1990).

For local development, ecotourism has been sold as a near perfect option for tourism to fill the economic void that exists in many far-flung rural communities. There have been attempts at standardizing the terminology, and in 1993, TIES published the *Ecotourism Guidelines for Nature Tour Operators*, which have been widely accepted by NGOs, tour operators and governments alike. In 1997, The Association for Ecological Tourism in Europe published guidelines for environmentally oriented tourism which have been useful for organisations in planning local level initiatives (Epler Wood, 2002).

Rooted in the conservation movement, ecotourism began as an experiment, which some practitioners hoped would yield positive results. As early as the 1970s, studies were undertaken into the economic benefits of nature-based tourism, and in Kenya it was found that nature-based tourism far outweighed hunting as a market segment (Thresher, 1981, in Epler Wood, 2002). By the 1980s, nature-based tourism had begun to gain international

interest, with rain forests, coral reefs and bird watchers flocking to remote areas. In Costa Rica, Kenya and Nepal, the industry became a more formal one, with many businesses electing to train locals to run tours and provide a market for those who were already making handicrafts (Andrade, 2008; Ross & Wall, 1999). The top nature-based tourism destinations by the year 2000 included South Africa, with tourist arrivals having increased by 486% between 1990 and 1998 (although this could also be attributed to the collapse of the repressive apartheid state and the change to democracy), Costa Rica, Indonesia, Belize, Ecuador and Botswana (World Tourism Organisation, 2003).

A number of authors have pointed to the fact that some businesses have 'greenwashed' their tourism ventures in order to gain some sense of legitimacy in the ecotourism industry (Haroon, 2001; Ross & Wall, 1999). Furthermore, there is a concern that stakeholder participation and fairness in management practices are not as legitimate as they may seem. This has brought about the distinction between community-based ecotourism and ecotourism that does not include equity, management and decision-making by community members (Scheyvens, 1999).

Community-based ecotourism is tourism which is locally based, has meaningful local ownership, where locals provide services to tourists and where those locals who are not directly associated with the tourism enterprise, receive some form of benefit. In addition, it is environmentally sustainable with minimal impact on the natural environment, contributes towards conservation and provides a platform for community participation and empowerment (Leballo, 2000; Ceballos-Lascurain, 1996). Scheyvens (2002) has highlighted four levels at which community-based tourism can be empowering to locals, namely, economic, whereby notable improvements in the quality of life can be observed in the long term, psychological, where self-esteem is built and locals seek out new opportunities for development as well as an increase in status, thirdly, on a social level it can be observed that community cohesion takes place and economic benefits are used for additional community development activities, and finally, on a political level, community structures become more vocal about needs and new positions are made available for increased representation on decision-making bodies (Scheyvens, 2002). It is therefore in the measurement of impacts and community perceptions around these issues that its legitimacy can be established and case specific studies can contribute to improvement of implementation, which will result in real benefits.

2.4.1 Eco-Lodge characteristics and management principles

As previously mentioned, in 2002, the United Nations acknowledged the impact of ecotourism as an emerging market segment by hailing that the International year of Ecotourism. The Commission on Sustainable Development gave the World Tourism Organization (WTO) and the United Nations Environment Programme (UNEP) a mandate to execute its plans of documenting lessons learnt from practice in the field, and promoting good practices within the field. In 2002, TIES published *Guidelines for Eco-lodges and Marine Ecotourism*, which lays out the principles upon which these endeavours should be built and managed (Epler Wood, 2002). In various international studies on small, micro and medium enterprises (SMMEs) in the tourism industry, it was found that a large number of accommodation SMMEs expressed no interest in expanding, and were motivated by factors other than income, i.e. development goals in communities (Atelejevic & Doorne, 2007; Hall & Rusher, 2004).

Eco-lodges, which Bulungula Lodge can be classified as, are described as accommodations which are dependent on nature and are built and managed on ecotourism principles (Bottril, *et al.*, 1995). This accommodation can range in luxury, from basic homestays and backpacking hostels to luxury tents and game lodge cabins (Epler Wood, 2002). The publication, *The Eco-lodge Sourcebook for Planners and Developers* (Hawkins, *et al.*, 1995), resulted from a conference at the first International Eco-lodge Forum and Field Seminar in 1994, followed by the *International Eco-lodge Guidelines* (Mehta, *et al.*, 2002), which have the following characteristics:

- It conserves the surrounding environment, both natural and cultural.
- It has minimal impact on the surroundings during construction.
- It fits into its specific physical and cultural contexts through careful attention to form, landscaping and colour, as well as the use of localized architecture.
- It uses alternative, sustainable means of water acquisition and reduces water consumption.
- It provides careful handling and disposal of solid waste and sewage.
- It meets its energy needs through passive design and combines these with their modern counterparts to promote sustainability.
- It endeavours to work together with the local community.

- It offers interpretive programs to educate both its employees and tourists about the surrounding natural and cultural environments.
- It contributes to sustainable local development through research programs.

Studies conducted in Costa Rica, Belize, Honduras and South Africa have indicated that eco-lodges and related tourism revenues can benefit local economies, with the correct philosophy and management structure in place (Andrade, 2008; Epler Wood, 2002; Rogerson & Visser, 2004; Baez & Fernandez, 1992; Lindberg & Enriquez, 1994).

A number of management guidelines were put forward in the *International Eco-lodge Guidelines* (Mehta, *et al.*, 2002) which focus specifically on management principles, which include the following:

- Provides vocational training to local staff and tour guides.
- The majority of staff, including management staff is locally sourced.
- Initiates after-hours second language courses for community members.
- Has guests contributing to community projects.
- Encourages indigenous knowledge sharing.
- Supports guest learning experiences by visiting local environmental and community development projects.
- Has guests contributing to conservation.

Since community-based ecotourism theory is intrinsically pro-poor, during the past two decades it has been promoted not only as a solely nature-based industry, but as a means whereby local community livelihoods could become sustainable, particularly in developing countries (Hsing-Sheng, 2007, cited in Andrade 2008; Scheyvens, 2002; Campbell, 1999). A study about ecotourism lodges in Brazil indicated that they were “providing employment, improving access to local residents, and making valued but limited purchases” (Wallace & Pierce, 1996: 1). In Malaysia, a study found that in order to improve local economic benefits for the community, linkages needed to be strengthened in order to maximise local procurement and thus increased job creation (WTTC, 2002b).

2.5 Sustainable tourism in South Africa

Rogerson (2005) indicated that tourism produced the strongest performance of all the priority sectors as identified by the Department of Trade and Industry (DTI), between the years 1998 to 2002. Employment in this sector showed an upward trend, along with accompanied contributions to GDP, while for the same period, all other priority sectors showed a decline in employment (Monitor, 2004).

The impacts of tourism development in South Africa have been studied by a number of authors from different perspectives (Viljoen & Tlabela, 2006; Rogerson & Visser, 2004). Rogerson & Visser (2004) did a general study of tourism development, Mahony & Van Zyl (2002), Hill, Nel & Trotter (2004) and Ndlovu & Rogerson (2004) focused on local economic impacts for rural livelihood development, while Ashley & Roe (2002), Ashley, Roe & Goodwin (2001) and Spenceley & Sief (2003), focused on pro-poor tourism impacts.

Before describing the tourism policy framework in South Africa, it is important to note the circumstances that these policies are meant to provide a solution to. It is for this reason that the following section describes the rural poverty context within South Africa.

2.5.1 Rural poverty in South Africa

Chronic poverty, most pervasive in South Africa's rural areas, is a state of being whereby the individual or household suffers deprivation over a long period of time (five or more years). This type of poverty can be either absolute or relative, the latter possibly being even more difficult to escape because people who are relatively poor are more often than not employed, but earn an income falling within the lowest quintile of the income scale (Hulme & De Swardt, 2003), which may not be sufficient to provide for basic needs. The Central Intelligence Agency (CIA) as well as the Development Bank of Southern Africa (DBSA) cited almost half of the South African population as living below the poverty line (Central Intelligence Agency, 2010; Development Bank of Southern Africa, 2009).

Although the HIV infection rate has peaked and is currently stabilising, the number of infections at present will result in a mass of deaths, particularly among economically active aged women, leaving orphans as well as broken and vulnerable family structures in its wake. This will have detrimental consequences for the economy and the general welfare of thousands of rural livelihoods, particularly those that fall within the lowest quintile of

consumption where prevalence rates are highest (Hogan, 2008; Triegaardt, 2006). Other serious and constraining issues facing rural communities in South Africa include insecure tenure and an inequitable land administration system, a lack of infrastructure and inequitable access to basic livelihood services. Rural communities also struggle to access quality health care systems and a functional and effective school system. The quality of life of millions of rural people in South Africa has been affected in part by the historical legacy of apartheid and in part by urban bias in terms of resource allocation, and has resulted in unacceptably low levels of literacy, and thus employability, which exacerbate already deeply entrenched systemic poverty. The South African Government has acknowledged this and launched different initiatives to address this grim scenario, albeit with marginal success.

2.5.2 Policy framework

After 1994, the South African National Government claimed to prioritise poverty alleviation and reduce inequalities as well as promote economic development in rural areas. This was reflected in the 1995 *Rural Development Strategy* which was aimed at eliminating poverty and creating full employment by 2020 (Viljoen & Tlabela, 2006). In 1995 the South African National Government gave municipalities a mandate to implement Local Economic Development (LED) to achieve the two-fold goal of reducing poverty and promoting economic growth at the local level (Hindson & Vincente, 2005). Only in 2006 was a framework released which outlined practical guidelines for the implementation of this strategy (Rogerson, 2009). The focus, although initially on micro-level projects, was reoriented to focus on Broad Based Black Economic Empowerment (BBBEE), due to a number of micro-project-based failures (Department of Environmental Affairs and Tourism, 2006, cited in Rogerson, 2009; Hindson & Vincente, 2005).

South Africa has a comprehensive tourism policy, with a number of policy documents being released by the then Department of Environmental Affairs and Tourism (DEAT). The first of these was the 1996 *White Paper on the Development and Promotion of Tourism* which defines ecotourism as “environmentally and socially responsible travel to natural or near natural areas that promotes conservation, have low visitor impact and provide for beneficially

active socio-economic involvement of local people” (Department of Environmental Affairs and Tourism, 1996, cited in Viljoen & Tlabela, 2006: 13). This was followed by the policy, *Guidelines for Responsible Tourism and Sustainable Tourism Growth*, and the *Tourism in GEAR* policy which was consolidated in 1997. Both the White Paper and the *Tourism in GEAR* documents pointed towards a collaborative effort whereby tourism should be led by government, driven by the private sector and should be community based and labour conscious (Viljoen & Tlabela, 2006; Spenceley 2003).

In 2002 the Department of Environmental Affairs and Tourism (DEAT) released the publication, *Responsible Tourism Handbook: A Guide to Good Practice for Tourism Operators* (Department of Environmental Affairs and Tourism, 2002), which included targets to reach government’s responsible tourism policy. This manual emphasised the need to focus on the triple bottom line, namely economic, environmental and social considerations. Furthermore, it prioritised partnerships whereby locals would have a significant stake in the tourism venture, supported by capacity building and management roles (Spenceley, 2008; Viljoen & Tlabela, 2006).

The few successful LED initiatives documented were tourism related, and, coupled with the fact that the tourism sector is one of the fastest growing labour-intensive sectors of the economy, it is increasingly been touted as an avenue toward economic growth and poverty alleviation (Good Governance Learning Network, 2008). However, a major issue constraining the use of tourism for economic growth and job creation at the local level is the gross lack of basic infrastructure in rural areas. More recently, mainstream local level tourism strategy has seen an attempt to create nodes of consumption which will ultimately stimulate the economy and provide a base to attract foreign currency injections and create jobs (Hindson & Vincente, 2005). Having said that, ecotourism, is a possible avenue for poverty eradication and private sector led local economic development in rural areas as it is able to rely on limited infrastructure and aims to leave as small a carbon footprint as possible.

However, although mass tourism could go some way to provide employment, and to some degree, alleviate poverty in rural communities, in remote areas where there is a lack of sanitation and general infrastructure such as roads, electricity and running water, this type of tourism is not necessarily a suitable option. In these communities eco-tourism would be a more suitable avenue to pursue in order to develop local economies.

2.5.3 Wild Coast tourism

A number of academics have written about ecotourism on the Wild Coast, the area in which Bulungula Lodge is situated. The most notable topics include the challenges facing the implementation of the Spatial Development Initiative (SDI) projects (Kepe, 2001), community wildlife management in close proximity to ecotourism sites (Palmer *et al.*, 2002; Kepe, Cousins & Turner, 2000), and the failure of ecotourism due to lack of acknowledgement of local power dynamics (Cousins & Kepe, 2004). Although the South African National Government has identified the potential of the Wild Coast in the Eastern Cape as a Spatial Development Initiative area, the goals delineated in the Wild Coast Tourism Development Policy (Department of Environmental Affairs and Tourism, 2001) have remained largely unrealised (Ashley & Ntshona, 2003). The range of local, provincial and national government departments who are meant to drive tourism development in this area have failed to maximise its potential due to uncoordinated efforts and limited buy-in from external investors (Lahiff, 2009).

In 2003 a study of three cases of private sector investment on communal land for tourism initiatives on the Wild Coast in the Eastern Cape, revealed that communities played roles mainly of land owners and employees, rather than being driving forces behind tourism development. This was attributed to lack of training and experience in tourism development. Furthermore, it was found that NGOs played a large role in the financing and facilitating of projects, and that the initial input gave communities a base from which to launch additional business ventures. It was found that tourism, although providing opportunities for livelihood diversification, also played a role in cutting off informal and often illegal livelihood options. Finally, the study showed that a lack of transparency among stakeholders had the potential to completely derail the development of tourism ventures (Spenceley, 2003). Similar studies on ecotourism (Mitchell & Faal, 2006; Ashley & Ntshona, 2003; Ntshona & Lahiff, 2003), have corroborated Spenceley's findings and have highlighted the benefit of skills training and increased access through NGO participation. In this regard, Bulungula Lodge is an ideal site for further investigation of these findings due to its increased developmental role through the establishment of a NGO in the area in order to contribute towards developmental priorities identified by the Lodge in consultation with the community. Since the success of local economic development as promoted by ecotourism principles rests largely on local vendor

success (Epler Wood, 2002), the access of local entrepreneurs to skills training and a market is of utmost importance if this type of tourism is to succeed in reducing poverty and indeed, work towards its eradication.

Based on a study conducted by Rogerson (2005) about the Wild Coast tourism industry, in which 104 entrepreneurs involved in SMMEs were interviewed, it was found that the industry is survivalist at best, with minimal government intervention and limited access to markets and business information by entrepreneurs. The study furthermore found that 85% of entrepreneurs had no previous experience in tourism prior to commencing business, 96% did not have any formal tourism training, and 53% were unemployed before starting their businesses.

Almost half of the respondents did not have a qualification beyond primary school, and one-third had completed matric. None of the respondents had received any funding from government and the majority had received donations from family and friends for seed capital. The major financial need, which Rogerson suggested indicated the survivalist nature of the industry, was to provide for basic needs instead of business development. This points to the fact that tourism among informal entrepreneurs was at subsistence level (Rogerson, 2004).

Nqileni, the village which serves as a case study for this research, is situated on the Eastern Cape's Wild Coast between Cweba and Coffee Bay. This stretch of coastline is bordered by the Indian Ocean and boasts a myriad of unique and diverse marine life. The climate is moderate to subtropical, with summer rainfall and slight humidity, becoming wetter further north towards Kwa-Zulu Natal. It is characterized by vast open tracts of land, interspersed by sporadic forest areas. The land is used mainly for subsistence farming and for livestock grazing.

According to a study conducted in 2007 by the Bulungula Incubator, the NGO based in Nqileni village, the population totalled 756 people, with 101 households, and a mean household size of 7.5 individuals. There were 392 females and 364 males, with children between the ages of 5 and 14 numbering 230 and youth aged 15 to 20 years numbered at 107. The survey indicated that 57% of the population were less than 21 years of age (Cloete & Poswell, 2007).

