Ecotourism Development in Madlangala

Written by:
Sanne Kok (RUC) ed1478
Louise Martinsen (KVL) s1878
Kasper Schmidt (RUC) 081274-1985

Supervised by:
Thorsten Treue
Torben Birch-Thomsen &
Anita Veihe

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Preface and Acknowledgements

The present report has been prepared as part of the SLUSE ILUNRM course, and is based on fieldwork carried out in South Africa. The report is the result of a cooperation among students with not only different professional, but also cultural, backgrounds. The process behind the finalisation of the report has consequently been filled with lively discussions, and we have all – in the words of one of our African counterparts – had our minds exercised.

We would like to thank our African group members for spending three laborious weeks with us – we are certain that it, at times, has been a quite frustrating experience.

Kasper Schmidt          Sanne Kok      Louise Martinsen
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1. Introduction

Around the world, ecotourism tends to be presented as a panacea: a way to simultaneously promote economic development in poor countries, enhance cultural sensitivity and promote sustainable natural resource management (Blaney, 2001: 5). However, ecotourism is a relatively recent phenomenon and still has to prove its potential (Doan, 2000). The UN has designated year 2002 as “The International Year of Ecotourism” and has thereby illustrated the massive global attention and optimism that has been devoted to the concept (www.un.org/documents/ecosoc/res/1998/eres1998-40.htm).

The idea of integrating economic development and sustainable natural resource management without disturbing cultural and social structures is indeed appealing, and many countries have adopted the idea for their national development strategies (Fennell et al., 2001:463). The South African government has since the end of apartheid in 1994 put significant effort into the design and implementation of the so-called Reconstruction and Development Programme (RDP), which identifies the tourism sector as a yet unrealised potential for economic growth (GOV, 1994). In 1996, the Department of Environmental Affairs and Tourism (DEAT) issued a policy framework and guidelines for tourism development in South Africa (DEAT, 1996). It argues that properly designed tourism ventures - i.e. “responsible tourism” which build on the principles of social, economic and environmental sustainability – may serve to bring “peace, prosperity and enjoyment to all South Africans” (DEAT, 1996:18).

The main question is whether the theoretical potentials can be converted into practice. The DEAT sponsored ecotourism project in the Maluti District is an example of such a translation. The focus of the project is poverty relief and the local NGO Environmental Development Agency (EDA) in charge of the implementation, places the project within the more socio-economic oriented branch of ecotourism: “The development of eco-tourism is seen as a way of creating employment, generating income for maintenance of livelihoods, fostering improved use of the natural resource base and improving skill levels.” (EDA, 2001d: 1).

With point of departure in these objectives, this report investigates the likely impacts of establishing the “Maluti Ukhahlamba Hiking and Horsetrail” on the inhabitants of Madlangala.

1.1 The Purpose of Study

As mentioned above, our choice of subject is motivated by an interest in the implementation of a national strategy into a specific local context. We suppose that the transformation from one level to another necessarily entails an adaptation of the project to the location, but may on the other hand, also introduce or even impose changes upon the local inhabitants, thus our main question:
Is eco-tourism a viable alternative and/or supplement to other sources of income, and is it likely to improve the livelihood situation of the residents in Madlangala?

A key term in the question is “eco-tourism”. We will not discuss the various definitions of this concept, but rather utilize the scope and field of the Maluti tourism project for limiting our own investigations to focus on socio-economic while excluding possible environmental impacts. Our observations in the area seem to support this initial decision, as the scale of the tourism project appears too small to introduce any significant negative or positive influences on the environment.

Our research question can be broken into three issues, which will be important to look into:

- Does the area hold tourist potential?
- What are the likely positive and negative impacts on the local community?
- And how are these impacts distributed within the community?

The three questions originate from studies of ecotourism projects elsewhere and are regarded important in assessing the success of these (see Ashley et al., 2000; Wearing, 2001; Lindberg, 2001). An affirmative answer to the first question is a prerequisite for the success of a tourism project. If the area does not have “sufficient quality products” such as attractions, landscapes and infrastructure, tourism is unlikely to thrive (Ashley et al., 2000: 2). However, in cases where areas do appeal to tourists, it becomes important to investigate what will happen to the ‘host communities’ once tourists start arriving. The possibility of increased income in a society is likely to be accompanied by a range of less visible socio-cultural impacts affecting larger parts of the communities (Weaver, 1998: 55), thus our second question. In relation to ecotourism projects, and especially the Maluti project, which takes a pro-poor approach, the question of distribution of positive and negative impacts is vital. Thus, if benefits are distributed unevenly, tourism has the potential of reinforcing problems of uneven resource distribution by marginalizing those who are excluded from participating (Futter, 1997d: 66). The answers to the sub-questions result in the final response to our main question.

1.2 Presentation of the area

The field-study site is Madlangala village, which is comprised of 4 sub-villages (EDA, 1999). They are located at the foot of the Drakensberg Mountains in the northeast corner of the Maluti District in the Eastern Cape Province of South Africa (EDA, 1999: 1). The Maluti District is part of the former Transkei homeland, which during the apartheid era was appointed for parts of the black population (EDA, 2001d).

The terrain is mostly mixed grassland with secluded pockets of indigenous mistbelt forest and the dramatic sandstone escarpment forms a natural boundary with Lesotho. The climate in the
area is very pleasant in the summer, with spectacular thunderstorms and abundant greenery, while the winter months often reveal snow-clad mountains. Frost occurs for about 4 months a year (EDA, 2001d: 2).

The primary use of the land is for agricultural purposes, mainly subsistence production. The major crops produced include maize, sorghum, pumpkins, beans, cabbage and green vegetables. The area has a very low employment rate, 38.5% are unemployed and a high dependency ratio of 20 people per formally employed person (EDA, 2001d: 3). Other activities in the area during the year include beer production for domestic use as well as for consumption in the shebeens, harvesting thatching grass and producing brick for house construction (EDA, 1999:13). The infrastructure in the area is rather undeveloped, the majority of roads are untarred and in an unpassable state during wet or snowy periods. Neither electrification nor telephones are found in the villages although cellular phones can be used in some cases (EDA, 2001d: 3).

1.3 The Ukhahlamba Tourism Anchor Project¹

In 1995 the area was identified as having a great potential for tourism. This lead to the formation a local tourism institution “Ukhahlamba Tourism Association” (UTA). And subsequently this lead to the creation of eight Community Tourism Organisations (CTOs) (EDA, undated–a: 1).

1.3.1 The Important Organisations and Stakeholders

Presently, there exist eight CTOs across the entire Maluti District. Villagers can join the CTO as individuals or as members of a community project (EDA, 2001e). Each community project is centred round the production of goods, i.e. there exist bread projects, chicken projects, sewing projects etc. and ideally these should serve both domestic needs and create a surplus for sale.

EDA has an implementing function and provides guidance and capacity building for CTO members. EDA is responsible for the overall financial management of the TP, including the administration of funds from the Department of Environmental Affairs and Tourism (DEAT) Poverty Relief Fund and the Department of Provincial and Local Government (DPLG), contributing with R850,000 and R400,000 respectively. However, by the end of 2001, UTA should take over the financial responsibilities (EDA, 2001e: 5).

The five CTOs involved in the TP have each nominated a Project Steering Committee to drive the construction of the chalets (see next sub-section), allocating workers², collecting material

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¹ In the rest of this report, the Ukhahlamba Tourism Anchor Project will be referred to as TP (tourism project).
² This must be according to the fair trade principles e.g. avoiding nepotism (EDA, 2001e)
and communicating the project to the wider CTO (EDA, 2001b: 3). Once the construction work has ended, the PSC is re-elected and will be in charge of running the TP (EDA, 2001e: 5).

1.3.2 The Project and its Products
The TP started in March 2001 and consists of two main products: 1) a hiking trail and 2) five chalets for overnight accommodation en route the trail. The trail consists of a five-day tour on either foot or horse back. The trekkers are guided along footpaths via various attractions (battlefields, rock art, indigenous forests, waterfalls) and spend the nights in chalets found at 5 sites (EDA un-dated, b). Throughout the rest of the report we will limit our focus to the site close to Madlangala village.

The chalets have simple modern conveniences including: safe water supplies, proper sanitation with two flush toilets (linked to a septic tank) and hot water showers, using wood for heating. All in all: “The trail will provide hikers and riders with the opportunity to have close contact with local culture (food, hospitality, entertainment, medicinal plant knowledge etc.) rock art and heritage sites, whilst enjoying the sparkling streams, clean air and stunning views in an unspoiled mountain environment.” (EDA, 2001b)

1.3.3 Project Scope and Benefits
As the TP origins from a development initiative, the main focus is poverty alleviation:

This is a poverty relief project which should address the needs of the poorest in the community, but also those who are trying to help themselves. (EDA, 2001e: 3).

Apart from the mentioned target groups, three other groups should preferably benefit from TP, those are: women, youth and the disabled (EDA, 2001d: 6). EDA stresses that only limited positions of formal employment can be offered through the TP, rather they expect poverty relief emerging through “a wide spectrum of spin-offs” (EDA, 2001e: 10) such as emerging farmers selling produce to guesthouse hosts, supplying the needs of the accommodation facility, such as cleaning and catering, furnishings, meals, entertainment etc. Once operating, it has been estimated that five households per village will benefit directly from the TP, by performing individual tasks such as food or entertainment. Additionally, four guides and two guards per site will derive a regular income, at least two community projects will generate income through sale of produce and a further ten individuals per village will benefit through the sale of crafts (EDA, 2001e: 11).
2. Methodology

This section contains a presentation of the methods used during the fieldwork, followed by a discussion of their limitations and the problems encountered in the field. The methods we have chosen for our fieldwork originate exclusively from the social sciences. This choice is motivated by two factors: 1) the nature of our subject, and 2) the disciplines of the group members, including the African group members, which were all cultural geographers. Within the social sciences we have used both qualitative and quantitative methods. However the emphasis has been on the use of qualitative methods.

2.1 In the Field

During the week we spent in Madlangala, we conducted:

- 26 interviews in individual households; 8 in Mabua, 7 in Pepela and 11 in Makomoreng
- 4 focus-group interviews; 1 with the women cooking for the students in Makomoreng, 1 with a group of men in Makomoreng, 1 with a group of women in Pepela and 1 with a group of women in Makomoreng.
- 4 semi-structured interviews with PSC-members in Mabua and Makomoreng. In total there are 7 PSC members, which implies that we have talked to more than half.
- 3 unstructured interviews with locals involved in the tourism project.
- 2 semi-structured interviews with EDA representatives.
- Focussed observations during the walk of a part of the trail including paying a visit to the chalets, seeing the Khoisan paintings etc. A PSC member functioned as our guide.
- General observations in relation to the stay in the village.
- One unstructured interview combined with observations during firewood collection with a group of women collecting firewood.
- Questionnaires concerning an evaluation of the stay in the village “from a tourist-perspective” were handed out to all the groups of students participating in the field trip.

When we refer to the interviews or observations in the following chapters, we indicate them by the number in the list (Appendix I), e.g. (I2) refers to interview 2.

The many different methods have, apart from serving the purpose of providing new information, also served the purpose of methodological triangulation. We have employed this strategy by 1) using the same method e.g. semi-structured interviews in different contexts, the “within-method” and, 2) by investigating the same issues through different methods e.g. both in focus-groups, questionnaires, the “between-method” (Mikkelsen, 1995: 82). Both strategies

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3 For a more detailed list of investigations, criteria for choosing respondent and representativeness of respondents, see app. I
have served to provide us with a more detailed picture of the TP in relation to the local context; the first by focussing on inconsistencies between perceptions, the second by revealing more diverse information and maybe also “reaching” more diverse respondents. In the following sections the backgrounds for using the different methods will be presented.

2.1.1 Interviews with the key-informants
We considered PSC members and EDA representatives as key-informants, and by interviewing them we expected to gain an overview of the project, of demographic composition of the community and of the local economic activities, and we hoped that they could help us shaping our questions for fitting the local terminology and reality. Lastly, we hoped to receive some help in identifying respondents representing the second category.

The type of information we were looking for, combined with our lack of knowledge concerning the local context, called for the use of a flexible tool, allowing us to pursue interesting issues emerging during the interview. Based on these considerations we decided to use semi-structured interviews (Mikkelsen, 1995: 102). We were aware that the obtained information would not represent any kind of objective truth, but reflect the views, interests and position of the interviewee. However, considering our wish to disclose the local perception of things we do not think that this necessarily should be considered a disadvantage. We have tried to avoid a strong subjective bias of only one perspective by utilizing “methodological triangulation” (Mikkelsen, 1995: 82), thus asking the same kind of questions to different people.

