



# Guidelines for community-based ecotourism development

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# Introduction

Tourism is the world's largest industry. It accounts for more than 10% of total employment, 11% of global GDP, and total tourist trips are predicted to increase to 1.6 billion by 2020. As such, it has a major and increasing impact on both people and nature.

Effects can be negative as well as positive. Inappropriate tourism development and practice can degrade habitats and landscapes, deplete natural resources, and generate waste and pollution. In contrast, responsible tourism can help to generate awareness of and support for conservation and local culture, and create economic opportunities for countries and communities.

WWF is taking action to reduce negative impacts, and to encourage responsible tourism that enhances not only the quality of life, but also natural and cultural resources in destinations.

## The purpose of these guidelines

These guidelines identify some general principles, and highlight some practical considerations for community-based ecotourism. They seek to provide a reference point for field project staff, and to encourage a consistent approach. However, prevailing conditions and levels of knowledge about ecotourism vary considerably between countries and projects, and this will dictate how the guidelines are interpreted and used at a local level.

The guidelines are not intended to be a detailed 'how to' manual, but rather stand as a collection of issues and topics to be considered and addressed. In some countries, such as Brazil, WWF has been involved in the development of specific policies and good practice manuals for ecotourism which relate to local circumstances and go into more detail.

Although the guidelines are primarily intended for use within WWF, they may also be of value to partner organisations and other agencies, and demonstrate to a wider audience, WWF's interest and approach in this field. They are based on experience obtained from WWF projects, and from published literature and case studies. A list of helpful reference sources is also included. Throughout the text, information on individual WWF ecotourism projects is provided in boxes. Though these are only referenced where their content is relevant to a specific point, the information contained in them complements the guidelines as a whole.

In total, twelve guidelines are presented. These have been grouped into four sections that relate to different stages of community-based ecotourism initiatives. These are:

- A. **Considering** whether ecotourism is an appropriate option;
- B. **Planning** ecotourism with communities and other stakeholders;
- C. **Developing** viable community-based ecotourism projects;
- D. **Strengthening** benefits to the community and the environment.

Although this is a broadly sequential ordering, all the issues raised by the guidelines should be considered together to obtain a comprehensive picture.

E. MENDEL/WWF-UK



Giant Panda in its natural habitat, Sichuan Province, China.



Tourists at the Marine National Park, Fernando de Noronha, Brazil.

## What is community-based ecotourism?

Ecotourism is a frequently debated term. Sometimes it is used simply to identify a form of tourism where the motivation of visitors, and the sales pitch to them, centres on the observation of nature. Increasingly, this general sector of the market is called 'nature tourism'. True 'ecotourism', however, requires a proactive approach that seeks to mitigate the negative and enhance the positive impacts of nature tourism. The International Ecotourism Society defines ecotourism as responsible travel to natural areas that conserves the environment and sustains the well-being of local people.

This definition not only implies that there should be a recognition of, and positive support for, the conservation of natural resources, both by suppliers and consumers, but also that there is a necessary social dimension to ecotourism.

The term 'community-based ecotourism' takes this social dimension a stage further. This is a form of ecotourism where the local community has substantial control over, and involvement in, its development and management, and a major proportion of the benefits remain within the community.

How the community is defined will depend on the social and institutional structures in the area concerned, but the definition implies some kind of collective responsibility and approval by representative bodies. In many places, particularly those inhabited by indigenous peoples, there are collective rights over lands and resources. Community-based ecotourism should therefore foster sustainable use and collective responsibility. However, it must also embrace individual initiatives within the community. (These issues are covered further under Guideline 4.)

