National Responsible Tourism Guidelines for the South African Tourism Sector

Application of the Guidelines to the Nature-Based Tourism Sector

OVERVIEW REPORT OF THREE CASE STUDIES: PRETORIUSKOP CAMP, JACKALBERRY LODGE, AND CORAL DIVERS

Anna Spenceley

This report was compiled from reports on the following three case studies

PRETORIUSKOP CAMP, KRUGER NATIONAL PARK
Ralf Kalwa, Wik van der Walt, Johannes Moreko, & Stefanie Freitag-Ronaldson

JACKALBERRY LODGE, THORNYBUSH GAME RESERVE
Piers Relly with Eddie Koch

&

CORAL DIVERS, SODWANA BAY
Anna Spenceley, Stuart Roberts, & Christopher Muziwakhe Myeni

10 March 2002
Report to DfID / DEAT
## CONTENTS

1. **SUMMARY** ................................................................................................................................. 3
2. **INTRODUCTION** .......................................................................................................................... 3
   2.1 The nature-based tourism sub-sector ....................................................................................... 3
   2.2 Tentative sub-sector guidelines for nature-based tourism ....................................................... 4
   1.1.1 Economic Guidelines ................................................................................................... 4
   1.1.2 Social Guidelines .......................................................................................................... 4
   1.1.3 Environmental Guidelines ............................................................................................ 5
2.3 Background to Study Sites ........................................................................................................... 5
2.4 Methodology ............................................................................................................................... 7
3. **SUMMARY OF RESULTS** ............................................................................................................. 9
   3.1 Economic Guideline Assessments ....................................................................................... 9
   3.2 Social Guideline Assessments ............................................................................................ 12
   3.3 Environmental Guideline Assessments ................................................................................ 14
4. **APPLICATION OF THE GUIDELINES** .................................................................................... 17
   4.1 Performance of the Enterprises against the Guidelines ......................................................... 17
   4.2 Availability of Data ............................................................................................................. 19
5. **CONCLUSIONS: IMPLICATIONS FOR FUTURE ASSESSMENTS** ........................................... 20
6. **CONTACT DETAILS OF CONSULTANTS** ................................................................................ 22
1 SUMMARY

Three responsible nature-based tourism assessments were implemented in South Africa during February 2002. The case studies aimed to pilot test three commercial tourism enterprises in relation to a selection of the National Responsible Tourism Guidelines for South Africa that were developed in 2001. This report presents a summary of the results of the case studies.

2 INTRODUCTION

2.1 The nature-based tourism sub-sector

The nature-based tourism industry is one that relies heavily on the integrity of an attractive environment to persist. By its very definition, it frequently occurs in rural rather than suburban areas, where the majority of South Africa’s poor people reside. The responsible design and management of enterprises working in this sector of the tourism industry has critical implications for the growth and maintenance of economically, socially and environmentally sustainable development.

This document sets out the assessment of the draft guidelines and indicators for responsible tourism as applied to three South African nature-based tourism enterprises:

- Pretoriuskop Camp in Kruger National Park, Mpumalanga
- Jackalberry Lodge in the Thornybush Game Reserve, Northern Province
- Coral Divers in Sodwana Bay, KwaZulu Natal

Sixteen guidelines were selected to assess application to the nature-based tourism sub-sector, and are only small proportion of the 104 agreed National Responsible Tourism Guidelines. They were highlighted for use for the following reasons:

- Assessable during the operational rather than construction phases – with data that should be readily available to enterprises
- Attractiveness to consumers (tourists and tour operators) – these are issues that the tourism market and the tour operators want to know about
- Objectively and transparently measurable and declarable – rather than qualitative or intangible issues that are open to interpretation by assessors (e.g. reporting 3 of 10 staff received training, rather than 33%)

Dealing with the selected guidelines will decrease costs for business, and improve marketability of operation.

1 The full reports can be obtained from the authors or from Anna Spenceley (contact details at the end of the document).
2.2 Tentative sub-sector guidelines for nature-based tourism

1.1.1 Economic Guidelines

1. Buy locally–made goods and use locally–provided services from locally-owned businesses wherever quality, quantity, and consistency permits. Monitor the proportion of goods and services the enterprise sourced from businesses with 50 km and set 20% target for improvement over three years.

2. Give customers the opportunity to purchase locally produced crafts and curios, set targets to increase the proportion of sales of goods sourced within 20 km of the enterprise. Assist local craft workers to develop new products to meet market demand as evidenced in the enterprise.

3. Government and established businesses need to redress previous imbalances, and to enable the historically disadvantaged to engage in the tourism sector. For example they should source 15% of services and 15% of products, increasing by 5% per year, for 3 years, from historically disadvantaged groups, and/or individuals, and report on purchasing activities.

4. Encourage visitors to spend more money in the local economy, and to visit local bars and restaurants and participate in tours to local areas, bringing business to local communities. Where appropriate treat this as part of the business of the enterprise and charge a booking fee or commission, or sell craft and local food products through the mainstream enterprise.

5. Recruit and employ staff in an equitable and transparent manner and maximise the proportion of staff employed from the local community. Set targets for increasing the proportion of staff and/or of the enterprise wage bill going to communities within 20 km of the enterprise.

6. Be transparent when reporting community benefits distinguish between

- Benefits to employees
- Benefits to emerging or community based entrepreneurs
- Community benefits, for example leasehold payments, that go to community projects (grinding mills or school books) or are distributed as household income in the local area.

Consider establishing targets to monitor progress in achieving objectives.

1.1.2 Social Guidelines

7. Consider what contributions the enterprise can make to scholarships, local youth sports teams and other community causes. Monitor and report increasing contributions with respect to the number of projects and level of investment.

8. Use tourism as a catalyst for human development, focussing on gender equality, career development and the implementation of national labour standards. (Report on gender equality and career development)

9. Use local guides, and encourage them to continually improve their quality, to ensure that the community speaks for itself and to increase the revenues going into the local community (by higher fees for quality tours). Monitor and report this economic contribution to the community and set targets to increase it annually.