Most of the adult working aged population are unemployed in Nqileni and at the time of the survey in 2007, approximately 120 people were employed. Of those employed, 52 individuals worked in Gauteng in the mining sector, and a further 10 people worked away in the Western Cape in the farming sector. 38 people worked at the Bulungula Lodge or affiliated businesses, a further 16 worked in other parts of the Eastern Cape and the remaining 6 did not list the details of their employment. In 2007 there were only 5 high school graduates in the entire village, and the Bulungula Incubator survey estimated that of the 337 children in the village less than 20 years old, only 45 were attending school between grades 7 to 12.

Land tenure is communal, with a community trust, headed by the local chief, being responsible for administration of the land. The Communal Land Rights Act (CLRA), which was passed in 2004, accords traditional leaders significant rights to allocate and administrate land on behalf of vaguely defined 'communities' (Lahiff, 2009). Hall writes that according to the Communal Land Rights Act, land administration committees are to administer the land democratically, according to 'community rules' which, when registered, convert the community into a single juristic person. However, there have been reports that traditional councils have been established according to the Traditional Leadership and Governance Framework Act 41 of 2003, which allows for 60% unelected tribal authorities and their representatives who often assume the role of the community land administration committees (Hall, 2009).

Although this does not guarantee unfair administration of land, it lends itself to gross abuses by tribal authorities and works against democratisation of land reform, potentially leaving poor community members even more powerless.

The governance structure in Nqileni is tribal, with a single chief, No-Ofisi Gwebindlala presiding over a large area including the village with two sub-headmen who report to her. The Nqileni Community Trust was created to represent land and commercial interests in the community, and this body is made up of ten elected community members. Key decisions are referred to the Trust, such as who will be employed and what type of additional projects will be undertaken (McKenzie, 2008), although at the time of the fieldwork for this research the role of the Trust had diminished considerably.

2.6 Tourism and classical economic development theories

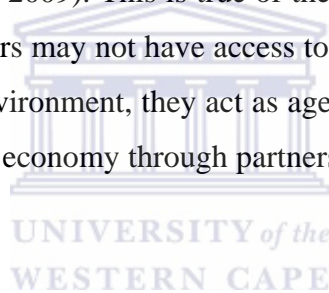
Tourism development followed very closely along the lines of economic development theories. In the 1950s and early 1960s, modernisation theory was most popular, and served as a macroeconomic blueprint for advancement among underdeveloped countries in order to mimic similar growth paths to developed nations (Rowe, 2009). This was positivistic in nature and followed a social evolutionist logic, most popularly demonstrated in Rostow's five stages of growth, which mapped the path from a traditional to a mass consumption society (Mallick, 2005; Graaf, 2004; Rostow, 1960). Tourism development followed a similar path, with destinations being packaged and consumed en masse. The modernisation era, much like Jafari's (2004) 'advocacy' platform, was unreservedly pro-tourism. Increased foreign exchange earnings became a major focus, and as such, developing nations opted for mass tourism development in order to increase overall economic growth. There are a number of cases such as Kenya and some Caribbean countries, in which tourism has surpassed primary sector exports in terms of its earnings which has further proved to encourage tourism development in much of the Third World (Dieke, 2000).

Although this theory has been identified as obsolete, it still seems to be the preferred growth path by the South African Government. While strides have been made at national levels to provide a policy environment for social change in less developed areas of the country, major tourist attractors such as the Kruger National Park and Table Mountain have still been pushed abroad as the main reasons to visit South Africa (Rogerson & Visser, 2004). Furthermore, since the tourism strategy is focused on investment in nodes of consumption, remote rural areas once again will not benefit from infrastructure development reinforces agglomeration within the tourism industry, which benefits marginal communities little, if at all.

In the mid-to-late 1960s, the spread of the reactionary, dependency theory, which was consistent with Jafari's (2004) 'cautionary' platform, which saw many authors hold cynical attitudes about the actual benefits of tourism (Williams & Shaw, 1998; Marsh, 1975; Bryden, 1973). Certain authors have argued that tourism has become something of a neo-colonial force, which enforces interdependence between nations, core and periphery (developed and less developed countries) and which could hold detrimental consequences for peripheral nations. (Mowforth & Munt, 2009; Prosser, 1994; Opperman, 1993). An example used was that of the virtual collapse in the Gambian economy in 1994, following a *coup d'état*, led many European countries, with the endorsement of the UK government, to advised their

residents to boycott Gambia as a holiday destination, bringing the economy to a virtual halt (Mowforth & Munt, 2009). This also highlights the unequal development of globalization in favour of the West.

The world systems theory, which follows a similar line of thinking to dependency, further postulates that although there are core and periphery countries, there are also semi-peripheral countries, which are relatively more developed than peripheral countries, but not as developed as developed countries and that as core countries benefit from semi-peripheral countries, so they too benefit from peripheral countries in order to further the agenda of the accumulation of capital. Tourism, both mass tourism as well as new forms of tourism such as nature-based tourism and ecotourism are all seen as a continuation of capitalism by continuing to draw once remote communities into tourism activities, commodifying culture and nature for the consumption of the historically affluent and the growing Third World middle class (Mowforth & Munt, 2009). This is true of the case study area, however, despite that fact that individual local actors may not have access to channels which might allow them to change the macroeconomic environment, they act as agents of change within their specific contexts, by stimulating the local economy through partnerships with local NGOs and private sector companies.



2.7 Humanistic development

Although the classical theories tried to explain why the phenomena of development and underdevelopment exist, they fell short due to an insular focus on economics as the causes of development and underdevelopment. Modernisation focused on the reasons why traditional societies should mechanise and become more like the West, and Dependency (meaning the Dependency Theory) postulated that underdevelopment was caused solely by colonialism and an exploitative relationship between core and periphery.

The humanistic approach, which undergirds the present study of Bulungula Lodge in the Nqileni community, as a catalyst for local economic development, is more holistic and takes into consideration other factors affecting individuals, communities, and ultimately nations. The work of Paulo Freire (1970) was significant in the development of the humanistic paradigm as his work challenged the hierarchical approach and instead recommended a more grassroots-based approach whereby communities were seen as being able to determine their

own development priorities, give input into potential projects and, through participatory processes, implement and reflect on those projects (Dinbabo, 2003; Hope & Timmel, 1984). Freire's views were based on Marxist conflict theory which was emancipatory in nature and steered clear of creating class divisions, but rather sought to realise equality among community development workers and community members (Hope & Timmel, 1984). The humanistic approach works on the basis of egalitarianism and the ability of those traditionally seen as 'beneficiaries' to become collaborators and synergists who work alongside community development practitioners to develop their own development priorities.

The way in which this applies to ecotourism in general and this study in particular, is that it assumes the right of locals to be a part of the tourism activities and make contributions and decisions towards and about the way in which the enterprise is operated. The Bulungula Lodge has as one of its founding principles, the ethos of community participation and empowerment, and this study seeks to investigate whether the enterprise indeed implements the principles it espouses.

2.8 The Sustainable Livelihoods approach

The sustainable livelihoods paradigm, which, although developed in the 1980s, was not widely recognised until the late 1990s, and was subsequently adopted by the United Kingdom's Department for International Development (DFID), the United Nations Development Programme (UNDP) as well as a number of NGOs (Ellis & Biggs, 2001). As the name suggests, the approach is a broad concept of how to intervene in order to promote poverty alleviation, which is based in part on Sen's capabilities approach, which emanates from the humanistic paradigm. The Sustainable Livelihoods Framework (SLF), which will be discussed below, is a tool to operationalise inquiry into livelihoods.

2.8.1 Sustainable Livelihoods Framework

This framework represents in a user-friendly format, the relationships between various factors affecting rural livelihood strategies (Scoones, 1998). Based on this framework, poverty and development, and the success or failure of LED through tourism, are seen as two sides of the same coin. (United Kingdom Department for International Development, 1999; Carney, 1999).

The framework assists in analysing the causal relationships between various factors which influence the livelihood strategies and outcomes of various groups of people, in this case the Bulungula Lodge employees, owner, the Bulungula Incubator (NGO) employees and project participants. According to Scoones (1998), the framework can be applied at various levels of the social scale, from individuals and households, to as large a sample as a region or nation.

The framework in Figure 2.1 illustrates that development does not occur in a linear fashion and there is no prescribed starting point from which to engage in the analysis of livelihood systems. According to the United Kingdom Department for International Development (DFID), there is most likely a direct relationship between “*organisational structures and the vulnerability context*”, as well as the “*livelihoods outcomes and assets*” (United Kingdom Department for International Development, 1999: 2). The various elements will be explained in the following section, followed by its application to the Bulungula Lodge in Nqileni. The framework contains a category that highlights the contexts which exist in the specific study area, along with its history, climate, demography and political contexts. These affect every aspect of the life of communities, shape their world views, and mould their ability to pursue livelihood options, based on their availability.

Institutions, according to Scoones (1998: 5), are “regularised practices structured by rules and norms of society which have persistent and widespread use...they are the social cement which links stakeholders to access to capital of different kinds to the means of exercising power, and so define the gateways which they pass on the route to positive or negative livelihood adaptation”. It is important to gain an understanding of institutional processes in order to understand what type of interventions to develop so as to alleviate poverty and promote successful community development initiatives. It is also important in order to show which processes motivate sustainability.

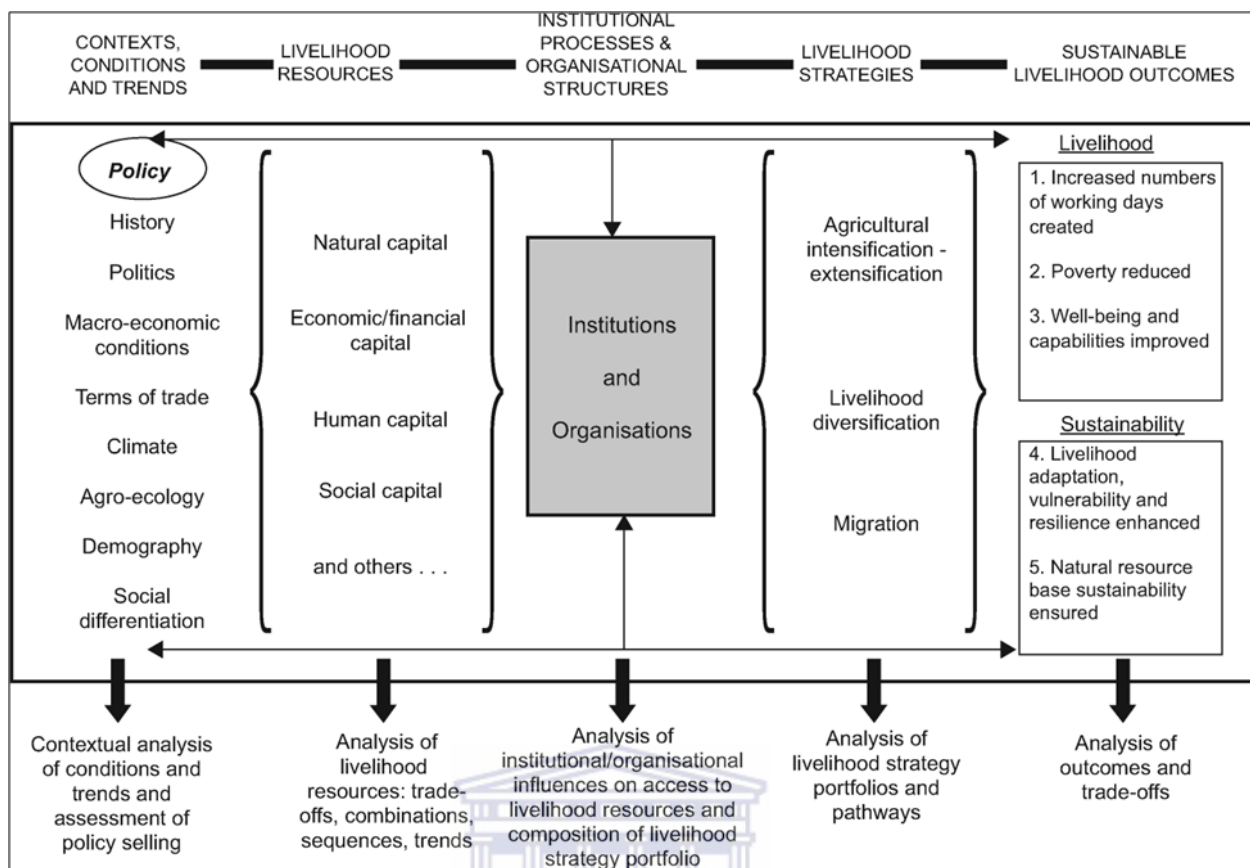


Figure 2.1: The Sustainable Livelihoods Framework (Scoones, 1998: 3)

2.8.2 Livelihood Resources

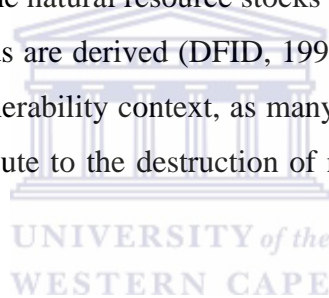
According to the DFID Sustainable Livelihoods Framework, there are five key resources upon which livelihoods are built, as opposed to the four outlined by Scoones (1998). These assets are referred to as capital, but not in the economic sense, where assets are a product of investment which yields a flow of benefits over time (United Kingdom Department for International Development, 1999). Capital here refers to both the physical stores of capital as well as networks and relationships between people and access to certain types of capital which either hinder or encourage growth of a livelihood.

Human capital can be described as the knowledge, skills and ability to labour or command labour. It also includes health and education levels as well as leadership potential. Arguably this is the most important type of capital, since if it is low it can severely impair the utilisation of the other forms of capital and thus affect the livelihood objectives or outcomes negatively (United Kingdom Department for International Development, 1999; Scoones, 1998).

Social capital comprises the relationships people have with one another. This can be in the form of social networks, both horizontal and vertical networks. Kinship ties and relationships of trust are also seen as social capital. There are many ways in which the poor survive through reliance on these social networks. According to the DFID, social capital is most closely linked to the institutions and structures with which it has a two way relationship, and can be mutually reinforcing (DFID, 1999).

Physical capital is the basic infrastructure and producer goods necessary to support sustainable livelihoods. The most essential of these are affordable transport, secure shelter and buildings, an adequate water supply, clean and affordable energy and access to information (DFID, 1999).

Natural capital is the sum of all the natural resource stocks from which natural resource flows and services useful for livelihoods are derived (DFID, 1999; Scoones, 1998). Natural capital is very closely related to the vulnerability context, as many shocks that devastate livelihoods are natural processes that contribute to the destruction of natural capital. Examples of these would be droughts or floods.



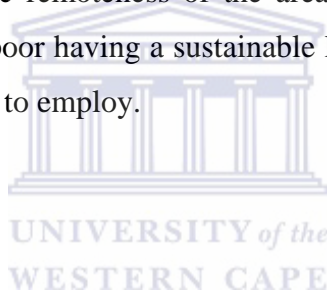
Financial capital is cash or its equivalent in the form of credit, savings and other economic assets. People use these in order to adopt different livelihood strategies (DFID, 1999; Scoones, 1998). According to DFID, financial capital can be divided into two categories, namely available stocks and regular inflows of money (DFID, 1999). The former can take the form of savings, which is preferable because it implies a sense of self-reliance, as opposed to credit, but can also take the form of liquid assets such as livestock and jewellery. If credit is available to people it could also be seen as available stocks, which could be used to undertake various types of livelihood strategies (DFID, 1999).

In the last-mentioned category, ‘regular inflows of money’ refers to any money coming in on a regular basis such as an old aged pension, a child support grant, disability grant or remittances sent to rural areas from those who have migrated to urban areas in search of employment. Financial capital is probably the most versatile of the livelihood assets in that it can be traded for tangible goods as well as connections within institutions and organisations. This is also the asset that is most scarce to the poor and it is for this very reason that the other types of capital are so important to them in order to create sustainable livelihoods (DFID,

1999).

