

FORTIETH MEETING OF THE WTO REGIONAL  
COMMISSION MEETING FOR SOUTH ASIA

AND

TECHNICAL SEMINAR ON ECOTOURISM

Bandos Island Resort,  
Maldives  
25-27 April 2001

# ***REPORT***

Note by the Secretary-General

*The Secretary-General submits to the Commissions, a report on  
the 40<sup>th</sup> meeting of the WTO Commission for South Asia and  
Technical Seminar on Ecotourism  
which were held in Bandos Island Resort, Maldives  
from 25-27 April 2001*

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## I. BRIEF OVERVIEW

At the gracious invitation of the Government of Maldives, the World Tourism Organization (WTO) organized its annual Regional Commission Meetings and Technical Seminar on Ecotourism which was held in Bandos Island Resort from 25-27 April 2001.

The meetings comprised the Fortieth (40<sup>th</sup>) Meeting of the WTO Commission for South Asia and the Thirty-sixth (36<sup>th</sup>) Meeting of the WTO Commission for East Asia and the Pacific, held on 25 April 2001; a Technical Seminar on Ecotourism held on 26 April 2001; and, a Technical Tour of selected island resorts of the Maldives held on 27 April 2001. There were 55 participants from 20 Asia-Pacific nations.

The Commission Meetings considered, amongst other matters, tourism market reports which provided statistical and analytical information on the development of international tourism in the region in 2000 and trends in tourism activities over the past ten years. They were apprised of the regional and technical cooperation activities carried out by the Organization in 2000 and 2001. WTO also informed delegates on the status of the Global Code of Ethics and the constitution of the World Committee on Tourism Ethics as well as the preparations for the fourteenth session of the WTO General Assembly which will be held in Seoul, Republic of Korea and Osaka, Japan from 22 September to 01 October 2001. The Commissions were also requested to review the documentation regarding the proposed amendments to the WTO Statutes and convey their approval.

In view of 2002 having been declared the International Year of Ecotourism by the United Nations, the Commissions were informed of all the activities that WTO would coordinate between 2001 and 2002 in relation to the celebrations of the Year. Similarly, it was decided to organize a Technical Seminar on Ecotourism within the framework of these meetings which would define ecotourism and its implications for Asia-Pacific tourism.

## II. FORTIETH (40<sup>TH</sup>) MEETING OF THE WTO COMMISSION FOR SOUTH ASIA

Please see Attachment for the Final Agenda of the 40<sup>th</sup> Meeting of the Commission for South Asia

### *Adoption of the Provisional Agenda*

The Provisional Agenda consisted of 9 items. However, at the commencement of the Meeting, the Secretary-General requested the Chairman of the Commission to add a new item in the Agenda as new Item 9 which would be the "Status of the Process of Ratifying Amendments to the Statutes of the Organization". The delegation from China requested the permission of the Commission to attend the Meeting as a Observer and to address the Commission to inform them of China's intention to bid for the hosting of the 15<sup>th</sup> session of the WTO General Assembly in 2003. The Commission accepted the request and included the Statement by China as the new Agenda item 10. The delegation from the Republic of Korea also requested the permission of the

Commission to attend the Meeting and inform the Members on the preparations of the 14<sup>th</sup> session of the WTO General Assembly which would be held in Seoul, Republic of Korea and Osaka, Japan in September – October 2001. The Commission accepted this request and recommended that the delegation address the Commission after the presentation of Agenda document 8 which was dealing with the same subject.

The Final Agenda, with 11 items, was approved unanimously by the Commission.

### *Communication of the Chairman of the Commission*

The Communication of the Chairman of the Commission was delivered by Mr. Samin Jan Babar, Secretary, Ministry of Minorities, Culture, Sports, Tourism and Youth Affairs of Pakistan.

After welcoming all the participants to the Meeting and describing the programme for the Meeting, the Chairman then provided a brief description of world tourism in 2000. He believed that this analysis augured well for South Asian tourism and that it was essential that, in view of the expected growth of the Asian tourism industry, tourism planners ought to focus their development plans on marketing strategies while at the same time protecting the numerous cultural and natural heritage sites which are located in the South Asia region.

He thanked WTO for having always played a pivotal role for furtherance of tourism in the South Asia region and he felt that the progress in tourism in the region was a clear manifestation of WTO's endeavour to exploit the tourism potential of South Asia by arranging meetings and seminars and providing technical/financial support to Member States, deputing sectoral missions for formulating short and long-term tourism projects and conducting studies relating to the promotion of tourism.

Finally, the Chairman described the latest status of the Pakistan tourism industry with particular emphasis on its tourism policy, liberalization of visa processing and improvements in accommodation. He also informed the Commission of two main activities which Pakistan would organize later this year – a two-day conference for local and foreign tour operators, travel writers and journalists on tourism in June this year at Hunza; and, a car rally from Islamabad to Khunjerab in November.

He concluded his communication by expressing his hope that the Meeting would be able to come up with concrete proposals with a view to making the South Asia a prosperous region through the dynamic force of its tourism industry with the unstinted support of WTO.

### *Preliminary remarks of the Secretary-General*

In his preliminary remarks, the Secretary-General informed the Members of the Commission of the excellent results of world tourism and stated the good health of world tourism was mirrored by the good health of the Organization particularly through the new membership of Canada, Monaco, Honduras and Bahrain as well as the intention to join of states such as the Federal Republic of Yugoslavia, Vanuatu and Cape Verde. He also recapped on the improvements in the Organization in terms of its services and activities over the last ten years and highlighted the economic robustness of the Organization.

With a view to the future, he expressed his concern that the gradual disengagement of central governments of developed states for tourism and the growing control of tourism being handed over to provincial and local authorities would have far-reaching effects on the Membership of the Organization and the scope and nature of its activities. He stated that the world of tourism, in all its diversity, is changing. Information and communication technologies are reshaping the face of the industry, liberalization and globalization are gaining momentum, new players are appearing, new balances are being struck and new configurations are emerging. He reiterated his desire that WTO explore the possibilities of new working partnerships between enterprises, professional associations and trade unions, NGOs and administrations, universities, local authorities and central or federal governments but he also stressed that WTO would not lose the essence of its mission of an inter-governmental organization in the process of establishing new partnerships.

### *Presentation of the statistical monograph for East Asia and the Pacific*

Based on a request made by Member States of the Joint Commissions for South Asia and East Asia and the Pacific at their last meeting in Sakai, Japan in October 2000 through which they expressed their desire for more comparative data between the two regions in the statistical monographs, WTO was pleased to present, for the first time, a combined statistical monograph for the Asia-Pacific region. Dr. H. Varma, WTO Regional Representative for Asia and the Pacific, presented the Commission with a detailed analysis on the state of tourism in 2000 at three levels: global, regional (Asia-Pacific) and with specific data on South Asia. In particular, the monograph provided the following information:

- There were 698.4 million international arrivals worldwide in 2000 which corresponded to a growth rate of 7.4 per cent over 1999.
- International tourism receipts also grew in 2000 – this time by 4.5 per cent over 1999 to reach US\$ 475.8 billion.
- Europe is still the most visited region of the world with 403.2 million arrivals which correspond to a 57.7 per cent of the global market share. The Americas stand at second place with 129.2 million arrivals but are closely followed by East Asia and the Pacific with 111.9 million arrivals. It was the first time international arrivals to the East Asia and the Pacific region exceeded 100 million expanding its market share of world tourism to 16 per cent as compared to 14.6 per cent in 1999.
- Africa, Middle East and South Asia have lower market shares in international tourism with Africa receiving 27.7 million arrivals, Middle East 19.9 million and, South Asia 6.4 million. However, Middle East and South Asia grew the most in international tourist arrivals over 1999, at 19.9 per cent and 10.7 per cent respectively.
- South Asia, despite receiving many less tourists than East Asia and the Pacific generated more receipts per arrival demonstrating its ability to stimulate tourist spending.

- Various factors have contributed towards the Asia and Pacific region's success in tourism including improvements in *product diversification, marketing and promotion, information technology, and, visa facilitation*.
- India is still the top tourism destination of South Asia with 2.6 million international tourist arrivals and a growth rate of 6.4 per cent over 1999. Even though its market share is still considerably high at 41.2 per cent, it is the first time that its market share has fallen below the 50 per cent mark in many years.
- International tourism to Iran has continued to grow with an impressive performance. Iran witnessed a 28.7 per cent increase reaching 1.7 million arrivals. The average annual growth rate of Iran in arrivals between 1995 - 2000 was 30.7 per cent. Furthermore, the loss of market share by India has greatly benefited Iran whose market share in tourism in South Asia has more than doubled during the last five years from 10.8 per cent of its current 26.5 per cent.
- In 1999, Pakistan was showing negative growth in tourism and had been in a slump in the previous years. However, with growing political stability, the country received 543 thousand tourists - a growth rate of 25.7 per cent.
- Maldives continues to perform well and its tourism arrivals grow steadily. In 2000, Maldives received 467 thousand international tourists which corresponded to a growth rate of 8.6 per cent.
- 2000 was not a good year for Sri Lanka. Tourist arrivals dropped by 8.3 per cent and this can be attributed towards a combination of political instability and negative media coverage in international source markets.
- After a year of setback, tourism to Bangladesh regained impetus in 2000. Bangladesh received 200 thousand international tourist arrivals in 2000 which corresponded to a growth of 15.6 per cent – the third highest growth rate of the region.
- India again tops the list of South Asia tourism earners having earned US\$ 3.3 billion in 2000 with a growth rate of 9.5 per cent. Whereas in terms of tourist arrivals, India's market share is falling, in terms of tourist receipts, it still has a glaring dominance of market share in receipts which in 2000, corresponded to 64.8 per cent.
- Iran continues to be the South Asian nation with the highest growth in tourism receipts as well as in arrivals. Receipts amounted to US\$ 850 billion (a 24.8 per cent increase). The average annual growth rate of Iran in receipts between 1995 - 2000 was 36.6 per cent.

- Pakistan's recovery in international tourism arrivals has been more than matched by its performance in international tourism receipts. As such, Pakistan received US\$ 86 million in receipts which corresponded a growth rate of 13.2 per cent.
- Maldives continues its steady growth in tourism receipts having earned US\$ 344 million in 2000 with a growth rate of 5.8 per cent..
- The loss in tourism arrivals by Sri Lanka was matched by its loss in international tourism receipts which also fell by 8 per cent to reach US\$ 253 million.
- In turn, Bangladesh's performance in tourist receipts was on par with that of arrivals having earned US\$ 59 million – a growth rate of 18 per cent and the second highest of the region.
- Of all the regions of the world, South Asia is the most dependent on long-haul tourism which currently makes up for 75 per cent of total tourism activity to the region and is expected to further grow to 85 per cent by 2020. This places South Asian tourism under considerable risk and we believe that the South Asian nations should restructure their marketing strategies towards promoting intra-regional tourism and domestic tourism.

*Application to the region of the General Programme of Work for 2000 - 2001*

Dr. Varma presented a report to the Members of all the activities carried out by the Organization within the region, through its six major sub-divisions, of which the following are highlighted:

- Two technical cooperation projects were completed: Tourism Development Master Plan for **Pakistan**, and, the Southwest Coast Tourism and Community Infrastructure Study of **Sri Lanka**.
- One technical cooperation project is currently being executed: Tourism Development and Management Master Plan for the **Islamic Republic of Iran**.
- One technical cooperation project is expected to commence shortly: Tourism Development and Marketing for **Bangladesh**.
- Two sectoral support missions were carried out in April 2000 for **India** – Destination Marketing for the State of Kerala, and, the project formulation mission for a Sustainable Tourism Plan for the State of Nagaland. WTO expects to field a project formulation mission to **Nepal** for a Tourism Development Master Plan.
- The Secretariat also informed on the various seminars and conferences organized within the Asia-Pacific region particularly the Joint WTO/ESCAP Seminar on Tourism Statistics and the Development of Tourism Satellite Accounts held in Bangkok, Thailand from 21-24 February 2001; the WTO/UNEP International

Conference on Sustainable Development of the Islands of the Asia-Pacific which was held in Sanya, Hainan, China from 6-8 December 2000; and, the International Conference on Cultural Tourism held in Siem Reap, Cambodia from 11-13 December 2000.

- WTO, with the support of the South Asia Travel and Tourism Exchange (SATTE) organized a South Asian Ministerial Summit on Joint Promotion and Marketing of Tourism which was held on 23 April 2001 in New Delhi, India within the framework of SATTE 2001. The Summit discussed the key aspects of a joint regional tourism marketing programme, strategic approach and marketing campaigns in major source markets and international travel and trade fairs as well as the designation of South Asia Tourism Year 2003.
- The Secretariat also informed the Members of future meetings especially the International Conference on Tourism and Island Economies which would be jointly organized by WTO and the Organizing Committee of the World Festival for Island Cultures, Jeju 2001 and the Jeju Provincial Government, held in the city of Jeju, Republic of Korea from 13-15 June 2001.