10. Develop a local social contract for interactions and behaviour between the local community and tourists (including responsible bargaining), developed with the participation and contributions from the community, and display it prominently for visitors and publicly within the community.
1.1.3 Environmental Guidelines

11. Meter the quantity of water consumed and manage consumption and leakage so as to reduce water consumption by 5% per annum for 3 years, and report water consumption and performance in monitoring.

12. Measure electricity consumption and introduce energy saving measures to achieve 5% reduction in use per annum over three years. This can be done by for example dimming lights, using low energy appliances and light bulbs and enhancing the use of natural ventilation.

13. Set targets to increase the proportion of energy used from renewable resources – for example solar, wind, hydroelectric (increase by 10% over 3 years). Sustainable use of wood, from indigenous and plantation forests is complex, and great care needs to be taken.

14. Set percentage targets and time scales for the reduction of waste produced, levels of recycling and reuse of waste from the enterprise. Set appropriate targets for reduction and/or recycling of waste produced per year for paper (5%), plastics (5%), metal (5%) and glass (5%). Report on progress towards 15% targets over 3 years.

15. Invest a percentage of profits or turnover in species conservation or habitat restoration and management. Report the investment, and try to increase this by 5% per year.

16. Work with conservation authorities to ensure that visitors to natural heritage areas are aware of the impacts that they may have on the ecology of the area and how they should behave in order to minimise those impacts.

It would be useful in the near future if the trade associations and operators working in nature-based tourism across South Africa reviewed these guidelines and took them on board for implementation. For example, the case studies made it clear that waste-water management and sewage disposal should be reviewed. It has also been made clear that there is some overlap of guidelines. For example, the three economic guidelines regarding purchasing could ideally be combined (Guidelines 1-3). There is also some overlap between the Economic and Social guidelines regarding community benefits (Guidelines 6 and 7). Similarly, the guidelines regarding the use and training of local guides and equality in career development (Guidelines 8 & 9) are partially covered within the recruitment and employment guideline in the Economic section (Guideline 5).

2.3 Background to Study Sites

The study sites were selected to illustrate the application of the guidelines to nature-based tourism operations in national and provincial parks and on privately owned land within three of South Africa’s provinces. They were also selected to illustrate terrestrial photographic safaris and marine scuba diving. The study sites were also well known to the author and this, to varying extents, facilitated agreement of the operations to conduct the pilot studies, and also allowed some inclusion of previously collected information.

Pretoriuskop Camp, Kruger National Park

Pretoriuskop Camp is located in the south-western section of the Kruger National Park (KNP) some 10 km from Numbi Gate. Pretoriuskop is often the first port of call for many photographic safari tourists visiting the park, as it links in conveniently with the towns of White River and Nelspruit. The camp and surrounding park are operated by the government parastatal South African National Parks (SANParks), while the shop and restaurant are operated by private sector companies: Tigers Eye and Natures Group respectively. The commercialisation of shops, restaurants and camps within the park aims to allow SANParks to concentrate on its core business of nature conservation.

2 The choice of Jackalberry Lodge was also intended to illustrate responsible commercial hunting operated in conjunction with photographic safaris, but the assessment revealed that hunting packages had not been sold during the period that this study examined.
whilst allowing experts in the field of retail and leisure to concentrate on selling products and providing meals.

Pretoriuskop Camp is one of the twelve main camps within KNP, which also contains four satellite camps, four bushveld camps and three bush lodges. The camp has 352 beds distributed in accommodation varying in quality from luxury furnished ensuite chalets to rondavels with communal kitchen and ablution facilities. These vary in price from R110 to R2200 per unit/night. There are also facilities for forty camping sites (R65 per site/night). In addition to morning and evening safari drives, SANParks also operate bush braais and bush walks for visitors.

The region of the park in which the camp is located neighbours the Mdluli Tribal Authority’s communal lands. This community has jurisdiction to around 845 ha land within KNP on a property called Daannel, which lies close to Pretoriuskop camp. The Mdluli TA has requested that this land be controlled and supervised by KNP’s conservation staff, and has not yet commercially exploited the land for tourism purposes.

**Jackalberry Lodge, Thornybush Game Reserve**
Thornybush Game Reserve lies on the south-western boundary of the Timbavati Private Game Reserve and to the north-east of the Limpopo province (Northern Province) town of Klaserie. The reserve consists of aggregated and contiguous privately owned game farms now incorporated under a common constitution. The reserve is divided into northern and southern management areas. Management are currently in the process of creating a separate entity, known as Southern Thornybush Wildlife and Property Management (STW&P). They are aiming to present separated financial information for each entity. This is particularly important in the case of STW&P as it is engaged in the land management for all of the privately owned properties in the southern Thornybush area, including those that are not allied to the lodges and those that are not engaged in commercial tourism enterprise. It serves a wider constituency than Jackalberry and associated lodges.

A number of the privately owned farms operate established commercial tourist lodges, offering big five game viewing experiences to paying tourists – mostly from overseas. Jackalberry Lodge offers 10 beds at nightly rates of around R1,600 per bed/night. Its sister operation Waterbuck Lodge (8 beds) operates in the same way. Photographic safaris are currently operated, and although no commercial hunting was operated during the period of study, there are proposals to offer hunting packages in the future.

The reserve borders the Timbavati community. There are no joint land ownership arrangements or leases between the privately owned farms and the community, so external participation in the activities on the reserve arises primarily through formal and casual employment. Very few of the employees reside within the Timbavati village community. Prior to their employment at Jackalberry lodge and/or the Timbavati region, members of management all resided in areas outside of the 50 km measurement range.

**Coral Divers, Sodwana Bay**
Coral Divers (CD) is a privately owned company located in Sodwana Bay in KwaZulu-Natal. The main focus of CD’s operations is the provision of scuba diving trips for guests to the coral reefs that lie within Sodwana Bay. They also offer training courses through PADI, ranging from beginner to instructor levels. CD has 150 beds and offers a variety of types of accommodation ranging from safari tents, to luxury en-suite huts, and offers catered or self-catering options. Prices vary from R90 to R228 per bed/night.
CD is one of three commercial dive operators licensed by KZN Wildlife to operate within the Maputaland Marine Reserve. Only one of these, Mseni Lodge, has accommodation facilities. Another seventeen companies operate ‘private’ boats on a non-commercial basis in the reserve, but do not pay a license or concession fee to the conservation service to do so.