2.1.2 Focus-group Interviews
Due to the initial stage of the project, we anticipated that most of the villagers had not been directly involved in the project or even heard of it. Furthermore, the concept of tourism would probably be new or unknown to the vast majority of the local population. Based on these considerations, we decided that focus-group interviews would be ideal for discussing perceptions and ideas and maybe develop new ways in which local people could contribute to the TP. We hoped the discussions could reveal information on three issues: 1) the present understanding of the concept of tourism and the project itself, 2) the needs, problems and positions of the interviewed and 3) the future expectations and concerns regarding the project.

2.1.3 The Questionnaires
We decided to conduct a number of household interviews, in order to uncover the spread of information and the involvement in the TP according to social parameters as well as geography. The interviews consisted of two parts: a quantitative and a qualitative. This design should facilitate comparison and reveal possible patterns of the distribution of knowledge of and involvement in the TP.
2.1.4 Observations
We decided to use observation as a method by dedicating ourselves to the role as tourists in an attempt to evaluate the project from the tourist point of view. On a more focussed level, we planned to participate in a guided tour in order to assess the quality of the attractions in the area and the skills of the tour guide.

2.1.5 Unstructured interview
The unstructured interviews were conducted because we wanted an opportunity to talk to people in an informal setting hoping that it this way would be possible to disclose information on some more sensitive subjects, such as the responsibilities of and relationship between men and women respectively.

2.1.6 The student questionnaire
The questionnaire distributed among our fellow students was included in order to supplement our own experiences in relation to establishing the tourism potential of the area.

2.2 Evaluation of the Fieldwork

2.2.1 Language
The most significant problem during the fieldwork was that of language, since it was difficult to get interpreters, who spoke English very well. On one occasion, a supervisor did the interpretation, however, he quickly took over and actually performed the interviews, deciding which questions should and should not be posed. Consequently, we had no means of controlling that the same formulation was used in all the interviews, thus limiting the comparability of answers, just as the the risk of missing out on possible important details was increased.

All in all, our lacking language skills and the limited time for finding, and getting to know, good translators have meant that especially the data from the household interviews and the focus group interviews may only reflect parts of or a simplification of the answers given.

2.2.2 Cultural Codes
During several of the interviews it became clear that we had different cultural approaches to interviewing. The African students were much better in approaching people and gaining their attention than the Danish. Also, the African students seemed to know how to address the respondents and which subjects might be sensitive. The Danish students, on the other hand, asked more direct questions and insisted on probing, thus sometimes risking to force answers from people who simply did not know. This may have led to answers given simply to satisfy the interviewer or close the subject. On the other hand, the avoidance of certain issues and the lack of probing on the part of the African students, may have led to superficial information giving rise to even more questions, rather than clarifying.
2.2.3 The Interdisciplinarity of the Group
Those students who were experienced in conducting qualitative interviews were mostly interested in the flow of the interview and tried to explore the topics introduced by the respondents. On the other hand, those unfamiliar with the method, were mostly occupied with adhering to the list of topics in the interview guide. This combination of skills and foci could if time had allowed for it have proved to be very beneficial adding both structure, overview and fluency to the interview.

2.2.4 The Role of the researcher
To conduct empirical work is always to intrude on other people’s lives. Kvale (1996) suggests to reflect on four important ethical aspects in relation to interviews: 1) the participation of the interviewee should be voluntary, 2) in the presentation of data, the anonymity of the interviewee should be protected unless agreed otherwise, 3) the material should be treated in a responsible manner and 4) the researcher should reflect on the possible consequences of the interview for the interviewee (117). Regarding the first aspect, most of our respondents were contacted in their homes without prior notice (this was the method suggested by a local PSC member, when asked for help in identifying respondents for our household interviews (I7). This could imply that people would hesitate to refuse participating, as they might be considered impolite, but in a couple of instances this concern was dispelled by people asking us bluntly to leave⁴. In another situation, a key-informant hesitated to be interviewed because she was tired, when she finally agreed to talk to us she felt uneasy and exhausted, and we therefore decided to stop the interview after a few questions (I9). The second and fourth aspect regarding the anonymity of people and the treating of the material are more difficult to handle. Although, we do not mention any names in our report, several people will be recognisable simply by their position and because of the small size of the village. EDA has asked for our report and in that respect we do not know which consequences their reading of some of our findings may have for e.g. the PSC members. However, we do not feel that we have criticised the doings of any individual, but have rather tried to explain our observations according to the structures of the project or the whole setting of the area. In terms of the third aspect, we are – as already mentioned - aware of the limitations of our material, and we will do our best to treat it in a responsible manner.

Regarding power relations, it was - due to our limited language and cultural knowledge - impossible for us to assess whether people spoke freely in our presence we did, however, experience that interpersonal relations in some cases affected people’s willingness to speak. In several cases we experienced the presence of a man would induce women to refrain from

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⁴ Unfortunately, another group of students had already interviewed them a couple of days before and they believed us to be the same people. Despite, our efforts to convince them differently, they maintained that they had no more information for us, and we of course accepted this.
talking and in focus group interviews where only women were present, it seemed that one of them would dominate the talking (I3; I4). In relation to the domination between genders, we took up the challenge of collecting firewood with the women, and by approaching them in the kitchen, thereby excluding the men from interfering and thus being able to speak more freely with the women.

2.3 Could other Methods or Approaches have been used?

We believe that the use of the matrix ranking might have been a good idea, as it could have added important details to the information we have obtained. Another way to disclose more information on the economic activities could have been to produce a seasonal calendar, which might induce people to think a bit more thoroughly about how they spend their time. Similarly, it seems that we lack detailed information on the informal power relations and the relation between traditional local organisations and new organisations, since such information might have shed some more light on some of the difficulties associated with the TP. One way of obtaining information on the power relations could have been to attend a community meeting or pursue more information through the production of a Venn diagram displaying the status of key persons and different organisations\(^5\). We realise that the methods we have used are rather similar, or may to some extend lead to similar types of answers or appeal to the same type of people, in relation to triangulating information it would have been more ideal, had we used a wider variety of PRA methods such as those mentioned above.

\(^5\) See Mikkelsen 1995.
3. Findings

We have structured the findings according to six themes under which we compare the data obtained by the different methods. The themes are: activities, benefits, concerns, organisations, attractions, and target group.

3.1 Activities

In this section, we will present information on income sources, their character and economic importance.

3.1.1 Cash Income

According to the household-interviews 73% households included members carrying out migrant work. In about 39% of the households at least one person received pensions (app. III).

The other cash-income sources were sale of agricultural and gardening products (42%) and activities such as taxi-driving, selling eggs, participating in the Working for Water project and beer brewing (in total 46%). A slight geographical bias was observed as 75% of the requested households in Mabua were engaged in cash-generating activities, compared to 29% in Pepela and 36% in Makomoreng (app. III).

The general picture was that the inhabitants in all three sub-villages were engaged in a few income generating activities, deriving cash mainly from external sources such as remittances from migrant workers and pensions.

3.1.2 Non-cash Income

All but three households were involved in growing vegetables and fruits and keeping livestock. In that respect, the participants in one of the focus-group interviews (I2) expressed a satisfaction that our stay did not overlap with the gardening season. As the plan for the TP includes having tourists all year, this may pose a problem in the future, and especially for the women, who are responsible for most of the daily tasks that needed daily attention such as cooking, washing, taking care of the children etc. (I7; I14).

In relation to the community projects some confusion occurred on the subject of people's involvement, the household interviews show that only 27% of the households were engaged in the projects, whereas three of the focus-group interviews point to a high rate of participation especially among the women (I5, I2, I4). However, not all of the community projects are up and running, among other things it was mentioned that the Chicken Project was without chickens. The Sewing Project, however, seemed in progress, working as a teaching program in which one woman would pass on her skills to the other members of the
Project. A recently started community project focussed on the production of arts and crafts for selling to tourists (I5).

EDA has put much emphasis on increasing the production in the community projects expecting the tourists to provide a market for local products. However, we experienced that much of the food that we were served during the stay was bought (I16). This may be due to the fact that the projects still need to function more efficiently, but it may also be that a part of the necessary products for serving tourists cannot be produced locally, but needs to be bought elsewhere.

3.1.3 A Need for Cash Income
It seemed that most people in all three sub-villages lacked commodities which could not be obtained from local production, such as clothes including school uniforms for the children and shoes, basic hygienic commodities like soap, toilet paper and also tools, sowing seeds and fertilizers had to be bought outside the community (I16) and information based on the investigations of the cropping group).

The few income creating activities, combined with rising unemployment among the men, point to two important aspects in relation to the TP: 1) people are eager if not desperate to earn money and 2) many have the time to engage in (new) projects/activities. The first aspect was confirmed in the several interviews where people expressed that they expected paid jobs from the TP (I1). Furthermore, the need for cash led some of the interviewees to state that they were willing to accept whatever working conditions they would be presented with including low salaries, long working hours, and stressful tasks (I7). The second aspect points to a large volume of available and motivated labour force.

3.2 Expected Benefits
All but one interviewee expected the TP to give rise to either personal or community level benefits.

3.2.1 Personal Benefits
In total 73% of the household interviews stated an expectation of deriving personal benefits from the TP through employment, by selling vegetables, eggs, chickens, crafts etc. to the tourists or by accommodating tourist (I1). Although not stated directly in all interviews, it became clear that the main emphasis was on the expectation that the TP would create jobs, and preferably permanent jobs (I1). This pattern of expectations was supported by other interviews with locals, where it was added that some of the benefits would be channelled through the community projects (I5; I7).
From the interviews with EDA members it appeared that the main goal of the TP is not to create permanent jobs, but to upgrade markets for local products and services, thereby creating a suitable environment for local entrepreneurship and community driven initiatives (I12).

3.2.2 Community Benefits
Around 50% of the interviewed households said they expected the TP to provide benefits for the community in the form of electricity, improved roads, schools and/or health clinics (I1). In addition, the men in a focus group interview also expected/hoped that the village would get a bottle store, a supermarket and a butcher shop once the TP is operating (I3). In a women’s focus group interview it was mentioned that profits from the TP would provide funds for kick-starting presently non-functioning community projects (I5). It was explained that the profits from the TP will be deposited in a common community account in the bank for financing projects of common interest (I7). The community level benefits expected by the EDA were of a smaller scale, e.g. a new roof to the school (I12).

3.3 Commitment and Distribution of Benefits
The respondents in general seemed very reluctant to engage in the TP and instead choose to “sit and wait” for concrete jobs. One explanation to this may be that people have not really adopted the community/empowerment element of the TP. Another may be that people are disillusioned by previous experiences and consequently are reluctant to adopt the idea. One PSC member mentioned that people had previously been promised projects of other kinds, which never materialised. The interviewee believed that such experiences had discouraged at least some people from getting involved in the TP (I6). The fact that so many people expect to derive benefits from the TP without being involved in its implementation seems to support his expectations.

Fair and equal distribution of benefits and jobs is to be secured by a ‘rotation principle’ implying that e.g. people who have accommodated visitors once are not allowed to do so again before everyone has accommodated visitors (or have benefited from the TP in some other way) (I9). In relation to accommodation, the rotation principle seem to be adhered to, e.g. part of our group was not allowed to stay at a household that had accommodated visitors before. However, we did notice that so far visitors had been accommodated only in Makomoreng; this could lead to jealousy on the part of the other sub-villages. In relation to catering the rotation principle was not adhered to. Thus, the women working in the kitchen during our stay were the same as the ones who had catered for the previous visitors (I2).

It is the PSC members that are responsible for securing a fair distribution of tasks (EDA, Undated -c). Some of the PSC-members indicated that this was a quite troublesome task, that caused a lot of discussions and exposed them to pressure from members of the community
wanting to be selected for jobs (I6; I9). In this connection, we were quite surprised to find that PSC-members are only paid for a few of the administrative and informative jobs that they carry out (I12).