#### ***Implementation of the Global Code of Ethics and Constitution of the World Committee on Tourism Ethics***

This document described the current state of the implementation of the Global Code of Ethics since its adoption at the last session of the General Assembly held in Santiago de Chile, Chile in 1999. Since then, both the Secretariat and its Member States have been taking concerted action in ensuring the dissemination worldwide of the Code.

However, two subsequent developments are necessary to complete the preparation of the Code implementation machinery: the adoption by the 14<sup>th</sup> session of the General Assembly in Seoul and Osaka of the Protocol of Implementation, and, the creation of the World Committee on Tourism Ethics. The draft Protocol has been circulated to Member States with the request that they view it in order for its adoption later this year.

#### ***Information on the International Year of Ecotourism – 2002 celebrations and activities***

Given the designation by the United Nations of 2002 as the International Year of Ecotourism and its request that WTO undertake activities to support this initiative, WTO, through this agenda document, described its policy towards the celebrations for the Year and what activities would be carried out therein. Of the various activities, of particular reference are the regional conferences it would organize between 2001 and 2002 on ecotourism. In the case of the Asian region, Maldives has expressed its desire to organize the Conference in its territory within the first quarter of 2002. These regional conferences would then lead up to the World Ecotourism Summit, to be held in Quebec, Canada from 19-22 May 2002 (with support from UNEP). The Summit is expected to be the largest ever gathering of all stakeholders involved in or affected by

ecotourism, including national and local governments, private sector organizations, NGOs, and, academic institutions.

***Information on the 14<sup>th</sup> session of the WTO General Assembly, Republic of Korea and Japan, 22 September – 01 October 2001***

The Agenda document informed Members of the various meetings that would be held within the framework of the General Assembly session including the sessions of the Executive Council, Commission Meetings, Round Tables, Plenary Meetings and the Committee of the Whole. The document also offered information on the facilities being offered by the Governments of the Republic of Korea and Japan.

The head of the Korean delegation then took the floor and gave a detailed account of the preparations currently underway by the Government of the Republic of Korea in order to guarantee a successful session of the General Assembly. Participants were informed of the close collaboration between the Governments of Japan and the Republic of Korea and were also notified of the setting up and operation of an Internet webpage since November 2000 which provides prompt and up-to-date information on the General Assembly. Korea would organize a "World Tourism Souvenir Exhibition" within the framework of the General Assembly and Member States were encouraged to participate actively.

***Status of the Process of Ratifying Amendments to the Statutes of the Organization***

The WTO Executive Council during its latest meeting in Madrid in November 2000, adopted decision 14(XLIII-XLIV), on the recommendation of its Working Group, encouraging Member States to ratify the proposed amendments to the Organization's Statutes. Member States were apprised of the various texts of amendments and with a list of countries that had ratified them.

***Statement by China on its intention to bid for the hosting of the 15<sup>th</sup> session of the WTO General Assembly in 2003***

The head of the Chinese delegation to the Commission Meetings took the floor and expressed the Government of China's intention to bid for the hosting of the 15<sup>th</sup> session of the WTO General Assembly in 2003. The delegate informed the Commission of China's extensive participation in WTO activities as well as of its ability to host a meeting of this size and nature. Thereupon, the delegate gave an overview of the various conference facilities, hotel arrangements and other logistical arrangements that would be placed at the disposal of the General Assembly session should China be selected as the next venue.

***Place and date of the forty-second (42<sup>nd</sup>) meeting of the Commission***

With regard to the next meetings of the Commission, it was noted that the 41<sup>st</sup> meeting of the Commission would be held in Seoul, Republic of Korea on the afternoon of Sunday, 23 September 2001. The decision for the hosting of the 42<sup>nd</sup> meeting of the Commission was postponed to the 41<sup>st</sup> meeting in Seoul.

**ATTACHMENT****WTO COMMISSION FOR SOUTH ASIA**

**Fortieth Meeting  
Bandos Island Resort, Maldives  
25 April 2001**

***FINAL AGENDA***

1. Adoption of the agenda
2. Communication of the Chairman of the Commission
3. Preliminary Remarks of the Secretary-General
4. Presentation of the statistical monograph for South Asia (tourism trends)
5. Application to the region of the general programme of work for 2000-2001
6. Implementation of the Global Code of Ethics and Constitution of the World Committee on Tourism Ethics
7. Information on the International Year of Ecotourism – 2002 celebrations and activities
8. Information on the 14<sup>th</sup> session of the WTO General Assembly, Republic of Korea and Japan, 22 September – 01 October 2001
9. Status of the Process of Ratifying Amendments to the Statutes of the Organization
10. Statement by China on its bid for hosting the 15<sup>th</sup> session of the WTO General Assembly in 2003
11. Place and date of the forty-second meeting of the Commission (the forty-first meeting of the Commission would be held within the framework of the 14<sup>th</sup> session of the WTO General Assembly which is scheduled to be held in Seoul, Republic of Korea and, Osaka, Japan in September-October 2001)

### III. TECHNICAL SEMINAR ON ECOTOURISM

#### BACKGROUND

At the commencement of this new Millennium, the tourism industry has become one of the greatest economic forces of the world surpassing mega-industries such as the automobile, telecommunications and the petroleum industries. WTO statistics show that in 2000, there were 698 million international tourist arrivals that generated US\$ 476 billion in receipts. The statistics also reveal that by 2020, there would be 1.5 billion international tourist arrivals generating US\$ 2,000 billion.

These vast numbers of world travelers are expected to have a strong impact on the environment. Today's tourist is an experienced and educated traveler who is showing a growing tendency to seek destinations that are more clean, safe and environment-friendly. Nature tourism or ecotourism is a relatively recent phenomenon.

Recognizing the global importance of ecotourism, the United Nations designated the year 2002 as the International Year of Ecotourism. At the behest of the UN Commission on Sustainable Development, WTO and the United Nations Environment Program (UNEP) have joined forces to take a leading role in the preparation and coordination of activities to be undertaken at the international level during the Year. Of the various activities, the main event would be the World Ecotourism Summit that would be held in Quebec, Canada from 19-22 May 2002. A Pan-Asia Seminar is also slated to be held in the Maldives in the first quarter of 2002.

WTO's endeavour is to organize various regional technical seminars on ecotourism during 2001 to serve as awareness raising events for ecotourism and to disseminate information on the celebrations of the International Year of Ecotourism. The Asia-Pacific region is home to magnificent, diverse, natural and cultural tourism attractions: sunny, golden beaches; scenic mountains and landscapes; waterfalls and mineral hot springs; archaeological monuments; social and cultural establishments including museums; and, excellent facilities for sports – all these features combine to form a mighty attractive tourist product with potential and capacity to attract international tourists.

However, in view of the expected tourist traffic to the Asia-Pacific region over the coming years, the region's ecotourism products run a risk of not being optimally utilized. For tourism to become a substantial economic activity, it is imperative that the development of tourism be sustainable. The beautiful natural and cultural environment is what attracts the tourist – and, as more tourists arrive, greater is the need to protect these unique resources – not only as a legacy to future generations, but also to protect the tourism industry itself. Mass tourism, unplanned and disordered development on impractical scales, has the potential to destroy the very same attractions that have charmed foreigners to travel to the Asia-Pacific region.

As a precursor to the International Year of Ecotourism, WTO's endeavour, through the seminar held in the Maldives, is to assist its Member States in developing a better understanding of ecotourism and the advantages it can offer in the diversification of the Asia-Pacific tourism product, and the direct benefits it can deliver, if managed properly, to a local community and a local

economy. The aim of this seminar and the activities related to the International Year of Ecotourism, is to demonstrate to the world that through careful planning, systematic implementation of an ecotourism development plan and effective management of ecotourism, benefits can be maximised and problems minimised. Trade-offs will always be inevitable but each community must study thoroughly and decide on the trade-offs most convenient to it for the long-term development and sustainability of the tourism industry.

### **SEMINAR ORGANIZATION**

The Seminar was organized in the following manner:

There was an official opening ceremony with an opening speech by the WTO Secretary-General, an inaugural speech by H.E. the Minister of Tourism of the Maldives, and a speech by H.E. the Minister for Culture, Tourism and Civil Aviation of Nepal.

The Seminar was divided into two technical sessions. The first session, "Development, Management and Sustainability of Ecotourism", began with a presentation by Dr. Walter Jamieson, WTO consultant, on the subject of development, management and sustainability of ecotourism. This presentation was followed by selected presentations from the Islamic Republic of Iran, Maldives, Nepal and the Republic of Korea.

The second technical session, "Characteristics of International Markets for Ecotourism", began with a presentation by Dr. Harold Goodwin, WTO consultant, on the subject of the characteristics of international markets for ecotourism. This presentation was followed by selected country presentations from China, Malaysia, Philippines, Sri Lanka and Thailand.

The day ended with an interactive session and a summary provided by the WTO consultant and remarks from the WTO Secretary-General, H.E. the Minister of Tourism of the Maldives and the WTO Regional Representative for Asia and the Pacific.

### **SUMMARY OF PRESENTATIONS**

#### **Opening Session**

##### ***Opening Speech by the WTO General Assembly, Mr. Francesco Frangialli***

The Secretary-General began his presentation by stating that the organization of this seminar was a manifestation of WTO's decision to firmly advocate and support the development of ecotourism as an increasingly important sector of international and domestic tourism activity. Given the massive volumes of tourism traffic world-wide, Mr. Frangialli said that tourism and tourists are expected to have a strong impact on the environment. He also explained that WTO studies have determined that the profile of the average international tourist has evolved. The tourist is more experienced and educated. He is searching for a new destination that is clean, safe and, above all, environment-friendly.

He then stated that ecotourism has had great impact on the tourism industry to such an extent that the United Nations has designated the year **2002** as the **International Year of Ecotourism**. He went on to relate the many activities that WTO would organize in relation to the event as one of the lead organizations designated by the UN Commission on Sustainable Development for the preparation of activities on an international level during the Year. The main event would be the **World Ecotourism Summit** which would be held in **Quebec, Canada** from **19-22 May 2002**. He also expressed his thanks to the Government of Maldives for its gracious invitation to host a **Pan-Asia Seminar** in the **Maldives** in the **first quarter of 2002**.

He concluded by explaining that the aim of the seminar was to raise awareness of ecotourism as well as to disseminate information on the celebrations of the International Year of Ecotourism. Since tourism in general and ecotourism in particular, can only be successful if properly developed and managed, the seminar was structured to focus on two essential components for successful ecotourism management. The first technical session would focus on the developmental issues of ecotourism, its management and its sustainability in economic, social and environmental terms. The second technical session on the marketing and promotion of ecotourism products and would identify the latest techniques in ecotourism marketing, and would describe the salient features of the ecotourist.

*Inaugural Speech by H.E. the Minister for Tourism of the Maldives, Mr. Hassan Sobir*

The Minister of Maldives' presentation focused on the good practices that have contributed to the success of Maldives' tourism industry since it started to develop in 1972. In fact, all economic activities on the islands are carried out with sustainability as the watchword. Maldives' tourism development has always been planned, and among the good practices highlighted is the use of battery-operated cars in the whole country. Nets are not used for fishing; only 20% of habitable islands can be devoted to building purposes, the rest are left in their pristine and original form; the height of buildings cannot go beyond that of coconut trees; all resorts have to have incinerators installed; bungalows have to face the sea and be located from a restricted point of the beach line. All these practices related to the "do's and don'ts" of tourism development are guided by regulations which are strictly enforced. A violation of any of them carries heavy penalties.

With respect to the disposal of garbage, some international airlines are collaborating very closely with the Maldives. They distribute bags to passengers on flights to Malé, in which they deposit all the waste they produce during their visit and take it back to their country of origin to be recycled.

Marine ecology is also a natural asset of the Maldives, therefore, endangered species such as sharks and turtle are protected under very stringent laws, because it is more profitable to maintain these species in their habitats for the enjoyment of divers and snorkellers than to export them. The same goes for the wide variety of beautiful fishes which can be depleted easily if they are not protected.

The Minister applauded Philippines, the Chairman for WTO's Commission for East Asia and the Pacific, for proposing 2002 as the year of Ecotourism and for initiating the ecotourism conference in the Maldives. He also reminded participants of the fact that there would be another conference on the same subject at the same venue next year.