The Mbila Tribal Authority (TA) neighbours the reserve and Mbazwana is the largest town within it. The Mbila TA consists of an estimated 20-25,000 inhabitants within a society that is reportedly not cohesive. An estimated 80% of local people within the community are unemployed.

2.4 Methodology

Each of the assessments was implemented using a previously prepared comparative methodological framework. This was provided to ensure consistency between the studies and the production of comparable data and reports, that would allow the performance of the operations to be transparently assessed and compared. Working databases were provided as tools for the assessors to facilitate data collection, and also to allow operations to update their progress towards responsibility in the future, and to help set and monitor benchmarks.

Pretoriuskop Camp, Kruger National Park
Stefanie Freitag-Ronaldson was briefed on the work to be implemented, and the study was conducted during the week 12 to 15 February 2002. The survey team (Ralf Kalwa and Wik van der Walt), working under the supervision of Stefanie, sent survey forms and questionnaires that were forwarded to Camp Management a week prior to the survey being conducted. Johannes Moreko from the Mdluli Tribal Authority interviewed various managers personally and also set up meetings in Skukuza.

In addition, management received an Employee Data form in advance to ensure that information regarding staff could be collected. The survey team met with management and supervisory staff over a period of four days to complete all the survey forms and discuss the implications of the questionnaire and the project as a whole.

Jackalberry Lodge, Thornybush Game Reserve
Eddie Koch was briefed on the study, which was then conducted by Piers Relly under Eddie’s supervision during the week 11 to 13 February 2002, using existing and some previously compiled research information. The quantitative financial information was drawn from accounting records for the financial year ended December 2001. Other updated information was obtained by means of detailed interviews with Kevin Godding, the lodge director and Sue Godding, the general manager. Management was given a chance to review the report for accuracy and made a number of minor comments and corrections.

The lodge does not present disaggregated accounts (although it does allocate certain costs to each of these entities in a consolidated income statement) and the core data covers the activities of Jackalberry and Waterbuck lodges, Kayatula (for owner use) as well as the southern Thornybush land management division.

Coral Divers, Sodwana Bay
The assessment of Coral Divers took place between 1 and 10 February 2002, and was researched by through reviews of relevant literature, observation, semi-structured interviews with key personnel based on the methodology, and questionnaires distributed to staff at the lodge. Stuart Roberts, the general manager of Coral Divers, sourced and supplied statistical information regarding employment, training and wages, and facilitated the course of the field study. In the cases of casual labourers offering services to guest near to the beach (e.g. people offering to clean diving
Christopher Muziwakhe Myeni undertook structured interviews in Zulu and translated information into English. A repeated-measures design was used in the surveys with questionnaires. Drafts of the report were sent to Coral Divers management and to KZN Wildlife participants for review for clarification and comment.
3  SUMMARY OF RESULTS

The following tables present summaries of the performance of the three case study sites in relation to the sixteen economic, social and environmental responsible tourism guidelines assessed. They have been arranged in this way for easy comparison between operations, and to provide an indication of how data on levels of responsibility may potentially be collated and reported by a central agency. More detailed information on each operation can be found in the main reports.

3.1 Economic Guideline Assessments

<table>
<thead>
<tr>
<th>GUIDELINES ASSESSED</th>
<th>PRETORIUSKOP CAMP</th>
<th>JACKALBERRY LODGE</th>
<th>CORAL DIVERS (CD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Buy locally–made goods and use locally–provided services from locally–owned businesses wherever quality, quantity, and consistency permits. Monitor the proportion of goods and services the enterprise sourced from businesses with 50 km and set 20% target for improvement over three years.</td>
<td>0.86% of expenditure was used on items (groceries/general goods) made and purchased within 50 km of Pretoriuskop. The purchase of local brooms occurs on an ad hoc basis (e.g. 15 brooms at a total of R75 in 2001). Some products are made by Historically Disadvantaged Individuals, but not within 50 km. 21% of its annual shop profits go towards HDI programmes across South Africa.</td>
<td>0.2% of lodge and farm purchases are locally made products. 59.6% of purchases are from local businesses (&lt;50 km). 38.3% of services sourced locally (&lt;50 km). None of the services used are sourced from Historically Disadvantaged Individual owned enterprise. Management willing to try and meet targets but subject to mentorship for management and structured programme to set up small businesses in region.</td>
<td>1.1% CD expenditure in 2001 on locally made products. 23.1% was on local purchases (36.9% within 100 km). 1.9% of total expenditure on local services. Targeted improvements for local food &amp; crafts at proposed new outlets at Mbazwana.</td>
</tr>
<tr>
<td>2. Give customers the opportunity to purchase locally produced crafts and curios, set targets to increase the proportion of sales of goods sourced within 20 km of the enterprise. Assist local craft workers to develop new products to meet market demand as evidenced in the enterprise.</td>
<td>0% of curios sold in the shop are purchased locally. Shop management has recently changed and the new operators (Natures Group) are committed to Historically Disadvantaged Individuals’ programmes elsewhere in South Africa. They will assess local products and the shop manager is committed to facilitating this process. No assistance currently given to assist local craft workers developing new products.</td>
<td>0% crafts and curios were purchased from local sources (&lt;20km). 99.2% of total expenditure was from non-Historically Disadvantaged Individual (HDI) owned businesses (40% from a Cape Town based company). The majority used HDI labour but the percentage accruing to HDI’s could not be quantified. Management willing to support local crafters but lack time, capacity &amp; resources to develop such a programme. Structured external intervention required.</td>
<td>100% crafts purchased made within 20 km (but volumes were low). Assist local craft workers commissioning furnishings on an ad hoc basis. Proposals to develop craft retail outlet (for sustainably produced crafts) at CD with local person to manage.</td>
</tr>
</tbody>
</table>
3. Government and established businesses need to redress previous imbalances, and to enable the historically disadvantaged to engage in the tourism sector. For example they should source 15% of services and 15% of products, increasing by 5% per year, for 3 years, from historically disadvantaged groups, and/or individuals, and report on purchasing activities.