3.4 Potential Negative Impacts and Concerns

In the household interviews 54% of the respondents did not express any concerns in relation to the TP (app. III). The remaining 46% of the respondents mentioned the following concerns:

- Five respondents pointed to the Basotho people as a possible threat. The respondents feared that the Basothos would attack the tourists or steal building material from the chalets out of jealousy. One person in Mabua dismissed such concerns as being prejudice (I6).
- Three respondents were concerned that problems with AIDS would increase.
- Three respondents mentioned fear of colonization, in the sense that tourists would set up fences to keep out local people or take over the land.
- One respondent feared that tourists roaming around in the mountains might cause fire, shoot the local people or even throw atomic bombs.
- One respondent expressed some concern in relation to potential changes in local lifestyle, e.g. increasing promiscuity (I1).

It is interesting to note that people either express no concerns at all or express concerns not directly linked to tourism whereas no attention is paid to more obvious and likely impacts such as potential environmental degradation and social influences. This perception of impacts, was to a great extent supported by the information extracted from the other interviews where the Bashotos, AIDS and atomic bombs were also mentioned. To us, this might indicate a lack of in depth reflections on the matter in the community and thus the inhabitants have simply stated their general fears when asked about negative impacts.

3.4.1 Social and Cultural Impacts

In the men’s focus group interview a concern over nepotism in relation to hiring people for tasks as expressed (I3). The relevance of this concern is supported by a PSC members who told that people were approaching him, either in an attempt to secure jobs for themselves or their relatives or in order to complain about others – rather than themselves - having received jobs. Learning from prior experiences, e.g. the “Working for Water” project, he anticipated that negative impacts would emerge due to tensions within the community over the distribution of benefits (I6). In fact, we believe that such tensions have already surfaced as we

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6 Concern was also voiced in relation to tourists, primarily from overseas, coming with some 'wrong powders'. Whether reference was made to narcotics or anthrax (the anthrax problem was at its peak at that time) we do not know (I7).
experienced several times that questions concerning economy made the respondents feel uncomfortable and we failed to get any clear answers to our questions. The PSC member also expressed the concern that people’s lifestyles would change, that traditions would become increasingly commercialized and that indigenous knowledge could be reduced to “tourist-attractions” (I6). One person expressed the concern that exhibiting culture for money, e.g. the dancing team7, might destroy the cultural meaning of the dance (I10).

3.4.2 Concerns and Understanding of Tourism
It is interesting to note that despite the seriousness of the feared impacts, the respondents who expressed concerns still claimed to be very happy about tourists coming to the area (I1). We take these obvious contradictions to indicate either of two things firstly, that people are desperate and therefore willing to do anything in order to improve their livelihoods, implying that they prefer tourists to come despite the potential livelihood threatening impacts. This interpretation is supported by a focus group interview where the interviewees tell about their negative experiences connected to the previous stay of another group of students (I2). Despite this exclusively negative experience, they all claimed to be willing to continue to cater for tourists since there was no alternative way for them to earn money. Secondly, it could also mean is that people do not really understand the full range of the TP, implying that they find it difficult to form any detailed concerns. These two reasons may also interact to support the observed reactions as an urgent need for jobs together with a limited knowledge of the practical implications of tourism may cause people to focus on the positive aspects only. This way, the expression of serious concerns do not necessarily clash with the positive attitudes towards tourists coming to the area since there is actually no link between tourists and concerns.

3.4.3 EDA’s Position
The interviews with EDA did not shed much light on neither expected nor potential negative impacts. Questions concerning potential negative impacts were elegantly circumvented by appraisals of all the good things that the TP can do for the area, and nowhere in the written material concerning the TP are any negative aspects mentioned (I12). Thus, we are left with the impression that so far there has not been carried out any investigations of, or reflections on, the potential negative impact of the TP. The tendency to focus on positive aspects while downplaying potential negative aspects was confirmed by a respondent stating that “the EDA is the one selling the project” (I6). Also we witnessed an EDA representative close a discussion of negative impacts with a local inhabitant by dismissing his concerns (which were

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7 It is intended that a “professional” dancing team should be set up as a part of the tourism project. The team will be administered by the PSC, the dancers will be paid for their performances consequently expected to train hard and work out a coherent show.
not specifically related to tourism) while avoiding to direct his attention to more realistic and likely negative impacts.

3.5 Organisations

In this section we will try to comment on the organisations and stakeholders in the TP.

3.5.1 Familiarity with the Organisations

In general, the knowledge – with respect to EDA – was highest in Makomoreng and lowest in Mabua. The knowledge of CTO, PSC and the TP was highest in Makomoreng and lowest in Pepela. Despite the fact that a significant number of households knew of EDA, only 42% said that they - as a household or community – had ever received any help from it (app. III). Very few people in especially Pepela knew of CTOs and PSCs, while an equally high rate of people knew of these in Makomoreng. In relation to the TP it was also people in Makomoreng that were most knowledgeable (app. III). An explanation for this difference in knowledge may be that Makomoreng is closest to the site and that 3 out of 7 PSC members live in Makomoreng. Also, people in Makomoreng have through the accommodation of the visitors witnessed the TP "in action", while people in Pepela and Mabua may only have heard rumours about the coming of "tourists".

3.5.2 The Organisation and Involvement of Local People

Comparing the household interviews with those of the PSC members, we observed a rather large difference in the knowledge of the TP. This could be due to the structure of the TP, making PSC members responsible for a range of duties, while the rest of the community is informed on, and/or employed for, individual tasks. Several of the household interviews seemed to confirm a limited interest in the TP on the part of the community, as many respondents stated that they were not particularly interested in information on the TP and did not attend the community meetings where the TP is debated (I1). A PSC supported these statements adding that villagers often approached her after the meetings complaining about the decisions taken (I9).

3.6 Attractions and Services

In terms of the features that may attract tourists to the area, 12% of the households had no idea of what they might be; 73% agreed on scenery (i.e. primarily the mountains) as an important factor; 19% mentioned culture, and 15% stated other reasons (e.g. remoteness of location and the poverty stricken character of the area) (app. III).

In the students questionnaire, we found support for the local opinion that the mountains and vegetation is indeed an attractive feature of the area (I13). We were there in mid-October and experienced the “spectacular thunderstorms and abundant greenery” (EDA, 2001c: 2) which are some of the attractive features of the area during the summer (and/or spring, as we
experienced). Material from EDA also emphasize attractions such as rivers, waterfalls, crystal swimming pools, San rock paintings and caves. During our walk we saw examples of these attractions, and we agreed that on their own they would not be “enough” to attract tourists, but that they gathered in a trail offered an interesting insight into the area and the history of its inhabitants (I15).

3.6.1 Cultural Differences
With respect to the local culture as an attraction, the students evaluated both the welcoming séance and the dancing session as interesting and pleasant. The welcoming show functioned as an official introduction of both parties and increased the feeling of security on both sides. However, the show also gave rise to some more unpleasant experiences since several of the local men, including ones with a prominent position in relation to the organization of the show, were intoxicated, implying that they were a bit too straightforward and unrestrained in their appearances. Also in this connection, one interviewee also informed us that – during our stay in the village - military police patrols stationed in the mountains just outside the village had been instructed to make sure that no intoxicated people were roaming around (scaring the visitors) after eight at night (I14).

3.6.2 A Poverty Stricken Area
One respondent believed that the poverty stricken nature of the area would serve to attract tourists (I1). In one respect this observation is probably true since a lot of people probably could be interested to experience how poor people live. However, it may equally well serve as a disincentive, since the perceived risk of crime as well as the occurrence of begging probably increase in a poor area. During our stay we did not feel threatened in any way, however, we were still a bit more alert than usual, and most of us did not feel comfortable being out at night alone (I16). The fact that we were economically more resourceful than the inhabitants led to a continuously asking for money, candy and our clothes on the part of the locals (I16). All the student groups confirmed that they would like to visit the area again – as tourists (I13).

3.6.3 The Remoteness of the Area
One respondent believed that the remoteness of the location in itself would serve to attract tourists (I1). However, the lack of communication and transportation to the area provided a feeling of being cut off from the rest of the world, and some students mentioned in the evaluation that this may limit the actual attractiveness of the area for future tourists (I13). The village offered no attractions or sights in itself, but one student mentioned that experiencing a rural area was interesting in itself and that part of the attraction of the area could be to participate in the daily tasks of the villagers (I13).
3.7 Target group

With respect to the kind of tourists expected to be attracted by the TP 89% of the respondents in the household interviews stated “all kinds of tourists” (app.III). The remaining 3 respondents were a bit more specific in their profile of likely visitors; one recognized that it depends on the preferences of the tourists. Another specified it to be people who love nature and the last one narrowed it down to “white people” (I11). This general inability to specify a target group was to a great extent supported by the information obtained through the semi-structured interviews, where the most specific tourist profile was offered by a PSC member who specified it to be “people who are interested in experiencing rural lifestyles, and who enjoys being in beautiful natural environments” (I6).

That people in general were unable to specify the target group of the TP seem to indicate that their understanding – i.e. the motivation for traveling and the determinants of destination - of tourism is quite poor. When we walked part of the trail, it quickly became clear to us, that the TP, in its present design will not be suitable for “all kinds of tourists”. The trail is physically challenging – especially so if carrying a backpack; and, if choosing to do it on horseback, the steep slopes and unmarked nature of the trail, will probably only appeal to quite adventurous and experienced riders (I115).

Since the nature of the benefits that may accrue from tourism, along with the nature of the demands posed by tourists, are likely to vary significantly between different types of tourists, the lack of a more clearly defined target group may increase the risk that people form unrealistic expectations to the merits of the TP.
4. Does the area have tourism potential?

Ranked as one of South Africa’s most popular tourist attractions the Drakensberg Mountains do indeed appeal to tourists (GOV, 2001), and it could be taken to suggest that the same would apply to Madlangala. In this section we will evaluate the tourist potential of the Madlangala and the TP. The analysis is divided into three parts:

1. The size of the tourism market in South Africa;
2. Characteristics of potential target groups;
3. Evaluation of the tourism project compared with competitors in the region and the preferences of target groups.

4.1 The tourism market in South Africa

In terms of foreign arrivals, South Africa received 5.98 million tourists during 1998 and 87% of the visitors were on holiday (Dieke, 2001: 91; Satour: 2001). 50% of the visitors came during the months of November to March, displaying a significant seasonal variation (Dieke, 2001: 91, 94). In terms of destination, 28% visited KwaZulu Natal, and 14% visited Eastern Cape, in 1998, and the average number of nights spend in South Africa was 17, and the average was R1.086 per person per day in 1998 (Satour, 2001).

In terms of the domestic market, more and more so-called coloured and black people have started travelling. Compared to the traditional travellers, this emergent class of travellers is characterised by a high proportion of day-trippers and people visiting friends and relatives, and they tend to have a relatively low spending power. The average spending per trip for all domestic tourists amounts to R1.178, and to R1.549 for the most well-of (1997 Rand). With respect to purpose of travel, holiday trips account for 45% of the domestic market, and in this connection it is mentioned that the emergent class of travellers tends to prefer gregarious types of entertainment experiences. In terms of destination, KwaZulu Natal is the most visited province (Futter & Wood, 1997c).

In the South African Yearbook 2000/2001 (GOV, 2001) ecotourism – including activities such as photography, botanical studies, bird watching, hiking and mountaineering – is mentioned to be the fastest growing segment of the South African tourism industry8. However, nothing is mentioned regarding the actual size of the market segment or the visitor profile. In a survey conducted among departing foreign visitors concerning which characteristics of South Africa that they found most appealing 47% mentioned scenic beauty.

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8 Additionally, village tourism is also mentioned as gaining increased popularity among visitors. No definition of the term is provided, and accordingly it is difficult to say what it actually implies. However, it could be taken as an indication that more and more tourists are motivated by experiencing local cultures.
29% mentioned wildlife, 23% mentioned the climate, 21% mentioned experience of African cultures and lastly, 19% mentioned ‘to see S.A. after the political changes. However, in this connection it should be noted that South Africa is famous for providing abundant opportunities for experiencing such characteristics (Dieke, 2001: 99). Thus, the competition is harsh and the market is dominated by Krueger National Park, which account for almost 50% of all foreign overnights in game parks, implying that many other parks in South Africa do not fare well in terms of visitors, probably because they are not well known and “lie off the beaten track” (Dieke, 2001: 99).

4.2 Specifying the target group

In table 4.1 potentially relevant target groups have been categorised according to their preferences with respect to activities, services and accommodation9. It is based on quite rigid “ideal types” of tourists in order to clearly demarcate the differences between their preferences, implying that there in reality might be significant overlaps (Wight, 2001: 60). The attractions, facilities and services of the TP will be evaluated with regards to the five different types of tourists, i.e. the experienced ecotourist, the general ecotourist, the backpacker/explorer, the special interest tourist and lastly the general interest tourist.