Some further general characteristics of ecotourism have been identified by UNEP and the World Tourism Organisation as:

- involving appreciation not only of nature, but also of indigenous cultures prevailing in natural areas, as part of the visitor experience;
- containing education and interpretation as part of the tourist offer;
- generally, but not exclusively, organised for small groups by small, specialised and locally owned businesses (while recognising that foreign operators also market and operate ecotourism);
- minimising negative impacts on the natural and socio-cultural environment;
- supporting the protection of natural areas by generating economic benefits for the managers of natural areas;
- providing alternative income and employment for local communities; and
- increasing local and visitor awareness of conservation.

**While definitions can be useful, what is more important is the appropriateness and quality of action, not what it is called.**

The processes involved in ecotourism include all aspects of planning, developing, marketing and managing resources and facilities for this form of tourism. Visitor provision includes access to natural areas and cultural heritage, guiding and interpretative services, accommodation, catering, sales of produce and handicrafts, and transport.

Appropriate recreational and special interest activities, such as trail walking, photography and participatory conservation programmes, may also be part of ecotourism. In some locations, hunting and fishing may be included as appropriate activities, provided that they are carefully researched and controlled within a management plan that supports conservation. This kind of sustainable use relies on local knowledge, provides significant local income, and encourages communities to place a high value on wildlife, resulting in net conservation benefits.

## WWF's position

WWF's Tourism Position Statement (WWF International, 2001) states that WWF and the tourism industry should share a common goal: the long-term preservation of the natural environment. It presents a vision that tourism development and practice should:

- be part of a wider sustainable development strategy;
- be compatible with effective conservation of natural ecosystems; and
- involve local people and cultures, ensuring that they have an equitable share in its benefits.

From the outset, this vision recognises developmental, environmental and social aims for tourism. WWF believes that tourism should be environmentally sustainable, economically viable and socially equitable.

Although representing a small (albeit growing) proportion of global tourism, ecotourism can demonstrate the positive interrelationship between these aims, and bring useful benefits to many parts of the natural world, including protected areas.

As a conservation organisation, WWF's interest centres on how ecotourism can best assist its mission to conserve nature and ecological processes. WWF believes that engaging and facilitating the activities of local communities is an essential part of this, hence a focus on community-based ecotourism. At the same time, through this focus, WWF supports the general principles of social equity, cultural integrity and poverty reducing policies that guide many development programmes.

Ecotourism is receiving considerable attention from international and national conservation, development and tourism organisations, such as UNEP and the World Tourism Organisation. At the same time, there has been growing international concern that ecotourism should be genuinely community-based. There are many reported incidents where forms of 'ecotourism', which are not sufficiently community focused, are having a negative impact on the environment, and where indigenous communities are not receiving sufficient benefit. Moreover, many small scale community-based ecotourism initiatives have been set up which have failed owing to a lack of market assessment, organisation, quality and promotion.

Ecotourism is no panacea. It is important not to exaggerate the opportunities and benefits it can bring. Careful planning and improved knowledge is needed. Ecotourism and responsible tourism should be part of wider sustainable development strategies, whether at a community or an international level.

This is the challenge for WWF and all parties involved in ecotourism. These guidelines attempt to assist field project staff to make informed decisions in meeting this challenge.



Baima 'Homestay' owners, Yazhe Village, Pingwu County, China. After a recent logging ban it is hoped that tourism can provide an alternative income for Baima people. Tourists on the way to Panda reserves can stay in these homestays.

## PART A Considering whether ecotourism is an appropriate option

The first three guidelines focus on the conditions and relationships within an area that should be considered before embarking on a community-based ecotourism initiative.

### 1 Considering the potential conservation gain

There needs to be a clear understanding of the relationship between local communities and conservation and how this might be improved through their involvement in ecotourism.

In most ecotourism projects, especially those supported by WWF, a fundamental objective is improved conservation of landscapes and biodiversity. Community-based ecotourism should be seen and evaluated as just one tool in achieving this. Its role may be to:

- provide a more sustainable form of livelihood for local communities;
- encourage communities themselves to be more directly involved in conservation; and
- generate more goodwill towards, and local benefit from, conservation measures such as protected areas.