These assets are very rarely distributed evenly among individuals and communities, with a number of factors placing restraints on their ability to gain access to some of these capitals. An example of this could be gender bias, where in traditional situations, women do not have the right to inherit tribal lands. In certain traditional settings, this is true for women, which could hinder women from having control over their own development and livelihoods. According to Hoon, *et al.*, 1997), legislation on land reform policy would have a positive impact on women who have been historically discriminated against. This is not as simple as it may seem because often the chieftain system is stronger than the legal system.

Another possible constraint could be lack of access to social capital or being born into a particular tribe or caste. People living in remote rural areas may also not have access to the most basic of services due to the remoteness of the area in which they live. All of these constraints work contrary to the poor having a sustainable livelihood and limit the number of livelihood strategies they are able to employ.



2.8.3 Livelihoods strategies

Livelihood strategies are the activities employed by individuals or households in order to make a living. These are often combinations of activities which Scoones (1998) describes as livelihood portfolios. Some portfolios may be focused on one particular type of activity or diverse types of activities. Livelihood strategies are often flexible and based on extraneous variables which are out of the control of individuals or groups living in rural areas. . The livelihood strategies employed by individuals or households either make them vulnerable or sustain them through changing seasons. Depending on the livelihood assets available to individuals and communities, they will be dependent on different resources for their livelihoods.

In the present study, this category is the most important as it is the livelihood strategies that affect what type of livelihood outcomes will be achieved. The author will provide an analysis of the field research in order to identify the perceptions of local stakeholders about the impact of the Bulungula Lodge on their livelihood strategies and thus their livelihood outcomes.

2.8.4 Livelihood outcomes

These are the outputs which people strive towards when employing certain livelihood strategies. The SLA stresses the importance of taking these goals seriously. Livelihood outcomes are tightly bound up with livelihood assets, as access to the latter is directly linked to the achievement of the former. The present study is focused on determining, based on the perceptions of various stakeholders in Nqileni, to what extent the Bulungula Lodge is helping the community to attain sustainable livelihood outcome. Scoones (1998) outlines a number of livelihood outcomes as follows:

- Creation of working days: There are three components to this category, namely employment that offers monetary reward or income; secondly, employment that leads to the creation of consumable goods, and thirdly, recognition that is received from being engaged in a worthwhile activity (Scoones, 1998). The accepted minimum number of working days for a sustainable livelihood is 200 days, according to Lipton (1977).
- Poverty reduction: Since poverty is multi-faceted in nature, the way in which it is assessed would depend on the study and research design. Income and consumption levels can be measured, or more subjective assessments, like participant perception can be measured. In this study, poverty and poverty reduction is based on participant-defined measures, with questions relating to number of livestock and small scale farming practiced, and education of children in the household.
- Well-being and capabilities: These are broad categories, which include factors such as power, happiness, security and a range of other measures. These concepts are based on the work of Chambers and Sen, and focus on the sum of all the livelihood resources as well as the individual's mind-set and sense of self (Scoones, 1998).
- Livelihood adaptation, vulnerability and enhanced resilience: According to Davies (1996, cited in Scoones, 1998), resilience to shocks is essential to coping, and thus to attainment of sustainable livelihood outcomes. The more secure the livelihood resources and supportive the organisations and institutions, the more likely livelihood adaptation will be.
- Natural resource-base sustainability: Since many people in rural areas all over the world often rely fairly heavily on natural resources such as wood for cooking, or fish and other marine animals for food, the natural environment runs the risk of being

degraded. The aim of creating natural resource-base sustainability is to maintain the integrity of the natural environment. Measuring this indicator is difficult and is linked to the measurement of various other natural resources to establish whether or not a resource is being depleted faster than it is able to renew itself (Scoones, 1998). In this study, natural resource-base sustainability was not measured, but findings from reports written about the Bulungula Lodge were used to supplement the findings of the data collection undertaken in this study.

2.8.5 The Sustainable Livelihoods Framework's use in poverty eradication

Poor people's ability to be active decision-makers is highlighted by this approach. Apart from being a respectful way in which to engage with the poor (as opposed to the top-down approach espoused by the orthodox Modernization theory), this is an important step to planning strategies which build on the strengths of those living in poverty, rather than their needs. It is also dynamic as people's strengths change over time and so their livelihood strategies would adapt to changes in their personal lives or their external circumstances.

The framework focuses on power dynamics within decision-making structures and is gender sensitive, which could prove invaluable in formulating non-biased policies which would ultimately have an effect on the general population (Singh & Gilman, 1999). The framework is compatible with ecotourism and pro-poor tourism as it seeks to maintain natural resource-base sustainability as well as producing net benefits to the poor that will provide the tools for them to empower themselves and eventually eradicate poverty. At face value the Bulungula Lodge seems to have all the necessary components to be able to reduce poverty and promote an environment where community members are able to cultivate meaningful and sustainable livelihood diversification strategies. However, to establish whether it actually has made a meaningful contribution to the community, would require further investigation.

2.9 Summary

This chapter focused on the development of the tourism industry as a sustainable development concept and the parallel economic development theories that led to the adoption of the theoretical basis for this study, which is the Pro-Poor Tourism (PPT) approach and the Sustainable Livelihoods Approach (SLF). The major themes in the discourse around tourism

development were that tourism advanced much along the same lines as social and economic development theory, moving from a place that was unreservedly pro-tourism, without being sensitive to host culture or environments; this stage was followed by one of intense scepticism about the benefits of tourism accrued to the host communities.

After this stage, one of new theories and alternative tourism practices arose, with niche markets such as ecotourism coming to the fore; followed by a collective realisation that these alternative forms of tourism could not compensate for the negative effects of mass tourism by applying them in any situation, but that each situation should be assessed to determine what the best course of action should be for that particular situation. The SLF was discussed, along with its elements and its application to poverty eradication, and its suitability for use in ecotourism projects.



CHAPTER 3: RESEARCH DESIGN AND METHODOLOGY

3.1 Introduction

This chapter focuses on the research design and methodology used for the present study. It begins by providing an outline of the ontological and epistemological origins and characteristics of the qualitative design, followed by a description of the case study methodology. The researcher goes on to describe and motivate the use of the data collection instruments used, particularly the secondary analysis, simple observation and semi-structured interviews.

The non-probability sampling which relates to this study is described with specific reference

to its suitability to qualitative research, and in particular to this study. The description and motivation for the purposive and snowball sampling used in the study is discussed, followed by the data processing and analysis methods. The chapter concludes with a discussion of possible limitations of the study.

3.2 The Qualitative research design

There are three distinct dimensions to each research paradigm that guides the researcher's reflection on the study and defines the nature of the enquiry. According to Terre Blanche & Durrheim (1999), *ontology* stipulates the nature of the reality that is to be investigated, *epistemology* specifies the nature of the relationship between the researcher and what he/she believes can be known, and finally, *methodology*, which describes the way in which the researcher will go about collecting information about what he/she believes can be known about the phenomenon. The research design used for this study is the qualitative paradigm, which is part of the phenomenological or interpretive meta-theory. Interpretive social science finds its origins with sociologist Max Weber, who embraced philosopher Wilhelm Dilthey's explanation of *verstehen*, which meant the empathetic understanding of the everyday lives of those being observed (Neuman, 1997).

The interpretive paradigm maintains that social interactions do not hold intrinsic meaning, but that meaning is derived through the subjective interpretation by the actors themselves. The researcher, assuming that no one is completely objective, assumes the role of intersubjective observer, assuming an interactional role and qualitative methodology to study a phenomenon (Giddens, 2006; Terre Blanche & Durrheim, 1999). Interpretive social science is associated with symbolic interactionism, which places emphasis on micro-scale social interaction (Mead, 1934, cited in Giddens, 2006) and in social science is often seen as synonymous with a qualitative method of research. It is seen as standing in contrast to positivism, which sees social interactions as scientifically observable phenomena, similar to the natural sciences, and therefore employs similar, quantitative research methods such as control groups and sample surveys, in which masses of data are gathered in order to make generalisations about a phenomenon across a vast number of research participants (Terre Blanche & Durrheim, 1999; Neuman, 1997).

Qualitative research methods do not seek to establish standardisation for phenomena being

investigated, but rather they seek to provide accurate interpretations of what is being researched through triangulation, which is the comparison of a single finding, using a number of different sources, in order to create valid results. Although qualitative research can provide the basis for further quantitative research, it could be sufficient on its own to provide data relating to a particular context or case.

Qualitative methods assume that meaning is derived only when seen in context and that by separating a phenomenon from the context within which it is embedded, this diminishes the quality of the findings. Some advantages of using qualitative methods, based on sustainable livelihoods research conducted by the United Kingdom Department for International Development (United Kingdom Department for International Development, 1999), are that they can be carried out rapidly and at a relatively low cost, that they are more participatory, that they can be used to explain causes of quantitative findings, and that they provide rich detail which is often lacking in quantitative methods, due to their focus on numerical data (United Kingdom Department for International Development, 1999; Strauss & Corbin, 1990). On the other hand, the disadvantages of qualitative research methods are that they are susceptible to bias, due to their reliance on interpretation, they can be very time and labour intensive, and they may not be suitable for inferring population characteristics due to small sample sizes (United Kingdom Department for International Development, 1999).

Quantitative and qualitative research methods were once seen as opposing one another, but in recent years it has become increasingly clear that they in fact complement each other, and as such provide generalizable data across participant groups, as well providing first-hand accounts of phenomena and so create a more complete picture of an observable phenomenon. The field research conducted for this study is qualitative. In addition the researcher uses existing statistical and research data, and compares this with qualitative data from field research. In the following section the methods used for this study will be discussed, outlining their suitability for the study and the interpretive paradigm, as well as the research context.

3.3 The case study approach

Unlike quantitative research, where information is sought from a large number of participants, qualitative researchers often follow a case study approach, whereby a large amount of information is gathered, using various methods, across a small number of

participants (Neuman, 1997). Based on the work of a number of authors regarding the definitions of the case study, it can be summarised as being the study of a single unit (household, event, and organization) which is contemporary, and is studied within its context (Yin, 1994; Miles & Huberman, 1994). The case study researcher immerses him or herself into the context of their case, and engages in analysis as part of the data collection process, allowing the researcher to be intimately involved in the case in a holistic way (Neuman, 1997). Critics argue that case study research is not scientific due to its subjectivity and failure to generate generalisable data, as well as the bias of the researchers, due to their intense immersion in the case (Kohlbacher, 2006; Tellis, 1997), but these authors both go on to add that this subjectivity can be avoided by using mixed methods of data collection and through triangulation.

The reasons for choosing the Bulungula Lodge as a case study were its ethos to work towards poverty eradication and boosting the local economy through job creation and skills development, and due to its proximity to one of the poorest villages in the region. Furthermore, unlike many other businesses, it established an NGO dedicated to community development, which has created over 100 jobs in the village and surrounding areas in just over two years, between 2009 and 2011.

The various methods of data collection which are associated most commonly with the case study approach are secondary analysis of documents related to the case, archival records, direct observation, participant observation and interviews. The following section contains the justification and description of the specific data collection methods, namely secondary analysis, direct observation and semi-structured interviews used for this study.

3.4 Data collection

3.4.1 Secondary data analysis

Initially a literature review was conducted, locating the major discourse around development theories, rural development, pro-poor tourism and ecotourism, and sustainable livelihoods, within which to embed the study theoretically, as well as to provide relevant information regarding trends and developments in the field. Information was sourced from books, journals, newspaper clippings, blogs and online videos. One of the difficulties of the study

was that there was not much written material available on the Bulungula Lodge, but through interviews with various stakeholders, triangulation was made possible in order to verify data.

A thorough internet search was done, comprising a number of blogs relating to the lodge and previous guests' experiences, as well as online newspaper articles written by independent newspapers and opinion pieces written by lodge staff. Bulungula Incubator (the NGO started by Bulungula Lodge) staff were also interviewed. Furthermore, Bulungula Incubator reports and internet sources related to the work done by the Bulungula Incubator, were examined.

3.4.2 Direct observation

Data collected by an external observer, using a number of different means such as video recording, photography and note-taking about observations, for later analysis, is usually referred to as direct observation. The researcher took pictures of a number of different aspects of the Bulungula Lodge and its operation, the Bulungula Incubator and the facilities, and infrastructure in the community. The researcher made observations during household visits and meetings held by the community in order to gauge the relationship dynamics between community members as well as power relations within the community. Since the researcher was an outsider and since she did not speak isiXhosa, when interacting with locals outside of formal interviews, it was difficult a challenge to communicate, and often hand gestures were used to convey intentions and explanations.

3.4.3 Semi-structured interviews

This type of interviewing is useful for gathering sensitive information regarding a particular case. An interview guide is prepared beforehand, with a broad range of topics, in order to probe the research issue in detail and from different perspectives (Babbie & Mouton, 2001). Instead of asking specific pre-determined questions, the researcher allows the respondent to answer open-ended questions at length, with few interruptions. This type of data collection allows for rich detail regarding a specific case. In the present study, semi-structured individual interviews were held with 53 respondents, divided into 5 groups (Table 3.1).

The first group comprised 13 Bulungula Lodge employees, the second included eight entrepreneurs who are involved in the community-owned businesses that were started by the

Bulungula Lodge. The third group comprised seven employees at the Bulungula Incubator – an NGO which was started by the Bulungula Lodge, five Bulungula Incubator project participants, and finally the 18 community members who were not part of any projects, run either by the Bulungula Lodge or the Bulungula Incubator, but were part of the decision-making process to appropriate the profits from the Bulungula Lodge for community benefit.

The questions asked were related to the research topic, but were adapted based on the relationship of the respondent to the Bulungula Lodge or any projects or programmes run either by the Bulungula Lodge or the Bulungula Incubator. All of the interviews were done face-to-face using an interpreter who resides in the Nqileni. Additional follow-up questions were directed electronically to the relevant individuals for answering, and one was conducted telephonically. The interviews (see Appendix 1 for interview questions) that were conducted face-to-face were recorded using a tape recorder. Interviews in the field took place in June 2011 and the follow-up questions via email took place between August and October 2011.

Table 3.1: List of interview respondents

Number of respondents	Relevance to the study
18	Community members, namely: <ul style="list-style-type: none"> • herbalist • sangoma • shebeen owner • brick maker • general community members
13	Bulungula Lodge employees, comprising: <ul style="list-style-type: none"> • owner • 2x managers • 2x watchmen • 8x general staff (kitchen & cleaning staff)
7	Bulungula Incubator employees, comprising: <ul style="list-style-type: none"> • director • education programme manager • essential oils project manager • sustainable livelihoods enterprise manager • community work programme manager • home based care project manager • volunteer
8	Entrepreneurs, namely: <ul style="list-style-type: none"> • horse riding guide

	<ul style="list-style-type: none"> • village tour guide • restaurant owner/ manager • herbalist tour guide • women power tour guide • 2x farmers • 1x fisher
6	<p>Bulungula Incubator project participants, namely:</p> <ul style="list-style-type: none"> • 4x lemongrass farmers • 1x homestay owner • 1x sewing participant

3.5 Sampling technique

The type of sampling used for this study is non-probability sampling, which is most often used for qualitative studies. Survey research routinely makes use of probability sampling, as the latter relies heavily on statistics and the randomness of respondents, whereas non-probability sampling uses methods that are case specific and related to the research objectives. Non-probability sampling is used in cases where probability sampling would be difficult and undesirable even if it were possible (Babbie & Mouton, 2001).

The present study is such a case, as the layout of the village is not like an average planned town, with streets and houses in neat linear rows. The houses dot hilltops and lie low in valleys, and are comprised of numerous huts within a homestead, that varies from family to family. Many of the male villagers work away in mines and farms. The sampling for this study does not aim to be representative of the community as a whole, but rather seeks to obtain research participants who are linked to the Bulungula Lodge through employment or kin, or benefit from one of the community development projects being run in the village. The two types of sampling techniques used, purposive sampling and snowball sampling, will be discussed in detail below.

