

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.

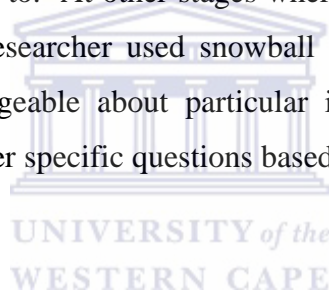
Neuman adds that purposive sampling is usually used when a researcher feels that a case will be particularly informative, such as a professional who could shed light on a particular issue that they are best positioned to give input into. Secondly, purposive sampling can be used when certain members of 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*.

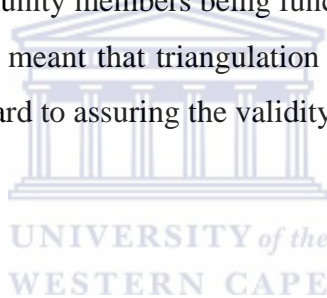
According to Neuman (1997), this method involves repeated iterations in a cyclical process that moves towards a final analysis of the material collected during field research. The researcher started off with vague ideas, and the data collected during field research. During this process the information 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.

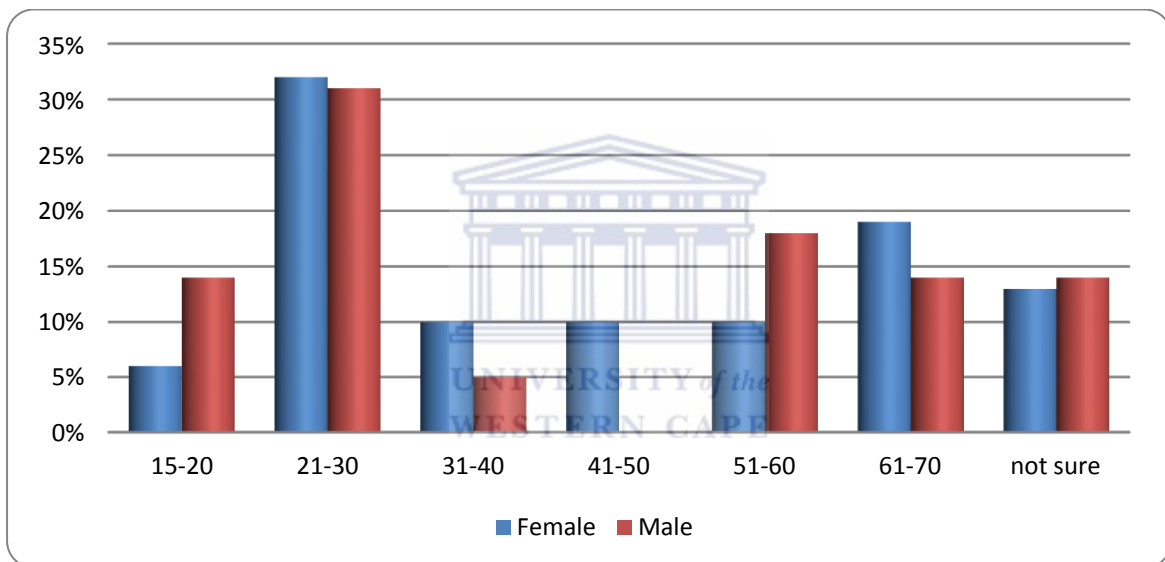


Figure 4.1: Gender Distribution by Age (Interview data: All respondents, Nqileni village, June, 2011)

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.