Purchases at Pretoriuskop are not geared towards local Historically Disadvantaged Individuals, save individual efforts (e.g. 15 brooms purchased from a local broom-maker). Shop management will support the community in their aspect of strength e.g. agriculture, and not necessarily in the curio and craft market. 0% expenditure by the shop currently spent on services locally.

6.6% of expenditure in 2001 spent on products from companies with over 79% indigenous employees. 100% of local services sourced from black empowerment companies or Historically Disadvantaged Individuals. Potential increase use of local services through training local men as guides for tours in Ozabeni Reserve.

4. Encourage visitors to spend more money in the local economy, and to visit local bars and restaurants and participate in tours to local areas, bringing business to local communities. Where appropriate treat this as part of the business of the enterprise and charge a booking fee or commission, or sell craft and local food products through the mainstream enterprise.

No contact has been established with local bars, shops and restaurants. Management were supplied with some options and encouraged them to investigate this approach. A Shangaan Village some 20 km from Pretoriuskop may prove to be an attraction for visitors in the future.

Tourists to the lodge do not go on out of reserve tours unless requested. Scope for product purchase is limited to the curio shop where the majority of goods stocked are from non-local sources. Visitors arriving by vehicle usually pass curio stalls established along the main tourist routes but there were no statistics on purchases made there. Infrequent ad hoc tours can be arranged to Blyde River and other attractions in area. Management willing to promote these if they have information and material especially with regard to cultural tourism.

Tourists encouraged to use local men to clean diving kit. Currently few advertisements for local bars/tours. Small sample of visitors had average local spend of R157. Sample of local sales/service people (curios, hair-ties, kit cleaning) showed revenue used for food and education. Market survey revealed additional products and services desired that could be facilitated by CD. Potential for interpretation board of local attractions.
<table>
<thead>
<tr>
<th>ECONOMIC GUIDELINES ASSESSED (Contd. . .)</th>
<th>PRETORIUSKOP CAMP</th>
<th>JACKALBERRY LODGE</th>
<th>CORAL DIVERS (CD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Recruit and employ staff in an equitable and transparent manner and maximise the proportion of staff employed from the local community. Set targets for increasing the proportion of staff and/or of the enterprise wage bill going to communities within 20 km of the enterprise.</td>
<td>News of vacancies spreads by word of mouth. Senior positions are advertised internally and existing staff promoted where applicable. All labour legislation strictly adhered to and locals are afforded first choice. Gender inequalities have been addressed in KNP. Pretoriuskop management are not responsible for employment of new staff and this remains a centralised Human Resources function. 6.25% of staff from within 20 km 4.31% of the wage bill finds its way back to the community closest to Pretoriuskop (within 20 km).</td>
<td>Eight employees (all male) joined the company during the year. Six were inherited from an existing operation in the reserve and two were recruited by word of mouth. The new employees were all engaged in the reserve and land management division. Such positions not traditionally sought by female candidates. The lodge recruits on an equal opportunities basis in regard to gender and race. 66 % of staff are resident within 20 km. Lodge seeks to increase labour resident near lodge.</td>
<td>News of vacancies spreads by word of mouth. Best person for job employed (regardless of gender or race) 64% staff from within 20 km of CD receiving 44.9% of the total wage bill. Will increase above inflation, as per negotiations with unions, and with proposed employment of more local apprentices and skippers.</td>
</tr>
<tr>
<td>6. Be transparent when reporting community benefits distinguish between *Benefits to employees *Benefits to emerging or community based entrepreneurs *Community benefits, for example leasehold payments, that go to community projects (grinding mills or school books) or are distributed as household income in the local area. Consider establishing targets to monitor progress in achieving objectives.</td>
<td>Employee benefits include pension, housing, medical aid, meal allowances, access to bursaries, skills development. Historically Disadvantaged Individual benefits are limited, although retailers at Pretoriuskop will consider purchasing from them in future if community services and products are of a high quality. Two building contractors with a local labour force of 46 have commenced re-building the restaurant and the reception. Very limited community benefits at present.</td>
<td>Contribution of R 3,706 made to a community computer centre, which is needs additional mentorship in order to function. Local chief and aides are entertained at the lodge from time to time but this is viewed as a relationship building exercise rather than a community benefit. Lodge is committed to making distinctions in benefit flows to community and communicating these to various stakeholders. General ledger indicates these distinctions clearly.</td>
<td>Employee benefits and those to emerging/CB entrepreneurs previously discussed. CD guests pay KZN Wildlife community levy. In 2001 CD visitors contributed R31,000 towards forthcoming local school electrification &amp; school renovation projects. With increasing occupancy, level of contribution by CD visitors will increase. Entrance fees also pay for KZN Wildlife staff &amp; services.</td>
</tr>
</tbody>
</table>
3.2 Social Guideline Assessments