3.5.1 Purposive sampling

Purposive or judgemental sampling as it is otherwise known, is an appropriate strategy for specific situations where it might be suitable for the researcher to choose a sample based on his/her knowledge of the area and population, as well as being in line with the research topic or question (Babbie & Mouton, 2001; Neuman, 1997). According to Neuman (1997),

purposive sampling rests on the judgement of an expert in the selection of cases, or the cases are selected with a particular purpose in mind, hence the name. This type of sampling technique usually accompanies field research and exploratory research. As a result, the researcher cannot claim that the sample selected is representative of the entire population, but rather uses this sampling method to choose individuals who are part of the economically active age within the village, or who are in some way related to the Bulungula Lodge or related businesses.

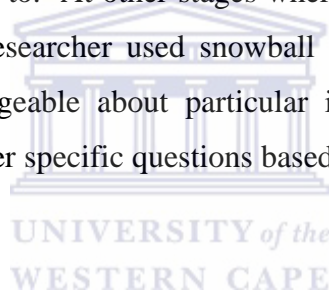
Neuman adds that purposive sampling is usually used when a researcher feels that a case will be particularly informative, such as a professional who could shed light on a particular issue that they are best positioned to give input into. Secondly, purposive sampling can be used when certain members of a community are hard to reach, and thirdly, when the researcher wants to identify particular types of cases for closer investigation (Babbie & Mouton; 2001; Silverman, 1993).

The researcher decided to use purposive sampling because the various interest groups within the community, as determined by the study, held particular knowledge about the Bulungula Lodge and related businesses and projects, based on their proximity to the Lodge and the issues being discussed. An example of this is the Bulungula staff members. The majority of the staff at the Lodge have been working there since the Lodge started in 2004. This means that they are in a perfect position to be able to comment on the way in which the lodge has made a difference to their livelihood strategies and outcomes. The business entrepreneurs and Bulungula Incubator project participants were selected in order to gain information about their businesses as projects started by the Lodge and Incubator, and the sustainability of those businesses, based on the training and support given by the Lodge. The Bulungula Incubator employees group, although not many locals are at management level, would be able to shed light on the development issues faced by the organisation, and offer a comprehensive list of services offered and challenges in providing those services. Furthermore, the community members not formally affiliated to the Lodge or the NGO could shed light on how much the entire community is actually consulted regarding the profits of the Lodge, and how they felt about the Lodge's developmental impacts in the village.

3.5.2 Snowball sampling

Snowball sampling, also known as chain referral sampling or reputational sampling, was used to complement the purposive sampling. This type of sampling can be described as sampling which seeks to gain information from interrelated networks and individuals (Neuman, 1997). According to Neuman, the most important characteristic is that each individual unit is linked to the next through a direct or indirect linkage. This does not mean that each of the units or people know one another intimately, but rather that, if a diagram was drawn to represent relationships, each of the units would be known to one or more of the other units within the diagram.

At any point during the field research, when an interviewee responded to one of the research questions in a way that no other respondents had previously, the researcher would ask him/her to elaborate and later ask whether there were others in the village who felt the same way. If he/she responded that this was indeed so, the researcher would take the opportunity to seek out the respondents referred to. At other stages where issues that might be pertinent to the study were identified, the researcher used snowball sampling in order to track down people who would be knowledgeable about particular issues, or who would fit certain characteristics to be able to answer specific questions based on their proximity to the issues at hand.



3.5.3 Quota sampling

This type of sampling is described as weak by a number of authors (Babbie & Mouton, 2001; Neuman, 1997), as it makes no attempt to avoid bias, and does not represent all characteristics of the sample accurately. Although weak, it is an improvement on haphazard sampling, which is based on convenience. The way in which this sampling type was implemented was that the researcher identified groups by gender and age, and proceeded to identify respondents in the community in order to get some randomly selected community members who were not involved in Bulungula Lodge or Incubator-related projects. The researcher took measures to prevent misrepresentation by doing one interview per household in order to avoid duplication of the same views.

3.6 Data processing and analysis

The data analysis method used in this study is referred to as *successive approximation*.

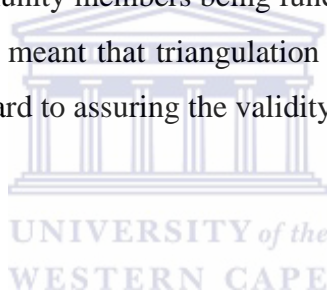
According to Neuman (1997), this method involves repeated iterations in a cyclical process that moves towards a final analysis of the material collected during field research. The researcher started off with vague ideas, and the data collected during field research. During this process the information was categorised and reviewed. The findings were sorted and coded. Themes were established and interpreted. The findings were compared to the categories established, and then the categories were adjusted to suit the data more accurately. The Sustainable Livelihoods framework was used to assist in the categorisation of data and to provide guidelines related to the indicators of sustainable livelihood outcomes. The tool is useful for analysing livelihoods and planning community development initiatives for poverty alleviation, as it shows the diversity in livelihood strategies and portfolios employed to create specific outcomes and illustrates in an integrated and holistic way, and the many different components which are involved in producing livelihood outcomes. It also draws attention to the importance of various types of capital, not only the importance of economic or financial capital. According to Krantz, (2001), this finding is in line with poverty assessments showing that poverty is much more than just insufficient income or food production. This allows for the use of multi-faceted solutions to poverty reduction, as diversification in livelihood strategies would provide multiple avenues for poverty alleviation. A second set of data was thus created. New questions that arose from this initial analysis process were used to formulate further questions, for which additional data collection was undertaken. The process was repeated, and as the process continued, theory and evidence mould into a more refined product. As the data is reflected upon it moves towards generalisations that reflect the evidence better.

3.7 Limitations of the study

The following limitations were experienced:

- Financial constraints: The field research took place in a different province, which made field research an exceptionally expensive task. The researcher travelled by plane and then drove for several hours in order to access the site.
- Timing: Due to the field research being conducted during the working week, some of the employed community members may have been overlooked, which may affect the results of the study.

- Language barrier: The language barrier posed a challenge for most of the interviews, because everyone in Nqileni speaks isiXhosa, and the researcher may have missed some of the nuances in the language. A local interpreter was hired for the duration of the field research in order to translate from English to isiXhosa and vice versa.
- Trust: Some of the respondents were reluctant to talk about certain issues. In addition, the interpreter was also the son of one of the two sub-headmen, as well as being related to a number of people who are linked to the Lodge. This fact may have prevented some respondents from opening up more fully
- Community meetings: It was unfortunately not possible to view attendance registers for community meetings, minutes for meetings or agreements between the Lodge and the community, due to a number of these events not having been recorded in writing. Most of the dealings between the Lodge and community are of a verbal nature, due to the vast majority of community members being functionally illiterate, and many being completely illiterate. This meant that triangulation was limited to reports, interviews and observations with regard to assuring the validity of the findings.



3.8 Summary

This chapter outlined details of the research design and the methodology employed. The researcher provided a description and rationale for using the qualitative design, and in particular the case study approach. The data collection methods were described, which included secondary data analysis, direct observations and semi-structured interviews, with a list of all the interview respondents. The sampling technique, non-probability sampling, was described and justified in terms of the study design, along with the sampling methods employed in the study. The sampling methods included purposive sampling, snowball sampling and quota sampling. A description of the data processing and analysis techniques was provided, namely successive approximation through a cyclical process of coding and analysing data, collecting new data and then repeating the process, after which final categories were established from which to draw conclusions. The chapter ends with a list of the limitations of the study and ethics statement.

CHAPTER 4: PRESENTATION AND DISCUSSION OF RESULTS

4.1 Introduction

The fundamental objective of this study is to evaluate the role of ecotourism as a catalyst for local economic development, based on the case of Bulungula Lodge in Nqileni village, in the Eastern Cape Province of South Africa. In order to do this, an investigation into the perceptions of various stakeholders was conducted in order to gauge to what extent they feel Bulungula Lodge has impacted on their livelihoods, focusing specifically on their livelihood strategies and outcomes. Since the Bulungula Lodge established a NGO in order to deal with a growing number of community development needs which were identified by the community, the Lodge has not been involved in any development work, but has delegated the role to the Bulungula Incubator. This study therefore encompasses the NGO as an extension of the Lodge (since, without the existence of the Lodge, the NGO would not exist either and the Lodge would have been engaged in more development projects) in order to assess the cumulative impact of the ecotourism initiative based on the aims as delineated in Chapter 1.

The following section is devoted to the presentation of the research findings based on the primary and secondary research conducted. The tools used for the analysis are based on the Sustainable Livelihoods Framework, specifically the livelihood strategy and outcomes indicators as described in Chapter 2, which outline the broad categories for measuring what a sustainable livelihood is. The following section will outline the characteristics of the sample chosen for interviews, followed by a description and summary of the main results. The main trends, anomalies and connections will be discussed and the chapter ends with a summary of the main findings.

4.2 Sample description and characteristics

The sample consisted of 53 respondents who permanently reside in Nqileni, are in the economically active age categories which spans the 15 to 69 year old cohort, and who are linked to the Bulungula Lodge in some way. There were 31 females, which made up 58% of the sample, and 22 males which made up 42%. Although the sample was not representative, the findings corroborated those of a survey done in 2007 which indicated that although females made up 52% of the population of Nqileni, they represented 58% of the population

that was based in the village on a permanent basis, since many males who are in the economically active portion of the population, migrate to urban centres, mines and farms for employment opportunities (Cloete & Poswell, 2007).

As Figure 4.1 illustrates, the 21-30 year old portion of the population made up the majority of the sample, many of whom work at the Bulungula Lodge as management staff, tour guides related to businesses created by the Lodge, and project managers working for the Bulungula Incubator. This is an encouraging phenomenon because this means that the Bulungula Lodge and Bulungula Incubator provide younger people with employment, which may help to prevent or at least reduce migration to urban centres in search of employment.

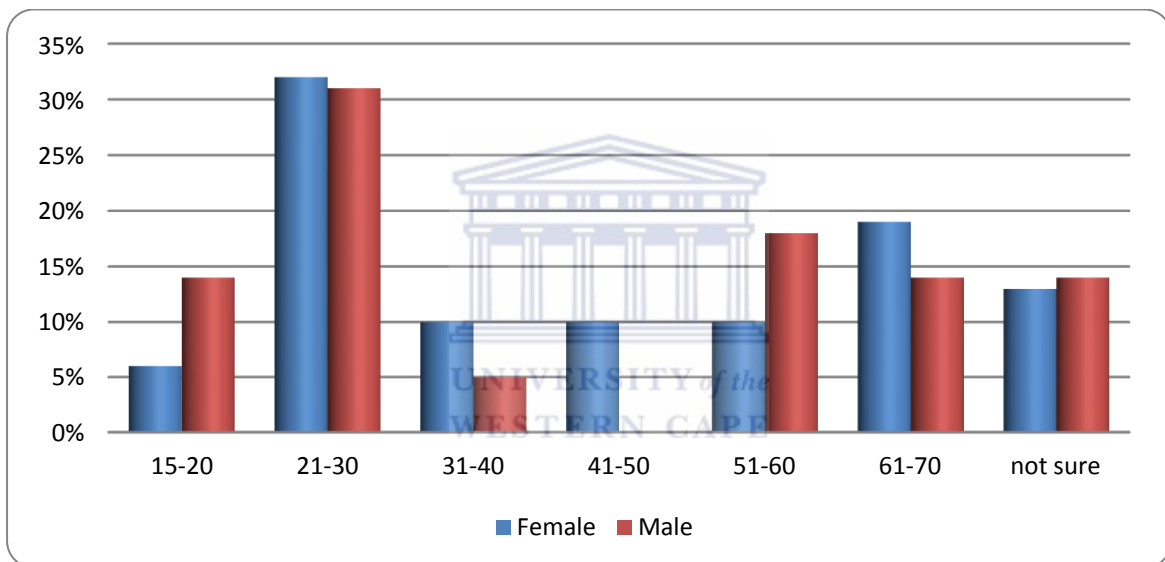


Figure 4.1: Gender Distribution by Age (Interview data: All respondents, Nqileni village, June, 2011)

The majority of respondents in this category are women, and since the Lodge employees are majority female, this is encouraging in a municipal district that sees female economic participation as marginal, and where the rate of unemployment is higher, at 82%, than that of men (Mbashe Integrated Development Plan, 2010). If the Bulungula Lodge and Incubator can continue this trend into the future it will mean that the local economy would increase to a size that would allow a new generation of economically active citizens to remain in the village to pursue careers which could have profound impacts on family structure and the sustainability of projects, if these projects are successful going forward. There seems to be a missing middle area in the age distribution, with few men in their thirties or forties. This

could point to the fact that not many men in that age group reside permanently in the village, due to the scarcity of livelihood options in the village. This could be attributed to the fact that many households have male heads that have migrated to work in mines. Although remittances from migrant labour can be seen as an extension of social capital, it can also hinder social capital in the sense that it has become normal to raise children without fathers in the village, which breaks down traditional family structures and leaves women and children more vulnerable.

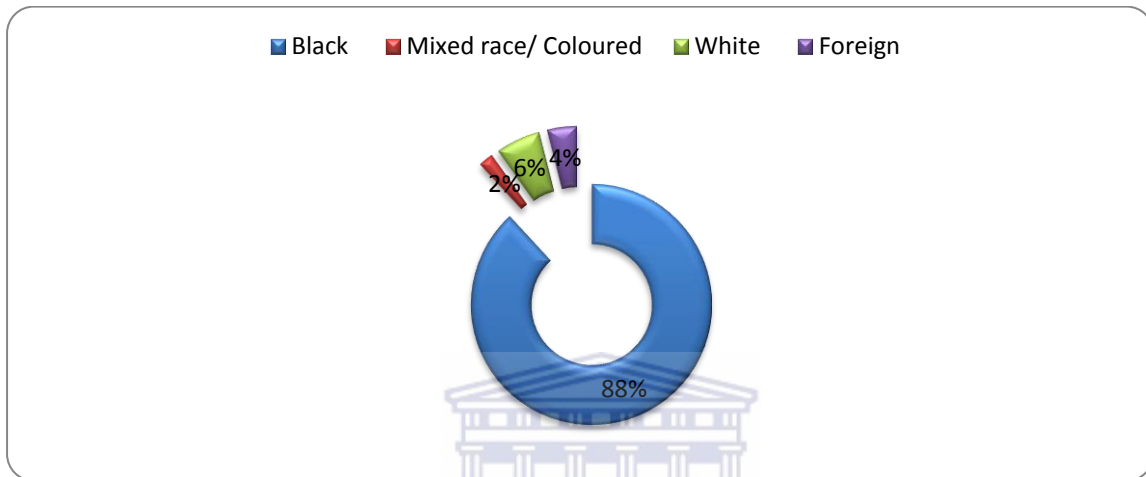


Figure 4.2: Population distribution by race (Interview data, Interview data: All respondents, Nqileni village, June, 2011)

The racial distribution of the sample, as illustrated in Figure 4.2, is consistent with figures released by Statistics SA which reveal that the dominant group in Nqileni is black South African, specifically people of Xhosa origin, who make up 89% of the total population in Nqileni. The remainder is made up of white South Africans (6%), South Africans of mixed race (2%), white foreign (2%) and black foreign (2%). The reason for the choice to disaggregate the group according to race, which was made by the researcher, was due to the fact that race was mentioned in numerous conversations with the owner of the Lodge and a number of NGO personnel, who acknowledged and discussed the continued skewed development that affected various black groupings within South Africa as compared to white groupings. Furthermore, there has been a correlation in most statistical analyses of the South African population for the past twenty years, between race and poverty, with black South Africans being the poorest. In the Stats SA Community Survey 2007, Mbashe district results showed that the black portion of the population was experiencing significantly higher levels of poverty than other race groups. This correlation was found among the sample as well, as the Xhosa portion, which comprised the vast majority, was significantly poorer, and had

lower levels of education than the people from other ethnic and racial groups in the sample. The urban bias for infrastructure investment and the fact that this area was formerly part of a Bantustan puts the area at a distinct disadvantage in almost every sector, which the current government has yet to rectify.