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9 These types are based on categories broadly acknowledged in the literature see e.g. Weaver (2001); Hampton (1998); ECTB (1999).
4.2.1 Attractions

There is an important difference between the mountains in the Maluti area and those of the other areas around the Drakensberg; where most other tourist sites are centred round conservation areas the TP is marked by the presence of people. This difference in “pristineness” could be a significant disadvantage in relation to both the experienced and the general ecotourists who value national parks and a “wilderness setting” highly relative to other attractions/activities (table 4.1). However, the inhabitation of the area could also be considered an advantage since the close relations between the TP and the surrounding local communities open up for the possibility of marketing traditional culture/rural livelihoods as an attraction. Cultural experiences seem to appeal to the segments belonging to the general ecotourists, experienced ecotourists, general interest tourists and the special interest tourists (table 4.1). Although other tour operators include cultural attractions as part of the experience, the TP offers the opportunity of living with or close to traditional black communities, which makes it quite unique.

EDA does mention the cultural dimension in their documents, but it seems that only limited attention is paid to realising this potential (EDA, undated-b). The placement of the chalets in the foothills of the mountains implies that tourists are accommodated about 20 minutes walk away, suggesting that the cultural component will primarily consist of the entertainment show. However, the planned home-stays could offer more cultural experiences, which would suit the preferences of both the general and experienced ecotourist segment and the special interest segment quite well. However, since the general and the experienced ecotourist value national parks and natural attractions higher than cultural attractions, it might be difficult for the TP to attract these target groups on that account.

4.2.2 Facilities and Services

Regarding the facilities in the area, the two main products of the TP are: 1) the chalets and 2) the trail. The chalets offer modern conveniences, but cannot be characterised a luxurious, and are placed with a view over the mountains and a small indigenous forest. This kind of accommodation seems to apply well to both the experienced and general ecotourists but less with the three other tourist categories that either prefer very cheap accommodation or hotels. Alternatively visitors can be accommodated privately, under more simple terms. According to table XX this type of accommodation primarily appeals to the backpacker, the experienced and the general ecotourist. Accommodation options offered in other areas of the Drakensberg

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10 See: http://www.drakensberg.org.za/index.htm

11 For a list of attractions offered in the Drakensberg Mountains see: http://www.drakensberg.org.za/content/cultural.htm
range from spending nights in caves and tent camps to overnight stays in huts and luxury hotels, but none of them include home-stays in black rural areas 12.

The second product of the TP is the trail and compared to other trail opportunities in the Drakensberg there do not seem to be any major differences in attractions and options for choosing short or long hikes, on foot or on horse back13. However, the physically challenging nature of the trail mainly seems to appeal to the experienced ecotourist. Still, it has to be kept in mind that both types of ecotourists prefer a wilderness setting or a national park for hiking and doing other activities. This could be a serious limitation for the TP which does not offer hikes in as pristine areas as can be found around national parks.

Apart from the two main products of the TP, a number of other features influence the potential of the area. Firstly, the area does not have a wide variety of large mammals, which means that it cannot attract wildlife tourists. Secondly, apart from the trail no other activities are offered, whereas some of the competitors mention golf courses, sports facilities and rock climbing which could attract the special interest segment14. The remoteness of the area together with the lack of means of transport and proper roads, may also discourage people from coming to the area, especially the segments belonging to the backpacker and the general interest tourist. The backpacker typically follow the footsteps of other backpackers and prefer to meet up with like minded tourists (Hampton, 1998: 642), and the general interest tourist does not want to travel long distances without point of interest. Lastly, the perceived high crime rate might be an important obstacle for attracting visitors as well (GOV, 1996; EDA, 2001c)

4.3 Comparing prices with attractions and services

The prices for trails including accommodation vary a lot between the different resorts in the Drakensberg Mountains. Listed in table 4.2 are a few examples of resorts, trails and accommodation, which can be compared with the TP in terms of attractions and services, thus useful when evaluating the activities, accommodation facilities and price of the TP:

12 See http://www.drakensberg.kzn.org.za/drakensberg/
13 See http://www.majoradventures.com/Mahike.htm or http://www.linx.co.za/trails/lists/kw43list.html
14 See http://www.drakensberg.org.za/content/activities.htm
Table 4.2:

<table>
<thead>
<tr>
<th>Trail name and activity</th>
<th>Basic description of the trail/attraction</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Southern Drakensberg</em>; Game walks</td>
<td>Five days in a wilderness area, including game walks, all equipment included; guiding</td>
<td>R997.50 per person</td>
</tr>
<tr>
<td><em>The Holt Trails</em>; Hiking trails</td>
<td>Hiking trails with accommodation in huts, caves, tents or chalets; 1-4 days</td>
<td>R250 – 900 per person</td>
</tr>
<tr>
<td><em>Drakensberg Gardens Golf and Leisure Resort</em></td>
<td>Suites with televisions, tennis courts, upgraded roads and a number of hikes</td>
<td>R229 per person per night for a double room</td>
</tr>
<tr>
<td><em>The Cavern</em>(^{15})</td>
<td>Luxury site; offers a wide variety of hiking and horse riding trails etc.</td>
<td>R1320 for a “five night special”</td>
</tr>
<tr>
<td><em>Mzimkulu Wilderness</em>; Hiking trail</td>
<td>Wilderness area; overnight in caves; campsite at base</td>
<td>R10 per person</td>
</tr>
<tr>
<td>National parks in general(^{16}) Day visitors, hiking trails</td>
<td>Wilderness setting, overnight in huts or camping; national parks</td>
<td>Average entry fees range between R10 – R100 per person per night depending on accommodation</td>
</tr>
</tbody>
</table>

Table 4.2: examples of comparable offers including resort type and prices, based on information from: http://www.linx.co.za/trails/lists/kw43list.html#Sani%20Pass

An interview with members of EDA revealed that although the prices for the product of TP had not been thoroughly discussed, they considered the price for a five-day hike including food and accommodation to be around R1200 per person (I12). This price, with an average day price of R240 places the TP in the rather expensive end of the scale, only exceeded by *The Cavern* offering luxurious hotel accommodation. This relatively high price immediately suggests that the `backpacker` will not be among the potential target group since this segment prefers cheap accommodation. Furthermore compared with what the other resorts can offer in terms of natural attractions, accommodation and accessibility the price seems too high to attract the remaining target groups i.e. the `special interest tourist`, the `experienced` and the `general ecotourists` and the `general interest tourist`. Summing up, R1200 is likely to be too expensive for the 5-day trail in Madlangala compared with other trips in the Drakensberg Mountains, and especially so when considering the average expenditure of domestic tourists ranging between R1.178, and R1.549. Thus, judging from the other prices, we suggest the price for the TP trail to be lowered to around R150 per day.

\(^{15}\) For further information see: http://www.cavernberg.co.za/index.htm

\(^{16}\) See http://www.rhino.org.za/tariffs.htm
4.4 Sub-conclusion

When evaluating the potential market for the product, it is quite clearly revealed that overseas visitors prefer the major national parks and other well-established tourist attractions as their prime travelling destinations. This suggests that it will be difficult for the TP to attract such markets. On the other hand the TP can offer something unique on the market: to live with rural people in a former black homeland, which is, for the socially and culturally interested special interest tourist an attraction in itself. However, the domestic market is fairly large and still growing, which provides some new opportunities for the TP. In that respect it is important to mention that a relatively large part of the growth is based on day-trippers, which, due to practical constraints, are not likely to travel to remote areas. That being said, the domestic market is still the largest, and it seems likely that domestic tourists would be more likely to spend a couple of days in a less well known area than overseas tourists who on an average spend only 17 days in the country. However, in relation to domestic tourists, the price is likely to be too high.

Based on the discussions in the previous sections it seems that the most obvious target groups would be the experienced and the general ecotourists and the culturally interested special interest tourists. However, there seems to be three serious constraints, which are likely to prevent tourists from choosing the TP as their holiday destination:

1. If a five-day trail is supposed to cost R1200, it is possible to get the comparable attractions and services cheaper elsewhere.
2. The experienced and general ecotourists value wildlife and wilderness higher than other attractions. The TP cannot compete with national parks in terms of natural scenery and attractions, thus risking to loose that market segment.
3. And lastly, the remoteness of the area; the TP “lies off the beaten track” and is not the obvious destination for the overseas tourist according to the statistics.

Since there seems to be no statistical material regarding the size of the ecotourism market in South Africa, it is impossible to accurately estimate the likely number of tourists arriving in Madlangala, but it should be fairly safe to say that there are constraints preventing large numbers from arriving. Also the aspect of seasonality is important in that connection since the Madlangala district has a distinct winter. Thus, people will probably only want to come during the pleasant seasons. As there are significant seasonal variations in the tourism market, the TP is likely to experience the same trend, thus working below capacity for long periods of the year. The aspect of seasonality, combined with competition from other tourist resorts in the Drakensberg, almost certainly means that the occupancy rate of the TP will be far below 100%. Rather we believe that the occupancy rate will be in the range between 10-15% as an average over the year.
5. What are the impacts from the project?

In this section we will evaluate the likely economic and non-economic impacts of the TP on the communities in Madlangala\textsuperscript{17}.

5.1 Economic impacts

In the assessment of the likely magnitude of economic impacts on the local economy, we will distinguish between four types of cash income:

1. \textit{Wages} from formal employment
2. \textit{Casual earnings} from selling goods, services, or casual labour\textsuperscript{18}
3. \textit{Dividends and profits} from locally owned enterprises
4. \textit{Collective income} e.g. profits from a community-run enterprise

(Adapted from Ashley, 2000: 4).

5.1.1 Wages

The only permanent employment, that will be created by the TP are the jobs as guards at the site. EDA expects that two guards will have to be employed; however, we consider three to be more realistic considering that the site has to be guarded 24 hours a day, every day of the year. Since the guards will be paid R1.200 per month, the total economic benefits from formal employment amount to R43.200 every year\textsuperscript{19}.

5.1.2 Casual earnings

Casual earnings include economic benefits derived from both the selling of goods (e.g. food, firewood, crafts) and casual labour (i.e. people hired for performing tasks).

In relation to casual earnings from selling crafts, or other goods and services, related to the desire of tourists to spend additional money, we do not attempt to make any estimates of their likely magnitude. However, we can note that we only saw locally produced crafts in one household, and nobody approached us trying to sell anything. We take this to indicate that the production of crafts for selling is not very common. Also, it might be added that many tourists

\textsuperscript{17} The estimates of benefits are derived in app. IV.

\textsuperscript{18} For the purpose of our study, we take casual labour to include earnings from non-permanent task-related employment.

\textsuperscript{19} Since the unemployment rate in the area is very high, it is assumed that there is a surplus of labour capacity in the area. Thus, there are no opportunity costs associated with the employment of the guards at the site, and the salary received by them is equal to the economic benefit associated with their employment. Also, it is assumed that it is locals that are hired for the job.
will probably be reluctant to buy crafts unless they are very small, light and suitable for taking on a challenging hike in the mountains.

In terms of casual earnings, from selling goods and providing labour to the TP, the magnitude of benefits will obviously depend on the number of visitors. Based on the discussions in section 4.5, we consider an occupancy rate in the vicinity of 12.5% to be the most realistic. In table 5.1 estimates of the yearly casual earnings related to the TP is presented for different occupancy rates and different levels of variable costs\textsuperscript{20}.

Table 5.1

<table>
<thead>
<tr>
<th>Occupancy rate</th>
<th>High variable costs</th>
<th>Low variable costs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Earnings from labour</td>
<td>Earnings from selling goods</td>
</tr>
<tr>
<td>25% (1.095 person-nights)</td>
<td>18.615</td>
<td>19.710</td>
</tr>
<tr>
<td>12.5% (548 person-nights)</td>
<td>9.316</td>
<td>9.855</td>
</tr>
<tr>
<td>5% (219 person-nights)</td>
<td>3.723</td>
<td>3.942</td>
</tr>
</tbody>
</table>

Table 5.1: Estimates of yearly casual earnings depending on occupancy rate (see app. IV for origin of estimates).

From table 5.1 it is seen that the TP, even at relatively low occupancy rates, has the potential to provide economic benefits through casual earnings. A prerequisite for the benefits to materialise at such low rates is, however, that a relatively high price can be charged, because otherwise the project will not be economically viable (see app. IV).