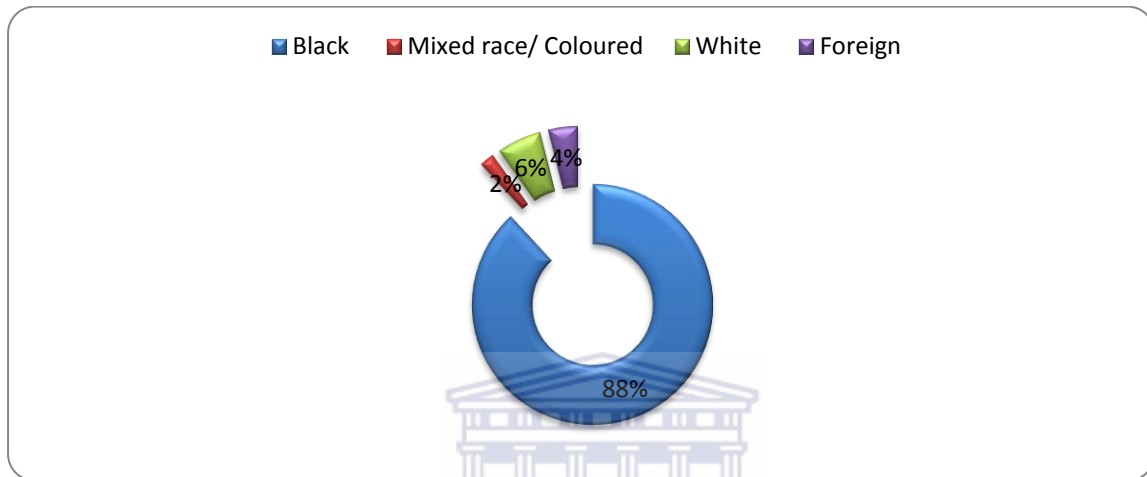


Figure 4.2: Population distribution by race (Interview data, Interview data: All respondents, Nqileni village, June, 2011)

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.

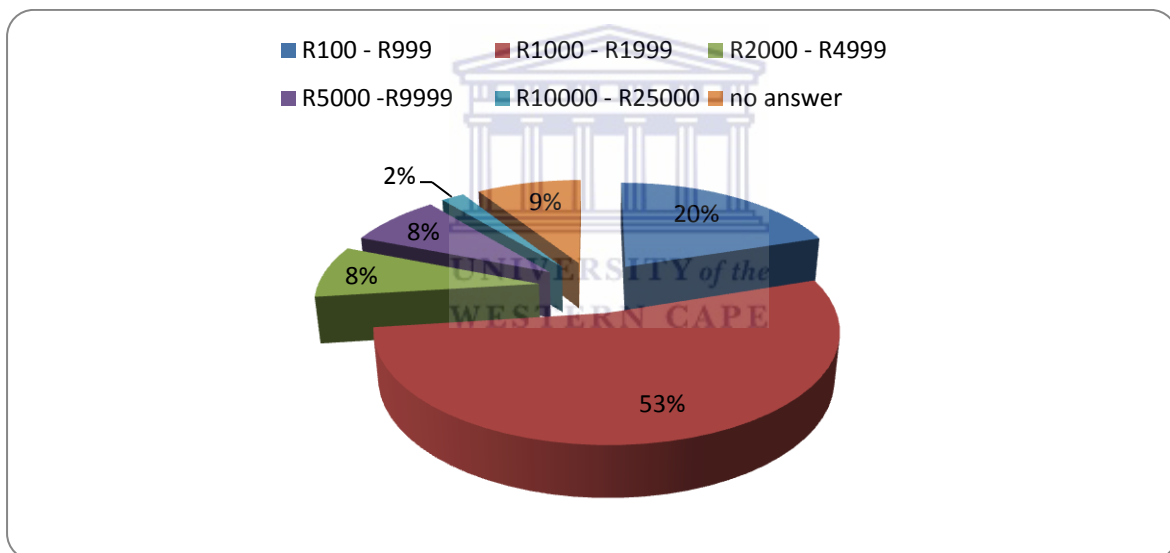


Figure 4.3: Income categories of the sample (Interview data: Bulungula Lodge owner, Bulungula Lodge manager, Bulungula Incubator employees, Nqileni village: June 2011)

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.

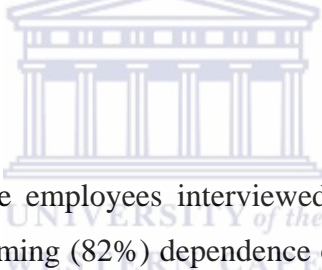
In addition to the education programme, community members are assisted to access government grants by helping them apply for identity documents, and interfacing with the Department of Home Affairs. A monthly HIV voluntary testing and counselling day is held where community members can get tested and 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.