Figure 4.3 illustrates the income categories of the sample. The majority of the sample, a massive 73%, earn below R2000 a month. This is consistent with findings in the Mbashe Integrated Development Plan (Statistics South Africa, 2007, cited in Mbashe IDP, 2010), which indicated that most of the residents live below the poverty line in Nqileni, where the mean household population was 7.5 people in 2007 (Cloete & Poswell, 2007). It would mean that on average, the majority of the sample, assuming the mean average household size is accurate, would be living on an average of R266 per person per month. There are, however, a number of different livelihood portfolios which help to cushion residents against shocks.

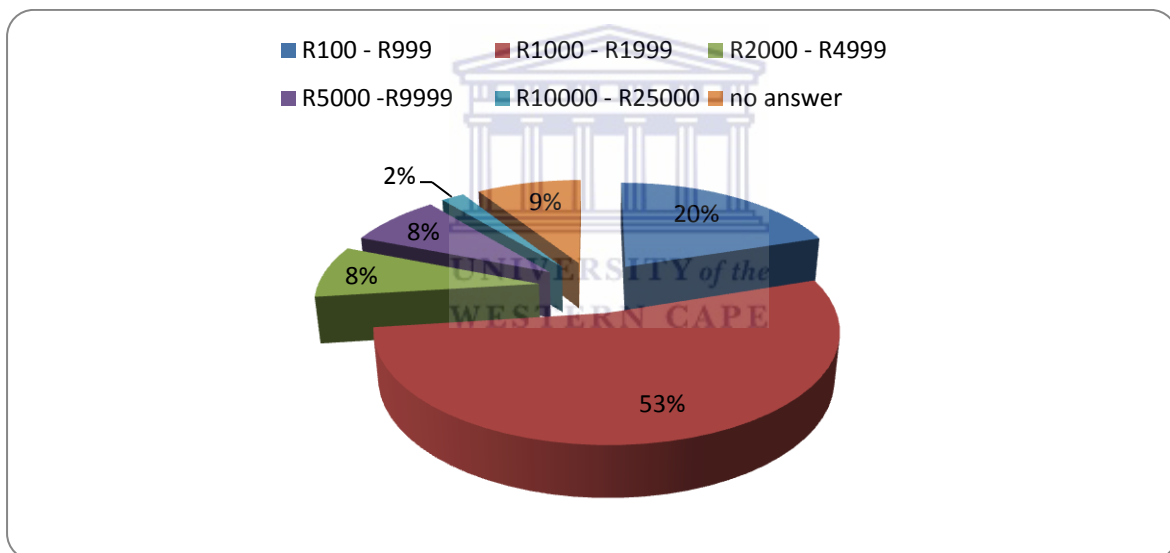


Figure 4.3: Income categories of the sample (Interview data: Bulungula Lodge owner, Bulungula Lodge manager, Bulungula Incubator employees, Nqileni village: June 2011)

The portion of the sample that earns over R2000 per month are in management roles, either at the Bulungula Lodge or at the NGO, with the highest income category representing a manager at the NGO. The higher income categories are directly linked to skills, which once again highlights the shortage of skills in this area. However, these income categories are related to income from tourism or NGO projects (identified in this study as a knock-on effect of tourism), and do not take into account the diverse livelihood portfolios of the sample population. Based on interviews conducted in the field, 72% of respondents were receiving

some sort of government grant in addition to their remuneration from the Lodge or related project. The Mbashe Municipality has been named the lowest formal economic performer in the Eastern Cape due to its residents' high dependency on grants (Mbashe IDP, 2010). In Nqileni, more than half of the population (57%) is under the age of 21, which makes grants all the more important to families with young children, and the elderly, who fall outside of the economically active age range (Cloete & Poswell, 2007).

In a survey conducted in 2007 (Coles, 2011), it was found that, apart from social grants, remittances from migrant labour was the only other major source of income in the village, other than the Bulungula Lodge and related businesses. Since the survey was conducted, the Bulungula Incubator started a number of projects which have become additional livelihood options for Nqileni residents, the details of which will be discussed later in the chapter. According to the survey (Coles, 2011), 46% of households reported having some of its members working away at mines in Gauteng and North West Province, and 18% reported having family members working at farms during harvesting season, mainly in the Western Cape. This shows a range of livelihood activities which lends itself to increased social capital.

4.3 Sustainable management of the Bulungula Lodge

This section describes the findings from the analysis of the operation of the Bulungula Lodge. Using the successive approximation technique as outlined in Chapter 3, the researcher synergised data from secondary analysis and field interviews in order to create categories that would represent the broad ideas which were common in the tools of analysis, as described in Chapter 2. As a result, the broad categories created were based on management principles which work towards the inclusion of the local community at every level of operation of the tourism initiative, and secondly, environmental sustainability, which is of paramount importance to the local economy of host communities due to the impact that such a development could have on the natural surroundings, which many rural communities rely on for livelihood resources. The following section is the presentation of the data analysis as described above.

4.3.1 Conservation

Conservation is particularly important, since sustainable natural resource management could

retain or improve the natural environment in areas where ecotourism takes place, if pursued correctly, or the environment could be destroyed, which would lead to not only the depletion of the natural resource base, but also the tourism industry in that area (Epler Wood, 2002). As indicated in Chapter 2, the conservation fields that were reviewed were based on building design and construction, conservation practices at the lodge, including energy and water management, and finally conservation education.

A number of steps were taken by the Bulungula Lodge to maintain environmental integrity and build natural resources by engaging in a number of rehabilitation projects. The site was identified as the premises for the enterprise because of the existing derelict structure. Based on a report by McKenzie (2008), the completion of the structure was subject to authorisation which required a scoping by the then Department of Environmental Affairs and Tourism, and a construction permit was issued. The construction of huts and ablution facilities employed the use of locally produced mud bricks, using cement plaster and thatch, as this maximized the utilisation of local expertise and limited the import of building materials (McKenzie, 2008). Local labour and skills were used, and the buildings were designed to fit in with the surrounding architectural style and form of the traditional Xhosa huts.

The area receives no municipal services such as piped water, refuse removal services or solid waste treatment, and as such, the Bulungula Lodge has initiated a number of projects in order to operate sustainably, such as the collection of water reserves during the rainy season in 30 000 litre tanks. The enterprise used to collect additional water from nearby rivers and springs, but has recently discovered an underground water source which has offered a steady supply of pure drinking water, negating the need for the collection of water from these auxiliary sources other than rain water. Kitchen waste is composted if organic, while paper and cardboard are burnt, plastic and other waste is taken to the municipal landfill in Mthatha. A basic biodegradable soap comprising mainly of phosphates is used for general cleaning, complemented with bleach for bathrooms. Compost toilets that do not require water are used, and a urine diversion system from the compost toilets is added to grey water from dishwashing, and used to make a nitrogen and phosphate rich liquid fertiliser that feeds the banana trees which grow next to the ablution block.

Since there is no electricity in the village, the Lodge meets its energy needs using a solar photo voltaic system with batteries to store energy. Water in the showers is heated using

paraffin as fuel with toilet paper as a fuse, which heats the water for approximately seven minutes. Candles are used for additional lighting where necessary and driftwood is collected and used for cooking on the fire. A wind turbine complements the solar panels, and refrigerators and stoves operate on LPG gas, along with a solar cooker for baking on hot days. According to McKenzie (2008), the Lodge has been involved with a number of conservation projects, such as rehabilitating the forest adjacent to the Lodge, as well as replanting mangroves that had been washed onto the bank near the Lodge after severe floods in the area. Furthermore, guests are educated about conservation practices by the posting of signs on doors in the bathrooms, kitchen and communal area. According to a Fair Trade in Tourism South Africa (FTTSA) report (Fair Trade in Tourism South Africa, 2011), the staff were aware of conservation practices as well as understanding why they were important.

4.3.2 Conservation Education

According to a Fair Trade in Tourism South Africa report (Fair Trade in Tourism South Africa, 2011), the Bulungula Lodge had put a number of systems in place with regard to conservation of the environment, as well as educating the staff at the Lodge about conservation practices, and the report writer noted that the employees had a good understanding of why the conservation activities were important. Regarding conservation education observed during the field research, there were a number of clearly marked labels and explanations up for visitors to understand the directions, significance and reasons for operating an environmentally friendly lodge. In addition, the Fair Trade in Tourism Report indicated that the Bulungula Lodge staff applied the conservation practices advocated by the Lodge, and that they also had an understanding of why they were important.

4.4 Collaboration with the community: management and decision-making

According to a number of authors (Tooman, 1997, cited in Walpole & Goodwin, 2000; Khan, 1997; Brohman, 1996; Keller, 1987), if ecotourism is to assist in the attainment of development goals, it is important that participation is planned in order to maximise community benefits. Interviews with numerous Bulungula Lodge staff members revealed that all major operational decisions are taken by the community, after a full community meeting is held to discuss issues and consensus is reached. These decisions include hiring of new staff, decision-making about the profit sharing and about new micro-enterprise developments.

Initially the Nqileni Community Trust was responsible for liaising between the Lodge and the community, but in the last year the whole community has been present for decisions. The strength of the Nqileni Community Trust has diminished over time though, as the position is unpaid and time consuming, which has resulted in low levels of interest by community members, and therefore the entire community has come together to take decisions about the Lodge. When interviewing a former Nqileni Community Trust representative, she said that the Trust was no longer holding meetings, and that she had resigned because no one was communicating with her about what was happening regarding the profits from the Lodge.

4.5 Employment and Skills Development

4.5.1 Employment

Employment is a large part of Bulungula Lodge's contribution to Nqileni's local economy. The Lodge employs 20 people, 19 of whom are locals either born in or married into the village. The 20th employee was the only person the Lodge could find who had a driver's licence. While the Lodge has focused on the employment of black females, who make up the majority (58%) of the workforce, they took home 50% of the wage bill (Fair Trade in Tourism South Africa, 2011). Although this is the case, the Fair Trade in Tourism South Africa board remarked that there was greater diversity among the management staff since their last assessment. One possible reason for the lack of females in leadership is that there are only a few people who have obtained a matric qualification.

Table 4.1: Estimated contribution to job creation

Number of positions	Description
20	Bulungula Lodge employees (includes managers, driver, and general staff)
11	Micro Enterprises
36	Bulungula Incubator Micro Enterprises
13	Bulungula Incubator staff
100	Community Work Programme

(Interview data: Bulungula Lodge owner & Bulungula Incubator employees, Nqileni village,

June 2011)

The Bulungula Lodge has launched a number of micro enterprises (Table 4.1) that are locally owned and run, and that support the demand for additional tourism products by the Lodge's guests. In total, 11 businesses have been created, which include a guided tour on horseback, canoeing across the Xhorha river, two masseuses who offer full body and Indian head massages, farmers who supply the Lodge with fresh produce, a bakery service, laundry service, a guided village tour, a guided tour to see the village herbalist and learn about indigenous herbal remedies, a guided tour during which guests can experience what life is like for Xhosa woman in Nqileni, a restaurant that serves pancakes with various fillings, and a fishing tour whereby guests can assist the local fisherman to fish using a net.

Other ways in which the Bulungula Lodge contributes to the local economy, besides the local procurement of labour, is through supporting local businesses. As far as possible, the Lodge procures goods locally, and what cannot be sourced locally is procured from BEE compliant businesses in the surrounding areas. There is no formal procurement policy in place, but in practice they have increased their support for local businesses (Fair Trade in Tourism South Africa, 2011). Vegetables from gardens created to supply the Lodge are procured, along with bread made using solar cookers. In addition, beer is procured from local suppliers, along with driftwood and local crafts, such as grass mats, dustbins and furniture.

Bulungula Lodge contributes to the collective income of the community, represented by the Nqileni Community Trust by donating 40% of the Lodge profits to the care of the Trust on an annual basis. In addition, the Lodge also leases the land on which the Lodge is built, which is in the care of the Nqileni Community Trust, which, along with community members, decides on what to use the money for. The combined rent and profit share amounted to approximately R40 000 in 2010, but due to the financial crisis and continued difficult economic environment, this year there will be no profit share, since the Lodge did not make a profit (Fair Trade in Tourism South Africa, 2011). In addition, Bulungula Lodge provides an ambulance service to locals, which is offered free of charge but forms part of the Lodge's corporate social investment initiative.

The Bulungula Incubator has a total of 22 employees, 14 of whom are locals, in addition to starting a number of employment creation initiatives which have been aimed at stimulating the local economy through sustainable livelihood enterprises. The organisation has a

dedicated department devoted to this task, which has recruited 32 individuals, 28 of whom are from Nqileni and the remainder from the Xhorha administration area. Of the 36 jobs created (four people participate in more than one project), the vast majority of recruits are women (84%). The projects initiated include the essential oils project, wool felting project, hair salon, homestay project, bee-keeping, photography, chicken farming and wind powered battery charging.

Furthermore, the Community Work Programme has created 100 part time jobs in the Xhorha mouth administrative area, 25 of which are in Nqileni. The NGO accessed funding through the Extended Public Works Programme for general repairs in these communities as identified and prioritised by community members themselves. A further four jobs have been created in education, as teacher's assistants in the pre-school, and two farmers assist with the nutrition programme that feeds an approximate 70 people each day.

4.5.2 Skills Development: Vocational Training and Capacity Building

Although no training offered by the Bulungula Lodge is accredited, all staff is offered basic on-the-job training related to their positions. For most of the kitchen and cleaning staff, this is comprised of a training session run by employees from a nearby backpackers lodge in Coffee Bay. Based on the Fair Trade in Tourism report, the score for skills development decreased by 34% over the year between October 2009 and October 2010, and constituted only 0.5% of total payroll as opposed to the THETA benchmark of 1% (Fair Trade in Tourism South Africa, 2011). This is most likely due to the NGO taking over development projects in the community. However, regarding staff training and development, a skills development plan should be linked to performance management systems, neither of which was in place at the time the report was compiled.

During 2007 the Bulungula Lodge offered English language courses for Lodge employees, but during the fieldwork in June 2011, no evidence of current courses existed. The Bulungula Lodge owner said that the courses were run for three months during 2007, but that there was no demand for follow-up courses. Some 23% of the sample suggested that one of the benefits of having the Lodge in Nqileni was that they learnt much from the guests, and speaking English was one of the specific benefits listed.

Levels of literacy are exceptionally low in Nqileni. In an adult literacy workshop conducted

between 2006 and 2007, most of the 16 participants who were Lodge employees had never before held a pen, and only two were able to recognise their own names (Cloete & Poswell, 2007).

The Bulungula Incubator also provides informal training to all their micro-enterprise participants. Thus far it has provided lemongrass farmers with skills to farm organically certified lemongrass. Wool felters were offered training by two professional felters, the hair salon owner underwent an apprenticeship at a hair dresser in Mthatha, and the homestay owners were trained by an in-house professional, and also visited successful homestay projects in Port St Johns. Furthermore, the sewing participants received training from one of the buyers of their products, the bee-keeping participants had a week-long training course with a professional bee-keeper from a nearby village, the photographer received in-house training, the chicken farmers were trained by a local NGO, and the wind-powered battery charger owner was given simple illustrations on operation by the Bulungula Lodge owner.

4.5.3 Community Services and Training

The Bulungula Incubator offers an early learning centre and extensive education programme, which is based at the Jujurha School, which the NGO built, and serves not only Nqileni, but the surrounding areas as well. The education programme includes a community library, and an after-school programme for grades four to six, working with School Governing Bodies, and advocating for better education by interfacing with state officials to do something about the state of schools in the area. They also offer a rural schools development project, which includes visits to various schools in the Xhorha mouth district to distribute supplies and teaching materials.