***Statement by H.E. the Minister for Culture, Tourism and Civil Aviation of Nepal, Mr. Omkar Prasad Shrestha***

After thanking the World Tourism Organization and the Government of Maldives for organizing a seminar of this nature, the Hon. Minister discussed the importance of tourism particularly in developing countries as a vehicle for poverty reduction through employment generation and foreign currency earnings. He also stated that tourism could play a key role in fostering international peace and fraternity. After describing Nepal's numerous tourist attractions, he then went on to describe in detail Nepal's vision of sustainable tourism development. He also explained that through the creation of the Nepal Tourism Board and the Civil Aviation Authority of Nepal, the country was a model for South Asia in terms of public-private partnership in tourism development. He expressed his concern that South Asia, despite its numerous tourism attractions, received too few tourists. He urged the WTO to provide assistance to South Asian countries while he also requested fellow South Asian nations to come together and learn from the example of South-east Asian countries. He recommended that South Asian nations improve their accessibility, liberalise frontier formalities, increase their joint marketing and promotion efforts, as well as increasingly adopting information technology in tourism practices.

**First Technical Session - "Development, Management and Sustainability of Ecotourism"**

***Presentation by WTO Consultant, Dr. Walter Jamieson***

The WTO Consultant began the First Technical Session by addressing the problem of the existence of a wide number of definitions of ecotourism. He stated that there is a growing trend of more nature-based tourism activities of which ecotourism was just one form. For development purposes, it was therefore important to understand tourism activity along a continuum ranging from experiencing primitive nature to mass tourism. Nature-based tourism and ecotourism would naturally have their own place on the continuum and it was important for the Asia-Pacific nations to understand the nature of their tourists, determine their needs and thereby, decide along which end of the continuum they needed to develop their tourism and whether they should cater for nature-based tourism or ecotourism. It was also important to understand that there was room in any country for both the nature tourist or the ecotourist.

Having established this base criteria, the consultant went on to define the positive dimensions of eco/nature-based tourism. The first and obvious dimension was the creation of varying levels of employment and generation of revenue to rural areas. The underlying factor behind this dimension was to endeavour that the tourist spend enough time in the region and therefore provide for economic development. Similarly, eco/nature-based tourism can stimulate the creation of local small and medium-sized enterprises and again the challenge was to provide sufficient opportunities for local people to obtain credit and technical expertise. Likewise, handicrafts industries and local traditions are stimulated, and infrastructure gaps in rural areas can be removed in rural areas through eco/nature-based tourism providing the financing or the rationale for investment in infrastructure.

In terms of negative dimensions of eco/nature-based tourism, a main concern was the significant loss of economic revenue through leakages. A remedy could be the consideration of small-scale community-based operations rather than larger enterprises owned by outsiders. Other

challenges include pollution control, traffic congestion, solid waste and wastewater disposal, reduction in value of traditional lifestyles and a commodification of both natural and cultural heritage if there are no proper interpretation services.

The consultant stressed that after a government has carefully reviewed the positive and negative dimensions of eco/nature-based tourism, it should be open to the option that perhaps tourism may not always be the best form of development for a particular situation and communities and resource planners must have an opportunity of saying “no” to tourism.

The next part of the presentation dwelt upon the sustainability of nature-based tourism and this can only be brought about through the integration of the twin objectives of conservation and income generation. In many cases, politicians and government officials who have to take decisions do not have the necessary skills or knowledge to make informed decisions. However, it is imperative that decisions be made after analysing key strategic issues in eco/nature-based tourism, namely: determining the carrying capacity and limits of the local area in social, economic and environmental terms; the designation and location of facilities; zoning; interpretation and presentation; and, visitor services.

In terms of management of eco/nature-based tourism, there is no singular planning and management process. However, it is fundamental that all stakeholders with an interest in the development of eco/nature tourism be consulted and involved. Other issues such as collection and analysis of data, identification of resource conflicts, goal and objective setting, situation of eco/nature-based tourism plans into the larger regional context, monitoring, marketing and training were also considered vital components of the management process of eco/nature tourism.

A copy of the presentation is enclosed as Annex 1 to this report.

### ***Islamic Republic of Iran***

The presentation from Iran began with a definition of Ecotourism. The presenter identified four standards by which responsible ecotourism could be measured: minimum environmental impact, minimum impact and maximum respect for the whole sculpture, maximum economic benefits to the host countries and maximum recreational satisfaction to participating tourists. This first presentation began to help the seminar identify who the ecotourist is and suggested that they are articulate, assertive and well educated. The presenter when on to identify that these tourists demand quality experiences and want to learn as much as they can about natural area and different cultures.

There are two main responsible bodies for environment and tourism in Iran: environmental protection is the responsibility of the Forest and Range Land Organization while the main body responsible for tourism is the Iran Touring and Tourism Organization. There are a range of laws and regulations related to the ecotourism sector including measures designed to protect the natural resources and heritage of the country and to deliver sustainable development. It was reported that the present laws need to be strengthened in both content as well as implementation if they are to be more effective in the protection and conservation of Iran's natural environment. The presentation ended with a series of recommendations for ecotourism development. These recommendations included the need to coordinate activities with all related responsible bodies, the

participation of local communities, the participation of the private sector in development as well as management and improving public awareness of the positive and negative dimensions of ecotourism. It was recommended that the following strategic actions should be considered including the design and implementation of a comprehensive data bank, the assessment of resources in terms of degrees of importance, the careful assessment of the environment, the creation of management plans, the development of suitable codes of practice for both tourists as well as tour operators, ensuring that indicators are developed and monitoring takes place and that hotels and other accommodation facilities are urged to utilize good environmental practices.

### *Nepal*

The Nepalese presenter also began with an assessment of different definitions of ecotourism. He identified five factors that were of particular importance: biodiversity, conservation, understanding and measuring environmental impact, sustainability and carrying capacity. It was felt that these primary considerations must also include the recognition of the role of cultural features, the past and present lifestyles and heritage of the local population, community involvement and benefits to the local community. It was felt that there was a triple bottom-line when one discusses ecotourism: environmental issues, social dimensions and economic impact. As with many other presenters, there was a discussion on the need to balance visitor enjoyment and the needs of the conservation movement.

The unique biodiversity of the country was described from the tundra type arctic to the temperate monsoons to the sub tropical climate conditions of various areas. The significant resources of the country were described. The national conservation strategy of 1988 had the following objectives: to satisfy the basic natural, spiritual and cultural needs of the people; to ensure sustainable use of resources; to preserve biological diversity; and, to maintain ecological systems. A number of achievements were identified as the country moves towards a comprehensive strategy of conservation and ecotourism. An example of a major achievement is the Nepal Tourism Board being identified as the overall winner in the Greening of Business Awards in 1999 at EIBTM-Geneva. The benefits of ecotourism in Nepal were discussed including such factors as increased local pride in indigenous people, conservation and sustainability, improved living standards in many destinations, employment opportunities, cultural rejuvenation, and increased hygiene and health leading to a better quality of life. The presenter identified a range of issues in ecotourism development including such factors as avoiding negative impacts, capturing revenue for conservation, understanding the issue of carrying capacity, ensuring ownership and empowerment on the part of local people, developing plans that lead to harmonious development, ensuring that capacity building takes place and examining user pay concepts for the visitors.

### *Republic of Korea*

The presentation started off with an assessment of the relative importance of tourism in the Korean national economy. In Korea, tourism is one of several strategic industries that play a major role in the development of the national economy. Government bodies dealing with Korea's tourism planning and policy include the Tourism Bureau of the Ministry of Culture and Tourism, the Korean National Tourism Organization, and the Korean Tourism Research Institute. Other organizations include the Tourism Entrepreneur Association, the Korea Tourism Association, the Korea Hotel Association and the Korea Casino Association. It was reported that many of these associations

find it difficult to implement their plans due to a lack of funds, and excessive reliance on central government for direction.

Koreans prefer tangible nature based scenery tourism. They like to visit natural resources such as mountains, hot springs, parks and coastal areas. The Korean Government has demonstrated its commitment to sustainable tourism by adopting the Seoul Declaration and setting out a four-point policy plan at the first APEC tourism ministerial meeting in July 2000. There are six types of protected areas in Korea: ecotourism conservation areas, national parks, major forest, wildlife sanctuaries, nature reserves and wetland protected areas. The designation and management of these areas falls in the control of five government ministries. The presenter identified that although national parks are places of outstanding natural ecosystems and landscapes they have been degraded due to excessive development and levels of use. Strategies for the sustainable use of environmental resources from a tourism perspective were identified including the need to evaluate the impacts of tourism activities on specific target areas, including measures for conservation and management in the environment and tourism and recreation projects, executing plans for the sustainable use of natural park areas, systematically strengthening the legislative measures necessary to develop ecotourism programs, strengthening environmental education programs both for tourists as well as local residents. The presentation ended with a discussion of ecotourism development in Janghwa-ri tidal area.

### *Maldives*

The presentation from the Maldives centered on examining the issue of ecotourism in a small island context. As with other presentations, especially the two technical papers, there was a discussion of whether the country was developing and managing ecotourism or nature-based tourism. The presenter looked at the differences along a continuum. She agreed that the appreciation of nature and culture, achieving minimal negative impacts, conservation and preservation and the redistribution of income were all important factors. It was argued that in the Maldives, the product was largely nature due to geographic constraints, social and cultural considerations and the country's development policy.

The Maldives presents a unique planning and management challenge due to its many geographic constraints which include high infrastructure costs, transportation challenges, high cost of utilities, the availability of labour and a narrow natural resource base. When these constraints are considered in light of important social and cultural factors such as the Islamic society and way of life, local social carrying capacities and the need to protect against cultural erosion, tough decisions must be made. These decisions include considering growth at the cost of the environment and quick dollars versus social harmony. The presenter identified the need to achieve important policy objectives including the maintenance and enhancement of environmental integrity, assuring eco-friendly products and services, maintaining important marine protected areas, conserving and enriching culture and society, reviving traditions and managing through good governance. The presentation identified that there are clearly risks in the overall tourism development process in the Maldives especially as they relate to the over dependence on marine based tourism which raises the issue of environmental and economic vulnerability. This vulnerability is related to the fragility of the ecosystem, the exposure to external shocks and the dependence on a single product. There are driving forces for change in the country including demands for the integration of tourism into the rural economy and the greater retention of tourism

dollars. It is clear that country is moving up the ecotourism continuum in terms of a firm commitment to ecotourism. The benefits of such an approach are greater cultural harmony, enrichment of the current product and greater benefits to the local community. The presentation recognized that there were significant challenges and trade-offs in developing the tourism product of the country.

### Second Technical Session - "Characteristics of International Markets for Ecotourism"

#### *Presentation by WTO Consultant, Dr. Harold Goodwin*

The consultant's presentation focused on placing ecotourism in the context of sustainable tourism and the market. The sustainability of ecotourism turned largely on methods of regulation and planning and management in destinations; the central problem being to balance the conservation of the environment and tourism. He believed that the marketing process assists in this management endeavour by attracting appropriate tourists and visitors to specific ecotourism destinations in sufficient numbers to make an appropriate contribution to conservation and to local livelihoods.

The consultant also felt that it was important to understand the actual size of the ecotourist market. He gave the example of a survey of American tourists which inquired into their nature-based activities. The survey showed more than half had reported visiting national parks or hiking within the last year, and more than 40% had explored a preserved area or gone to view wildlife. However, it was interesting to note that only 15% were defined as heavy users, spending the majority of their time in natural areas, and that this is the group which could most obviously be identified as ecotourists.

In his opinion, parks were significant tourist attractions and the marketing of national parks would provide the only source of reliable data on the numbers of international visitors attracted by the natural heritage of countries. Furthermore, the promotion of national parks could bring upon an important change for the benefit of ecotourism which would be to create an appreciation of the environment as a whole and to encourage people to visit habitats rather than to seek particular species. Such a change would be particularly important for nature and eco-tourism in rainforests where it can be much more difficult to see the wildlife than it is in savannah Africa.

He also mentioned that the nature tourism market can be divided up in a number of ways. Upon explaining the various categories, he then went on to say that most tour operators find that their groups are heterogeneous and that high quality guiding is essential in order to ensure that all participants in trips have an enjoyable experience and want to book with the tour operator again. The expectations of the various market segments range from those seeking immersion in a wilderness experience and prepared to put up with very basic accommodation, to those seeking high quality accommodation, good quality guides and a brief and comfortable experience of nature. The consultant gave another example of a study carried out in Belize in which it was discovered that only 18 per cent of nature tourists could be classified as ecotourists.

The consultant also recommended that in the marketing of ecotourism, one should be aware of the devaluation of the concept of ecotourism through misuse, particularly in the originating markets in Europe.

The consultant felt that marketing of ecotourism was conducive to public-private partnership. Government could facilitate destination marketing, as it could provide the regulatory framework and zoning; it could provide tourism education and training; and it could ensure environmental care and conservation. The private sector, on the other hand, could develop the products and diversify those tourism products in order to spread awareness of what is possible through the distribution chain back to the tour operators in the originating markets.