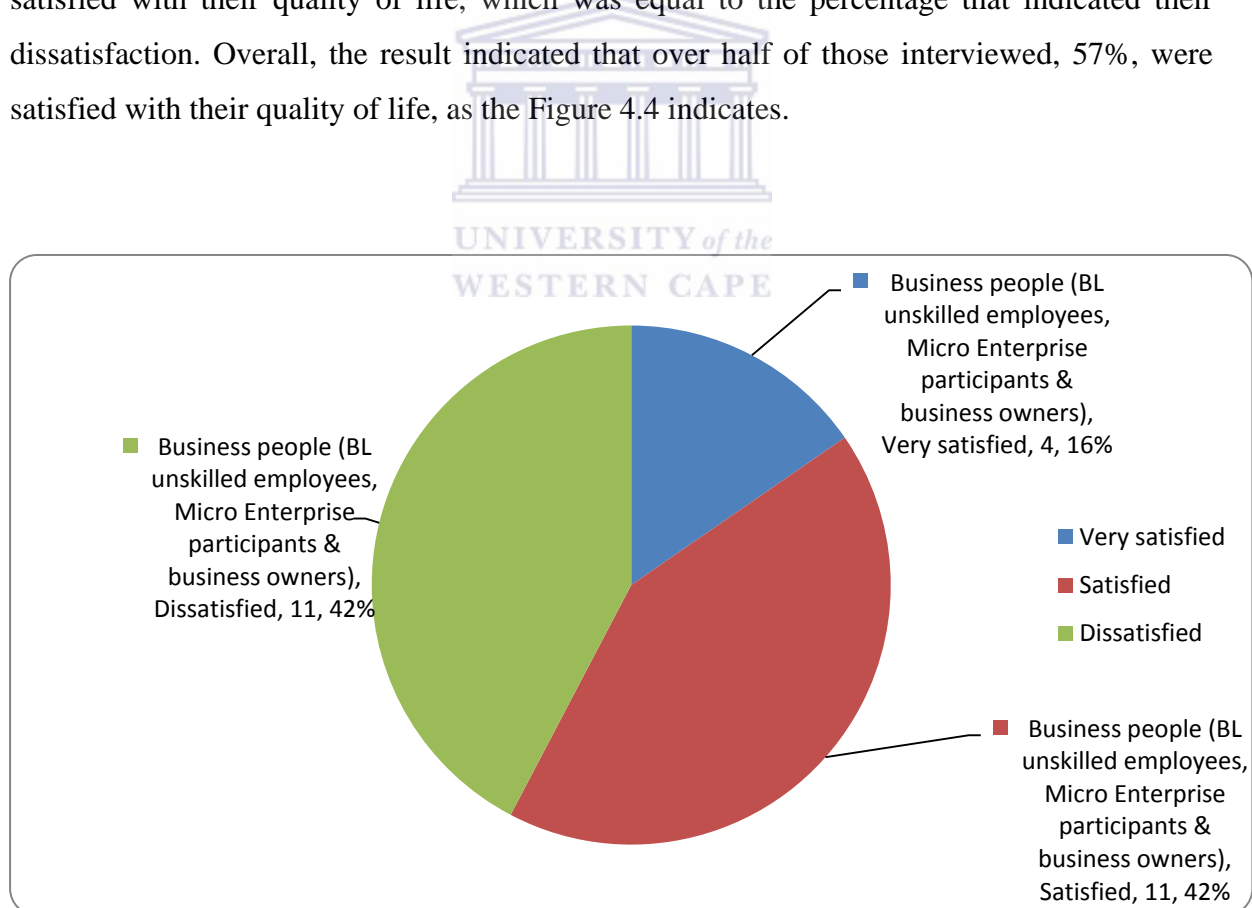


Figure 4.4: Satisfaction with quality of life (Interview data: Bulungula Lodge employees, business owners, micro-enterprise participants, Nqileni village, June 2011)

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.