There needs to be clear initial understanding of the relationship between local communities and the use of natural resources in the area concerned. The following are important issues to consider.

- 1 What actions are currently being taken, and by whom, which are supporting or damaging the environment? A challenge for community-based ecotourism is often one of being seen to benefit sufficient numbers of people in the community to make a difference. This has implications for structures for community involvement, considered under Guideline 4.
- 2 What type and level of incentive might be needed to change attitudes and actions in order to achieve worthwhile conservation benefits? Could ecotourism deliver this? How does it compare with other development options which may have worse environmental impacts?
- 3 What additional problems for conservation might be brought by ecotourism, to set against possible gains? This might include not only development and visitor pressure but also an over-emphasis on certain species compared with biodiversity as a whole.
- 4 Could alternative sustainable livelihood options achieve the same or better results with less effort or disruption? This requires an integrated approach to ecotourism within the context of sustainable development, as discussed further under Guideline 3.

The capacity of ecotourism to support a positive attitude towards conservation is not only achieved in proportion to direct economic benefits delivered. With many ecotourism initiatives it has been found that simply raising awareness that there is some realisable value in wildlife and attractive landscapes has been sufficient to make a considerable difference, both within communities and also politically at a regional or national level. The WWF initiative in Sabah (see adjacent), for example, has sought to influence the state Forestry Department as well as the local community, and in Brazil (see p.9) the Silves project has demonstrated an alternative to predatory fishing.

Many local communities have a strong tradition of respect for wildlife and natural environments that needs to be fostered and not undermined by too much emphasis on economic value. It is important to get the balance right.

Consideration of these issues at the outset should influence not only a decision about whether to proceed with the development of ecotourism but should also provide a basis for the strategy adopted (see Guideline 5). Thought should be given to some simple, achievable indicators and targets for conservation gain.

## Capacity building for ecotourism in Sabah, Malaysia

In Sabah, WWF-Malaysia, with assistance from WWF-Norway and the Norwegian government, has been working with the local community in village of Batu Putih, on the lower Kinabatangan river, on a model ecologically sustainable community tourism project (MESCOT).

This area has seen considerable loss of natural habitat through the expansion of oil palm plantations and logging. MESCOT aims to create an alternative sustainable source of income. The villagers themselves recognised the potential for ecotourism and approached WWF for guidance.

The model has sought to achieve a broad involvement of villagers in ecotourism, so spreading benefits and awareness of conservation issues. An initial period of close consultation led to identification within the community of the skills they would need to develop a successful project. These skills, which include hospitality, finance, marketing, computer skills and basic English, have been developed over time. Careful research was also undertaken on natural and cultural resources which could be included in the offer. An important lesson learnt has been the time required for capacity building to create a comprehensive and good quality product.

Structures for community participation have been important. A core planning group has shown extreme commitment over a long period. Outreach has been expanded through separate associations to cover homestays, boat services and village handicrafts. Participants have included young people and a good balance of men and women. A central presence for the project, in the form of a workshop office, was established at an early stage.

The first element of the tourist offer to be established was homestay accommodation. Over 800 bednights were achieved in the first six months, which is a small but significant beginning, with a high proportion of income retained in the community. Care has been taken to record feedback from visitors and tour operators and to build on this.

The time spent on internal capacity building is considered to be important in terms of the ongoing viability of the project after the withdrawal of WWF assistance. Marketing will remain a challenge. Forging external links with tour operators and others has been important here. Stimulated by MESCOT, a State Ministry of Tourism Homestay Development Unit has become more active in the development and promotion of the product.

MESCOT has led to heightened concern about the dwindling forest resources in the area. The development of interpretative trails by the local community has raised their interest and awareness of the richness of the biodiversity. Participation in tourism has encouraged clearance of rubbish, local landscape improvements and a forest rehabilitation programme, sometimes involving visitors themselves.



Village boat service for tourists in Sabah, Malaysia.