A copy of the presentation is enclosed as Annex 2 to this report.

### *China*

The Chinese delegation reported that since 1973, the Chinese Government has placed environmental protection at the top of their national agenda and that in 1998, the Asian and Pacific Parliamentary Conference had adopted the Guilin Declaration, which identified sustainable tourism as a main theme. Since 1991, the CNTA has been committed to balancing tourism development and the environment and China is committed to sustainable tourism development policies through green development plans and tourist education programmes, a green hotels programme, the development of ecotourism sites, areas and routes; and through the development of new habitat related tours (grassland, sand and bird watching tours). The provinces of Heilongjiang, Jilin, Sichuan, Yunnan, Jiangxi and Hainan have committed themselves to ecotourism development. China has a large variety of ecotourism products and ecotourism is seen as a driving force for increasing earnings from tourism in China. These eco-tourism products encompass ice and snow tours, wetland tours, agricultural tours, forest tours rural tours; and extreme adventure and spa tours.

### *Malaysia*

The Malaysian delegation reported on the progress made through the National Ecotourism Master Plan adopted in 1996. Rural tourism was identified as the fastest growing form of tourism in Malaysia, it was reported to be growing at 35% per annum and to account for 10% of total tourism revenue. Its definition of ecotourism encompasses enjoyment and appreciation of nature in "relatively undisturbed natural areas" that promotes conservation, provides benefits to local communities and is low impact. The Master Plan includes provision to inform visitors about Malaysia's natural and cultural heritage, to promote conservation, to ensure that a "significant proportion of socio-economic benefits" reach local communities and that tourists have a rewarding experience. Amongst its fundamental characteristics are environmental education and contribution to conservation. Detailed figures were presented from a current WTO/UNDP survey of international tourists in Malaysia, which is focusing on rural tourism. Malaysia reported that it was marketing ecotourism through worldwide general advertising and through specialist tour operators.

### *Philippines*

The Philippines delegate pointed out that ecotourism has become a buzzword and that everyone wants to join the bandwagon, it is a panacea able to protect the environment and cultural areas and to uplift local communities. The Philippines has issued an Executive Order intended to ensure compliance with national standards and guidelines for ecotourism development ensuring a quality experience for visitors. Ecotourism is seen as a tool for sustainable development and the

protection and conservation of the country's environment, natural resources and cultural heritage – economic benefits for local communities are identified as important. It has four major characteristics: promoting conservation, a tool for socio-economic development, showcasing the competitive advantage of the destination and an educational tool. The Philippines is currently developing a National Ecotourism Strategy and they have identified the USA, Europe and Japan as principle markets, although in 1998 98% of visitors to its protected areas were domestic tourists. The baby boomers (born 1946-1964) and the x-generation (born 1965-1976) are identified in the strategy as significant for ecotourism to the Philippines. The definition of ecotourism was drawn widely to include adventure and sports tourism. The Mt. Pinatubo Trek was presented as an example with strong linkages to local communities through cultural performances, demonstrations of crafts and story telling.

### *Sri Lanka*

The longstanding Buddhist tradition of Sri Lanka has produced an entrenched environmental ethic; the world's first wildlife sanctuary was created in what is now Sri Lanka in the third century BC. Recognising that ecotourism "is a small and specialised segment of the tourism market" Sri Lanka has begun a campaign to attract ecotourists as a long-term strategy. The short-term strategy is to promote ecotourism as an "add-on" for tourists already visiting the country. A committee has been formed to produce a set of guidelines on ecotourism for Sri Lanka. Some 17% of foreign visitors are thought to visit national parks in Sri Lanka each year. The presentation concluded with details of the Muthurajawela Project a day-visitor Marsh experience based around a "fishermen's village" educational display and structured around the working day of the fishermen so that tourism constitutes a supplementary livelihood – through sales of fish, local handicrafts and guiding. The project is a marked success attracting 1200-1500 visitors per month.

### *Thailand*

Ecotourism has been developed in Thailand since 1976 and it has been promoted in Thailand since 1998. The Government has a 10-point policy document on ecotourism, emphasis is placed on education, the involvement of local people and their participation in formulating development plans and there are sophisticated structures for achieving implementation. Thailand's analysis suggests that Asian markets, the USA, UK, Germany and Australia will be the significant ones. They differentiate between intensive ecotourists involved heavily in nature-related activities and semi-intensive – those tourists' activities are semi or non-ecological – astronomical study, mountain climbing and mountain biking. They reckon the ecotourism sector to be 23% of the incoming market, with a longer average length of stay (14.5 days compared with an average 7.2). The presentation concluded with a case study of Doi Inthanon National Park with its twin attractions of bird watching and visits to the Thai hill tribe people. The national park and local communities have established an Ecotourism co-operative to allow local participation in park management and to foster self-sufficiency through supplementary livelihoods. Thailand envisages joint development and promotion of ecotourism with neighbouring countries.

## RECOMMENDATIONS AND CONCLUSIONS

There is clearly no consensus about what constitutes ecotourism, with some quite sharp definitions closely related to IUCN and WTO definitions and others adopting a very inclusive approach, stretching the concept to include all forms of non-mass tourism in rural areas. Some definitions were seemingly closer to definitions of sustainable tourism, for some ecotourism and rural tourism seem very closely related, some viewed aspects of adventure tourism as part of the ecotourism experience and in some cases there was a strong village tourism flavour to the definitions. This inclusive view of ecotourism can be understood, as countries want to diversify their economies and to be part of the "ecotourism bandwagon". It is important that ecotourism not become a panacea as was pointed out by the Philippines delegate. It is important to separate activities that may occur in rural and natural areas as opposed to those that are ecotourism based. In fact, many of the activities described use natural areas as backdrops and facilities as opposed to seeing them as objects for appreciation and learning.

The "relatively undisturbed natural areas" criterion is often being ignored. Generally, highly inclusive and broad areas of activity are categorised as ecotourism, even where definitions may suggest narrower limits. Sri Lanka recognises that ecotourism "is a small and specialised segment of the tourism market". This was echoed by the delegation from Thailand.

National ecotourism strategies are emerging in the region. Malaysia has a strategy, the Philippines is currently developing one, Thailand has a 10-point strategy, Sri Lanka is developing national guidelines, and China is developing provincial strategies. Thailand envisages joint development and promotion of ecotourism with neighbouring countries.

There was discussion of the need to collect information about the demand for ecotourism and the expectations of tourists at the national level. Malaysia has been undertaking detailed research into rural tourism and there is scope for national tourism administrations to include tourism in their exit surveys and other intercepts. WTO hopes to be able to undertake some market segment surveys, including ecotourism, but resources are a constraint. Some concern was expressed about whether regional and domestic demand for ecotourism products would emerge and when.

Given that in the future much of the tourism generated in the Asia Pacific will be from the region, there is an urgent need to begin to understand the Asia and Pacific market. There were questions raised about how big the ecotourism market is given the more conventional view of ecotourism. Some wondered about how many sites actually meet the principles of ecotourism.

Several of the presentations distinguished between the two strategies of seeking to attract specifically ecotourism orientated tourists in the long-term and in the short-term, adding ecotourism to the itineraries of tourists already attracted to the country. Ecotourism products can be distinctive and attractive and can be very useful in establishing why tourists should visit a particular country – an ecotourism experience can often constitute the unique selling proposition, which attracts the visitor.

There was some discussion about the legitimacy of including local communities in ecotourism experiences with the attendant danger of the communities being “objectified”. It was pointed out that community participation and empowerment includes the right to say no from an informed position. Communities need to be aware of what engagement with tourism will mean and careful consideration needs to be given to issues of guiding and access with full and informed local community participation.

In discussion, the question of interpretation was raised and there was concern about whether or not there were any professional bodies for interpreters. The point was made that interpretation is expensive and that the cost of providing it should be borne in part by the tour operators. Interpretation can be a useful source of revenue if local guides are employed or if there are sales of guidebooks. At the national level, the priority may be to provide interpretation for local communities and domestic tourists in order to build support for conservation.

A number of other planning, management and development issues and priorities were raised. They included:

- The importance of partnerships as a means of achieving sustainable eco/nature based tourism.
- The need to integrate economic as well as natural conservation concerns in eco/nature based tourism. The difficulty of accomplishing this with a wide range of stakeholders was recognized and there were suggestions about the need to develop conflict resolution capacities within the region.
- The complexity of identifying carrying capacities was seen as a priority issue.
- Many called for the development of scientific ecological and social studies in order to be able to better understand how to manage natural resources areas. This raises the issue of ensuring the incorporation of scientific investigation and management considerations in the planning of ecotourism areas.
- The issue of certification was raised and can be seen as an important tool in achieving quality assurance not only in the hospitality industry but also in the management of natural areas and parks.
- The need to examine and develop innovative ways to ensure that economic development through tourism benefits local communities.

In his concluding remarks, the WTO Secretary-General made the important point that the development of ecotourism products and national strategies requires co-coordinated activity by many different departments of government and that the International Year of Ecotourism can be used to establish inter-departmental government committees – this is likely to bring long-term benefits to tourism ministries.

PRESENTATION BY WTO CONSULTANT,DR. WALTER JAMIESON*"The Development, Management, and Sustainability of Ecotourism/Nature Based Tourism"***Introduction**

If one examines the literature on tourism, and certainly the tourism plans and policies of many countries in Asia, the most commonly identified form of tourism is ecotourism. In my experience, there are a wide number of definitions of ecotourism that range from a form of tourism that has as its basic objective as the conservation of the environment and the education of the individual, to nature tourism which in some cases are consumptive forms of tourism such as fishing and hunting. It is clear that, in many cases, ecotourism has become another word for nature-based tourism. In other cases, the industry as well as governments have chosen to label certain tourism products as ecotourism in order to build on the popularity of this type of travel activity. And yet in other cases countries and organizations are using the word ecotourism in place of sustainable tourism. This confusion certainly is understandable given the fact that we are dealing with an emerging field of activity. This paper will look at some key development, management, marketing and sustainability issues of ecotourism and nature based tourism.

**Definitions**

Given the confusion about the term ecotourism, it is useful to start with commonly understood definitions.

"We may define ecotourism as tourism that involves travelling to relatively undisturbed or uncontaminated natural areas with the specific object of studying, admiring and enjoying the scenery and its wild plants and animals, as well as any existing cultural aspects (both past and present) found in these areas. Ecological tourism implies a scientific, aesthetic or philosophical approach, although the ecological tourist is not required to be a professional scientist, artist or philosopher. The main point is that the person that practices ecotourism has the opportunity of immersing him or herself in nature in a way that most people cannot enjoy in their routine, urban existences. This person will eventually acquire a consciousness and knowledge of the natural environment, together with its cultural aspects, that will convert him into somebody keenly involved in conservation issues."

(Ceballos-Lascurain, 1988, p. 13)

We may want to also understand the ecotourist. The ecotourist also is attracted to a natural area *per se*, and his main interest is to observe, study and admire the natural features found there, practicing a non-consumptive use of wildlife and natural resources. Among the many activities he might carry out are wildlife observation (bird watching being the most popular), nature

photography, geological exploration, botanical studies, painting of natural subjects, snorkelling, nature hiking, and mountain climbing. Activities intimately related to the former are archaeological exploration and photography, human contact with native cultures, and anthropological study. Ecological and cultural tourism, in other words, can go hand in hand, and may actually complement each other. It is no accident that in Mexico many of the archaeological zones are found in areas that also have great natural interest: Palenque, Coba, Bonampak and Yaxchilan, for example. (Ceballos-Lascurain, 1988, p. 13-14).

We can also look to the definition provided in the material for this meeting which states that the term ecotourism can have the following general characteristics which include: " all natural forms of tourism in which the main motivation for tourists is the observation and appreciation of nature as well as traditional cultures prevailing in the areas; it contains educational and interpretation features: it minimizes negative impacts upon the natural and social-cultural environment; and supports the protection of natural areas by conserving natural and cultural attractions and redistributing the economic impacts of tourism to the local people through employment".

The following figure from "North American Ecotourism Markets", P. Wight, Journal. of Travel Research, Summer 1996 helps to understand the continuum from experiencing primitive nature and the more commonly understood mass tourism.



### Ecotourism vs. Nature Based Tourism

There is no doubt that all the trends indicate a significant interest on the part of travellers to experience nature. Some tourists seek a backcountry form of tourism that allows them to commune with nature in a solitary way. For others, a walk in a forest on a paved pathway is the type of nature experience that they are looking for. It is therefore important to first begin to understand the motivations behind this popular form of tourism. The tourism industry and governments should understand the nature of their tourists and what their needs are when they begin to develop tourism products and marketing strategies. There are probably few tourists who seek a true nature experience and are prepared to live with the inconveniences and lack of support that many tourists feel are a necessary part of meeting their expectations. There are a much larger

number that want some form of nature-based experience. Ecotourists (as defined above) are not necessarily better tourists but rather a different form of visitor. There is room for both kinds of visitors.