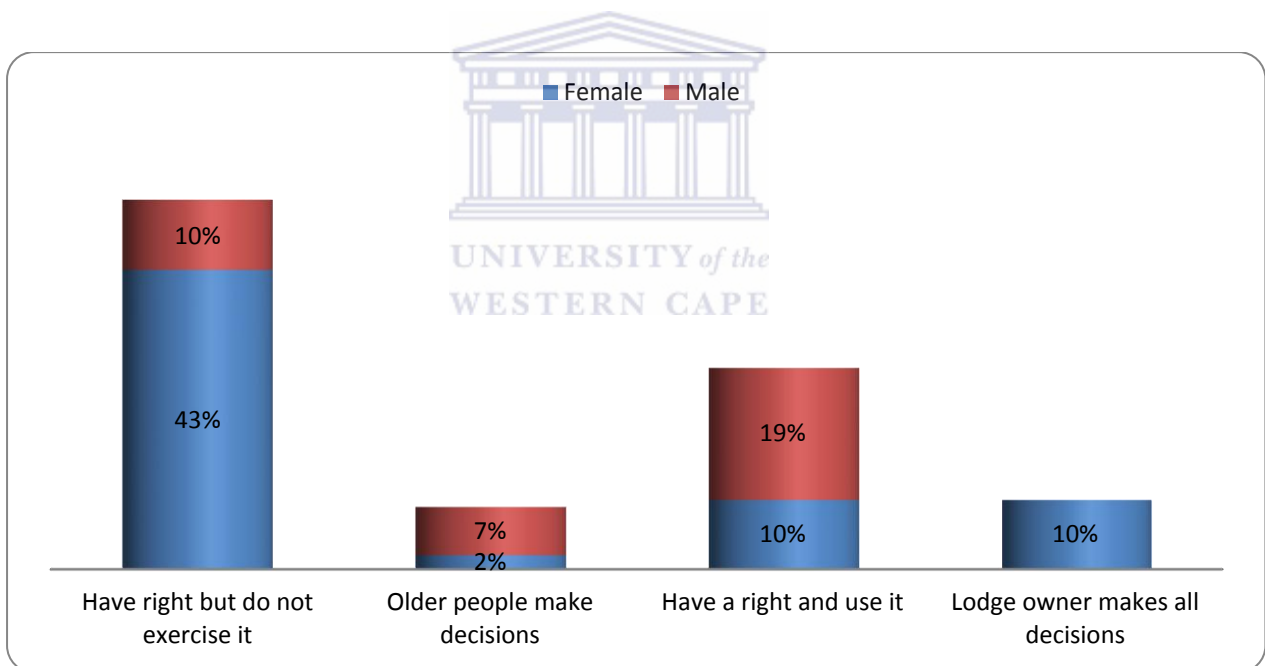


Figure 4.5: Decision-Making about community profits from tourism (Interview data: All respondents, Nqileni village, June 2011)

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.

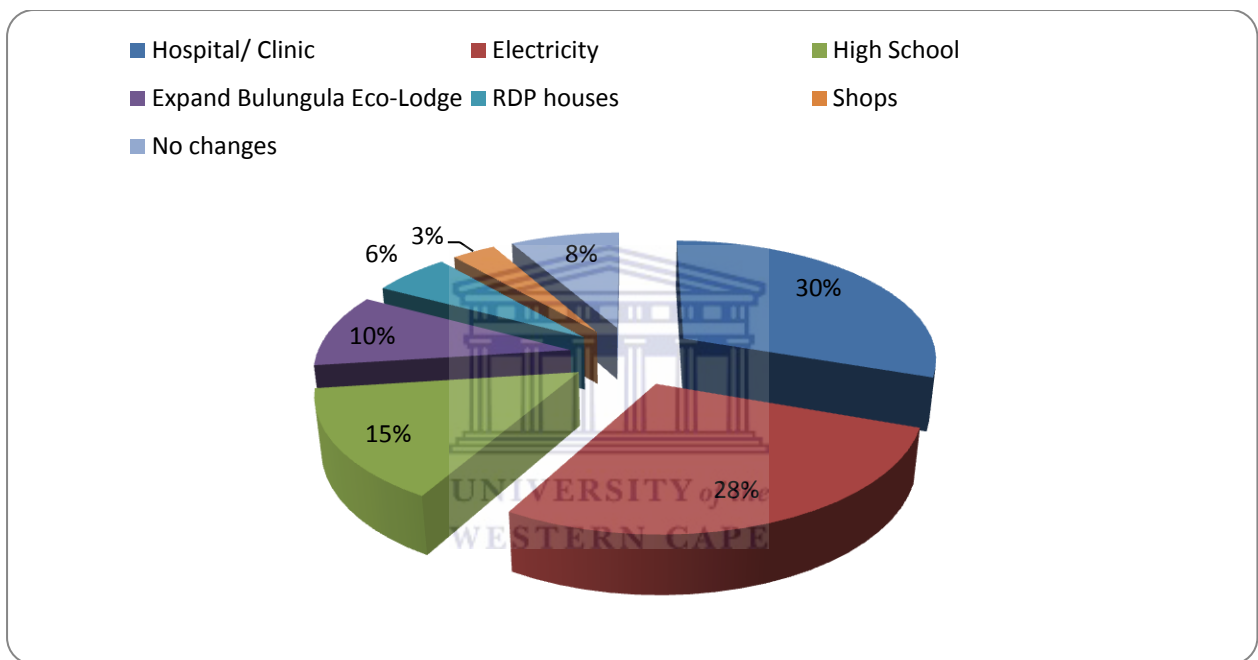


Figure 4.6: Desired changes in Nqileni (Interview data: All respondents Bulungula Lodge employees, business owners, micro-enterprise participants, community members not linked to the Lodge, Nqileni village, June, 2011)

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?