## 2 Checking the preconditions for ecotourism

Before pursuing community-based ecotourism the suitability of the local area should be checked and fundamental preconditions met.

It is important to avoid spending time pursuing ecotourism and raising expectations in circumstances which are highly likely to lead to failure. An initial feasibility assessment should be made before instigating a community-based strategy.

Some preconditions relate to the situation at a national level, others to conditions in the local area. The main aspects to check are as follows.

Reasonable conditions for undertaking tourism business are:

- an economic and political framework which does not prevent effective trading and security of investment;
- national legislation which does not obstruct tourism income being earned by and retained within local communities;
- a sufficient level of ownership rights within the local community (see Guideline 4);
- high levels of safety and security for visitors (both in terms of image of the country/region and in reality);
- relatively low health risks and access to basic medical services and a clean water supply; and
- practicable means of physical access and telecommunication to the area.

Basic preconditions for community-based ecotourism:

- landscapes or flora/fauna which have inherent attractiveness or degree of interest to appeal either to specialists or more general visitors;
- ecosystems that are at least able to absorb a managed level of visitation without damage;
- a local community that is aware of the potential opportunities, risks and changes involved, and is interested in receiving visitors;
- existing or potential structures for effective community decision-making (see Guideline 4);
- no obvious threats to indigenous culture and traditions; and
- an initial market assessment suggesting a potential demand and an effective means of accessing it, and that the area is not over supplied with ecotourism offers (see Guideline 7).

Some preconditions may be more relevant than others, depending on the local circumstances, and these may change over time. For example, in Namibia (see adjacent) cross-border conflict in Caprivi has seriously affected market demand in that region but action is being taken to enable promising ecotourism initiatives there to resume when the situation stabilises.

If the preconditions are met, this does not necessarily mean that ecotourism will be successful, only that it is worth proceeding to the next stage of consultation and assessment.

Checking these preconditions will require informed judgement. The concept of preconditions and fast pre-feasibility checks is increasingly applied among donor agencies in the tourism field. A useful guide to this process, giving far more detail than can be attempted here, has been produced by GTZ (1999).



## Community Conservancies in Namibia

In Namibia, WWF has been leading a consortium of national and international organisations in the implementation of a project (LIFE) which supports community-based natural resource management. The generation of funds through tourism to support rural development and conservation is a major component of this project.

Before independence, communities had virtually no rights to manage and benefit from wildlife, yet it competed significantly with their livelihood. Cases such as one farmer losing 97 sheep and goats to lions in one night were reported. Illegal hunting escalated, but several communities opposed this and game guards were appointed by community leaders, with assistance from NGOs. Post independence, this process was strengthened by legislation from the Ministry of Environment and Tourism which gave residents on communal land the right and responsibility both to manage and to benefit from wildlife and tourism. As a result, Communal Area Conservancies have been established which have to meet stringent criteria. By 2001, 12 had been registered and 25 were in the process of becoming so. All have some involvement in tourism.

The conservancies comprise self-defined groups of people who want to work together and make decisions and equitable deals on their land on their own terms. They are guided by their own constitutions and management plans, which also cover equitable distribution of income to members. Government retains overall responsibility for ensuring sustainability and that conservancies work within these bounds.

Some conservancies run their own tourism facilities, such as camping grounds. However, the greatest financial benefit to them has come from the ability, enabled by the legislation, to enter into joint ventures with the private sector, for example on the development of lodges, tour programmes and controlled hunting. In the Torra Conservancy, such ventures pay all the conservancy running costs (about \$15,000 p.a.) which include management of wildlife resources.

Considerable assistance and guidance has been given to conservancies, for example, in financial management and negotiating favourable contracts. Particular benefit has been obtained from organising exchange visits, to gain experience from ecotourism ventures elsewhere. The Namibia Community-based Tourism Association (NACOBTA) provides a link between communities and with outside agencies and operators, and supplies assistance to them through training, business advice, marketing, advocacy, and funding. A central booking and information system is being established.