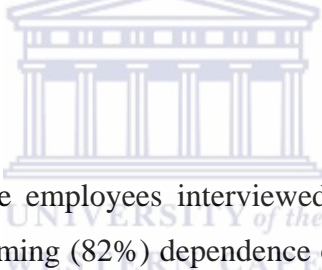
In addition to the education programme, community members are assisted to access government grants by helping them apply for identity documents, and interfacing with the Department of Home Affairs. A monthly HIV voluntary testing and counselling day is held where community members can get tested and gain access to anti-retrovirals with assistance from the local clinic. To this end, the Bulungula Incubator runs numerous parenting workshops, some to encourage early childhood development practices at home, and others to improve basic knowledge about hygiene and good diet.

4.5.4 Intercultural appreciation and knowledge transfer

The Bulungula Lodge encourages interaction between locals and guests by allowing free movement between the Lodge and village. There are no fences around the Lodge, and locals frequent the Lodge during evenings and weekends. On tours run by local guides, there has been virtually no interference with regard to the design or execution of the tours by the Lodge, except for initial training by previous guides, which is not accredited. Tours are geared towards broadening visitors' knowledge of indigenous lifestyles, traditions and rituals, as well as challenges, of which there are many. Guides provide local knowledge and guests ask questions as they go along. In addition, the Bulungula Lodge tries to acquaint guests with basic Xhosa, which is the language spoken in Nqileni, by providing signs with basic phrases and words in communal areas such as the toilet stalls and kitchen area.

4.6 Livelihood outcomes: community perceptions

4.6.1 Employment



Most of the 13 Bulungula Lodge employees interviewed employ a number of livelihood strategies, such as subsistence farming (82%) dependence on government grants for children in their households, with 72% of the staff indicating that they received grants for at least one of their children, and an additional 23% claimed that they receive remittances from mine workers, while 31% were involved in projects run by the Bulungula Incubator.

All general staff at Bulungula Lodge work on a rotational basis, whereby they work for two weeks each month. That means that unskilled labourers work for approximately 26 weeks per year, or 182 days. The managers alternate as well, with only one manager working for six days per week, and the rest work four shifts each week, for every week of the year. The majority of staff members were unemployed for a period of more than two years before starting to work at the Lodge.

Six of the 13 Bulungula Lodge employees interviewed had more than one livelihood strategy that involved either the Bulungula Lodge or related projects, either directly or through kinship ties (for example, as an employee in the kitchen, and participating in the Bulungula Incubator's sustainable livelihood enterprises).

As illustrated in Table 4.2, almost half of those working for the Bulungula Lodge have diversified their sources of income by engaging in multiple tourism-related activities. Although not all livelihood diversification strategies have been tourism-related, those that do not relate directly from tourism have been the result of the existence of the tourism enterprise. Livelihood strategies that have been replaced by tourism and the NGO projects include the production of mud bricks, as well as the collection of firewood for sale to neighbours. The majority of those who pursued those livelihood strategies were women, and all of them perceived the change as a positive trade-off.

Table 4.2: Numerous Livelihood Activities Related to the Bulungula Lodge

Number of Employees	Livelihood Activity Portfolio
6 (46%)	Have multiple Bulungula Lodge or NGO related incomes
4 (31%)	Work at the lodge and are business owners
3 (23%)	Either involved / have family members involved in Bulungula Incubator projects

(Interview data: Bulungula Lodge employees, Nqileni village, June 2011)

Although the Lodge-initiated micro-enterprises provide a form of livelihood diversification and were operational throughout the year, most of the micro-enterprises are vulnerable to seasonality, with April, July, September and December being the busiest times of the year for their businesses, a finding which is consistent with other ecotourism studies conducted (Walpole & Goodwin, 2000; Telfer & Wall, 1996). Although the businesses are community owned and operated, they were also completely reliant on the Lodge for market access. Businesses like the ILanga Fire Restaurant were completely reliant on the village tours run by the Lodge, as the absence of this tour would mean that visitors would never really travel that far into the village. This indicates that although the businesses are community-owned, they lack a level of self-sufficiency, due to a lack of skills and market access apart from the Bulungula Lodge, which is typical of SMMEs in the Wild Coast area as indicated by Rogerson (2005).

Semi-structured interviews conducted with a total of seven entrepreneurs linked to the NGO revealed that the revenues earned from the micro-enterprises were small but useful. Three of

the seven interviewed indicated that their projects, namely the lemongrass and homestay projects were not yielding enough money. The lemongrass and homestay projects yield around R500 and R400 per moth respectively, according to the project manager, and as both projects are in their infancy, but with appropriate leadership and marketing, could become viable enterprises. However, the homestay business may not be viable due to the current financial crisis, which has hit the hospitality industry hard, and this year the Lodge will not be able to distributing profits to the community because they ran at a loss. Since the homestay project is being marketed only through the NGO and indirectly through the Lodge (on the website link that directs users to the Bulungula Incubator website), the business will probably not be viable for the foreseeable future, unless the Bulungula Incubator finds some additional marketing avenues to boost the profile of this business.

The overall opinions of the sewing project participants were that they were satisfied with the project as the Bulungula Lodge provided a market for their goods. At the time of the field research, the sewing project had expanded to include the production of hot boxes, which are meant to reduce energy consumption by providing insulation for cooking. The project manager indicated that currently the project brings in an average income of approximately R600 per month, and that a buyer had been found for the hot boxes, which means that the business is likely to become more lucrative in the future.

4.6.2 Skills Development

The researcher asked eight business owners about what type of training and support they were receiving from the lodge, whether their businesses were vulnerable to seasonality, and how they felt about the Bulungula Lodge's economic impact in Nqileni. The entire cohort claimed to have been trained prior to starting their businesses. After further probing, the researcher was informed that those business owners who work for the Bulungula Lodge went to a hospitality enterprise in a neighbouring village to learn about basic hospitality training, but that besides the horse riding and farming that required technical training, no additional business training, such as financial literacy or business management, was offered. In a follow-up question about additional business support, all business owners indicated that all of their business was generated by the Bulungula Lodge, and that no advertising other than that offered by the Lodge was initiated by business owners. In fact, the concept of advertising seemed to be foreign to all of the business owners. All seven Bulungula Incubator micro-

enterprise entrepreneurs indicated that they received some sort of technical training in order to set up their businesses.

4.7 Quality of life

The perception of ‘quality of life’ is an indicator of poverty reduction according to Scoones (1998), and the researcher asked a number of community members who have been affected by the Bulungula Lodge or related economic projects about their quality of life and whether it has or has not improved since their involvement with Bulungula Lodge. The researcher interviewed 26 community members who were either working at the Lodge, business owners connected to Lodge-initiated businesses, or NGO micro enterprise participants. When asked whether they were satisfied with their quality of life, only 15% of those interviewed said that they were very satisfied with their quality of life. An additional 42% indicated that they were satisfied with their quality of life, which was equal to the percentage that indicated their dissatisfaction. Overall, the result indicated that over half of those interviewed, 57%, were satisfied with their quality of life, as the Figure 4.4 indicates.

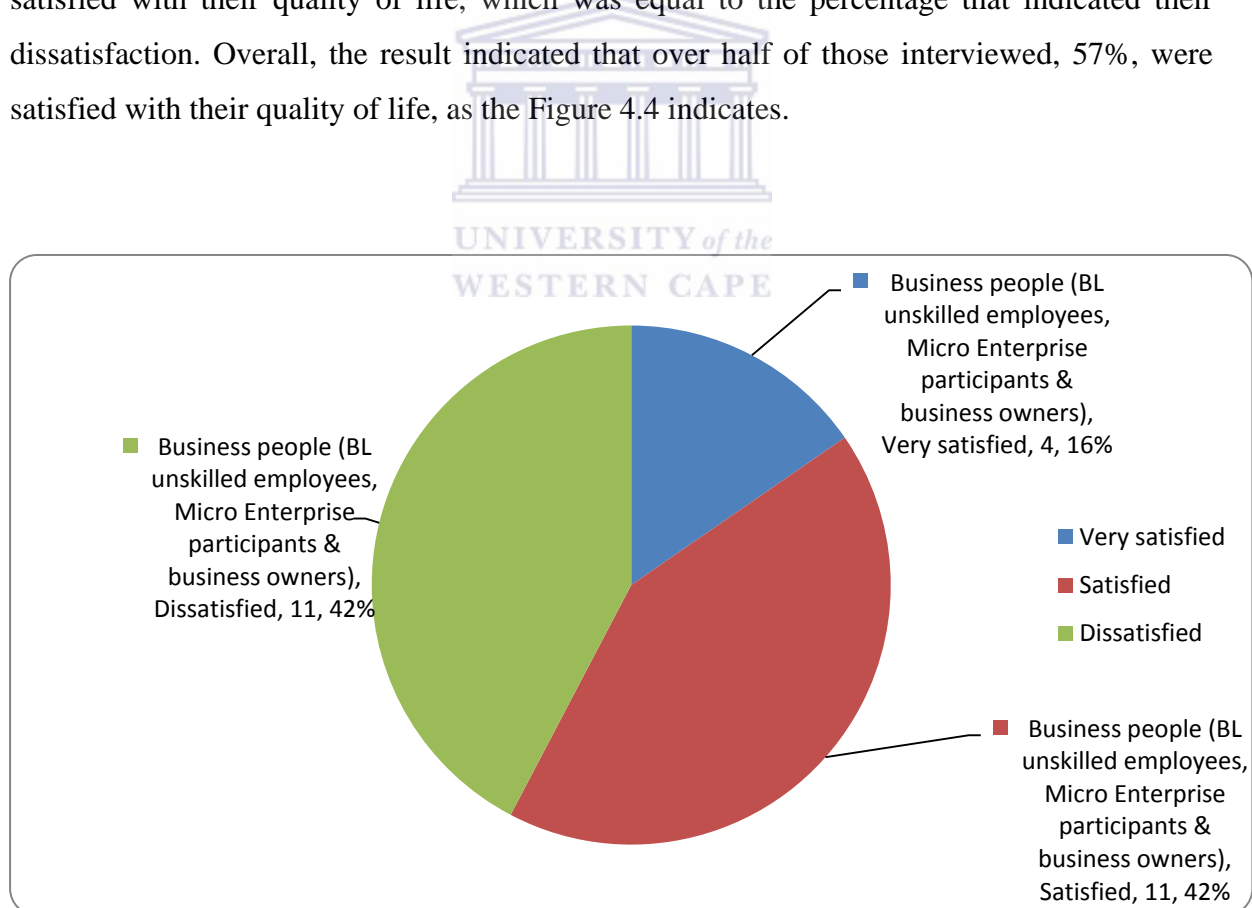


Figure 4.4: Satisfaction with quality of life (Interview data: Bulungula Lodge employees, business owners, micro-enterprise participants, Nqileni village, June 2011)

The fact that a number of business owners were dissatisfied with their quality of life does not indicate that the businesses have not made a difference to their quality of life however. Only 8% of respondents indicated that the economic activities they were involved in did not make a meaningful difference in their lives, while an overwhelming 92% indicated a vast improvement in their quality of lives and overall poverty. Some of the respondents indicated that it was an amazing opportunity for the youth to be employed in the village and to not have to migrate to find a job.

One of the Bulungula Lodge employees was able to start a business using wages that he received from his job at the Bulungula Lodge. This is the testimony of his experience in his own words:

Since the Bulungula Lodge opened, there is development in the village. There is a school here and a pre-school. We also have a tractor and a tent. Every month I get my wages from the Lodge that I used to build a hut...I also bought a donkey, a wardrobe, a solar light and many other things...When I was a guide I used to get crayfish and wood to braai, and then I bought beers to sell. Now I sell sweets, chips, candles, coke, biscuits, beer and brandy... Now the Lodge has also made a way for my son to earn money...

Another respondent said of the benefits she received from working at the lodge:

After matric I was not working, but now I am working here...We have many benefits since the Lodge came here, like the education they offer to the community about hygiene and how to sterilise the drinking water using jik (chlorine bleach)...before we used to drink the water without doing anything to it, and people would get sick...There is the planting project and the school. There was no school before, but now almost all the children are going to school...My mother is also part of the lemongrass project, so it gives her money to buy food for us.

When asked what it meant to their families, eight said that working at the Lodge allowed them to put food on the table, and two said that they do not go hungry anymore because of the wages earned at the Lodge. All the staff said that every day that they work, they are provided with a meal, which contributes substantially to the household. When asked about

the adequacy of their income to provide for their needs, seven of the 11 unskilled workers remarked that they were able to provide for their basic needs as a result of their salaries, and a further four said that their wages, along with supplementary forms of income allowed them to provide for their needs.

4.8 Perceptions of power and decision-making

The researcher interviewed 42 community members about their ability to make decisions about the profits from Bulungula Lodge (Figure 4.5). Over half of the respondents (53%) said that they do not participate in decisions about the profits that accrue to the community and an additional 29% said that they have the right to say what happens to the community profits because they are community members. Furthermore, 9% of respondents indicated that the older people in the village make the decisions and another 10% believed that the Lodge owner made the decisions about what to do with the profits accrued by the community.

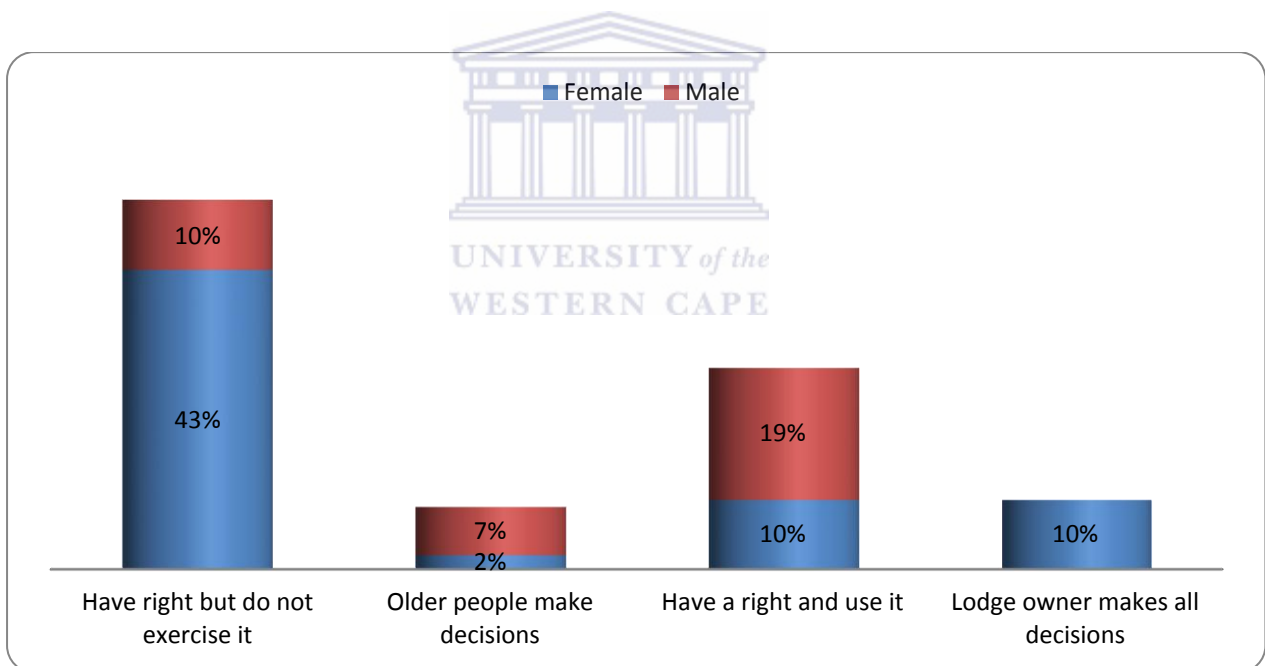


Figure 4.5: Decision-Making about community profits from tourism (Interview data: All respondents, Nqileni village, June 2011)

Over 80% of those who were not active in decision making were women. The group that seemed to be active in decision making was comprised of over 70% males, which indicates a distinct lack of participation by women in decision-making related to proceeds accrued to the community from tourism activities. This furthermore, indicates that although women constitute the majority of the sample, and the employees at the Lodge, they do not earn as

much as their male counterparts, nor are they as active in decision making regarding profits accrued to the community. As Echtner (1995) indicates, employment initiatives are often directed at marginalised groups, which include women. However as Walpole & Goodwin (2000) suggest, the employment and sex ratio is not necessarily a good gauge of female participation in tourism, and although this study focuses on employment creation, it does not delve into a deep analysis of the gender roles in tourism development, which would require a different study. Even though participation may be biased in favour of men, the fact that community participation and employment is a priority means that fewer economic leakages will occur (Ross & Wall, 1999).