5.1.3 Dividends and profits
Increased economic activity and creation of indirect employment, due to increased demands by tourists for goods and services produced by other sectors (e.g. agriculture, restaurants and transport), are often advanced as important indirect benefits of tourism (Futter & Wood, 1997a; DEAT, 1996). It is such benefits that we take to comprise this category. In this connection, Futter and Wood (1997a) highlight that “The more integrated, developed and diversified the local economy, the more indirect employment is created. In the rural areas of South Africa where the economy is underdeveloped, indirect employment is likely to be limited.” (51). This statement refers to the fact that the creation of indirect employment is contingent upon the existence of other sectors with which the tourism sector can interact. In

\textsuperscript{20} High variable costs denote a scenario where casual labourers are paid R40 per day, and expenditure on locally produced goods is R18 pers./day. Low variable costs denote a scenario where casual labourers are paid R35 per day, and expenditure on locally produced goods is R14 pers./day.
places like Madlangala where people are engaged in very few activities there exist few other sectors, which can be stimulated by increased demand. The initiation of the different community projects may be seen as an attempt to link different sectors of the economy, especially agriculture/gardening, livestock and tourism. Whether it will succeed is not immediately evident, since only few sectors are able to supply, e.g. in relation to the baking project, the cropping group informed us that the locals were not able to produce sufficient wheat to sell, just as they could not afford to process it. In terms of estimates of the economic benefits derived from the community projects, most of them are probably included in the estimates of casual earnings from selling food to the project, since the community projects are intended as suppliers for the project.

In terms of increased profits of locally owned enterprises, it is likely that the spaza shops, and maybe the shebeens, which to our knowledge are the only enterprises in the area, will experience dramatic increases in their profits. Thus, during our stay the shop owner had to go to town several times to replenish his stock indicating that even few tourists due to their high spending power, can have an important effect on the profits of store owners.

5.1.4 Collective income
The collective income is the profit generated by the TP. The size of the profits depends on several factors such as the price charged for the product, the number of visitors and the costs associated with providing the product. In table 5.2 estimates of the collective income that the TP can be expected to give rise to, are presented in different scenarios.

<table>
<thead>
<tr>
<th>Price (Rand per person per day)</th>
<th>Occupancy rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>Low variable costs</td>
</tr>
<tr>
<td>200</td>
<td>86.650</td>
</tr>
<tr>
<td>150</td>
<td>31.900</td>
</tr>
</tbody>
</table>

Estimates of the yearly collective income arising from the project under different scenarios concerning price, occupancy rate and variable costs\(^{21}\) (see app. IV for details).

Based on the discussions in section 4.4 and 4.5 we believe that R150 is the maximum price, and that the relevant occupancy rate is in the vicinity of 12.5%. From the table it is seen that it

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\(^{21}\) High variable costs denote a scenario where casual labourers are paid R40 per day, and expenditure on locally produced goods is R18 pers./day. Low variable costs denote a scenario where casual labourers are paid R35 day, and expenditure on locally produced goods is R14 pers./day.
is only when the low cost estimate is applied that this scenario actually result in a profit. Thus, unless a higher occupancy rate than 12.5% can be achieved, a price than R150 can be charged or the costs can be reduced significantly, it does not seem likely that the TP will give rise to any significant collective income. In this connection it should be noted that the scenarios, which result in a negative profit represent a situation where the project is economically unviable, since it implies that there are insufficient funds for paying the fixed costs (maintenance and wages to guards) associated with the project.

5.1.5 Likely impacts and local expectations
From our interviews with the locals in Madlangala we got the impression that people in general had very high expectations to the project in relation to the provision of both personal and collective benefits. In the scenario, which we consider most realistic, total economic benefits amount to R61,460 per year, equivalent to R5,122 per month. Considering the economic situation of many of the people in the area, this is indeed a lot of money, but it is obviously not sufficient to provide all the benefits that the local expected or hoped for. Thus, based on our estimates we believe that it is fair to conclude that many people will be disappointed, and especially the ones who anticipated significant collective benefits, since the collective income is likely to be so small that it may take several years to save enough money to pay for a new roof on the school. In relation to the private benefits it is also likely that many will be disappointed.

5.2 Non-economic impacts
In addition to economic impacts, socio-cultural and environmental impacts are also linked with ecotourism (Scheyvens, 1999; Weaver, 1998). However, as we have limited ourselves from dealing with the environmental impacts, this section will focus on socio-cultural impacts.

5.2.1 Capacity building
Capacity building and development of individual skills are important potential benefits from tourism development (Ashley, 1998; Wearing, 2001). From the interviews with EDA it was clear that capacity building was not only considered a positive benefit, but a prerequisite for implementing the TP (112). Consequently, workshops and other forms of training have been arranged for those who are expected to be directly involved in the TP. In relation to the PSC members, capacity building has been emphasised as a direct benefit (112). Thus, they have been promised, due to their acquired skills, that they will be appointed for paid positions in the operational phase. In more general terms, however, the TP seems to build on the idea of taking advantage of the skills, which people already possess – e.g. in the community projects.

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22 Especially so when considering that 4 villages, and who knows how many sub-villages, have to share this collective income.
5.2.2 Social impacts
From our interviews we found that the majority of the respondents, despite their limited knowledge of tourism, had a positive attitude towards the TP, and tourists would coming the area. In this connection, experience from other places show that:

While the initial stages of tourism are usually met with a great deal of enthusiasm on the part of local residents because of the perceived economic benefits, it is only natural that, as unpleasant changes take place in the physical environment and in the type of tourist being attracted, this feeling gradually becomes more and more negative (Martin & Uysal, 1990, in Johnson et al., 1994: 630).

Considering the negative experiences with previous visitors it seems likely that peoples attitude towards the TP and tourists will change as they become more familiar with the implications of hosting tourists (12). Moreover, the attitudes are also likely to be influenced by the limited actual economic benefits. In this connection, the distribution of benefits becomes important as competition may cause tensions and jealousy between beneficiaries and non-beneficiaries (Scheyvens, 1998; Ashley et al., 2000). Based on our findings – i.e. economy being a sensitive issue, people approaching PSC members for jobs and to complain about others getting jobs - we believe that such tensions, and competition, are already emerging. In Doan (2000) a case is mentioned where competition for a tour-guide position resulted in the death of a tourist guide, thus illustrating the seriousness of the social impacts of tourism. Tensions emerging at this early stage of the process suggests that more pronounced impacts may also arise at a later stage.

5.2.3 Socio-cultural impacts
The relevance of the concerns, which are voiced by two interviewees in relation to potential commercialisation and devaluation of traditional and cultural practices’ (11, 16) are supported in the literature (Weaver, 1998; Wearing, 2001). Thus, treating culture and traditions as commodities may imply that they loose their meaning. Seen from a different perspective, the encouragement of locals to exhibit their culture may, provided that the exhibition is gaining positive recognition by outsiders, have a positive impact on local communities by revitalising traditional practices and skills (Ashley, 1998; Scheyvens, 1999). The actual character of cultural impacts in any given case depends on a number of factors; if the conditions listed below are present the risk of significant socio-cultural impacts is relatively high:

- Significant differential in wealth between tourists and the host society
- Significant cultural and racial differences between tourists and the host society
- Strong tendency of tourist to adhere to their own cultural norms while at the destination
• High proportion of tourist relative to local population
(Adapted from Weaver, 1998:55)

Considering the poverty of the area, and the likely type of visitors, the first and the second condition are likely to be relevant in relation to the TP. The third condition depends on the type of tourists, but in general it must be assumed that people interested in learning about different cultures have a certain level of respect for other cultures. Considering the likely scale of the project, however, the proportion of tourists relative to locals is likely to be very low, implying that the fourth condition is not met.

Relating to the first and second condition, the arrival of tourists may contribute to changing the lifestyles of people living in the area, as one interviewee suggested (I6). Based on information from the cropping group, and our own findings and observations, it seemed that a large part of the young generation did not have ambitions of living as subsistence farmers in the remote villages. Rather they were attracted to the larger, and more westernised, cities and the possibilities for getting an education. With this in mind, it seems likely that the aspirations of the youth could be reinforced by people coming “from the outside” representing a lifestyle and material basis appealing to the youth. However, several interviewees also expressed that they perceived the possibility of learning about different cultures, and meeting different people, to be a benefit of the TP (I1).

5.3 Sub-conclusion

A positive impact of the TP is the increased cash income in the community. The size of casual earning and collective income depend on a range of factors including occupancy rate, prices and costs. Estimates based on what we believe to be the most realistic scenario indicate they were significantly lower than the wage incomes, the collective income being almost insignificant. The latter result means that people hoping for large improvements in the area may be disappointed.

In terms of non-material impacts, some members of the community will benefit through capacity building. However, in general the focus seems to be on taking advantage of existing skills. Negatively, the lack of concerns towards tourism is likely to change once the TP approaches a further stage in the process, among other things due to the competition for the limited benefits. Also the arrival of tourists to the area may impact on lifestyles, which could have both negative and positive effects.
6. How are the impacts distributed within the community?

To start with, the distribution of the different types of economic benefits displayed in the previous sub-chapter will be discussed. The discussions will be based on the scenario with respect to the profitability of the project, which we consider most likely23. Subsequently, the distribution of capacity building will briefly be discussed.

6.1 Wages

We expect three guards to be hired once the tourists arrive. The amount deriving from wages have been estimated to R43.200 per year, indicating that more than two thirds of the total yearly benefits (R61.460) from the TP is in effect only distributed among 3 people.

6.2. Casual Earnings

The yearly casual earnings are estimated to be around on R8.220 for task-related jobs. As mentioned in section 1.1.3, EDA estimates that five households per village, equal to 20 for the site, plus 4 guides will benefit from task-related earnings during the operation of the TP. This implies that the tasks related earnings will be concentrated around a relatively small group of people.

The yearly casual earnings from the sale of goods are estimated to R7.67224, and the community projects are to be the main suppliers. Since at least two community projects per village are expected to generate an income from supplying the TP (EDA, 2001e: 11), it is likely that a significant number of people will gain from TP through casual earnings from the sale of goods, but that the amount of money per person will be quite small.

In relation to who will benefit from casual earnings, the distributional plan for the TP specifies that CTO members are preferred for carrying out tasks as well as for delivering products (EDA, 2001e) and in complying with the Fair Trade Principles, the PSC members are obliged to choose labourers from poorest households (I12).

The guides, the hostess and the kitchen team have received training in the skills – guiding and hospitality, respectively - necessary for performing these jobs (EDA, 2001e:2). In relation to

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23 See appendix IV for details concerning how the different benefit estimates have been obtained. The estimates refer to the conditions: 12.5% occupancy rate, low costs and R150 charged for the five day trail, we realise that the number could easily be influenced by other parameters or changed conditions, however, our interest is focussed on the magnitude of the amount rather than the exact number.

24 It should be noted that the costs associated with producing the goods have not been taken into account. Thus, the actual profit of the projects is likely to be smaller than what the estimate suggest.
guiding, people have been selected for the job according to the criteria 1) good knowledge of the area and 2) communication skills (EDA, 2001d: 9). The second requirement will – at least when dealing with English speaking travellers – also necessitate a fairly good knowledge of English. All in all, these jobs demand skills, implying that once people have been trained and obtained experience, it will be more economically sound to let them stay in the job than to replace them by inexperienced labourers, and consequently it is the same who will benefit.

Most of the task-related jobs such as cooking and cleaning were carried out by women. The community projects also seemed to be quite gender specific implying that if upgraded and provided with a market, it would primarily be women receiving the benefits. Based on this we can conclude that women seem to be the largest group of beneficiaries from the project. Since neither participation in the tasks, nor membership of the community projects, require any monetary investments there seems to be favourable conditions for the main target group of the TP, i.e. the poor, to participate. Moreover, necessary skills for undertaking tasks such as cooking, cleaning and washing, can be held by both rich and poor. Similarly, at least some of the community projects involve the aspect of mutual learning, meaning that special skills are not essential prerequisites.

In relation to the geographical distribution of casual earnings, members of EDA and PSC explained a possible inequality in the distribution of with practicalities i.e. the fact that Makomoreng was located closest to the site, meant that it would be easier for the inhabitants to perform services and sell products (I6 and I12). During our stay, however, this kind of reasoning was not valid, as we could have been provided for in any village. We were shown a letter from EDA to the PSC members according to which the reason for all of us staying in Makomoreng was our preference for staying in a sub-village that we (our supervisors) already knew. As we upon our arrival expected to be scattered across the sub-villages, we perceive this a quick response to emerging conflicts regarding an unequal distribution of benefits across villages and within sub-villages.