Conservancy Tourism Option Plans ensure tourism is market driven, of good quality and respects the environment and cultural heritage. These are being reflected in a Tourism Policy for Namibia addressing responsible tourism.

There are encouraging signs that this integrated management of tourism and conservation is benefiting biodiversity. Wildlife numbers, including black rhino and elephant, have increased significantly since the community approach has been adopted.

E.PARKER, WWF-UK



Vitalia and Marcus – Community Game Guards of the Torra Conservancy, tracking rhino with tourists.

E.PARKER, WWF-UK



Damaraland Camp – an ecotourist lodge in the Torra Conservancy, Namibia.

J.NEWBY, WWF-UK



Himba Girl, Namibia.

### 3 Adopting an integrated approach

Rather than being pursued in isolation, community-based ecotourism should occur in the context of other options and programmes for conservation, sustainable development and responsible tourism.

The small scale of most community-based ecotourism initiatives means that their impact, both on nature conservation and on income and employment for the community as a whole, is limited. They can be more influential and successful if they are integrated within other sustainable development initiatives at a regional and local level.

Ecotourism can be integrated with other sectors of the rural economy, creating mutually supportive linkages and reducing financial leakage away from the area. It can also be coordinated with agriculture, in terms of the use of time and resources and in providing markets for local produce.

In principle, multiple sector activity within local communities should be encouraged. Ecotourism markets are small, seasonal and sensitive to external influences such as political changes or economic instability in the host or generating country. On the other hand, ecotourism can shield against threats to other sectors.

As well as horizontal integration within the community, the success of local ecotourism initiatives may depend on vertical integration with national level initiatives to support and promote responsible tourism. In addition to making linkages with what may already exist, efforts should be made to influence national policies in favour of ecotourism, including coordination between tourism and environmental ministries and policies. National level support is needed in terms of linking conservation and tourism activities and responsibilities, appropriate legislation and assistance towards small enterprises and community initiatives, and national and international promotion. In Brazil, for example, WWF has been seeking to influence national policy as well as local capacity (see adjacent).

At an early stage in work on ecotourism it is important to be aware of the work of other national and international agencies in this field and to seek mutually beneficial coordination.

## Developing tools for community-based ecotourism in Brazil

Brazil is witnessing an explosion of interest in and international funding for ecotourism. Although this may promote conservation in a country where environmental awareness is still very low, it also poses a threat of uncontrolled tourism with serious impact on natural habitats. WWF-Brazil has therefore instigated a programme of capacity building and awareness raising at a local and national level, to promote a form of ecotourism that is community-based and well regulated.

Components of the programme include:

- proposing and testing a training methodology for community-based ecotourism, based on eight pilot projects which are diversified in terms of ecoregion and type of ecotourism;
- producing a training manual and preparing trainers to multiply the methodology in different regions of the country; and
- working towards the development of a certification system for ecotourism at a national level.

Training has been aimed at the conservation and business sectors. A modular approach has been adopted, involving workshops every six months and, in the time between them, direct technical assistance to projects in the field. The workshops are participatory and the practical experience of trainees is used to improve the methodology. Lessons learnt include the need for technical staff and not just a manual to help grassroots organisations, and the need for sufficient time (two years) for consultation and research when initiating ecotourism with a community.

As well as developing certification, WWF recognises the need to influence government at federal and state levels in Brazil to disseminate sound principles of ecotourism.

A key feature of the approach in Brazil has been to disseminate practical experience. With WWF support, one of the pilot projects is already well established, being one of the first community-based ecotourism initiatives in the country. It is located in Silves, a lakeland area 300km from Manaus. The project was motivated by the concern within the local community to protect its traditional fishing resources from predatory commercial fishing. The Silves Association for Environmental and Cultural Preservation was established to manage the lakes and promote conservation. An ecolodge was developed and opened in 1996, run by local people, with 20% of net profits being put towards the management of the reserve.