4.9 Conservation Knowledge

Table 4.3: Level of conservation knowledge among community members

Number of participants	Knowledge about conservation
26 (62%)	No knowledge about conservation since the Bulungula Lodge opened
12 (28%)	Learnt about protecting the forest from the goats, safe water practices and not to kill snakes and forest animals
4 (10%)	Learnt about protecting the forest, safe water practices, the appropriateness of alternate energy sources in a setting like Nqileni, recycling, and sustainable natural resource harvesting

(Interview data: All respondents, Nqileni village, June 2011)

Based on questions directed at 42 community members regarding the contribution of the Bulungula Lodge to conservation knowledge, 62% said that they had learned nothing about conservation since the Lodge opened, while 28% said that they had acquired basic knowledge of why it was important not to cut down trees, to recycle and to protect springs used for human consumption with those used by animals. Only 10% indicated that they had acquired fairly extensive knowledge about ecosystems and the need to protect certain plant and animal species, safe water practices and the need to rehabilitate the forest. The Table 4.3 indicates the level of conservation knowledge as identified by the respondents.

4.10 Community Benefits

Of the 42 respondents interviewed about what they feel the most important contributions are that the Bulungula Lodge has made to the community (Table 4.4), the majority of respondents (86%) mentioned employment, followed by education (81%), and community income (74%). Other community benefits that were mentioned include the provision of water tanks (52%), the gravel road (17%) and access to medical services as a result of the free ambulance service provided by the Lodge (14%). Although the road had nothing to do with the Lodge or NGO, the community members interviewed felt that before the Lodge came, there was nothing, and since it opened, the community have received a number of benefits.

Table 4.4: Community benefits (categorised)

Number of respondents	Benefits
36 (86%)	Employment
34 (81%)	Education
31 (74%)	Community Income
22 (52%)	Water Tanks
7 (17%)	Gravel Road
6 (14%)	Access to Medical Services
3 (7%)	None

(Interview data: All respondents, Nqileni village, June 2011)

Only three respondents indicated that no benefits were derived from the Bulungula Lodge's existence, and one of the three suggested that the Lodge owner made a deal with the community that there would be a five-year turnover period for staff at the Lodge in order to create more employment for people in the community. According to her, the owner went back on his word. She said that the Lodge decisions were biased and that only one family was being employed. Upon further investigation it was revealed that there were a number of family members working for the Lodge and related businesses, but 98% of the sample agreed that decision-making was a participatory process. Furthermore, a number of people who were referred to the researcher by the disgruntled community member did not express dissatisfaction with decision-making at the Lodge, and therefore no further investigation into the claim was pursued. Of the 53 respondents interviewed, the vast majority, 41 (77%) did not distinguish between the Bulungula Lodge and the Bulungula Incubator. Even a few of the

employees at the Lodge attributed some of the benefits offered by the NGO to the Lodge, because they saw them as a single entity.

4.11 Desired changes in Nqileni

The main benefits to the community were related to the provision of livelihood resources. However, the most pressing needs in the community were infrastructural (Table 4.4), which are out of the control of the Bulungula Lodge, and require government intervention.

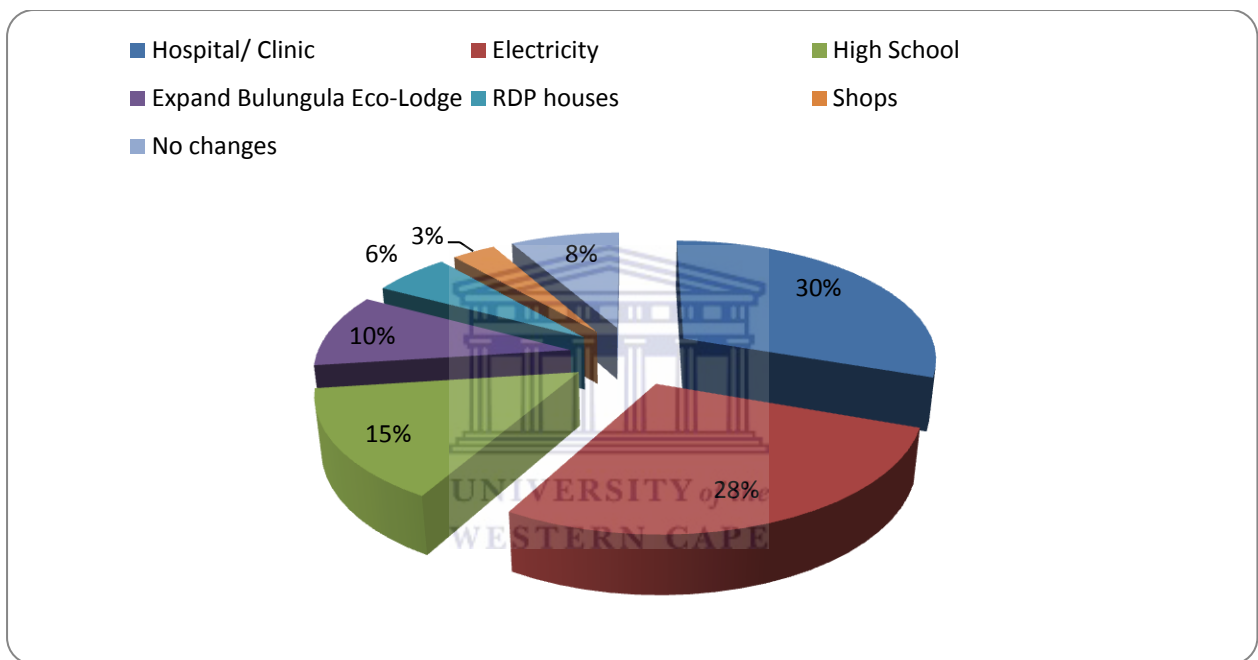


Figure 4.6: Desired changes in Nqileni (Interview data: All respondents Bulungula Lodge employees, business owners, micro-enterprise participants, community members not linked to the Lodge, Nqileni village, June, 2011)

Of the 42 people interviewed, 77% mentioned a hospital or clinic, and said that currently, even though the Lodge provides an ambulance service, it still takes over an hour to get to hospital. Some 71% indicated the need for electricity for lighting the village at night and for cooking and heating. One person said “we need electricity so that we can visit our friends. When it gets dark here it is dark and you must stay inside”. Other reasons for mentioning electricity were that they would not have to collect firewood anymore; a task that many suggested was a labour and time intensive activity which yielded little economic benefit.

Some 43% suggested that a high school should be built in the village, and 29% wanted the Bulungula Lodge to expand. When the researcher asked the owner of the Lodge whether expansion was a possibility going into the future, he said that that was not a possibility from a capital investment point of view, as well as environmentally. From a capital investment point of view, his logic could be likened to the law of diminishing returns. He argued that an incremental increase in size of approximately 10% would require expansion of the restaurant kitchen, parking area, appliances and energy, which would be far more than a Lodge of its size would be able to earn back in profits within a reasonable time frame. Before the Lodge opened an environmental assessment was done to establish carrying capacity, and it was found that the Lodge could sustain no more than 40 guests at a time in order to protect the integrity of the natural resource base and minimise erosion.

Additional measures were taken by the Lodge to reduce soil erosion by not allowing vehicles to drive within 500 metres of the Lodge, unless absolutely necessary. What this means for the lodge and the Nqileni community is that the contribution of the Lodge to the local economy by providing additional employment in future is not significant. The only way in which more people will gain employment at the Lodge is either if more micro-enterprises are created and sustained, or if older staff members are replaced by younger ones after their retirement.

Other needs included a high school in the village, and RDP houses, which are houses that government allocates free of charge to poorer citizens. When asked why they wanted RDP houses, all seven people who mentioned it as a need said that currently, the round, single room in which they were living, did not afford them any privacy. A further four suggested shops in the village and 9 did not suggest any changes, saying that they would not know what to change. According to the Mbashe Municipality IDP for 2010/2011, all of the changes suggested by the Nqileni residents are not likely for the foreseeable future.

4.12 Challenges in contributing to vibrant local economies

All participant groups were asked what challenges they faced in realising a more fruitful local economy. The following is a summarized list of the responses given by the various interviewees as well as observations by the researcher:

- All participant groups agreed that government involvement and infrastructure development were the factors that would most affect the local economy, with 48 people (91%) attributing a portion of the lack of economic development to infrastructure development. Although the government has acknowledged the good work the NGO has done, this has not translated into action. A Bulungula Incubator employee said that although they work alongside government, due to delivery backlogs and inefficiency regarding service delivery, the NGO has acted as a substitute for government.
- The overall view of the project managers who are involved in promoting enterprise development at the Bulungula Incubator is that there is a challenge in moving towards sustainability with regard to the micro-enterprises which were started by the NGO. The reasons given were, firstly, that people in the village see themselves as unemployed, even when they have their own businesses. The researcher also found this during interviews conducted with a number of interviewees. One woman, who was running a shebeen from her hut, said that she had to sell beers, because she was unemployed. Another woman, who makes bricks for a living, said that she was unemployed and she was upset that the Lodge wasn't hiring.
- Although education ranked high as a benefit, as well as being identified as a need, it does not seem to be a priority for adults in Nqileni. Most of the respondents are illiterate and have had no schooling whatsoever, which has fostered a *laissez-faire* attitude towards school attendance. Many of the children stay home from school due to bad weather or because they have to assist their parents with chores. Apart from school attendance, the quality of education in government schools in the area is poor, which poses a challenge to the development of the children in the area at present, as well as being an impediment to future development of the local economy. Once the children finish schooling at the early learning centre operated by the Bulungula Incubator, there is no acceptable primary or high school to move on to, and unless drastic action is taken another generation will most surely live in poverty.
- Both the Bulungula Lodge and Bulungula Incubator (the NGO) face tremendous skills shortages, as the level of formal education is extremely low and is impeding the promotion of locals into positions of power within the organisations. The lodge has employed some of the only matric graduates in the village, and as the Bulungula

Incubator needs qualified employees, it has had to source them from outside of Nqileni. As a result it has no village residents occupying management positions at the operational level. The failing school system has compounded the problem, making it nearly impossible for locals to receive a quality education, apart from at the early learning centre provided by the NGO. If the problem persists, which is likely, there will be little hope for future generations to improve their socio-economic wellbeing.

- The lack of conservation knowledge among community members is a concern and is likely to see the land lose valuable vegetation to livestock grazing. The locals do not seem to understand the importance of conserving the natural vegetation. However, the fact that between 2009 and 2011 there have been no diarrhoea-related deaths in the village is encouraging, as during the two years before (2006 to 2008), there were several deaths related to drinking unsafe water and sharing water sources with animals, which mean that among the general population, some strides have been made with regard to conservation knowledge.

4.13 Summary

This chapter focused on the presentation and discussion of the research findings, which started with a description of the sample population, including demographic characteristics and income categories. The findings from the analysis of the Bulungula Lodge operation against eco-lodge management principles and pro-poor tourism principles were presented. The findings were presented in three broad categories, namely conservation, employment and skills development, and management and decision making.

The results of the analysis of the enterprise were compared to the results from community members' perceptions of the developmental impacts of the Lodge and related businesses, which included the Bulungula Incubator and related projects these, are treated as extensions of the Bulungula Lodge, due to their establishment by the Lodge in response to a growing number of development needs.

Summary results have indicated that the Bulungula Lodge and related projects have played a positive role as a catalyst for local economic development, but their efforts are hindered partly due to government passivity, and partly due to a lack of implementation of certain

initiatives that could increase the capacity and in turn capabilities of community members.



CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

In this chapter the researcher will highlight salient points from Chapter 4, which relate to the various research objectives and findings from field research. Firstly, an overview of the analysis of the tourism model employed by the Bulungula Lodge will be presented, along with relevant contributions by the Bulungula Incubator, based on criteria set out in Chapter 2. The broad themes that were used to categorise findings were *conservation, employment and skills development*, and *decision making* regarding operational practices and profits accrued to the community. In addition, an analysis of the livelihoods outcomes as expressed by community members has been undertaken, based on livelihood outcome indicators as outlined in Chapter 4. The analysis for the categorization of community benefits and desired changes as described by the community members themselves, as outlined in Chapter 4, will also be delineated, with reference to how they affect the local economy of Nqileni village. A

comparison of stakeholder perceptions has been undertaken and the results presented below. Finally, the chapter contains an explanation of the broader significance of the study along with the possible implications for the Bulungula Lodge and Bulungula Incubator in Nqileni and surrounding villages.

The tourism model as implemented by the Bulungula Lodge was analysed against eco-lodge management principles (Mehta, *et al.*, 2002), and the sustainable livelihood outcomes (Scoones, 1998), as described in Chapter 2. The broad themes outlined in the previous paragraph have been compared to the principles mentioned above, in order to determine to what extent the Bulungula Lodge and the Bulungula Incubator have acted as a catalyst for local economic development in Nqileni. The conclusions will be related back to the literature reviewed in order to provide a sound basis for future action.



5.2 Summary of the Findings

5.2.1 Conservation

The Bulungula Lodge is run sustainably when compared to the principles set out in Chapter 2, pertaining to reliance on existing infrastructure and complementing the form and design as displayed in the traditional architecture. This is corroborated by a number of authors who have conducted research in this area (Fair Trade in Tourism South Africa, 2011; McKenzie, 2008; Cloete & Poswell, 2007) as well as the environmental scoping report (Martin, 2003) prepared prior to commencement of building. Due to a dire lack of municipal infrastructure, the Lodge has adopted alternative sources of energy, water and waste removal that are environmentally friendly and actually work towards building the natural capital, which, according to Scoones (1998), contributes towards natural resource base sustainability, one of the indicators of a sustainable livelihood.

The Lodge has provided environmental education for its staff, who, according to the Fair Trade in Tourism report (FTTSA, 2011), not only implement conservation measures, but also

display knowledge about the importance of conservation. Measures are also taken to educate guests, but the greater community seems to lack a basic understanding of conservation and the reasons therefore, based on the 42 (excluding Bulungula Lodge management and Bulungula Incubator staff) interviews conducted, which revealed that over half (52%) indicated that they had learned nothing new since the Lodge opened in Nqileni, and just under a third saying that they had learned only basic conservation information. Despite this apparent lack of knowledge in the sample population, the Bulungula Incubator (2011) released a report that indicated that the community have received information regarding alternative water sourcing and have been engaged in a water safety project, which has resulted in a decrease in deaths by diarrhoea as a result of ingesting contaminated water.

5.2.2 Management and decision-making

According to the eco-lodge management principles outlined in Chapter 2, the lodge is locally oriented in their management, staff procurement and decision-making regarding both the operation of the Lodge and the 40% donated share of profits that the community receives from the owner. Three of the four managers are local, with the decision-making being a collaborative community-based system chaired by a local sub-headman. All operational decisions are made by the community, based on consensus reached at community meetings.

Based on the interviews with Bulungula staff as well as community members, there was consensus about the method of decision making with regard to community decisions and profits from the lodge. This is in line with pro-poor tourism practices and Eco lodge management principles, which stipulate that management, should be encouraged among local community members (Mehta, *et al.*, 2002, cited in Epler Wood, 2002). However, it was discovered that the decision making process is biased in favour of men, with only 19% of the sample actively participating in decision making and minimal participation by women and the youth (those below the age of 30). According to Scoones (1998), participation in decision making plays a vital role in promoting an empowering environment and also providing a basis for enhanced self-esteem, since the recognition of being involved in something worthwhile is vital in eradicating poverty. The marginalisation of women in this group could indicate the intentional exclusion of certain groups, or a lack of encouragement for women to participate.