<table>
<thead>
<tr>
<th>GUIDELINES ASSESSED</th>
<th>PRETORIUSKOP CAMP</th>
<th>JACKALBERRY LODGE</th>
<th>CORAL DIVERS (CD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>7. Consider what contributions the enterprise can make to scholarships, local youth sports teams and other community causes. Monitor and report increasing contributions with respect to the number of projects and level of investment</td>
<td>KNP’s Department of Social Ecology has initiated a craft market sales point just inside the park at Numbi Gate. Camp management support a local dance group and arranges access to the camp. There are other initiatives that could be engaged with in future.</td>
<td>Contributions to the local Ilkley Environmental school. Contribution per local school attendance will be reviewed annually. (Contribution for 2001 was R 9,486) Support of the Southern African Wildlife College by sponsoring a cultural show held at the lodge on an annual basis (R 2,000) and a local theatre group R1500 plus tips estimated at R1000.</td>
<td>Current micro-loans to school pupils for books etc: paid off by work for CD. Financial support of local soccer tournament in 2001. Facilitation of environmental education by KZN Wildlife. Opportunities to assist local enterprise development, business training, and sustainable agriculture projects.</td>
</tr>
<tr>
<td>8. Use tourism as a catalyst for human development, focussing on gender equality, career development and the implementation of national labour standards. (Report on gender equality and career development)</td>
<td>Men and women are employed relatively equally at Pretoriuskop (44% male, 56% female). Management has a number of female staff. Over 90% have received training in the past. 15% of staff received promotion in the past year</td>
<td>Of the permanent staff, gender split (69% male, 31% female). Excluding farm employees, gender split is 57% male; 43% female Six staff received training (14% of total), all male. Six staff were promoted (5 male (83% of promotions): 1 female). Staff turnover low due to job scarcity. Most of the promotions have resulted from the restructuring of the lodge and farm activities and to some extent organic growth. (New private lodge extensions) Management’s ability to increase proportion of women labour constrained by the physical nature of farm labour.</td>
<td>Almost equal numbers of men and women employed at CD (49% male, 51% female). Career development is role rather than gender oriented (e.g. skippers &amp; diving staff). Little opportunity/scope for advancement due to small numbers of management staff. 72% male staff &amp; 48% female staff have received training from CD</td>
</tr>
<tr>
<td>SOCIAL GUIDELINES ASSESSED (Contd . . .)</td>
<td>PRETORIUSKOP CAMP</td>
<td>JACKALBERRY LODGE</td>
<td>CORAL DIVERS (CD)</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------------------</td>
<td>-------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>9. Use local guides, and encourage them to continually improve their quality, to ensure that the community speaks for itself and to increase the revenues going into the local community (by higher fees for quality tours). Monitor and report this economic contribution to the community and set targets to increase it annually.</td>
<td>None of the guides are sourced locally. All guides are well trained within the company’s framework and the company has strict rules pertaining to qualifications - FGASA 3 SKS for Lead Rifle and FGASA 1 for Back-up Rifles. All the guides are promoted once their level of training improves.</td>
<td>Lodge manager doubles as guide using two trackers. The two trackers fall outside of the definition of local (&lt;20 km); one only marginally so at 23 km. 37.5% of the remuneration paid to rangers/trackers is earned by local people. (The ranger is also the camp manager and his salary skewed the statistic in favour of the one ranger). The manager received FGASA training during the year. Ratio unlikely to change unless there is major expansion in current bed capacity given small number of guides and trackers. In current year a former tracker was promoted to manager of sister Kayatula Corporate Lodge.</td>
<td>22% all skippers local. Two local people to receive skipper training in 2002. 22% total guiding bill accrues to local guides Low interest locally of diving due to perception of high risks.</td>
</tr>
<tr>
<td>10. Develop a local social contract for interactions and behaviour between the local community and tourists (including responsible bargaining), developed with the participation and contributions from the community, and display it prominently for visitors and publicly within the community.</td>
<td>KNP’s Department of Social Ecology has created a social contract within the framework the local Lubambiswano Community forum. This forum serves as a platform for the two parties to communicate their ideas and concerns. Job opportunities, contract work are advertised at these meetings and many field staff are recruited via this forum.</td>
<td>Management are committed to the idea but have so far not negotiated such a contract. Some mentorship and clear guidelines about the nature and content of such a contract is required.</td>
<td>CD consider important to develop social contract in consultation with local staff, given increasing proportion of foreign tourists. Local crafts people revealed problems with tourists over-bargaining.</td>
</tr>
</tbody>
</table>
### 3.3 Environmental Guideline Assessments