Let's start therefore from the position that true ecotourists are few in number. From the point of view of many governments and communities, it would be more fruitful to begin to think about nature based tourism activity and to understand the role that this activity can play in both the conservation of the natural environment as well as increasing the economic and social well-being of residents. If countries were to concentrate solely on the very small ecotourism market it would, in many cases, have little impact on their economic bottom-line.

This is not to say that the objectives of ecotourism are to be ignored but rather that product development and marketing strategies must be consistent with market realities. From the conservation perspective it is also important to identify the true ecotourism market since it can play an important role in accommodating visitation to ecologically sensitive areas that will not damage the environment, and at the same time provide economic and social benefits.

### The Nature Based Tourism Experience

While there is considerable discussion about ecotourism, there is far less understanding of what the nature based tourist is looking for in terms of experience. Ceballos-Lascurain's definition helps us begin to understand the phenomenon.

Nature based tourism experiences can include the following:

- |                                |               |
|--------------------------------|---------------|
| ▪ Wildlife observation         | ▪ Hiking      |
| ▪ Bird watching                | ▪ Rafting     |
| ▪ Whale watching               | ▪ Swimming    |
| ▪ Visiting museums             | ▪ Cycling     |
| ▪ Enjoying scenery             | ▪ Walking     |
| ▪ Understanding other cultures | ▪ Kayaking    |
| ▪ Learning                     | ▪ Canoeing    |
|                                | ▪ Backpacking |

It is interesting to note that on the left side we see more conventional eco/nature tourism activities while on the right hand, there are more active activities that take place in a natural setting but lean more towards adventure tourism forms of activities.

The elements of the nature based tourism experience are described in the following table.

- |                   |                         |
|-------------------|-------------------------|
| ▪ Grasslands      | ▪ Hot springs           |
| ▪ Forests         | ▪ Scenic landscapes     |
| ▪ Mountains       | ▪ Local cultures        |
| ▪ Waterfalls      | ▪ Interpretive centers  |
| ▪ Caves           | ▪ Wilderness experience |
| ▪ Beaches         | ▪ Wildlife.             |
| ▪ Natural streams |                         |

Some natural areas are protected as national parks, some are wildlife sanctuaries and some carry with them very little legal protection. Some of these areas are well managed with coherent interpretive plans and development strategies while others have very little direct intervention. All this to say that there are diverse types of areas both in terms of their attractions as well as their management.

## **The Paper**

Given the complexity of the issue, this paper will discuss some of the key elements in developing sustainable nature based tourism that has as its basic objectives the protection of the environment and the creation of economic well-being (even more importantly the reduction of poverty). There are many other dimensions that could be explored but given the current state of the art, this orientation will provide useful points for discussion.

This presentation is designed to complement the country presentations that have been prepared. It will be important to have an opportunity to hear what member economies are doing in helping to conserve nature and create economic well being through nature based tourism.

## **Positive Dimensions of Eco/Nature Based Tourism**

When properly managed eco/nature based tourism can have a number of positive impacts on both the environment as well as the surrounding local communities. These impacts include:

- Varying levels of employment that can be generated through tourism activity. The challenge is to ensure that the nature based tourism experience allows the visitor to spend time in the region and therefore provide for economic development. The tourist who leaves a larger center to spend a few hours in a nature reserve and then returns to the larger center has had very little if any positive impact on the local community. He/she does have an impact however on the road system, the sewage system and other dimensions of the community.
- Nature based tourism can stimulate the creation of local small and medium-sized enterprises. Activities such as guiding, bed and breakfasts, home stays and outfitting are examples of locally based businesses that can be formed and sustained. The challenge is to ensure that there are opportunities to obtain credit and technical expertise if local people are to participate in the creation of wealth at the local level. Very often the people who are most in need of economic development are those least able to access credit and/or expertise. While there is a great deal of discussion of potential positive impacts there have to be conscious efforts made to ensure that the necessary resources are available to the poor.
- Sustainable nature based tourism must ensure that the profits from the tourism activity are at least in part reinvested into the local economy. It is equally important that some of the proceeds are directly used to maintain the conservation activities of either governments or NGOs.
- Very often more remote areas suffer from significant infrastructure gaps and nature based tourism can help to provide financing or the rationale for investment in infrastructure. While the infrastructure may be necessary to meet the needs of tourists it can also have beneficial impacts on the local community.

- Depending on the nature of the surrounding communities the handicraft industries and local traditions can be either revitalized or maintained. How to do this must be the subject of another paper but it is essential to think about how the cultural dimensions of an ecosystem can also be enhanced and maintained.
- Sensitive and well-developed interpretive programs can help to develop a conservation ethic not only within tourists but also with the local community. This is especially true if the local population can be convinced that their well being in part depends on a healthy ecological setting.

### **Negative Dimensions of Eco/Nature Based Tourism**

There is no form of tourism that is inherently benign. Once visitors are introduced into a natural environment there will be negative impacts. The issue is rather one of the levels of impacts and how proper planning and development can minimize these impacts. Examples of negative impacts can include:

- There is increasing evidence that demonstrates that many destinations are experiencing a significant loss of revenue due to economic leakages to larger centers or other countries. It is vitally important that any form of sustainable nature based tourism creates tourism experiences and investment that will ensure that significant share of the revenue and profits stay within the community. This often leads us to begin to consider small-scale and community-based operations rather than larger enterprises that may be owned by outsiders. While politicians are very happy to speak about 3, 4 and 5 star hotels, it may be that from an economic development perspective, especially one specifically concerned with poverty reduction, that small-scale locally owned enterprises could achieve the highest possible economic development for a community.
- Visitors contribute to various forms of pollution whether they be air, water, visual or sound related.
- Traffic congestion, depending on the scale of the attraction, can be an issue.
- How to deal with solid waste as well as wastewater is a constant challenge especially in natural areas.
- The forms of tourism development that surround nature based tourism can at times in fact lead to the reduction in the value of traditional lifestyles and concerns.
- Without proper interpretation we see that the commodification of both natural and cultural heritage can occur.

### **Overall Impact Assessment**

What these impacts indicate that we must be very conscious of the potential negative impacts of tourism and do whatever is possible to minimize them. This also leads one to conclude that tourism may not always be the best form of development for a particular situation. Communities as well as resource planners must have the opportunity of saying "no" to tourism.

Unfortunately too many government departments as well as the private sector seem to remove this opportunity from residents as well as those concerned with conservation.

### **Sustainable Nature Based Tourism**

Given the realities that have been described above, it is incumbent upon all the major stakeholders (including the immediate community) to begin to think in an integrated way about how to achieve the twin objectives of conservation as well as income generation. While it is easy to talk about these goals in conceptual terms, we are all aware of the significant dilemmas facing decision-makers and communities. How does one weigh the advantages of jobs and other forms of economic development with the possible destruction of the integrity of an ecosystem? Politicians and government officials who are faced with these decisions often do not have the necessary skills set or knowledge to make informed decisions. In other cases political realities and pressures force decision-makers to adopt directions that they know are not the best either for the economy or for the environment. Too often we are dealing with two opposing views. The challenge is to seek that magic middle ground where economic development occurs with minimal environmental damage is. However, do not forget that any form of activity in a natural area will have an impact. The question is what level of impact is deemed to be acceptable to both the community and those concerned with the conservation of the environment.

Descriptions from the various countries on how various jurisdictions are seeking to achieve the magic balance between development and conservation. The next section of this paper will look at a process by which one can begin to achieve the best possible results.

### **Key Strategic Issues in Eco/Nature Based Tourism**

#### ***Capacity and Limits***

One of the important starting points in the management process has to be a consideration of the carrying capacity of the local area in social and economic terms as well as the natural environment itself. Whether one talks of limits to acceptable change or carrying capacity it is important that stakeholders are aware of the ability of various dimensions of the destination to absorb tourism. We now have a good understanding of physical carrying capacity. Physical capacity concerns can include such things as the destruction of habitat, decline in wildlife species, soil erosion, pollution of water sources and so forth. The Tourism Authority of Thailand has an excellent manual that looks at a series of dimensions for beginning to understand these impacts. (Manual for Ecotourism Tourism Facility Design and Development)

Sustainable tourism will often require that limits to growth or change be imposed because the capacity of sites or communities must be respected. The setting of limits is almost always controversial and will run against dominant industry and political philosophies that are based on the premise of perpetual growth.

A community's capacity to absorb tourism is difficult to determine, especially because continued expansion is often assumed. But limits always exist, as in the availability of piped services and utilities, and there is usually a high cost to expanding infrastructure. Furthermore, population growth must be accompanied by more schools and other services, so the pace, nature, and size of development are certainly legitimate and important carrying capacity issues for all residents to comment upon.

As discussed earlier visitors are looking for various forms of a nature-based experience. For some having no one on a trail is the ultimate nature based experience. For others there is no problem in having larger groups of people around them when they are out in the natural setting. If the concern is visitor satisfaction then a better understanding is needed of the nature of the tourists and what their psychological carrying capacities are. Essentially it means dealing with perceptions and feelings when trying to measure this particular aspect of carrying capacity.

The Tourism Authority of Thailand manual does identify a formula based approach to carrying capacity that is used in the design of parks and recreation areas. While these may be useful indicators they cannot replace the process of scientific inquiry and the real world of decision-making.

### *The Design and Location of Facilities*

The Ecotourism Society of America and others have begun to design strategies that can allow developers to situate structures in ecologically sensitive areas without severely damaging the environment. Sensitive design along with appropriate technologies can help to insure minimal impact on the natural environment.

Whether to situate lodging in a natural area depends on a number of factors but in many cases it can be argued that situating accommodation in or near surrounding communities can avoid negative impacts on the natural environment while at the same time ensuring the highest possible level of economic development. There is always the danger that self-contained facilities, even if well designed, can have minimal economic impact on the surrounding communities. From a sustainability perspective one has to think not only about design issues but how the location of a facility will allow for the greatest possible level of local economic development.

### *Zoning*

One of the useful techniques available at our disposal is not to treat natural areas in a unitary manner. It is possible to protect highly sensitive ecological zones while at the same time opening up less sensitive areas to visitor activity. It is useful therefore to use the same techniques employed in city planning to zone natural areas for various purposes. What goes with this of course is the need for careful management to ensure that the zoning strategies are respected by both visitors as well as all aspects of natural area management.

### *Interpretation and Presentation*

For many visitors the significance of a natural environment can only be understood through professional interpretation and presentation. Too often the visitor leaves a natural area without increasing his/her knowledge of the environment that they have visited and the need for its conservation. It is true that interpretation programs can be costly but they serve an essential function in ensuring a high level of visitor satisfaction. Interpretation is also essential in helping to build a respect for the ecological setting and to advise visitors of what is appropriate behaviour. The rest of the session could be spent on this topic, but it is essential for those responsible for the management of natural areas to consider interpretation as a central focus point.

The knowledge of interpretation and its impact on the visitors is growing quickly. Park managers and planners must certainly be exposed to current interpretive philosophies and techniques. There are few instances where it can be seen that state-of-the-art interpretation is

taking place. While often the lack of financial resources is identified as the reason for deficiency, it is very often a lack of knowledge and skills about current low-cost techniques of interpretation that is the root cause. As the use of multimedia becomes more common and less expensive site managers should also think seriously about using this form of communication to introduce the visitor to the ecological settings in which they are about to participate in order to allow them to get the full value of their experience.

### ***Visitor Services***

As there is a growing recognition of the positive economic benefit of tourism, there must be a corresponding concern for the visitor in terms of the services provided. In some cases the services are essential such as washrooms. The location of parking, signage, the existence of sources of alternative information, first aid assistance and so forth have to be seen as an essential element in the ongoing management process. Ensuring that sites offer at least a minimal level of visitor services has to be seen as an important part of the overall management of natural areas.

This is essential in ensuring that the customer leaves satisfied and is prepared to return as well as to recommend the natural area and its surrounding community to friends. It is also important to consider that there is a range of visitors at sites from the very young to the old, from the physically able to those with restricted mobility, and visitors also may have varying levels of knowledge of the local language. Sites must therefore have visitor management plans in order to ensure that the needs of different visitor groups are met.

### **Planning and Management Process**

There is no singular planning and management process. However, there are some essential elements in any planning process.