6.3 Collective Incomes

In the scenario, which we consider most likely, the collective income amounts to R2.388 per year for all four villages including a number of sub-villages. When regarding the relatively limited collective income arising from the TP it is evident that, a prioritisation will have to take place between different alternative investment options. We were told that at least according to the original plan, such decisions should be taken in the CTOs (I12), but as of yet there does not seem to exist any guidelines for the process of decision making, which

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25 Among other things the distribution of benefits was discussed at a conference the 14. October 2001, thus fixed plans had not been made at the time we visited the TP. We have requested information on the decisions taken at the conference, but have so far not received any information on the matter.
implies that it is difficult to say who will benefit from the collective income. No matter what, however, it seems fair to conclude that the collective benefits from the project are likely to be negligible in relation to the economic situation of the community.

6.4 Capacity Building and economic benefits

In the previous sub-chapter, it was mentioned that the PSC members gained from the TP in terms of capacity building intended to qualify them for holding central and paid positions in the operational phase of the TP²⁶. Also the semi-permanent jobs (guides and hosts) were offered both money and training. Thus, it becomes evident that both types of benefits are likely to be concentrated among the same relatively small group of individuals. The ‘members’ of this group are, as a consequence of their training and economic benefits, likely to experience not only that their economic situation will improve but also that they, compared to the rest of the community, will be better equipped to deal with potential negative impacts arising from the presence of tourist. In relation to the discussion in section 5.2.2 concerning changing attitudes towards tourism, and potential segmentation of the community into two, a consequence of this very concentrated distribution of benefits may be that tensions are created between the fortunate ones and the unfortunate ones.

6.5 Sub-conclusion

In table 6.1 our findings regarding the distribution of economic benefits are presented.

<table>
<thead>
<tr>
<th>Type of income</th>
<th>Wages</th>
<th>Casual earnings from tasks</th>
<th>Casual earnings from sale of goods</th>
<th>Collective income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size of benefit (Rand/year)</td>
<td>43.200</td>
<td>8.220</td>
<td>7.672</td>
<td>2.388</td>
</tr>
<tr>
<td>No. of beneficiaries</td>
<td>3</td>
<td>Around 25</td>
<td>Relatively many</td>
<td>Many</td>
</tr>
<tr>
<td>Average income per beneficiaries</td>
<td>14.400 Rand/year</td>
<td>343 Rand/year</td>
<td>Very little</td>
<td>Insignificant</td>
</tr>
<tr>
<td>Type of beneficiary</td>
<td>Male</td>
<td>Primarily female; people who have had training</td>
<td>Primarily female; Primarily community projects</td>
<td>Everyone</td>
</tr>
</tbody>
</table>

Table 6.1: The distribution of the different types of economic benefits

²⁶ Benefits to PSC members during the operational phase have not been taken into account when estimating the likely magnitude of benefits from the project. Thus, it is not yet clear, what their responsibilities are going to be, how they are going to be paid and how much they are going to be paid.
It is seen that the largest proportion of benefits is centred in the hands of very few individuals. Thus, it is probably only three households, which will experience that their livelihoods are significantly improved by the TP. Considering the economic situation in the area the benefits provided through casual earnings from tasks may also have the potential to make a difference for the individual. On the other hand, seen from the perspective of the community as a whole the economic impacts of the TP are likely to be insignificant. An interesting thing to note is that despite the fact that women are the largest group of beneficiaries in terms of non-collective income, it is in effect men who get the largest share of the non-collective benefits. In terms of reaching the poor, it is difficult to say whether or not this has happened, however, it can be noted that the prerequisites for participating in most of the activities do not seem to discriminate against them. In relation to the distribution of benefits in the form of capacity building it is found that these benefits accrue to the same persons who are also likely to get significant economic benefits. Thus, the fact that people have received capacity building is indeed the reason why they are appointed for the positions that has the potential to provide significant benefits.
7. Conclusion

Is ecotourism a viable alternative and/or supplement to other sources of income, and is it likely to improve the livelihood situation of the residents in Madlangala?

There seem to be several important factors, which are likely to discourage tourists from choosing the Maluti-Ukhahlamba project (TP) as the holiday destination. Thus, based on comparisons between the project and other offers on the market, the following constraints on the potential of the area have been identified:

- The price of R240 per person per day is very high; comparable natural attractions and services are available cheaper elsewhere
- Many tourists value wildlife and national parks very highly, and there are plenty of competitors offering such products
- The remoteness of the area, which “lies off the beaten track”

Together these constraints lead to the conclusion that the tourism potential of the TP is limited, and that the price of the product will have to be lowered to around R150 per person per day if tourists are to be given an incentive to choose this destination. However, even if the price is lowered it is suggested that the actual occupancy rate is likely to be in the vicinity of 12.5%.

Based on a price of R150 per person per day and an occupancy rate of 12.5% it appears that the TP is only just economically viable, and the economic benefits which it can be expected to provide to the community as such are consequently insignificant. In terms of private benefits, the TP is only likely to provide a steady income for three people, and relatively small - but nevertheless potentially important – casual earnings for a larger, but still limited, group of individuals. In terms of non-economic benefits, a limited number of people will receive benefits in the form of capacity building. Since the capacity building is centred around the development of skills necessary for working with tourists, the people who benefit trough capacity building are among those who also benefit economically.

Thus, the TP is only likely to provide benefits large enough to sustain the livelihood for three people, and to supplement the livelihoods of a relatively limited number of households whereas the main part of the community is unlikely to experience any improvement of their livelihood situation. This is likely to imply that a lot of people will be disappointed, since many displayed very high expectations – or hopes – to the projects’ potential to bring, both private and collective, economic benefits. In terms of the private benefits, it seems likely that the distribution of these may give rise to some tensions within the community. Thus, there
were indications that tensions and jealousy had already started emerging in relation to the appointment of people for temporary jobs.
8. Recommendations

Due to the competition on the market for mountain experiences, with which the TP cannot compete in terms of natural attractions, we suggest that the cultural dimension of the product and the home-stay option are being emphasised in marketing campaigns in order to differentiate the product from other experiences in the Drakensberg Mountains. Furthermore, the price of R1200 for a five-day trail in Madlangala seems too high compared with other offers in the Drakensberg, and we recommend that it is lowered. Especially considering that the average spending per trip for domestic tourists amounts to R1178, the price seems to be too high for that market.

Additionally, a potential market could be to offer fieldwork facilities for students, who could provide the TP with a steady source of visitors from schools and universities. The potential of that market has not been investigated, but based on our experience as students in Madlangala, it could be interesting to investigate that potential further. Also, it is important to make the product visible for different societies who have a common interest in the environment and cultural experiences, all belonging to the special interest tourist segment.
Bibliography


EDA (undated-a): “I Have a Dream...” (with apologies to Martin Luther King). Environmental Development Agency, Matatiele.


Appendix I: List of interviews and observations

1. Interviews with 28 individual households. Date: 15.10.01 (3 interviews – testing the questionnaire); 17.10.01 (25 interviews). See appendix III for a schematic presentation of findings, and discussion of sampling strategy, and questionnaire.

2. Focus group interview with the women cooking for the students (us) in Makomoreng. Date: 19.10.01. See appendix II for interview guide.

3. Focus group interview with a group of men in Makomoreng; the men were approached while taking a break from some construction work. Date: 12.10.01. See appendix II for interview guide.

4. Focus group interview with a group of women in Pepela; the interview was done in a household, that initially was approached in connection with the conduction of the individual household interview, but where a group of women were present. Date: 19.10.01. See appendix II for interview guide.

5. Focus group interview with a group of women in Makomoreng; the group consisted of the women and a single man who turned up for the official introduction. Date: 15.10.01. See appendix II for interview guide.

6. Semi-structured interview with PSC member from Mabua; the interviewee was responsible for the practical coordination of the work in connection with the construction of the site. Date: 18.10.01. See appendix II for interview guide.

7. Semi-structured interview with PSC member From Makomoreng; the interviewee was the treasurer of the project. Date: 15.10.01. See appendix II for interview guide. The interview was followed up during the stay, since we were in close contact with the person throughout our stay.

8. Semi-structured interview with PSC member from Makomoreng. Date: 17.10.01. See appendix II for interview guide.

9. Semi-structured interview with PSC member from Makomoreng; the interviewee was the local manager and administrator of our stay. Date: 18.10.01. See appendix II. The interview was very brief due to the interviewee being exhausted.

10. Unstructured interview with person, who seemed to be very involved in facilitating our stay in the village. Date: 20.10.01.
11. Two unstructured interviews with former hosts. Date: 20.10.01.

12. Two semi-structured interviews with EDA representatives. 18.10.01. See appendix II for interview guide.

13. Questionnaire, distributed to the other groups of students participating in the field trip, concerning an evaluation of our stay in the village. Date of distribution: 20.10.01. See appendix III for interview guide.

14. Unstructured interview with women/girls, combined with observations, during firewood collection. Date: 18.10.01.

15. Focussed observations, and informal conversation, during walk on part of the tourist trail. Date: 16.10.01.
Appendix II: Key-informants and Focus-group Interviews

- the selection of respondents and the interview-guides

The interview-guides
The interview-guides in this appendix include the interview-guides for both the key-informant interviews and the focus-group interviews. During the interviews with the key-informants, the issues rather than the specific questions were touched upon and additional questions arose in all cases during the interview. Most informants were very talkative, but in a single case the respondent gave single word answers and accordingly the interview-guide was more adhered to, (I5).

The interview-guide for the focus group interview functioned more as a basis for formulating issues and questions. In three of the four interviews (minus I3) the questions posed had been changed to suit the specific group of people.

Selecting respondents
The respondents for the key-informant interviews were selected on the basis of their position in the relevant organisations e.g. EDA and PSC. Furthermore, four out of seven PSC members were interviewed (3 from Makomoreng, 1 from Mabua) where we also conducted the household interviews. Within the different organisations we were not given much choice of whom to interview, but had to “grab the chance” e.g. the EDA members came to the village only one day and had limited time for being interviewed.

In relation to choosing the participants for the focus-group interviews, the occasions arose spontaneously when a group of people were gathered. Three of the interviews were as initially planned to be divided according to gender whereas the last interview consisted of a group of women and one man, who were all involved in the TP through the community projects. During this interview, the single man dominated the conversation and did not let the women speak on their own initiative (I5). This led us to make an arrangement with one of the present women to go with her and a group of young girls out for fetching firewood, thus hoping to avoid the domination of men in the conversation (I14).
Interview guide for interview with EDA

1a) Where did the ecotourism idea come from?

1b) How do you understand the term ‘ecotourism’? (e.g. ecotourism, pro-poor tourism, community tourism)

1c) Why do you think that it is a good idea in this particular area? (suitability of site in terms of geographical/physical and cultural characteristics)

1d) What kind of tourist do you expect will visit the area?

2a) What are your interests in promoting the project?

2b) What benefits do you expect that the project will give rise to? (personal as well as in the community)

2c) Do you expect the project to have any negative impacts? (environmental, social, cultural)

2d) Has actions been taken to monitor/mitigate any of the potential negative impacts? (specifically environmental impacts)

2e) Who should benefit from the project?

2f) How/which measures do you take to reach them?

3a) How are you interacting with the local community?

3b) Are they participating in the project? (both in the planning, the implementation , and the operational phases)

3c) How are they participating?

3d) Who is participating, and who is not?
3e) Why are people participating?

3f) Why are they not participating?

3g) How are you encouraging participation in the project?

4) How is the project managed? Who is responsible for the daily management of the project?

5) Who constitutes the CTO?

6) How is the PSC elected?

7a) How are you working with the CTO/PSC?

7b) What are your experiences with the collaboration so far?

7c) How are the CTO/PSC working?

8a) Experience so far?

8b) Have your expectations been fulfilled?

8c) What are the prospects for the projects? (Will it be sustainable?)
Interview-guide for interview with PSC (or CTO)

1a) Where did the ecotourism idea come from?

1b) Why do you think that it is a good idea in this particular area? (suitability of site in terms of geographical/physical and cultural characteristics)

1c) What kind of tourist do you expect will visit the area?

2a) What are your interests in promoting the project?

2b) What benefits do you expect that the project will give rise to? (personal as well as in the community)

2c) Do you expect the project to have any negative impacts? (environmental, social, cultural)

2d) Has actions been taken to monitor/mitigate any of the potential negative impacts? (especially environmental impacts)

2e) Who should benefit from the project?