<table>
<thead>
<tr>
<th>GUIDELINES ASSESSED</th>
<th>PRETORIUSKOP CAMP</th>
<th>JACKALBERRY LODGE</th>
<th>CORAL DIVERS (CD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Meter the quantity of water consumed and manage consumption and leakage so as to reduce water consumption by 5% per annum for 3 years, and report water consumption and performance in monitoring.</td>
<td>Water usage is measured monthly at Pretoriuskop and water management implemented by central KNP. Camp management has little knowledge of the water use in the camp and are not up to date with new technology and water saving devices available. The camp uses more water per guest than the industry norm of 350 litres per person per day (4 741 kilo litres of used monthly). This translates into 890 litres per bed occupied, which averages out at a cost of R79.21 per bed night occupied.</td>
<td>Water is obtained from two sources: (1) The Klaserie river at an annual cost of R700 and (2) from boreholes. In the case of (1) raw water is stored in a holding dam and filtered for use in the lodge. As the cost to the company is minimal and the quantity is relatively unlimited, the incentive to use water sparingly is low. In the case of both (1) and (2), no flow meters are used and water reduction targets have not been implemented.</td>
<td>No meters installed by landlords, KZN Wildlife, and no plans to do so. Therefore not possible to report water consumption. Existing low-water consumption practices in laundry, water-heating, small toilet cisterns &amp; context of low water pressure. Potential for grey-water recycling with dive-kit cleaning, information for guests, &amp; water-saving faucets/showerheads.</td>
</tr>
<tr>
<td>12. Measure electricity consumption and introduce energy saving measures to achieve 5% reduction in use per annum over three years. This can be done by for example dimming lights, using low energy appliances and light bulbs and enhancing the use of natural ventilation</td>
<td>Electricity is measured accurately and amounts to an average of 168 708.3 KwH per month which translates to R 73.14 per bed. Low wattage bulbs are being phased in. No other technologies are used at present. Guests are requested to turn off their air conditioners whilst not in their hut. Greater awareness and energy savings could be implemented in future.</td>
<td>Gas cooking units have been installed in the lodge kitchens to replace electricity. Low energy lighting was installed in some units but the power surges from ESKOM supplied electricity cause the bulbs to blow and the cost of each unit, relative to power savings is considered too expensive. No formal method of monitoring electricity usage is in place but management clearly interested in reducing use of electricity and counsel staff in this regard e.g. management of air conditioning.</td>
<td>No billing of electricity use by KZN wildlife, therefore not possible to report usage nor financial savings through reduced use. Existing energy conservation measures in laundry, water heating, ventilation, daylight switches, move to low-energy bulbs, use of natural light. Proposals to reduced consumption for lighting by 40% and in the laundry by 30%. No monitoring of petrol/diesel volumes used – bulk billing by KZN Wildlife. Use likely to increase with increased occupancy (more dive launches). 4-stroke engines not yet economically viable.</td>
</tr>
<tr>
<td>ENVIRONMENTAL GUIDELINES ASSESSED (Contd . . .)</td>
<td>PRETORIUSKOP CAMP</td>
<td>JACKALBERRY LODGE</td>
<td>CORAL DIVERS (CD)</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>--------------------</td>
<td>-------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>13. Set targets to increase the proportion of energy used from renewable resources – for example solar, wind, hydroelectric (increase by 10% over 3 years). Sustainable use of wood, from indigenous and plantation forests is complex, and great care needs to be taken.</strong></td>
<td>The camp requires energy to run air conditioners and fridges to cater for more than 300 tourists per night. Eskom electricity is most suited for this level of energy use. No renewable energy sources are being investigated by SANParks at present.</td>
<td>Wood used for fires is taken only from bush clearing activities. The lodge is economical in the use of this wood (boma fires only) and there is a high level of awareness in regard to sustainable use – bearing in mind the number of users in the reserve. No solar or wind energy sources are in use other than for fence electrification.</td>
<td>Proposals to install windmill to power office computers. Solar power not practical due to weather conditions. No proposals by KZN Wildlife to use renewable energy sources.</td>
</tr>
<tr>
<td><strong>14. Set percentage targets and time scales for the reduction of waste produced, levels of recycling and reuse of waste from the enterprise. Set appropriate targets for reduction and/or recycling of waste produced per year for paper (5%), plastics (5%), metal (5%) and glass (5%). Report on progress towards 15% targets over 3 years.</strong></td>
<td>All metals, glass and tins (100%) are separated from general waste and shipped out of the Kruger National Park by a private contractor for recycling. Other waste is incinerated and the ash is buried. Suppliers collect old water bottle containers and used cooking oil.</td>
<td>Waste is separated and stored in collection areas. The commercially renewable waste e.g. glass and cans is collected and removed for recycling although the outcome of this process is unknown. It is assumed that this waste is transported to a depot where it is accumulated for later processing on a commercially viable basis. Management willing to try and meet these targets.</td>
<td>Recycling scheme run by KZN Wildlife stopped 2 years ago due to impracticalities of transporting separated waste to depot 150 km away. CD bound by KZN Wildlife waste management policies. Potential for recycling if depot opened at Mbazwana (15 km away). Management consider volumes waste already reduced e (e.g. already buy in bulk; no local pig farmers for waste food)</td>
</tr>
<tr>
<td>ENVIRONMENTAL GUIDELINES ASSESSED (Contd . . .)</td>
<td>PRETORIUSKOP CAMP</td>
<td>JACKALBERRY LODGE</td>
<td>CORAL DIVERS (CD)</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------</td>
<td>------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td><strong>15. Invest a percentage of profits or turnover in species conservation or habitat restoration and management. Report the investment, and try to increase this by 5% per year.</strong></td>
<td>Tourism funds in the Kruger National Park end up in the larger pot and are not allocated to a single project. Kruger funds may end up being used for conservation efforts in the Cape for example. Money generated in the Kruger National Park is used to cross-fund other National Parks in South Africa. Pretoriuskop’s contribution to the annual turnover in the Kruger National Park amounted to 6.29% or R 5 889 399 during the previous financial year.</td>
<td>The landowners in the southern Thornybush reserve all contribute pro-rata to the STW&amp;P company. Included in (STW&amp;P’s activities and budget responsibilities are habitat maintenance, dam construction, erosion protection and anti-poaching. Although there is no specific budget for game purchases, the reserve embraces an ethic that seeks to provide visitor satisfaction through the delivery of good game sightings. The investment in this experience is ongoing. The breeding of tuberculosis free buffalo is an example of this commitment.</td>
<td>16.4% expenditure in 2001 to KZN Wildlife (but also to cover electricity, water etc) and an estimated 15-20% of CD’s payments went to finance conservation projects in the province. Estimated CD contributed to 2-3% of Sodwana Conservation budget. Contribution should increase with levy payments &gt;5% year.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Visitors to CD paid estimated R640,000 to KZN Wildlife in entrance and day-fees.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Potential to increase by assisting local environmental awareness, advertising turtle tours, habitat creation, channelling guest donations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Work closely with KZN Wildlife, and CD staff participate in training offered by the conservation authority. PADI diving codes taught to divers taking courses at CD, and dive briefings include information about the marine reserve. Could distribute diving codes from KZN Wildlife directly to guests to improve environmental awareness.</td>
</tr>
<tr>
<td><strong>16. Work with conservation authorities to ensure that visitors to natural heritage areas are aware of the impacts that they may have on the ecology of the area and how they should behave in order to minimise those impacts.</strong></td>
<td>Managers at Pretoriuskop are unaware of the impacts that tourists may have on the natural resources of a National Park. Discussion and debate on the issue has enlightened the staff somewhat and they have been sensitised to implement best practises wherever possible. This outcome is concerning and requires urgent attention.</td>
<td>As a private game reserve, contact with conservation authorities is limited. The reserve would welcome incorporation into the Timbavati Private Game Reserve and hence KNP but the landowners are unable at present to meet the requirements of KNP and the Association of Private Nature Reserves (APNR). Ownership of disease free buffalo now a major constraint (APNR buffalo are not disease free). Guiding activities usually include (informal) commentary on the role and need for natural heritage protection, conversion of farming land to game reserves etc.</td>
<td>Work closely with KZN Wildlife, and CD staff participate in training offered by the conservation authority. PADI diving codes taught to divers taking courses at CD, and dive briefings include information about the marine reserve. Could distribute diving codes from KZN Wildlife directly to guests to improve environmental awareness.</td>
</tr>
</tbody>
</table>
4 APPLICATION OF THE GUIDELINES

4.1 Performance of the Enterprises against the Guidelines

**Pretoriuskop Camp, Kruger National Park**

The Camp on its own fared well in the guidelines measuring employment ratios and human resource information. The camp’s performance on issues of social commitment and resource utilisation / environmental management requires urgent attention. Staff seemed to be willing and keen to investigate mechanisms of doing this in future.