### ***Stakeholder Participation***

It has now become accepted that local communities must be involved in the planning process. It is even more important that if a process is to be sustainable, in every sense of the word, that the full range of stakeholders with an interest in the development of eco/nature tourism be consulted and involved. There are now well-known models of stakeholder analysis and participation that can be referred to. The following diagram gives an indication of the range of stakeholders that can be part of any planning and management process. What is important to understand are the different ways in which stakeholders may wish to participate. This is especially true of indigenous people and the poor. Very often their voices are lost in the sea of private sector and conservation voices. Special efforts must be made to insure that indigenous people have an equal opportunity to express their views and influence decisions.



Tourism Stakeholders

### *Collection and Analysis of Data*

With the scarcity of financial resources in many locations in Asia it is often difficult to justify the expenditures necessary to collect all of what might be seen as essential bio-physical as well as social-economic data required to produce plans and policies. One must accept that in many instances that scarce resources may not allow a planning and management exercise to use North American or European models of information gathering and analysis. However, having said this, it does not mean that professional and dependable analysis cannot occur. What this does recognize is that there have to be new rapid appraisal methods used to secure the necessary data and to carry out the analysis. The challenge to the natural environment community is to begin to understand the realities in many developing economies and to provide the means by which sustainable planning and management can occur with little money. There is also the need to understand the capacity levels of the people responsible for the process of data gathering.

### *Identifying Resource Conflicts*

The range of stakeholders discussed above clearly indicates that it is inherent in almost any process that there will be differing views and values. Recognizing this reality forces resource managers to begin to use the well-understood approaches of conflict resolution and mediation. It is also equally important not to create situations where confrontation is inevitable. Large public meetings putting one group against another can only ensure that there will be little opportunity for creative problem solving. Too often this creates a situation of win/lose rather than trying to use professionals who can at least establish the environment for win-win situations. One has to recognize however that there may be instances where there are simply no solutions that will meet the needs of all interested parties. The challenge then is to achieve just, but not always equally accepted, plans and policies.

### *Goal and Objective Setting*

Many assume that the setting of goals and objectives is a simple and straightforward process. In a multi-stakeholder environment this is clearly not the case and all efforts must be made to help interest groups identify their goals and objectives. For indigenous people as well as

the poor, professional help must be provided in order to ensure that they can become equal members in decision-making.

### *Situating Eco/Nature Based Tourism Plans into Larger Regional Context*

If nature based tourism is to succeed there has to be a " fit" between the natural environment plans and the larger community's plans. While this would seem to be self-evident, very often it is not the case. At times protected areas are forced on communities without careful consideration of the impacts on financial and physical plans. In other cases, the level of infrastructure is simply not able to absorb large tourism numbers. It is essential therefore that eco/nature based tourism supports local initiatives and objectives.

### *Monitoring*

Every tourism plan whether it be concerned with ecotourism or some other form of tourist activity always calls for monitoring. However, rarely does monitoring take place due to the lack of financial resources and political will. Monitoring is essential in all planning and management exercises particularly when we are dealing with natural environments that are irreplaceable and fragile. The technology of monitoring does exist and we now have a very good understanding of practical indicators to measure success as well as failure. Governments must recognize that monitoring is not a luxury but rather it is essential if we are to understand the impact of tourism. Sensible monitoring procedures allow us to change procedures and adopt new approaches in helping to ensure that the overall objectives of conservation and poverty reduction are achieved.

### *Marketing*

In order to achieve the full potential of ecotourism, it is necessary to better understand the nature of tourism markets and tourist motivation. It would not be prudent to design and plan for one particular type of tourist or tourism activity. To be successful destinations and governments must become much more sophisticated in matching their product to the market. It is impossible to change the product. However, it is possible to develop it in such a way that it can provide for varying types of experience always with sustainability as the ultimate objective. It is also important to accurately present and promote the nature-based product. In many instances, due to the remote dimensions of an eco/nature based tourism product, careful positioning is required.

In many instances, a circuit becomes a necessary element of trip planning in order to make certain that visitors will travel to more remote locations. There may also have to be combinations of various forms of tourism to augment the nature-based activity. Many government departments must learn new "tricks of the trade" in both positioning as well as promoting the eco/nature based tourism experience. In addition, governments must carry out careful market research to insure that there does exist a sustainable market before ecotourism investments are made.

### *Training*

As mentioned earlier there are situations when there is a lack of capacity on the part of many of the stakeholders. Training is essential if we are to achieve open and sustainable forms of eco/nature based tourism. Some examples of training that can occur are:

### The Management of Ecotourism:

Such a course would allow the participant to: understand the basic elements of ecotourism, the market and market trends, assess the potential of individual and group ecotourist specialty markets, use green guidelines for operating a successful ecotourism business, analyze and address the special needs of ecotourists and local communities, establish an ecotourism planning process at the local and regional levels, develop trip circuits and travel packages that are safe and offer a wide variety of experiences and understand the vital role of interpretation and education in adding value.

### Ecolodge Development:

Such a course would allow the participant to: assess the market demand for ecolodge types and the experiences they provide, estimate realistic cost projections/revenue potential and develop pricing strategies, find the best locations and evaluate site development opportunities and constraints

Establish regional planning cooperation, and develop a master plan to incorporate sustainable development and green guidelines into the project.

### Coastal and Marine Ecotourism:

Such a course would allow the participant to: integrate coastal zone management and marine/reef conservation into a sustainable tourism development strategy. Identify the special characteristics of marine ecotourists, use innovative resource planning techniques and coastal zone management best practices, establish zoning and visitor tracking methods, educate visitors and staff about low-impact forms of recreation, monitor and assess more accurately the long-term effects of tourism on local resources and increase government's commitment in marine park protection and effective coastal management.

### **Conclusion**

This paper has attempted to provide some thoughts and discussion on various issues relating to eco/nature based tourism. This newly developing field still has to be defined but it is clear that there are a number of different types of nature based tourism of which ecotourism is but one limited expression of people's interest in the natural environment. It is important to expand our understanding of the many different forms of nature-based tourism, and an equally large number of different types of ecotourists and nature-based tourists, if we are to meet tourists' needs and reduce poverty through tourism activity.

PRESENTATION BY WTO CONSULTANT,DR. HAROLD GOODWIN*“Characteristics of International Markets for Ecotourism”*

The World Tourism Organization argues that all forms of tourism should be sustainable and to that extent, ecotourism is no different from any other sector of the industry. In looking at the characteristics of the international markets for ecotourism, I want in this presentation, to place ecotourism in the context of sustainable tourism and the market. Tourism is in many ways the ultimate consumer good. One of the difficulties about ecotourism is that it explicitly targets some of the world's most fragile environments and that there are increasing conflicts between different groups of consumers; and between consumers and conservationists in those fragile environments. The sustainability of ecotourism turns largely on methods of regulation and planning and management in destinations; the central problem being to balance the conservation of the environment and tourism. The marketing process assists in this management endeavour by attracting appropriate tourists and visitors to specific ecotourism destinations in sufficient numbers to make an appropriate contribution to conservation and to local livelihoods.

Nature tourism can be defined as all the forms of tourism which use natural resources in a wild or undeveloped form whether that is species, habitats, landscape, scenery or salt and fresh water features. In marketing terms, nature tourism is travel for the purpose of enjoying wildlife or undeveloped natural areas. The tourism industry sells natural landscapes and wildlife to tourists for their enjoyment. From an ecotourism perspective the objective is to maximise the yield whilst minimising the impacts.

As one of the world's largest industries, the tourism industry and the tourists it brings to remote and fragile destinations can either benefit those destinations or damage them. The ecotourism management objective is to secure a sustainable yield both for the conservation of natural heritage and for the benefit of local communities. Often in ecotourism destinations, the environment is the major resource available to local communities for their economic development.

The tourism industry and local communities seek to realise a return on their natural capital through non-consumptive and consumptive forms of tourism. The wide variety of non-consumptive forms of tourism in ecotourism destinations range from more active forms such as, photo safaris, bird watching, and sports like mountaineering and white-water rafting, through to more passive forms of tourism like viewing the scenery and sightseeing.

Bruskin and Goldring in 1998 undertook a survey of American tourists and inquired into their nature-based activities. Well over half had reported visiting national parks or hiking within the last year, and more than 40% had explored a preserved area or gone to view wildlife. The survey results show the wide variety of activities which people get involved with in tourism in natural areas.

### Nature-based activities

• Visiting parks	55%	• Bird watching	19.5%
• Hiking	55.0%	• Biking	18.7%
• Explore a preserved area	47.8%	• Freshwater fishing	17.9%
• Wildlife view	47.8%	• Snorkelling/diving	14.7%
• Nature trails	37.1%	• Exploring marsh	12%
• Unique natural	27.5%	• Climbing	11.6%
• Environmental education	20.3%	• Canoeing	9.2%
		• Ranching	4.0%

Perhaps more interesting is the presentation of the same data in terms of heavy users defined as those who spend the majority of their time in natural areas. Heavy users constitute just under 15% of the sample. Just over 15% spend some of their time there, and nearly 18% are defined as spontaneous users. That means that 48% of Americans on their last vacation had some nature tourism experience as part of their trip. However, it is important to note that barely 15% of American tourists were defined as heavy users, spending the majority of their time in natural areas, and that this is the group which could most obviously be identified as ecotourists. In terms of the market segments which exist for nature tourism, there are a number of activities which can be seen as primarily concerned with the enjoyment of nature – diving, birdwatching, photo safaris. There are outdoor activities, particularly adventure and sports activities which make heavy use of natural areas, but where the activity itself is not specifically related to the appreciation of nature.

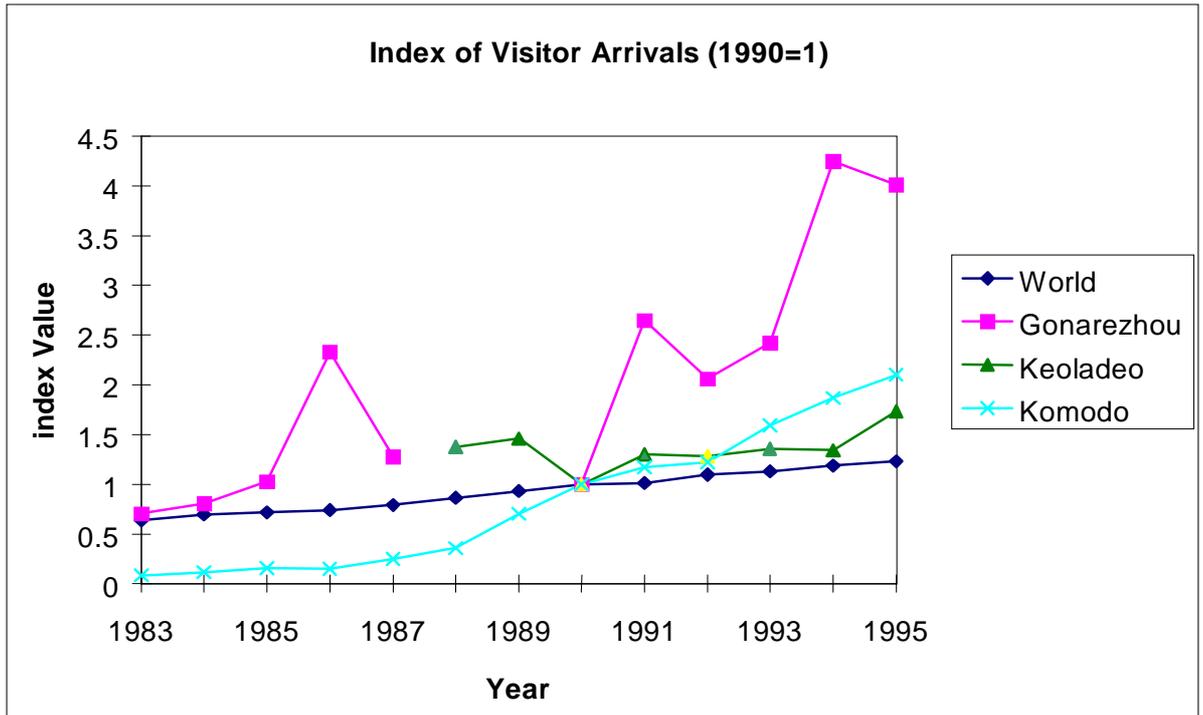
Another way of segmenting the market for nature tourism is to look at travel motivation and look for tourists whose travel motivations are associated with the enjoyment of nature or the appreciation of nature. For those tourists, the quality of the interpretation facilities is a key consideration, and certainly in America much of the competition between nature tourism operators is to do with the quality of the interpretation that they offer to their travellers.

For ecotourists motivated by the appreciation of nature, there is likely to be more concern that their activities should be low impact than for those whose primary interest is in the physical activity of trekking, white-water rafting or climbing.

One of the difficulties about nature tourism at present is that much of the emphasis is on the appreciation of species. Back in 1988, the World Wildlife Fund became the World Wide Fund for Nature, at least in Europe. It has been very difficult for WWF to change the perception of the organisation away from being primarily concerned with the conservation of a particular species (the panda is one of the worlds best known brand symbols) and towards a concern for the environment in a more general sense.