2f) How/which measures do you take to reach them?

3) How did you get elected?

4a) What are your responsibilities?

4b) In relation to the locals (CTO)?

4c) In relation to the NGO?
5) How do you interact/work with the NGO? (Division of responsibilities? Is the NGO dominant?)

6a) How are you interacting with the local community?

6b) Are they participating in the project? (both in the planning, the implementation, and the operational phases)

6c) How are they participating?

6d) Who is participating, and who is not?

6e) Why are people participating?

6f) Why are they not-participating?

6g) How is you encouraging participation in the project?

7a) Experience so far?

7b) Have your expectations been fulfilled?

7c) What are the prospects for the projects? (Will it be sustainable?)
Focusgroup Interviews

General theme: ecotourism

1) Are you aware that there is an ecotourism project in the area?

2) What does the project include?

3) Are you participating in the project? How (planning, implementation, operational phases)?

4) Who is participating, and who is not?

5) Why are people participating?

6) Why are they not-participating?

7) What do you expect to gain from the project?

8) So far, do you see anything useful coming from the project?

9) What do you see as negative impacts of the project?

10) What do you think could be done to mitigate the negative impacts?

11) Do you think this project can be sustainable?
Appendix III: Household Interviews

- discussion of sampling strategy and of the schematic presentation

Sampling strategy and representativity of sample
The intention was to conduct 8 interviews in each village; the number was decided due to time considerations. Due to time constraints only 7 were done in Pepela. The 11 interviews in Makomoreng include 3 “testing” interviews; since nothing was really changed they are included in the data set. The selection of households was based on stratified random sampling. Each village was divided into 8 sections, and subsequently one household was chosen within each section. Since the interviews were carried out during the day, the sample may be biased due to the fact that households where all members work outside the home during the day have not been included. However, we do not believe that the bias is that significant since we got the impression that there was someone at home in most households. With reference to schematic presentation of the data (included in this appendix), it is seen that practically all age classes and men as well as women are included in the sample, thus the representativeness of the sample appears acceptable. In terms of the sample size, about 10% of the households in Mabua were interviewed (total number of households: approx. 80); 6,7 % of the households in Pepela (total number of households: 105) and 13,8 % of the households in Makomoreng (total number of households: 80). Considering the homogeneity of the answers obtained through the interviews we believe that we have obtained a relatively good picture of the local context, and we believe that it to some extent is acceptable to make generalisations based on the material from the interviews.

The Data in the Schemes
The data from the household interviews are displayed in four schemes. The first scheme shows the data produced in all three sub-villages listed underneath one another. The first vertical row shows the single interviews, whereas the top horizontal row lists the themes and parameters included in the questionnaires. The categories under each of the parameters correspond to the questions in the questionnaire (see following the section), but some have been erased when no answers occurred. The answers to the questions have all been translated into numbers, meaning a simple counting of the listed activities, languages etc. Here, it is important to note that the qualitative part of the questionnaire has been included in the schemes in order to give an indication of general trends. However, the qualitative data have subsequently been presented in the text (see ch. 3).
Research questionnaire/Ecotourism [Madlangala]

Date:__________________________________
No.:___________________________________
Location:_______________________________

1. Age:________________

2. Sex:

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
</tr>
</tbody>
</table>

3. Which ethnic group do you belong to?____________________________

4. Spoken languages:

<table>
<thead>
<tr>
<th>Number</th>
<th>Language</th>
<th>Response</th>
</tr>
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<tbody>
<tr>
<td>1.</td>
<td>English</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>isiZulu</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>SiSwati</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>isiNdebele</td>
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</tr>
<tr>
<td>5.</td>
<td>Setswana</td>
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</tr>
<tr>
<td>6.</td>
<td>Sepedi</td>
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<td>7.</td>
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</tr>
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<td>8.</td>
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<td>9.</td>
<td>Tshivenda</td>
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</tr>
<tr>
<td>10.</td>
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<tr>
<td>11.</td>
<td>Xitsonga</td>
<td></td>
</tr>
<tr>
<td>12.</td>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

5. Number of persons in your household:______________

6. Children/adults/migrant workers:______________

7. Education: formal/informal:___________________________________________
8. Activities:

<table>
<thead>
<tr>
<th>Skills</th>
<th>Common</th>
<th>Occupation</th>
<th>Cash</th>
<th>Non-cash</th>
<th>Importance</th>
<th>Notes</th>
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<tr>
<td></td>
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<td>No</td>
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<td></td>
</tr>
<tr>
<td>1. Beer brewing</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2. Brick making/laying</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Arts/crafts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Spaza/tuck shops</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Carpentry</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>6. Painting</td>
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<td>7. Garden</td>
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</table>

9. Are you aware of:

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
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<tbody>
<tr>
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<tr>
<td>NGO/EDA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CTO</td>
<td></td>
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</tr>
<tr>
<td>PSC</td>
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</tbody>
</table>

10. Have any of the agencies helped you?
<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
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</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
11. If yes, how?
___________________________________________________________________________
___________________________________________________________________________
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12. Do you know the tourism project in the area?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

13. What do you understand by “ecotourism”/ the ecotourism project in the area?
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
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14. Do you expect the ecotourism project in the area to help you in any way?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Elaborate:
___________________________________________________________________________
___________________________________________________________________________
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15. Have you been involved in the tourism project?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
16. Do you expect to be involved in the future?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Elaborate: ________________________________________________________________
_______________________________________________________________
_______________________________________________________________
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_______________________________________________________________

17. What in your opinion attracts tourists to the area?

_______________________________________________________________
_______________________________________________________________
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18. What do you think could be the impacts of the ecotourism project/ tourists in the area?

_______________________________________________________________
_______________________________________________________________
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19. Do you have any concerns about the ecotourism project/ tourist coming to the area?

_______________________________________________________________
_______________________________________________________________
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_______________________________________________________________
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XIV
Schematic presentation of the findings from the household interviews: Mabua, Makomoreng and Pepela.
Schematic presentation of the findings from the household interviews: Mabua.
Schematic presentation of the findings from the household interviews: Makomoreng.
Schematic presentation of the findings from the household interviews: Pepela.
Appendix IV: The economy of the project

Considering that R1,250,000\textsuperscript{27} until now has been invested in developing the Tourism Project (TP), and that a promise of additional support during the operational phase has been given by the Local Economic Development fund, it is interesting to discover that there as of yet not has been performed any economic calculations as to the profitability of the TP.

As mentioned in chapter 3, economy seemed to be a sensitive issue, and accordingly it was impossible for us to obtain very much information on the economy of the TP, e.g. how much people were paid for the different tasks. This, combined with the fact that EDA could not provide us with any information on the composition of investment costs, expected maintenance costs, expected salary expenses and expected number of visitors, imply that it is a bit difficult to evaluate whether or not the project will be economically viable, and to what extent it will provide benefits to the community. However, since such economic considerations are very important in relation to our main question we will, nevertheless, attempt to make some very rough estimates of the magnitude of benefits which the project can be expected to give rise to depending on different assumptions regarding prices, costs and number of visitors.

The budget for our stay

In connection with our stay, the project/community received 70 Rand/day/person. According to letter from EDA to the community, the R70 were to cover the all costs related to our stay and were broken down as follows:

- 40 Rand for food (3 meals per day) including coffee/tea, juice and salary to caterers
- 20 Rand for sleeping quarters (including washing, heating, lighting and toilet paper)
- 5 Rand for mattresses and bedding
- 3 Rand for entertainment
- 2 Rand for management person or subcommittee who does all the arrangements, making sure everything is ready, good quality, sorts out problems, provides information, acts as host/hostess for the visitors

On the 18\textsuperscript{th} of October 2,894 Rand had been spend on buying food, equal to about 16 Rand/pers./day\textsuperscript{28}. Additionally, R450 had been paid to the caterers\textsuperscript{29}. The total expenditure on

\textsuperscript{27} R850,000 from the Department of Environment and Tourism (DEAT) Poverty Relief fund, and R400,000 from the Local Economic Development (LED) fund.

\textsuperscript{28} Total expenditure divided by number of person-days (178).
food and caterers during the 6 days was R3344 (2.894 + 450), equal to about 19 Rand/pers./day. Compared to the budgeted 40 Rand/pers./day this implies that the community made a profit of around 21 Rand/pers./day on the food budget.

In terms of the other “posts” in the budget, we are unable to assess the actual costs associated with supplying the services (e.g. it is difficult to assess the cost of supplying a mattress, or of having people stay in ones house) and consequently it is difficult for us to estimate the surplus arising from these activities. However, we have a feeling that the locals find the tasks very lucrative, implying that the payment significantly exceed the perceived cost.

Profitability of home-stay option
From the estimates above it is suggested that the total cost associated with accommodating, and feeding, one person for one day amounts to about R46 (R30 Rand for accommodations + R16 for food), excluding salary to caterer, since it is assumed that tourist will eat in the households where they are accommodated. Allowing for the fact that most tourists will probably be a bit more demanding than we were in relation to the variety of choice concerning the type and amount of food served, we (arbitrarily) raise the expenditure on food to the double, implying that total costs rise to 62 Rand/pers./day. If future tourists are to be charged R70 like we were the resulting common profit will be relatively small, since most of the income is used for paying individuals for supplying services. We do not believe that many people will be willing to pay much more than what we did as the prices which are charged for staying under primitive conditions (e.g. caves, chalets) in connection with hiking trails and national parks are often somewhere between 10 and 20 Rand/night (excluding meals).

Profitability of the chalets
The most important difference in relation to profitability between the home-stay option and the chalets is caused by the fixed costs – i.e. paying guards, maintenance and administration/marketing expenses - that are associated with the chalets30.

In the following section we will attempt to estimate the profitability/economic viability of the project; in order to do so, we have to make a lot of assumptions, some of them quite speculative, regarding the size of both variable and fixed costs.

29 3 women were hired for the catering task, and they were paid 25 Rand/day each. On the 18th we had been in the village for 6 days. Thus, the total expenditure on caterer salary at that date was 3 pers. x 25 Rand/pers./day x 6 days = 450 Rand.

30 Administration and marketing is in effect also associated with home-stays. However, we have chosen to disregard this.
**Variable costs**

The variable costs are the costs that arise in connection with tourists coming to the area. They consist of expenditure on food and other consumptive goods, payment of people for shopping, cooking, cleaning, washing and in other ways taking care of the tourists, e.g. guiding and entertainment.

Based on the budget for our stay in the village, and assuming that tourists will be provided with more choices in relation to the type and amount of food served, we will make the assumption that expenditure on food will be significantly higher than when were there due to the more luxurious nature of the facilities. More specifically, we will assume the cost of food will be three times higher, corresponding to a cost of 48 Rand/pers./day (3 x R16).

Wood for heating the water, fuel for lamps, toilet paper etc. also have to be paid for. Based on what we paid during our stay we set these expenses to 5 Rand/pers./day.

In relation to shopping, cooking, cleaning and washing, we assume that it will be necessary to have two people hired to do this when the chalets are occupied by 12 people (full capacity), and in addition to that it will probably also be necessary with a host/hostess who can take care of more administrative and logistic tasks. In terms of guides, we assume that at least two guides will be needed; thus, unless all 12 people are part of the same group it is likely that they would like to make use of more than one guide. It is not clear how much people are to be paid for such tasks. The women who worked in the kitchen during our stay were only paid 25 Rand/day, and translators were only paid 20 Rand/day. However, based on the pay received for a days work in the WFW – i.e. between 30 and 60 Rand\(^{31}\) – we believe that the pay should be set a bit higher. Since the guards that are to be hired by the TP are to be paid 1.200 Rand/month, which is equivalent to about 40 Rand/day, we have decided to use this as an estimate for how much people are to be paid for a days work.

Based on these assumptions, the variable costs associated with having 12 people accommodated in the chalets, and guided around the area, for 24 hours is about 836 Rand (12 x R48 + 12 x R5 + 5 x R40), equivalent to about 70 Rand/pers. Assuming full capacity at all times, this corresponds to a yearly cost of 306.600 Rand for each site.

**Fixed costs**

The fixed costs represent the costs that are incurred no matter whether there are any tourists or not. In our case they consist of salary to guards at the site, maintenance costs and expenses associated with administrating and marketing the project.