There are definitely advantages to the approach of using sustainable tourism guidelines for measuring progress on the three important fronts of social, economic and environmental indicators. Ideally these should be integrated into the overall environmental auditing processes, with direct feedback loops to senior management at all levels (i.e. in Pretoriuskop, as well as Skukuza, Tigers Eye head office and Natures Group head office).

During the assessment was evident that the that the commercialisation of certain operations affected the integration of all aspects of camp life to some degree. For example:

- The shop manager was guided by his head office and has had little opportunity to assess the potential of the local community and its products. Company policy is broad-based and although the thinking behind purchasing crafts and curios does include the needs and aspirations of Historically Disadvantaged Individuals, it may not include those closest to Pretoriuskop. Furthermore, the objective of management to purchase goods of high quality and diversity may exclude locals for some time to come. They have however committed themselves to researching the local markets.
- The restaurant is undergoing a slow metamorphosis from the one previously owned by SANParks. Services and goods are all sourced from areas more than 50 km away and unless some catalyst initiates a different way of doing things, it is felt that operations will continue to exclude the local communities.
- Since the camp itself does not manage the shop or restaurant, it has less contact with goods purchased and therefore will have less opportunity to incorporate the local community into their activities. Creative ideas will be required to bring local communities and Historically Disadvantaged Individuals on board.

Camp staff rely heavily on the Department of Social Ecology to handle community issues on their behalf, but the shop managers, restaurant managers and camp managers are not included in the discussion process. They do not attend forum meetings and thereby many aspects of common ground never see the light. This needs urgent attention and highlights the need for an integration of the social ecology concept into all facets of management and business within the KNP.

A number of recommendations were made to assist KNP in improving the level of responsible operation at Pretoriskop Camp (see main report).

**Jackalberry Lodge, Thornybush Game Reserve**

In relation to the guidelines, and the purchase of goods and services, the managers of the lodge would like to support local and Historically Disadvantaged Individual’s business but very few of such exist in the area and those that might, do not meet quality and reliability standards.

The implementation of energy saving methods and responsible waste disposal were fairly clearly defined and require changes in attitude plus in some instances straightforward financial cost-benefit decisions. The lodge was not under any financial pressure to implement energy saving investments
(an exception is the installation of gas in the kitchen). It was perceived that electricity was the most convenient energy source and at present, they will manage the unnecessary use of power. Usage is not monitored in detail.

Likewise with water, borehole and river water is perceived to be unlimited, and is obtained at a low cost. Whilst this does not imply a lack of interest in good water management on the part of the managers and staff, there is little perception of its cost and hence less incentive to accurately monitor usage. This area of environmental management does not receive much attention. Solid waste is responsibly separated and disposed of but the destination of bottles and cans removed from the property is unknown.

In relation to community issues, the managers and owners of private lodges understand the rationale of a program such as those advocated by the guidelines but struggle with best methods for executing them. Like the communities they are seeking to empower, they may also require mentorship in the transformation of their businesses and in efforts to meet the targets laid down in the guidelines.

The management at Jackalberry displays a willingness to engage with the community and in community related projects but like many small lodges they claim limitations such as:

- Budgetary and financial (often determined by the owners and not the managers)
- Resource constraints – lack of time to pursue community development and transformation activities
- Lack skill and capacity to engage and persevere with projects
- In the case of Jackalberry, they manage the lodge(s) and the land, adding an additional tier of responsibility and time commitment

In the case of privately owned game reserves there are fewer motivations to drive community process. This was attributed to the following:

- Lack of congruence in the policy of separate land owners with different agendas
- Unwillingness of landowners to go beyond certain budgets (financial or resource)
- No joint land ownership or lease arrangements between community and landowners
- Lack of state support/intervention and/or donor funding.

Nonetheless, the greater reserve has implemented a compulsory contribution from each landowner to the local school. In addition to this, various contributions have been made by Jackalberry to local or regional causes, but other than school funding, managers and lodge owners have not been able to instigate and support community training, development, skills acquisition and enterprise development.

**Coral Divers, Sodwana Bay**

Considering the absence of any formal national or sub-sector guidance available in South Africa regarding responsible tourism, and the lack of financial incentives to make savings in resource use, Coral Divers performed surprisingly well on the majority of the guidelines. In instances where less progress had been made, the management was very keen to evaluate and develop systems to improve where possible. It would be possible to implement monitoring systems for all of the guidelines assessed, save the difficulty of addressing waste disposal.

Existing environmental objectives in relation to guidelines were well established in relation to energy conservation, although less formally prescribed in relation to economic and social aspects. Objectives were not set within any environmental or socio-economic policy, but were related to informal but integral practices developed by CD management.
The assessment was greatly facilitated by the General Manager of Coral Divers, who was committed to the success of the study. Coral Divers were especially in information produced regarding the community development aspects and the potential for marketing. The company has been through a period of concentrating on growth and improving the quality of service provided. There was an impression that the assessment had allowed them to increase the scope of areas that should now be addressed. The company is open to practical suggestions and appears to be willing to implement feasible changes to management systems that may improve the level of their responsible performance. The following quote from Stuart Roberts, Coral Divers General Manager, indicates the extent to which responsible tourism is considered:

“Responsible tourism is an area that needs to be addressed, not only to make ourselves more marketable, but also to create a healthier environment in which to operate by uplifting the local community and looking after our natural resources. [This report has] highlighted and reinforced…the need to address these issues & become more proactive with regard to them.”