One of the big changes which would benefit data in ecotourism would be to create an appreciation of the environment as a whole and to encourage people to visit habitats rather than to seek particular species. Such a change would be particularly important for nature and eco-tourism in rainforests where it can be much more difficult to see the wildlife than it is in savanna Africa. The marketing of ecotourism in the next ten to twenty years should be one of the mechanisms by which the appreciation of habitat becomes more dominant in the market place.

Parks are significant tourist attractions.



The graph plots the international trend rate in international visitor arrivals at 4% and the rates of growth in park visitors at Keoladeo, Komodo and Gonarezhou. All the national parks which we were looking at in the mid 90s were showing rates of growth well in excess of the 4% international trend rate. National parks provide the only source of reliable data on the numbers of international visitors attracted by the natural heritage of countries. The national parks data are an important source of information for those involved in marketing natural heritage and assessing performance.

Parks attract relatively wealthy international and domestic consumers to marginal and often poor rural areas. In doing so, they provide opportunities for economic development particularly if the tourism in and around the park can be integrated into a rural development strategy. National park status is an important marketing tool. In the UK it is far more important than World Heritage Site status in attracting tourists; and national parks status is extensively used by tour operators in their brochures.

The nature tourism market can be divided up in a number of ways. There are people with specialist interests like bird watchers and botanists. However, far more common are the generalists with an enjoyment of nature but with relatively little specialist knowledge of the species or habitats that they are visiting. You can also divide the market between the fit and the less fit, the active and the passive. Most tour operators find that their groups are heterogeneous and that high quality guiding is essential in order to ensure that all participants in trips have an enjoyable experience and want to book with the tour operator again.

The size of the nature tourism market is not reliably known. There are a number of estimates but they are mostly unreliable. It is clear that it is not a single unified market, it's evolving rapidly, it varies considerably in the way that all tourism markets do according to nationality, age, gender and educational background. Those sectors of the market, which function around interest and affinity groups, are easier to access. There are a limited number of

birding and wildlife operators, but the more significant part of the market is, in volume terms, the casual FIT and tour group visiting which is part of more general country programmes.

One of the particular difficulties with ecotourism is that it is both a market segment and a philosophy for planning development and management. It is a description of a target market and also an approach to the planning, development and management of tourism in natural areas. One of the uncomfortable relationships is between national parks managers, protected areas managers, conservationists on the one hand and the tourism industry and tourists on the other. Much work needs to be done in improving these relationships.

### Nature Tourists Products and Segments

Wilderness, low impact experience	Hardcore nature tourists
Basic facilities, high quality guiding	Dedicated nature tourists
Less basic facilities, good quality guides	Mainstream nature tourists
Day trips with adequate guides	Casual nature tourists

Nature tourists are a heterogeneous group and it is not uncommon to find a mixture of the four categories identified here in any one particular group although some tour operators will attract a predominance of one or other of these groups. It is important for people involved in marketing nature tourism products to recognise that nature tourists have a wide range of different expectations of their experience. Expectations range from those seeking immersion in a wilderness experience and prepared to put up with very basic accommodation, to those seeking high quality accommodation, good quality guides and a brief and comfortable experience of nature.

### An example from Belize

<p>Ecotourists 18%</p> <ul style="list-style-type: none"> <li>• High on learning</li> <li>• Physical adventure and fitness</li> <li>• Escape home environment</li> <li>• Keen to be with others</li> </ul>	<p>Nature Escapists 21.5%</p> <ul style="list-style-type: none"> <li>• High on appreciating and learning</li> <li>• High on escape</li> </ul>
<p>Comfortable Naturalists 33.3%</p> <ul style="list-style-type: none"> <li>• Sought escape and learning</li> <li>• But in relative comfort</li> </ul> <p><i>Palacio &amp; McCool 1997</i></p>	<p>Passive Players 26.9%</p> <ul style="list-style-type: none"> <li>• Scored low on escape, learning, healthy activity and group cohesion</li> </ul>

Palacio and McCool undertook work in Belize to identify and quantify different sectors of nature tourism travellers. They identified the largest group as being comfortable naturalists, those who sought learning and escape from the pressures of everyday life, but wanted to do so in relative comfort. The next biggest group were the passive players who scored low on all four of

the categories that they were using for their analysis. They scored low on escape, they scored low on the desire for learning, they scored low on the commitment to healthy activity (exercise) whilst in the park, and they scored low on wanting to participate in a group. The nature escapists, some 22% of the sample, scored high on appreciating nature and learning about it and high on escape, but the ecotourists who scored high on all four categories constituted only 18% of the nature tourists that they were looking at in Belize.

Our own work on culture and natural heritage at three national parks for the British government's Department for International Development in the mid '90s showed that, certainly in Asia, the predominant reason for international travel was for a cultural experience. This finding is significant I think, particularly because we were interviewing people in wildlife parks. 57% of the people we interviewed in Komodo National Park rated culture as their most important motivation for travel, and 45% of the people we interviewed at Keoladeo National Park in India, said the same. The opportunities to create benefits for local communities whose culture is attractive to many visitors to natural areas is significant.

If we turn now to look at different tour operators, Ziffer back in 1989, identified essentially four different kinds of tour operators. The first group of tour operators who sell nature and who were unaware or uncaring about the impact of nature tourism, is the predominant group. There are then sensitive tour operators who provide their travellers with information, who seek to influence the way their travellers behave and who practice minimum impact tourism for example by removing waste and rotating campsites, are a significant and growing group. The number of tour operators who can be seen as donors or active participants of conservation, the doers, is much smaller. It is clear from the UK market that tour operators are more and more concerned to use the supply chain to guarantee quality and to guarantee the delivery of the ethos of their companies into the destinations. Some UK wildlife and nature tourism operators are moving towards more explicitly responsible positions in part to secure marketing advantage.

Now to turn explicitly to ecotourism, from a marketing perspective, ecotourism is first of all a description of a particular motivation for travel. But it is also a description of particular activities like wildlife viewing or bird watching - and for some, mountaineering or mountain biking - and a concept useful in analysing the impacts of tourism. It is important to be clear about the particular usage as it can often obscure meaning.

Ecotourism is essentially an aspiration, and marketing can assist in realising that aspiration. The Ecotourism Society's definition of ecotourism as "responsible travel to natural areas that conserves the environment and sustains the well-being of local people", is the most widely accepted. It implies a celebration of cultural and natural diversity. It recognises the linkages between people, their places and their environments, and it provides a framework within which the empowerment of local communities can be achieved so that they can become hosts, and in some genuine sense have guests. But there is much to be done to realise these wider objectives.

One of the difficulties in marketing ecotourism is the devaluation of the concept of ecotourism through misuse, particularly in the originating markets in Europe. Kelman put it very clearly when he argued that a tour which is advertised as 'environmentally friendly' can be just as suspect as many of the products tatted up with green packaging in your grocery store. The whole range of eco-trips described includes ecotours, ecotravels, ecosafaris, ecovacations, ecocruises - the eco-label has been significantly tarnished, and people now openly talk about the green washing of products when the "eco" label is used. To a large extent in the UK, the debate has

moved on and people are talking about ethical or responsible travel as the debates widen to cover the triple bottom line of Rio and move beyond the strictly 'environmental'.

One of the key challenges is to turn nature tourism into ecotourism. If nature tourism is all those forms of tourism which take place in natural areas, and which use an experience of nature as part of the product, then ecotourism becomes low impact nature tourism which contributes to the maintenance of species and habitats through a contribution to conservation, and / or provides a revenue to local communities sufficient for local people to value, and therefore to protect their wildlife and habitat heritage as a source of income. Ecotourism is thus a subset, a smaller part of nature tourism.

Marketing can contribute to a strategy for changing nature tourism into ecotourism if those responsible for marketing tourism to natural heritage areas are able to define the management priorities with protected area managers to (1) define the appropriate type of nature based tourism for the particular destination, and (2) determine how it needs to be changed into ecotourism. Marketing can contribute to establishing partnerships between tourism, natural and cultural heritage and local communities working within agreed limits of acceptable change. Once the particular recreational users and forms of tourist visits that are likely to have the most beneficial impacts for local communities and the least detrimental impacts on the conservation area have been identified, marketing can be used to attract the right tourists.

There is little or no reliable data on the size of the ecotourism market. It is best understood as a sub-sector of nature tourism, identified by motivation and by the high positive impacts delivered through reinvestment in conservation and through benefits accruing to local communities, and the low negative impacts associated with ecotourism forms of visits. The role which marketing plays in attracting appropriate visitors i.e.: visitors who will appreciate the park without negatively impacting on it, is important. It is necessary to look at independent tourists, FITs, day excursionists, people coming in organised groups, people who come in with specialist operators with very specific interests in the birds, the butterflies, the flowers or the mammals, and not for profit and other affinity groups.

But we shouldn't forget those who visit a park simply because they find themselves close to it during their journey. For example, at Bharatpur, one of the major markets for the Keoladeo reserve are the lunch groups who stop en route between Agra and Jaipur. These coach groups make a significant contribution to the park through admissions fees, but they have only very passing involvement with the park in that they only take a very short walk on some of the hardened paths. One could argue that this is one of the most "profitable" groups that the park attracts (high revenue low management costs) , although they certainly wouldn't be identified as ecotourists.

In drawing up an ecotourism marketing plan, the first questions to answer are "What are your nature tourism assets?"; "What are the species, habitats, landscapes and the relationships between the people and their environment, the biological and cultural diversity that you have to bring to the market place?" In drawing up your plans, it is important to involve the tourism industry, the private sector, in both the originating markets and in the destination, and involving guides, conservationists and local communities in auditing those assets and drawing up a marketing plan.

There are a number of factors to consider. For the tour operators it is important to look at their level of knowledge of the parks and of their own clients and to consider what interpretation services they need locally as opposed to the guides who travel with their groups from the originating market. You can gain a lot of information about the kind of groups that they bring from the images and text in their brochures. One of the most cost effective ways of increasing visitation in natural heritage areas and extending stay, is to work with the operators who are already bringing groups to your country and add natural heritage product.

The second area to look at is the way in which your natural heritage is presented in the guide books, the travel pages and the internet, and to see whether by working with the guide book and travel writers you can encourage an appreciation of the natural heritage which is available as part of the tourism assets of your country.

Marketing to individual tourists is inevitably more expensive, but for the FITs, much can be done within the destination to encourage visits to natural heritage areas through information left in hotel rooms and by working with the local guiding companies. You also ought to consider using the visitor surveys that you undertake to look at travel motivation; to get visitor feedback on interpretation, and other facilities provided in natural heritage areas; and also to look at their preferences for viewing species and habitat. This is invaluable information when designing product.

The choices which consumers make are constructed largely by the destination images that they have from friends and relatives, from the travel media and from their education. Much of this "organic image" is difficult to change quickly.

Gunn has argued that there are essentially two different destination images. There is the organic image which is formed at an early age and is based on what is learnt of a country and of its species and habitats. My childhood, for example, was dominated by the geography of sub-Saharan Africa, while the next generation is much more aware of the rainforest. There is little that a country can do in the short run to change the organic image, but Peru, for example, has done work with schools in the UK to ensure that Peru has formed part of the national curriculum for many school children, and they will reap the benefit of that when those children begin to travel.

The induced image is the result of the promotion of the country as a tourist destination. National tourist offices can shift the appreciation of their country and the appreciation of the extent of the natural heritage, which is available for tourists.

Whilst much can be done to change the image in the destination, much of the immediate effort needs to be undertaken in the originating markets by working with tour operators, travel agents, journalists and academics, guide book writers and publishers, and through your national tourist offices with marketing and advertisers. The marketing mix for ecotourism requires the same balancing of the four P's: product, place, promotion and price, as for any other marketing campaign, however it is important to note that ecotourism has to be supply led, it cannot be demand led. Although of course without demand there will be no ecotourism.

The issues of managing large numbers of visitors inside the world's fragile environments, which are the environments that most ecotourists want to visit, are complex. What is critical, is to attract the right number of tourists at the highest possible price in order to ensure that tourism meets the costs associated with opening natural areas for tourism and hopefully, makes a reinvestment in conservation. This requires that those marketing natural heritage areas work

closely with the conservationists and protected area managers who have the responsibility for managing visitors and for the conservation of the habitat and species.

Much can be done to develop the market through day excursions for individuals and groups, and through appropriate low impact activities. By working with specialist operators it is possible to attract groups directly from overseas with an interest in botany, birdlife, wildlife or walking. Learning about local culture, as we saw from the figures for Keoladeo and Komodo can be a major magnet for tourists. It is important not to forget the expatriates and the business travellers who may be attracted away from the big cities for the weekends to immerse themselves in wildlife and natural heritage. It is also important to remember the domestic markets for three reasons: first, domestic tourists are a major source of economic benefit to local communities and national parks; secondly, they are the electors who help shape political support for the protection of the natural heritage; and finally, although it is normally an economic burden, it is important to remember to engage the next generation through schools and colleges in the enjoyment of nature.