## PART B Planning ecotourism with communities and other stakeholders

The next three guidelines consider the kinds of structures and processes that need to be in place within a community to enable ecotourism to work well, and for the benefit of local people and the environment. These are not sequential steps and should be considered together.

### 4 Finding the best way to involve the community

Effective structures are required to enable the community to influence, manage and benefit from ecotourism development and practice.

Involving the community is a critically important and complex subject for successful community-based ecotourism. Opportunities and solutions will vary considerably in different areas and between communities. An important principle is to seek to work with existing social and community structures, though these can create challenges as well as opportunities. It can also help to identify potential leaders and people with drive. The main objective should be to achieve broad and equitable benefits throughout the community. Issues of gender may also be important and ecotourism can provide good opportunities for women.

Community-based ecotourism requires an understanding, and where possible a strengthening, of the legal rights and responsibilities of the community over land, resources and development. This should apply in particular to the tenure of community-held lands and to rights over tourism, conservation and other uses on these lands, enabling the community to influence activity and earn income from tourism. It should also apply to participation in land use planning and development control over private property.

It is important to remember that ecotourism is a business. As well as community-led initiatives, private enterprise and investment should be encouraged where appropriate, within a structure which enables the community to benefit, and have decision-making power over the level and nature of tourism in its area.

There are various ways in which the community can relate to private enterprise. The degree of community involvement and benefit can develop over time. For example, there are some ecotourism initiatives in the Amazon where lodges, that have been built with private investment, offer a concession to the community, an agreement to hand the business over to them after a specified period, and provision for an employment and training programme for local people.



Options for community involvement with enterprise include the following.

- 1 Private tourism businesses employing local people. Although a useful form of employment, it is very important to guard against poor wages and conditions and to ensure that training is offered to local people, including in management.
- 2 Local individuals selling produce and handicraft to visitors directly or through tourism businesses. This has often proved to be a good way of spreading benefits within a community.
- 3 Private tourism businesses (internally or externally owned) being granted a concession to operate by the community, in return for a fee and a share of revenue. There are many examples where this has worked well.
- 4 Individuals, with links to the broader community, running their own small tourism businesses. Success can vary and lack of skill and tourism knowledge has often proved a weakness.
- 5 Communally owned and run enterprises. Sometimes these suffer from lack of organisation and incentive, but this can be overcome with time.

Action can be taken to strengthen relationships between the community and private partners. This includes:

- advice and training for communities on their rights and negotiating practices;
- ensuring transparent, simple and consistently applied deals give sufficient incentive to private enterprises, recognise commercial realities, and minimise administrative burdens and uncertainty; and
- establishing committees involving local people, private operators and possibly government agencies and NGOs, to ensure understanding and smooth operation of agreements, and to help local communication.

The method of distribution of income earned by communities to individual members needs careful attention. This can sometimes be covered in legislation relating to communal rights. There are examples where communally-earned income from ecotourism has been directly divided between households or placed in community development funds or separate trusts for use on community projects such as health or education programmes.

Developing effective legislation to empower local communities and helping them strengthen their relationship with private enterprise, has been a major feature of WWF's work in support of ecotourism in Namibia (see p.7).

More detailed consideration of types of product and relationships with tour operators is given in Guidelines 7 and 8, and of training and other support in Guideline 10.

Above left: Community development advisors at Purus Conservancy, Namibia.

Above: Local Baima women in Pingwu County, China, have formed groups to make souvenirs for tourists. Here a young seamstress is making a traditional outfit worn by Baima women.

## 5 Working together on an agreed strategy

Close consultation with the community and other stakeholders should lead to an agreed vision and strategy for ecotourism, which has environmental, social and economic aims and attainable objectives.