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\(^{31}\) Information obtained from Wattle group.
The intention is that two guards are going to be permanently employed at the site. However, considering that the plan is that the site is to be guarded at all times due to risks of theft, we believe that it will be necessary with at least 3 guards. Since their salary is expected to be 1,200 Rand/month each, this is equivalent to a total yearly expenditure of R43,200.

In relation to the need for maintenance of the site and the trail it is mentioned in the material from EDA that the chalets are expected to require little maintenance due to the fact that they primarily have been constructed from local, traditional materials. On the other hand, the fact that the chalets have been equipped with conveniences such as running water, heaters and toilets suggest that they will require relatively much maintenance – possibly by professionals. Additionally, the tasks such as mowing the lawn also have to be done. In lack of any information on the likely size of maintenance costs we have (quite arbitrarily) assumed that they will be around 5% of the initial investment costs per year. We assume that the initial investment costs for each are equal to one fifth of the total investment costs, which we assume are equal to the total funding. Consequently, the yearly maintenance costs for each site is set at 12,500 Rand/year.

In terms of marketing, GEM has allocated a tourism officer to be responsible for making reservations and for marketing the PT. It is not clear whether GEM only pays for the employee, or if it also pays for the marketing itself, just as it is not clear if the arrangement is permanent or not. Due to lack of knowledge concerning the likely magnitude of marketing expenses we will disregard this for now. With respect to administration, EDA is assumed to be in charge at least for a few more years. Therefore, we have chosen to assume that there are no costs associated with the administration of the TP, rather than making a speculative estimate of the costs.

Based on the above assumption, we arrive at R55,700 as a very rough estimate for the yearly fixed costs associated with the site.

Estimating the profitability of the project
As already mentioned, EDA expect to charge 1,200 Rand/pers for the entire trail. Since this price covers spending the night at five sites, this implies that the price per site is expected to be around 240 Rand/pers. Assuming full capacity at all times, this corresponds to a yearly income of 1,051,200 Rand per site.

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32 We are aware of the fact that part of the funding probably is going to be used on administration. However, we do not know how much, and rather than subtracting an arbitrary amount from the total funding, we have chosen to ignore this in our estimation.
In order to get an estimate of the profit generated by the project under absolutely ideal circumstances – i.e. full capacity at all times, no marketing costs, and a product price of R240 – we subtract the estimated yearly fixed and variable costs from the estimated yearly income, and arrive at an estimate of R688.900 (1.051.200 – 55.700 – 306.600). Thus, assuming full capacity and that our estimates of the different costs correspond to the actual costs, it seems that the project is indeed very profitable, and that it can provide a lot of both private and common benefits.

Testing the sensitivity of the estimate
In this section we will investigate the effect of changing some of the assumptions underlying the “best case” scenario.

Table 1 shows the sensitivity of the profit to changes in the price charged for the product and to changes in the occupancy rate. An occupancy rate of 100, correspond to 4.380 persons spending the night in the chalets, 75 correspond to 3.285 persons, 50 to 2.190 persons, 25 to 1.095 persons, 12,5 to 548 persons and 5 to 219 persons. The numbers in brackets denoted casual earnings from labour and casual earnings from selling goods, respectively. In addition to this, every scenario give rise to private benefits in the form of wages paid to guards (i.e. 14.400 for three persons every year).

33 The effect on the profit of changing the occupancy rate has been calculated by assuming that the TP has been operating at full capacity x % of the time, and does therefore not consider inefficiencies introduced by operating at less than full capacity. Consequently, the numbers in the table are likely to be underestimates of the actual decline in profit which is likely to result from lower, and changing, occupancy rates.

34 The estimate for casual earnings has been obtained by multiplying the number of visitors in each scenario by the share of variable costs that can be attributed to the hiring of guides, caterers/cleaners and hostess (i.e. ( 5 x 40 Rand)/12 = 17 Rand/pers.). The estimate for casual earnings from selling goods is based on the assumption that, that one third of the expenditure on food (i.e. 16 Rand/pers.) is used for buying locally produced goods, and that 2 Rand/pers. is used for paying locals for supplying firewood to the site. Consequently, it is assumed that every visitor gives rise to 18 Rand of casual earnings due to demand for locally supplied goods. Here it should be noted that we have not taken into account the fact that there are costs associated with producing the goods; accordingly, the estimates for casual earnings from sale of goods are likely to overestimate the actual benefits.
<table>
<thead>
<tr>
<th>Price/day</th>
<th>100%</th>
<th>75%</th>
<th>50%</th>
<th>25%</th>
<th>12.5%</th>
<th>5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>240 Rand</td>
<td>688.900</td>
<td>502.750</td>
<td>316.600</td>
<td>130.450</td>
<td>37.375</td>
<td>- 18.470</td>
</tr>
<tr>
<td>200 Rand</td>
<td>513.700</td>
<td>371.350</td>
<td>229.000</td>
<td>86.650</td>
<td>15.475</td>
<td>- 27.230</td>
</tr>
<tr>
<td>150 Rand</td>
<td>294.700</td>
<td>207.100</td>
<td>119.500</td>
<td>31.900</td>
<td>- 11.900</td>
<td>- 38.180</td>
</tr>
<tr>
<td>100 Rand</td>
<td>75.700</td>
<td>42.850</td>
<td>10.000</td>
<td>- 22.850</td>
<td>- 39.275</td>
<td>- 49.130</td>
</tr>
<tr>
<td>70 Rand</td>
<td>- 55.700</td>
<td>- 55.700</td>
<td>- 55.700</td>
<td>- 55.700</td>
<td>- 55.700</td>
<td>- 55.700</td>
</tr>
</tbody>
</table>

Table 1: Sensitivity of yearly profit (i.e. collective income; in Rand) to changes in price paid by visitors and occupancy rate. Numbers in brackets denote the corresponding levels of casual earnings from providing labour and selling goods, respectively.

In terms of the occupancy rate we believe that the actual rate is likely to be a lot lower than 100. Thus, potential congestion problems (may arise e.g. when some tourist want to stay more than one day at a site, thereby preventing a continuous flow of tourist through the trail), demand for the product, seasonal variations, weekly variations and tourists who just want to walk part of the trail (not necessarily the part on which this particular site is) are all factors that are likely to have negative impact on the occupancy rate. More specifically, we suspect the relevant rate to be no higher than 25 %, but more likely around 12,5% (see sec. 4.4). This may seem very low, however, considering that it is equivalent to 12 people visiting the site every 8th day; 6 people every 4th day or 3 people every second day it does not appear to be unrealistic.

As it is seen from the table, changing the assumptions has an effect on the size of the profit. In terms of the price, we believe that the price stated by EDA is too high compared to what alternative offers on the market charge for accommodation in the Drakensberg Mountains (see section 4.3). Thus, the fact that the area is quite remote, quite unknown, often perceived to be dangerous and not a national park, combined with the facilities at the site, are likely to imply that people in general will not come to the area unless it is considered to be fairly cheap. More
specifically, based on the prices charged at other places we suspect the appropriate price to be somewhere in between 100 and 150 Rand.

From the table it is seen that the scenarios, which we consider most likely fail to be economically viable under the assumptions, which we have made. Thus, the profit is negative, which implies that there is not enough money for paying the fixed costs. Thus, in the long run the project will either stop operating or the costs will have to be reduced. Such cost reductions could be obtained in two ways: 1) by reducing expenditure on food, wages or casual earnings (i.e. the variable coats), or 2) by reducing the number of guards or the amount set aside for maintenance (i.e. the fixed costs).

In terms of the variable costs, we have probably been a bit conservative in our estimates. Thus, it is not unlikely that expenditure on food can be reduced to e.g. 24 Rand/pers./day\textsuperscript{35}, and that the payment to casual labourers can be reduced to 35 Rand/day. In total, this corresponds to a reduction of the variable costs by about R26, corresponding to a reduction by about 37\%. In table 2, the sensitivity of collective profits to such changes is presented for the price, and occupancy rate, intervals that we consider relevant (+ a margin).

<table>
<thead>
<tr>
<th>Price/day</th>
<th>Occupancy rate</th>
<th>50%</th>
<th>25%</th>
<th>12.5%</th>
<th>5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>200 Rand</td>
<td>50%</td>
<td>285.940</td>
<td>115.120</td>
<td>29.788</td>
<td>-21.536</td>
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<tr>
<td>150 Rand</td>
<td>50%</td>
<td>176.440</td>
<td>60.370</td>
<td>2.388</td>
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</tr>
<tr>
<td>100 Rand</td>
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<td>5.620</td>
<td>-25.012</td>
<td>-43.436</td>
</tr>
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<td>70 Rand</td>
<td>50%</td>
<td>1.240</td>
<td>-27.230</td>
<td>-41.452</td>
<td>-50.006</td>
</tr>
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</table>

Table 2: Sensitivity of yearly profit to reduction in variable costs by about 37\%. Numbers in brackets denote the corresponding levels of casual earnings from providing labour and selling goods, respectively\textsuperscript{36}.

\textsuperscript{35} Even though it did only cost 16 Rand/pers./day to feed us during our stay we do not believe that the cost for food can be set that low in the future. Thus, in the future it will be necessary to provide tourist with more food than we got.

\textsuperscript{36} The cost share attributable to casual labour has been reduced to 15 Rand per person (i.e. (4 \times 35 \text{ Rand}) = 15). Expenditure on locally produced food is reduced to 12 Rand/pers. since it is assumed that most of the reduction will happen in relation to expensive goods – i.e. goods that are not locally produced.
As it is seen in table 2, even a significant reduction in the variable costs does not necessarily imply that the project will be economically viable.

In terms of the fixed costs, it is seen that a reduction in these of no less than 25.012 Rand/year is necessary for making the 100 Rand / 12.5% option economically viable. Even though the estimate which we have used for the fixed costs are very rough – and speculative estimates, we do not believe that a reduction of these costs by almost 50% is realistic, especially not when it is considered that neither marketing nor administration costs have been included in the estimate.
<table>
<thead>
<tr>
<th>Age of respondent</th>
<th>Sex</th>
<th>Household size</th>
<th>Ethnic group</th>
<th>Language</th>
<th>Architectural style</th>
<th>Knowledge of</th>
<th>Expected benefits</th>
<th>Type of tourists</th>
<th>Attractions in area</th>
</tr>
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<tbody>
<tr>
<td>20-29 yrs</td>
<td>Male</td>
<td>2</td>
<td>4</td>
<td>English</td>
<td>3</td>
<td>1</td>
<td>10</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>30-39 yrs</td>
<td>Female</td>
<td>5</td>
<td>3</td>
<td>English</td>
<td>3</td>
<td>1</td>
<td>10</td>
<td>5</td>
<td>20</td>
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<tr>
<td>40-49 yrs</td>
<td>Male</td>
<td>7</td>
<td>3</td>
<td>English</td>
<td>3</td>
<td>1</td>
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<td>3</td>
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<td>3</td>
<td>1</td>
<td>10</td>
<td>5</td>
<td>20</td>
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<td>Male</td>
<td>6</td>
<td>3</td>
<td>English</td>
<td>3</td>
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<td>English</td>
<td>3</td>
<td>1</td>
<td>10</td>
<td>5</td>
<td>20</td>
</tr>
</tbody>
</table>

**Notes:**
- Mabua
- Mak.
- Pepela

**Activities/Income Knowledge of**

- Agriculture
- Agri. sale
- Projects
- EDA
- CTO
- PSC
- Personal
- Commun. Concerns
- Unspec. Spec.
- Scenery
- Culture
- Other
<table>
<thead>
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<th>4.0</th>
<th>1.0</th>
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<tr>
<td>0%</td>
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</tr>
<tr>
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<td>69</td>
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<tr>
<td>20%</td>
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<td>42</td>
<td>38</td>
</tr>
<tr>
<td>30%</td>
<td>19</td>
<td>60</td>
<td>65</td>
</tr>
<tr>
<td>40%</td>
<td>12</td>
<td>30</td>
<td>89</td>
</tr>
<tr>
<td>50%</td>
<td>42</td>
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</tr>
<tr>
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<td>46</td>
<td>70</td>
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</tr>
<tr>
<td>70%</td>
<td>73</td>
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</tr>
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<td>70</td>
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</tr>
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</tr>
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<td>84</td>
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</tr>
<tr>
<td>110%</td>
<td>57</td>
<td>35</td>
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</tr>
<tr>
<td>120%</td>
<td>68</td>
<td>91</td>
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</tr>
<tr>
<td>130%</td>
<td>31</td>
<td>91</td>
<td>51</td>
</tr>
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</table>

Note: The table above represents the percentage range for different values.