So, what are the key issues in ecotourism niche marketing? Most important is protecting and enhancing the product. By definition, these natural heritage areas need to be preserved for future generations. The market segmentation is the same in general terms, as it is for any other kind of tourism marketing. It is important to look at the social demographics and the country of origin, and the behaviour and at the motivation of the tourists.

The main targets for ecotourism marketing are (1) to extend the season by trying to attract a steady flow of tourists throughout the year; (2) to attract tourists who are already in the country traveling in groups or as FITs; (3) to create ecotourism expertise in the destination so that the quality of the visitor experience can be increased and; (4) to attract specialist operators with an established ecotourism clientele. The latter approach can often be the quickest in terms of guaranteeing a flow of tourists, but the numbers are likely to be small if you rely entirely on the special interest birding and wildlife operators.

In terms of marketing approaches, it clearly makes sense to partner with national parks in developing those marketing strategies. It is increasingly common now to see national parks services represented at the ITB in Berlin and WTM in London. Much can be done to improve the image of the natural heritage of your country through international magazines like National Geographical and through film series. Much of the effort is about accelerating what word of mouth would achieve. Much can be done through marketing in the destination close to the park. If the staff of the hotels and ground handlers are familiar with the product and have experienced it, they will promote it to tourists. Aside from that, there are all the traditional ways of marketing through tour operators, guide books, fairs and travel shows, through brochures, through familiarisation trips, through in-flight videos and through competition in the various awards schemes which exist for green tourism and ecotourism.

In thinking about the marketing of tourism to national parks, it is important to be aware of the increasing conflicts that exist between low impact activities like scenery viewing and wildlife watching, and high impact activities like climbing and white-water rafting and trekking. Marketing can play a significant role in managing visitor impacts and use conflicts.

Protected area carrying capacity is a major issue. One of the key questions is: "How much change is to be tolerated in a national park or other protected areas, through public use for a range of competing activities?" There are major conflicts between people who want to use

national parks for sports activities like bungee jumping or mountain biking, climbing or trekking, and those wanting to use the same habitats for bird watching, game viewing or photography. Carrying capacity offers a way of analysing and managing these conflicts. There is now a wide range of different kinds of carrying capacity assessment methodologies available. Most of them are expensive. In terms of marketing tourism in national parks one of the critical conflicts is between the social carrying capacity from the tourist perspective, and the ecological carrying capacity from the conservation perspective.

The keen bird watcher or wildlife photographer or the ecotourist or nature tourist seeking a contemplative experience is essentially looking for a tranquil experience. The climber, the white-water rafter or the young person trekking as part of a group is looking far more for a physical experience and for a comradeship of the group – often noisy camaraderie. The behaviours of those two different groups of tourists are likely to conflict with each other or at least, the noisy activity of the adventure tourist is likely to conflict with and spoil the experience for the contemplative nature tourist. This is a major carrying capacity conflict. It is also the case that active nature tourism like mountaineering or trekking can have a significant impact on ecological carrying capacity.

Ecological carrying capacity is easily defined as “the number of tourist that can be admitted on to a site without endangering it”, and it is normally managed through zoning systems by park and protected area managers. It is important that marketing strategies support those zoning strategies and also support the park regulations by discouraging the kind of behaviours that are not acceptable within particular areas of national parks. This is a further reason why it is important for those marketing natural heritage, and protected area managers to work together in developing visitor management strategies. Carrying capacity is both a research methodology and a management strategy. What is perhaps most important about carrying capacity is that it is an adaptive management strategy that can be used by protected area managers in conjunction with those responsible for marketing natural heritage.

If we turn to the question “What can be done?”. There are four key issues to look at: firstly we should recognise that tourism in protected areas is a major management issue; secondly, we should determine the limits of acceptable change in consultation between the park, local communities and specialist conservationists. Third we should implement an adaptive management plan – a plan capable of managing nature tourism into ecotourism; and finally plan a marketing strategy to attract the tourists who will enable the implementation of the plan.

As you know, marketing is much more than promotion, advertising and sales. It is about shaping, managing and meeting expectations, and about managing supply and demand. The Californian National Parks Service back in 1984 defined marketing as “the development of products / services which are consistent with client needs, pricing, promoting, and distributing these products / services effectively”. In this way marketing can take on a strong ecotourism dimension.

Marketing can be used to achieve institutional objectives working alongside park managers and conservationists.. Marketing can be used to set institutional objectives and priorities to define the appropriate markets, and used to analyse those target markets and to identify those market segments which are worth targeting. By developing appropriate marketing strategies and monitoring and evaluating each target, it is possible then to modify the strategy and tactics in order to achieve these ecotourism objectives.

Central to this process though, is the creation of a shared vision for a common resource. This can be achieved by developing partnerships between government and the private sector, partnerships capable of delivering forms of tourism that can contribute both to conservation and the livelihoods of local communities. In this way ecotourism can be achieved. Government can facilitate destination marketing, as it can provide the regulatory framework and zoning; it can provide tourism education and training; and it can ensure environmental care and conservation. It is the private sector, which develops the products and diversifies those tourism products in order to spread awareness of what is possible through the distribution chain back to the tour operators in the originating markets. The private sector can also support the education and training programmes necessary for developing ecotourism, and support the destination and product marketing and sales expertise that it has developed for other sectors of the tourism industry.

To recap then, managing nature tourism into ecotourism requires these five things:

- minimising negative impacts on local people, habitats and species
- maximising incomes and other benefits for local communities
- maximising revenues for reinvestment in conservation
- making the case for conservation
- quality experiences for sustainable businesses

One of the major contributions that the marketing process can make to the accomplishment of the ecotourism objectives is to assist in the process of demand and supply matching. If we review the experience of ecotourism development over the last ten years, it is clear that there have been too many product driven failures, too many good ideas which lacked an adequate marketing perspective and failed because insufficient numbers of tourists were attracted. The products were unsustainable.

It is also true that excessive demand can cause unacceptable change. Ecotourism needs to be market driven but supply led: ecotourism needs to be market driven within the limits of acceptable change identified by parks management in consultation with the industry. It is important for natural heritage destinations to find consumers in sufficient numbers, but it needs to be the right consumers. It needs to be the consumers who want things which the park can provide without damaging the natural heritage of the areas. There are often real supply side limits, and marketing needs to assist the process of community and conservation empowerment, which means being able to say 'no'. This then brings us to the concept of demarketing.

There are a number of ways in which parks and natural heritage areas can protect themselves from over-visiting:

- they can increase price
- they can create a queue to increase the opportunity cost
- they can limit promotion
- they can put additional resources into educating the visitors about how to minimise their impact
- they can promote alternatives and spread the visitor load
- they can stress environmental degradation
- and finally they can stress the problems of access and generally discourage people from visiting sites which are over-visited.

Swarbrooke usefully talks about the three P's of people, places and peak periods, and raises the issues of social equity, local economic impact and proportionality. All of these issues need to be taken into account in the marketing of national parks and other national heritage areas, whether as nature tourism or as ecotourism. They are a fundamental part of turning nature tourism into ecotourism.

As was argued in the DfID publication on 'Changing the Nature of Tourism', park managers can use tourism to increase direct income to parks through higher admission charges to help create employment for local communities. Marketing assists in both those processes. Marketing can also assist in encouraging consumers to contribute to this process by keeping consumers better informed about (1) who benefits from the money they spend, (2) the environmental impacts of their trip and (3) the importance of their behaviour within national parks or other protected areas.

As I said earlier, the size of the ecotourism market is unclear. The figures in my view, are highly unreliable. The Ecotourism Society of America says 7% of all international travel is ecotourism. The World Resources Institute in 1990, reported annual growth rates of 10 to 30 %, while Lew in his work on the Asia Pacific area talked about growth rates of between 10 and 25 %, Fillion talked about 40 to 60 % of tourists being nature tourists, and that 20 to 49 % of visits were wildlife related.

I think the best way for you to determine the size of your nature tourism market is to look at the visitor figures to your national parks, to make visitor surveys in national parks, and use a market segmentation approach to identify the number of ecotourists. However, I am not sure if that is necessarily helpful to you. More important is to focus on attracting the kinds of tourists who are appropriate to your national parks and other natural resources, and to look at the market in the traditional way. For example, it is identified for the US market that the predominant age groups for natural heritage and ecotourism travel are between 35 and 54. This is because they are higher spending, they are looking for a wilderness setting, and the opportunities for wildlife viewing and hiking and trekking. In addition, their motivation is to enjoy scenery and nature and new experiences and places.

The WTO is undertaking an ecotourism market survey, the results of which will be presented in Quebec in May 2002. The market survey is being conducted in some of the major originating markets namely Germany, Spain, France, the UK, the USA and Italy. This particular survey is identifying nature-based tourism as "all the forms of tourism in which the main motivation of the tourist is the observation and appreciation of nature". For the purposes of this study ecotourism is defined as containing educational and interpretation features, and as generally, but not exclusively, being organised by specialised tour operators for small groups. The results of this WTO research, when it is published early in 2002, should assist you greatly in identifying appropriate market segments. But much can be done now to identify special interest, wildlife and nature tour operators and to develop new marketing channels.

"What can marketing do to assist in achieving ecotourism?"

- It can create and reinforce the image of the destination both in terms of the individual natural heritage product and also ways in which it complements other visitor attractions, particularly those which benefit local communities.

- It can create specific communication opportunities as conservation efforts provide good media copy and also provide opportunities for news stories and promotions around particular development issues.
- Marketing skills can also create the necessary statistical information around which to make planning decisions about infrastructure, marketing and funding. The visitor intercepts could be very useful in determining the extent of demand for nature tourism in your country.

At Quebec in May of next year, the two major themes for discussion about ecotourism are the contribution to conservation; and the ways in which community involvement can bring benefits to local people and empower them in the planning and management of tourism to their area. Through empowerment, local people will gain skills and resources with which to manage, market and monitor ecotourism on their lands. The Quebec conference in May 2002 is discussing the marketing of ecotourism – the discussion here today about marketing ecotourism will be fed into that process.

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**ANNEX 1****WTO COMMISSION FOR SOUTH ASIA**

**Fortieth Meeting  
Bandos Island Resort, Maldives  
25 April 2001**

***FINAL AGENDA***

12. Adoption of the agenda
13. Communication of the Chairman of the Commission
14. Preliminary Remarks of the Secretary-General
15. Presentation of the statistical monograph for South Asia (tourism trends)
16. Application to the region of the general programme of work for 2000-2001
17. Implementation of the Global Code of Ethics and Constitution of the World Committee on Tourism Ethics
18. Information on the International Year of Ecotourism – 2002 celebrations and activities
19. Information on the 14<sup>th</sup> session of the WTO General Assembly, Republic of Korea and Japan, 22 September – 01 October 2001
20. Status of the Process of Ratifying Amendments to the Statutes of the Organization
21. Statement by China on its bid for hosting the 15<sup>th</sup> session of the WTO General Assembly in 2003
22. Place and date of the forty-second meeting of the Commission (the forty-first meeting of the Commission would be held within the framework of the 14<sup>th</sup> session of the WTO General Assembly which is scheduled to be held in Seoul, Republic of Korea and, Osaka, Japan in September-October 2001)

**ANNEX 2**

WTO COMMISSION FOR EAST ASIA AND THE PACIFIC

Thirty-sixth Meeting  
Bandos Island Resort, Maldives  
25 April 2001

*FINAL AGENDA*

1. Adoption of the agenda
2. Communication of the Chairman of the Commission
3. Preliminary Remarks of the Secretary-General
4. Presentation of the statistical monograph for East Asia and the Pacific (tourism trends)
5. Application to the region of the general programme of work for 2000-2001
6. Implementation of the Global Code of Ethics and Constitution of the World Committee on Tourism Ethics
7. Information on the International Year of Ecotourism – 2002 celebrations and activities
8. Information on the 14<sup>th</sup> session of the WTO General Assembly, Republic of Korea and Japan, 22 September – 01 October 2001
9. Status of the Process of Ratifying Amendments to the Statutes of the Organization
10. Statement by China on its bid for hosting the 15<sup>th</sup> session of the WTO General Assembly in 2003
11. Place and date of the thirty-eighth meeting of the Commission (the thirty-seventh meeting of the Commission would be held within the framework of the 14<sup>th</sup> session of the WTO General Assembly which is scheduled to be held in Seoul, Republic of Korea and, Osaka, Japan in September-October 2001)