All community-based ecotourism initiatives should be centred on a clear strategy agreed and understood by the local community and all other stakeholders with an interest in tourism and conservation. The strategy should enable a comprehensive picture to be formed of needs and opportunities in an area, so that a range of complementary actions can be taken. One of the main benefits from working on a strategy is to provide the community with the tools and knowledge necessary for decision making.

The strategy should be community-led and community-focused. However, it is essential that people with experience and knowledge of tourism and conservation are involved in its preparation.

People involved should include representatives of the local community, knowledgeable tourism operators, local entrepreneurs, relevant NGOs, conservation agencies including protected area managers, and local authorities. Links should be made as appropriate to the regional and national government level.

Inputs to the strategy should include:

- careful consultation within the community covering attitudes and awareness of tourism, possible opportunities and pitfalls, existing experience, concerns and level of interest;
- a comprehensive market assessment (see Guideline 7); and
- an assessment of the natural and cultural heritage, including opportunities presented for ecotourism and sensitivities and constraints (see Guideline 6).

It is also helpful to set out a clear statement of strengths, weaknesses, opportunities and threats.

The output of the strategy process should be an agreed vision for ecotourism over a specified period, together with an identification of aims, objectives and strategic priorities, an action plan, and a way of monitoring results. The action plan should identify practical initiatives, including a timescale and an indication of responsibility and resources required. It is very important, in order to avoid frustration, not to be too ambitious in terms of targets and timing.

The actions identified may include specific development or marketing projects. In some locations at least as much, or more, attention may need to be paid to action to manage tourism, including policies on development control and the handling of existing visitors. In many places, the relationship between the local community and a protected area may be an important element of the strategy, including agreed action on the level of any park admission fees and their subsequent use for conservation or within the community, which is an important issue for ecotourism.

The WWF PAN Parks initiative advocates a strategic approach involving all stakeholders (see adjacent).

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## Principles and criteria for parks

The WWF PAN Parks project is an initiative to raise awareness and support for Europe's protected areas through tourism. It provides a framework for a comprehensive, strategic approach. A set of principles and criteria has been developed as a basis for recognition as a PAN park. These are concerned with: the inherent quality of the natural heritage; natural resource management; visitor management and the quality of the visitor experience; and the existence a responsible tourism development strategy. The involvement of the local community and tourism enterprises, within and around the park, both in drawing up the strategy and in working with the park authority on implementation, is a fundamental requirement. Lessons learnt from helping individual parks work with local communities towards meeting the criteria emphasise the need for clarity and transparency in communication.

## 6 Ensuring environmental and cultural integrity

The level and type of tourism planned and developed must be appropriate for the area's natural resources and cultural heritage and consistent with the community's wishes and expectations.

A fundamental characteristic of community-based ecotourism is that the quality of the natural resources and cultural heritage of an area should not be damaged and, if possible, should be enhanced by tourism. Adverse impact on the natural environment should be minimised and the culture of indigenous communities should not be compromised. Ecotourism should encourage people to value their own cultural heritage. However, culture is not static and communities may wish to see change.

A practical approach is to identify the limits of acceptable change that could be brought by tourism and then to consider what level of tourism activity would generate this change.

It is very important that communities decide on the level of tourism they wish to see. Consultation during the process of drawing up an ecotourism strategy should reveal the kinds of changes that might be viewed positively or negatively by local people. They can then be helped to consider what this might mean in terms of the numbers and types of visitor to look for, when they should come and their length of stay. For example, in one community in the Amazon it was felt that more than eight visitors per month would be disruptive. Two important principles are:

- products developed should be based on the community's traditional knowledge, values and skills; and
- the community should decide which aspects of their cultural traditions they wish to share with visitors.

A similar approach can be adopted with respect to determining limits of acceptable change and of acceptable use as far as the natural environment is concerned. Here scientific knowledge may be required to enable a judgement to be made, taking account of the conditions of different sites at various times of the year. Often it is found that the quantity of visitors at any one time is a more critical factor than the overall level of visitation.