5.3 Employment and Skills Development

5.3.1 Employment

The largest contribution made by the Bulungula Lodge is in the area of employment creation. The operation is in line with local procurement goals as set out in Chapter 2, with all of the staff being from Nqileni village, except for one, who is from a neighbouring village in the Xhorha Mouth Administrative Municipality. Furthermore, all business owners that run lodge-initiated businesses are from the village. The Bulungula Incubator has no locals as part of their operational management team due to a lack of skills in this general population. The micro-enterprise participants, however, are mainly from Nqileni, with a total of 88% of project participants from the village, and the remaining 12% being from surrounding villages that are within the Xhorha administrative area. Furthermore, the lodge has contributed to local economic development through the provision of direct employment at the Lodge, which accounts for on average 182 working days per year, per worker. The Lodge also contributes towards indirect creation of work by, albeit limited but valued procurement of small items like bread, vegetables and local crafts.

Through the creation of micro enterprises that serve the needs of the Lodge, a further 10 part-time jobs were created, but these, although providing a much needed source of income, are subject to seasonality, and are erratic as an income source. The businesses and employment at the Lodge contribute to diverse livelihood portfolios including livelihood strategies that rely on natural resources, but are unsustainable in the sense that they are completely reliant on the Lodge for market access, and the business owners have no training that would allow a degree of self-sufficiency.

The Bulungula Incubator, the local NGO established by the Lodge to attend to numerous development needs, has a 64% local staff complement and provides a further 36 jobs through micro enterprise development, 88% of which is occupied by Nqileni residents and the rest from the surrounding villages. The general opinion among participants was that they could not support themselves on the income that they receive from their businesses, but that they appreciated the additional income.

5.3.2 Skills development

The Bulungula Lodge has made positive contributions towards skills development through vocational training of staff and related project participants. In addition, the Bulungula Incubator focuses on early childhood development in order to build the human capital base for the future, as well as providing scholarships to selected children for primary education outside the village. This, coupled with support programmes for schools in the surrounding villages, is contributing to building the skills base, not only in Nqileni, but also in surrounding villages. Neither the Lodge nor the NGO currently have adult literacy programmes in place. According to McKenzie (2008), basic adult literacy was offered in 2007, but subsequently no further programmes were held.

5.4 Community benefits and desired change

The main benefits accrued to the community can be divided into two main groups, namely economic benefits and non-economic benefits (see Chapter 2). Economic livelihood benefits include employment and community income, which support sustainable livelihood outcomes. These benefits work towards creating viable livelihood diversification strategies which include agricultural intensification, as is the case with the vegetable farmers who sell produce to the lodge, as well as non-farm livelihood activities which include tourism-related businesses as well as NGO-related projects. In addition, economic livelihood benefits create financial capital reserves, which the community can fall back on during times of stress and shocks.

Non-cash livelihood benefits include access to clean drinking water, a road, and access to healthcare and education. These all work towards enhancing human capital and contribute towards wellbeing and capabilities among community members. Although education appears as a benefit, the sample also identified it as a need in the community because, even though the NGO has made access to quality pre-school education available, once students complete, there is not a functioning school system to continue in. The nearest government primary school is approximately 2km away, the high school is even further, making it a difficult and expensive exercise.

The remaining changes, as suggested by the sample, were access to basic infrastructure including a hospital, electricity, RDP houses and shops. These would contribute towards physical capital stocks and would play a significant role in providing access to information

through the extended use of information and communication technologies, and vital healthcare and education, which is not currently a reality to the community.

Access to these infrastructural changes would require an enabling policy environment, as discussed in Chapter 2. The Bulungula Incubator plays an active advocacy role regarding expansion of service provision to Nqileni and the surrounding areas, and over and above that, they have substituted government services by rebuilding the local government primary school which had fallen down, substituted the government's school feeding scheme when funding was cut, and in conjunction with another NGO, provided rainwater tanks for the collection of clean drinking water in the absence of piped water (Bulungula Incubator, 2011). As a lack of government involvement was cited as a major constraining factor for economic development, an enabling policy and institutional environment is vital.

5.5 Conclusions

The Bulungula Lodge was analysed as a catalyst for local economic development against various economic and non-cash livelihood benefits (see Chapter 2), and the researcher has arrived at conclusions which will inform the recommendations that follow at the end of the chapter. The following section is a discussion of the research conclusions in relation to the research aims.

5.5.1 The Sustainability of the Bulungula Lodge

Based on the analysis of the Bulungula Lodge *vis-à-vis* conservation principles (see Chapter 2), the lodge can be described as sustainable. It operates in an eco-friendly way and contributes towards natural resource base sustainability, which is essential for the growth of the local economy and poverty reduction (Ross & Wall, 1999; Scoones, 1998). Although environmental education has taken place among staff, the lack of knowledge amongst the majority of the sample indicates that more could be done to educate the community as a whole about conservation and the need for natural resource base sustainability.

The introduction of new livelihood strategies linked to the Lodge and related projects provides alternatives to unsustainable reliance on natural resources for a source of income, as was the case before the opening of the Bulungula Lodge. These new livelihood strategies

provide a basis for livelihood adaptation and increase resilience against shocks, as the various benefits accrued to the community from the Lodge (employment, personal income, skills development, community income), can act as buffer in times of shocks.

5.5.2 Livelihood outcomes

a) Creation of working days

As discussed in Chapter 2, the elements of the creation of working days are income, production and recognition. In the presentation of research findings related to employment in Chapter 4, it was documented that the Bulungula Lodge and related projects have provided approximately 189 jobs in Nqileni and the surrounding communities. These jobs vary between part-time and full-time, and some of the jobs, such as many of the micro-enterprises started by the Bulungula Incubator, are linked to product output rather than number of days worked.

None of the jobs created, except full-time managers' positions at the Lodge and NGO, fulfil the universally accepted benchmark of 200 working days per year, as an indicator of a sustainable livelihood. However, almost the entire sample interviewed had diverse livelihood strategies, which included subsistence farming, social grants, remittances from migrant labourers and involvement in other projects related to the Lodge or NGO. These all work together in order to reduce poverty. Unfortunately not all of the strategies mentioned are sustainable, or desirable in the long term, such as government grants (excluding old age pensions). Some of the tourism-related jobs are prone to seasonality, but with capacity building for financial management and if prudence is exercised, the profits of these vulnerable jobs could be conserved for use during off-peak seasons.

b) Poverty reduction

This study has used two indicators for the analysis of poverty reduction, namely income categories and quality of life, which both contribute towards sustainable livelihood outcomes as discussed in Chapter 2. Based on the income categories of the respondents (see Ch. 4.2),

over 70% of the respondents earned less than R2000 per month, which falls within the lowest two quintiles in the income categories (Mbashe IDP, 2010). The overall indication is that the majority of the respondents can be categorised as poor. Their indication of satisfaction with the quality of their lives showed a 57% overall satisfaction rate, and 92% overall improvement rate. This indicates that the Bulungula Lodge and related businesses have contributed positively to poverty reduction and local economic development, even though the contributions toward poverty eradication are not sufficient to catapult the community out of poverty.

c) Well-being and capabilities

According to Scoones (1998), wellbeing and capabilities is the sum of all livelihood assets as well as the mind-set of the individual being observed. Indicators include power, happiness and security. In this study the researcher used ‘power’ as evident by the sample’s perception of their ability to make decisions about the tourism profits accrued to the community from the Bulungula Lodge, as well as the skills development initiatives. The perceptions of community members on their participation in decision making were examined. There was consensus among respondents that the operational decisions and the community profits are made by the community. However, the results showed that over half of the sample did not participate in decision-making and that the active participants were predominantly male, indicating a gender bias. The Fair Trade in Tourism report (Fair Trade in Tourism South Africa, 2011), noted that even though women make up over half of the employees at the lodge, they take home only 49% of the wage bill, which further indicates the disparity between men and women. According to Echtner (2000), the fact that the community in general actively participates means that there is likely to be less economic leakage of tourism revenues, even though the distribution might be unequal.

5.6 Recommendations

The following recommendations can be made:

- Guests at the Bulungula Lodge could be asked to contribute towards conservation initiatives, such as forest rehabilitation projects, through planting trees to offset carbon emissions, and safe water projects. In 2010, the Lodge contributed money towards an existing programme being offered by the Bulungula Incubator, but if

they had a specific project at the lodge that could complement the existing products, they could increase revenue and simultaneously increase conservation efforts.

- Tourism businesses could be set up for guests to view specific projects being run by the NGO in the area of conservation in order to create awareness.
- Community conservation education days could be held in order to educate locals about the importance of specific conservation practices that could assist in mitigating illness and contributing to sustainable natural resource management.
- In addition to the basic vocational training offered to the Lodge-initiated business owners, financial and business management training should be offered in order to broaden the business knowledge of the entrepreneurs while increasing their access to business information, thereby increasing the levels of sustainability of the various businesses. This training should include financial literacy, basic business management, marketing and interpersonal communication.
- There is currently no adult education programme running, neither at the Lodge, nor by the NGO. With levels of literacy among unskilled staff being very low, basic adult education is essential in order to promote empowerment within the population. Basic literacy and numeracy skills are essential, and as soon as resources become available, an adult education programme should be put in place by the Bulungula Incubator.
- Basic second language skills courses could be held for Bulungula Lodge staff in addition to visitor information about isiXhosa. The inability to speak English has constrained the ability of locals to communicate with guests, thereby fostering mutual exchanges of information. It is recommended that in future periodic language courses be offered at the Bulungula Lodge, to improve staff/guest interaction and communication.
- The Lodge could assist the community in promoting the positions of women through a voting system, whereby each person's vote counts towards a decision. This would mean that decisions would be more democratic, and all marginalised groups would be able to give input into decision-making regarding the operation and profit share of the Bulungula Lodge.

5.7 Summary

This chapter presented a summary of the data analysis findings undertaken in Chapter 4, with specific reference to their livelihood outcomes as described in the sustainable livelihoods framework and Pro Poor Tourism Benefits. The summary findings indicated that the Bulungula Eco-Lodge and by proxy, the Bulungula Incubator contribute positively to the attainment of sustainable livelihoods in relation to the creation of working days, poverty reduction, wellbeing and capabilities as well as natural resource base sustainability and livelihood adaptation and resilience to shocks.

The chapter ends with recommendations for both the Bulungula Eco-Lodge as well as the Bulungula Incubator, which could increase their effectiveness in reaching their poverty eradication goals as well as assisting in their contributions towards vibrant local economies.



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APPENDIX 1: SEMI-STRUCTURED INTERVIEW GUIDE

1. Introduction

A basic introduction was given about why the researcher was in the village, the reason for the study, and the details about the university. The researcher tried to create a relaxed atmosphere by asking general, open-ended questions covering broad categories, but did not ask questions in the same order with each interview. Furthermore, confidentiality issues were discussed and consent was obtained from each respondent prior to the interviews. The interviews were recorded using a tape recorder, and all necessary permissions were obtained from concerned parties.

2. General Questions: Asked to the whole sample

- When were you born?
- How long have you lived in Nqileni?
- Where do you work?
- How many days do you work each week?
- How many livestock do you have (sheep, goats, chickens, cows)?
- What do you usually eat?
- What do you use to cook with?
- Where do you buy your food?
- What type of crops do you grow?
- Do you sell any of the vegetables you grow?
- Where do you get your drinking water from?
- Do you do anything to the water before you drink it?
- How many children do you have?
- How old are they?
- Where do they go to school?

3. Community members

- What do you know about the Bulungula Eco-Lodge?
- How are decisions made in the village?
- What is your role in decision-making in the community?

- What changes have occurred in the community since the Bulungula Eco-Lodge opened?
- How have you benefited from the Bulungula Eco-Lodge?
- To what extent are you involved in the decision-making about the BL profits that go to the community?
- What are things that you feel should change in the village?
- To what extent have you been involved in the programmes that the BL has offered to community members?
- What job opportunities are there in Nqileni?
- What have you learnt about environmental conservation since the Bulungula Eco-Lodge opened?

4. Local business people: Linked to lodge initiated businesses

Employment

- How did your business start?
- Do you have any other sources of income?
- How many days do you work every week?
- What is the income range of someone in your position?
- Who benefits from the proceeds of the Bulungula Eco-Lodge?
- Did you receive any assistance with starting your business?
- Have you received any training from the Bulungula Eco-Lodge ?
- What kind of training have you received?
- What is your part in decision making about the Bulungula Eco-Lodge profits
- What have you learnt about environmental conservation since the Bulungula Eco-Lodge opened?
- Where do most of your customers come from?
- What kind of marketing do you do to attract business?
- To what extent has your business benefited from the BL being in Nqileni?
- Have you received any assistance from government with your business?
- How satisfied are you with your quality of life?
- How has being involved with the Bulungula Eco-Lodge affected your quality of life?

5. Workers at the Bulungula Eco-Lodge

- How many days do you work each week?
- What is the salary range for someone in a position like yours?
- What type of training have you received from the Bulungula Eco-Lodge?
- What have you learnt about nature conservation since the Bulungula Eco-Lodge opened?
- To what extent are you a part of the decision-making at Bulungula Eco-Lodge?
- Who makes the decisions about how to run the Bulungula Eco-Lodge?
- How do the headman and sub-headmen fit into decision-making in Nqileni?
- How have you benefited from BL being in Nqileni?

6. Community Trust representatives

- How was the trust established?
- Where are the members of the trust from?
- How does the headman fit in?
- Have you received any training?
- What kind of training have you received?
- To what extent are you involved in making decisions about the Bulungula Eco-Lodge?
- Who decides what to do with the money that is received from Bulungula Eco-Lodge?
- What kind of challenges have you faced?
- What do you think needs to change in the community?
- To what extent has the BL benefited the community of Nqileni as a whole?
- Who can use the things that the trust buys from the Bulungula Eco-Lodge profits?

7. Farmers

- What type of crops do you grow?
- Do you sell some of your produce?
- Who do you sell your produce to?
- How much of your vegetables do you sell to Bulungula Eco-Lodge?
- Do you have any other sources of income?
- What sources of income do you have?

- Have you attended any training sessions?
- Are you involved in the decision-making at Bulungula Eco-Lodge?

8. Bulungula Eco-Lodge major shareholder

- What made you decide to start this business?
- How did you decide on the percentage of equity that the community would hold?
- Who makes the decisions regarding operational activities at Bulungula Eco-Lodge?
- To what extent have you been in partnership with government?
- Which departments have you dealt with?
- How much of the food that you serve is procured locally?
- What percentage of the staff are local?
- How many businesses has the Bulungula Eco-Lodge assisted in starting up?
- What type of assistance was offered to them?
- What other projects are you involved in that relate to led?
- What challenges have you faced in running the business?

9. Bulungula Incubator director

- How did the Bulungula Incubator start?
- What type of programmes do you run?
- What is the aim of your organisation?
- What type of training do you offer to your staff?
- What do the operational management staff get paid on a monthly basis?
- What type of training do you offer to people in the community?
- What is the relationship between the Bulungula Eco-Lodge and the Bulungula Incubator?
- What role has the local and provincial government played in assisting Bulungula Incubator to achieve your objectives?
- What is the relationship between the Bulungula Incubator and the community?
- What kind of opportunities have been made available to the community by Bulungula Incubator?
- What are some of the challenges that Bulungula Incubator faces?
- Do Nqileni residents play any role in decision-making regarding programmes at the NGO?

10. Bulungula Incubator staff members

- What type of activities are you involved in?
- How many people do you reached directly through your activities?
- How many jobs have been created due to your project?
- What are the monthly average income categories of project participants?
- How would you characterise the involvement of community members?
- For how many days does the project provide employment to community members involved?
- What role has the government, local or provincial, played in your organisation?
- What is the relationship between the lodge and NGO?