It was clear that the potential use of a manual, which could provide information on responsible tourism practice would be of use, and there was a desire from management for this type of tool. CD’s environmental performance was admirable given the absence of cost savings associated with implementing energy saving technology. In addition, their established staff training systems, guidance for trainee divers from PADI, and levels of local employment compared well with the guidelines. CD’s use of a computer-based financial recording system made the assessment feasible in terms of producing proportional information quickly.

4.2 Availability of Data

In the three case studies, the majority of the information required to implement the assessment was readily available through the company accounts and existing financial monitoring. Some data issues that constrained certain aspects of the assessments included:

- Level of interest and assistance from enterprise management staff had great implications for the level of success of the assessment.
- Lack of existing monitoring information (e.g. water and energy consumption at Pretoriuskop Camp and Coral Divers) and therefore the need for indirect measures of data collection
- Lack of existing information regarding historically disadvantaged companies used for purchasing products and services, and the need for time to collect such data.
- Evaluation of how much money visitors spend in the local economy (a separate study was required to interview tourists, and monitoring over time may be logistically expensive).
- Data collection limited by time constraints when data was not computerised.
- Where perceived cost savings were negligible, less attention was paid to monitoring of certain resources used
- Issues of consistency in monitoring of guideline aspects with staff turnover.
- Problems in assessing an operation that had more than one management unit and data set (e.g. Pretoriuskop Camp, restaurant and shop).
5 CONCLUSIONS: IMPLICATIONS FOR FUTURE ASSESSMENTS

The three studies highlighted a number of issues and concerns regarding the application of the guidelines. These included:

- They provided a stimulus for enterprises to consider ways in which the sustainable tourism agenda can be widened to reflect the triple bottom line (economic, social, environment) rather than simply dealing with environmental issues.
- The case studies confirmed the need for a geographically specific and relevant designation of ‘local’ in relation to sourcing products, services, and staff.
- The definition of ‘local resident’ was problematic. Does an individual who once lived in Cape Town but moved to the area 10 years ago qualify as local or not? Does an employee’s place of birth or childhood discount them from ever being a local resident by definition? For the purpose of regular monitoring, this needs to be determined at the enterprise level.
- The guidelines encourage people to confront the complexity of the labour market and the availability of certain skills and products through training and other forms of support.
- Use of proportional information rather than actual financial data made the collection of information far easier, since confidential aspects of the accounts were not required. However, there is clearly an intrinsic mathematical problem in the use of proportions. For example, if an enterprise were to increase its current investment in conservation from nothing, by 5% per year, they would still be contributing nothing after 5 years, but would be successfully implementing the guideline. Therefore there should be a declared initial target to be improved upon.
- Proportions of expenditure used as targets for annual improvement would needed to be assessed in context (e.g. major capital purchases made locally during one year may not be repeated in subsequent years). This should be taken into account by standard accounting procedures on depreciation.
- The reasons for reporting performance in relation to proportional rather than actual activities was to avoid potential concerns over data security and confidentiality. Consultants having access to raw data in order to calculate the proportions need to reflect confidentiality of such information.
- Difficulty in applying guidelines to a camp where different management and ownership structures are in place in different parts of the operation (e.g. Pretoriuskop’s camp, restaurant and shop).
- Waste management assessment to include quantities collected and recycled, and its ultimate destination. Targets for reductions (e.g. 5%) need to be explicitly determined in terms of volume or mass.
- The need for enterprise management to appreciate the benefits of a guideline assessment in relation to the time and effort required to monitor and report responsible performance. A guidance document would also include the purpose and support for the guidelines, and the process by which they were developed.
- It is unlikely that enterprises will be able to successfully fulfil each and every aspect of the responsible tourism guidelines, and therefore they should concentrate on areas where their efforts can be most effective and be given credit as such. The guidelines are a menu of possible responsible tourism activities.
- Evaluation of overall performance in relation to responsibility – and the need for a checklist of adherence to the different guidelines would be of use in destination, provincial or national collation of results – sector by sector.
- The need for a best practice manual to guide enterprises and assessors in designing and operating responsible tourism.
• Despite provision of a detailed methodology and reporting framework for assessment and a reporting framework, the overview tables indicate that there remain difficulties in collating comparable data between enterprises. Clear assessment guidance is required for future assessments in addition to training in responsible tourism practices and evaluation for assessors and businesses.
• A need to design and regularly update a database of responsible tourism benchmarks across South Africa.
6 CONTACT DETAILS OF CONSULTANTS

Pretoriuskop Camp, Kruger National Park


Ralf Kalwa & Wik van der Walt
Rhengu Environmental Services, P O Box 1046, Malelane, 1320
Tel: 013 790 0429 / 082 414 7088 Fax: 013 790 0429 rhengu@mweb.co.za

Johannes Moreko
Thipane Community Development, PO Box 2531, Hazyview, 1242
Tel: 083 3447405 Fax: (013) 798-0025 moreko@mweb.co.za

Stefanie Freitag-Ronaldson
South African National Parks, Suite 14, Postnet, Private Bag X1013, Phalaborwa 1390
Tel: 082 3419515 Fax: (013) 735-6518 stefanief@parks-sa.co.za

Jackalberry Lodge, Thornybush Game Reserve


Piers Relly
P O Box 1037, Saxonwold 2132
Tel: 083 2667067

Eddie Koch
Box 5529, Nelspruit, 1200
Tel: 083 2674633

Coral Divers, Sodwana Bay


Anna Spenceley
c/o Institute of Natural Resources, P. Bag X01, Pietermaritzburg, 3209
Tel: 033 3460796 / 072 311 5700 Fax: 033 3460895 spenceleya@nu.ac.za

Stuart Roberts
Coral Divers, P. Bag 310, Mbazwana, 3974
Tel: 035 5710290 Fax: 035 5710042 coraldivers@mweb.co.za

Christopher Mziwakhe Myeni
PO Box 1474, Mbazwana, 394
Tel: 083 5151137