Useful tools in the management of visitors include the following.

- 1 Agreements with tour operators over the number and size of groups to bring.
- 2 Codes of conducts for visitors (see Guideline 11).
- 3 Application of systematic environmental, social and cultural impact assessment on all proposed development. This should also be concerned with details of what is offered to visitors, such as the choice of products sold to them (for example avoiding artefacts with a sacred significance) or the use of inappropriate sources of fuel.
- 4 Zoning both within and outside protected areas. This should cover both the siting of facilities and the degree of access allowed. In some locations, village communities have identified specific zones for ecotourism, both with respect to facility provision and wildlife conservation measures. A common approach is to locate tourist lodges some distance away from community villages.

The planning process should ensure that monitoring measures are in place so that it is possible to tell when limits of acceptable change have been reached (see Guideline 12). Furthermore, strategies for making the necessary adjustments to overcome any problems identified will need to be established.

There are many examples in the Mediterranean (see adjacent) where environmental degradation has occurred but also places where sound planning control and community involvement have prevented over-exploitation.





## An alternative way for the Mediterranean

WWF is working in the Mediterranean to draw attention to the environmental damage caused by many years of intensive tourism development. It is also seeking to support responsible tourism alternatives.

Contrasting examples can be found in Turkey. Belek is an area of ecological importance which has been transformed into a mass tourism destination, plagued by bad planning, over capacity, growing pollution and lack of community involvement. Neighbouring Cirali, by contrast, is a small coastal community where WWF-Turkey, working with local stakeholders, has been successful in securing the enforcement of existing laws that limit the type and quantity of coastal development. A new management plan for the area encourages limited and low impact development. A local association has been created and during the high summer season, locals, tourists and volunteers monitor the many turtle nesting sites in the surrounding beaches. Cirali demonstrates how relevant stakeholders can come together to create a new vision for environmentally responsible tourism.

WWF-Greece has a policy to support community-based ecotourism. Its conservation project in the Dadia forest reserve is a leading example. Involvement of the local community and providing income through tourism has generated support for the reserve. Tourism facilities in the form of a hostel and information centre were passed on to a community-based enterprise, local guides were recruited, and a link made with the women's agrotourism cooperative. However, in this area, equal importance is given to visitor management and concerns over carrying capacity, with a clear zoning system and management plan, and involvement of conservationists in all aspects of ecotourism development.



Above left: Aerial view of a crowded and resource intensive beach, and a crowded ferry boat, Liguria, Italy.

Above: Dadia Forest, Greece.

## PART C Developing viable community-based ecotourism projects

Far too many community-based ecotourism projects have proved not be viable and have failed. The following two guidelines seek to highlight some of the potential pitfalls.

### 7 Ensuring market realism and effective promotion

Ecotourism projects must be based on an understanding of market demand and consumer expectations and how to place the product offer effectively in the market place.

The main reason why many community-based ecotourism projects have failed is that they have not attracted a sufficient number of visitors. Often, assumptions made about the marketability of a particular location or experience have been unrealistic and not based on research. As a result, promotional activity has been misdirected. A problem has been the lack of tourism knowledge not only among local communities themselves but also among advisors and supporting agencies.

A thorough market assessment should be undertaken for the destination as a whole and for the individual ecotourism project. This should consider the following.

- 1 The patterns, profiles and interests of existing visitors to the area, based on visitor surveys. In principle, it is far easier to get more out of existing visitors than to attract new ones.
- 2 The location of the area with respect to established tourist circuits in the country. Proximity to these and opportunities for deflection make a considerable difference.
- 3 The level, nature and performance of existing ecotourism products which are competitors but also potential collaborators.
- 4 The activities of inbound tour operators and ground handling agents in the country and coverage by international tour operators.
- 5 Existing information and promotional mechanisms in the area.

The unique or particular qualities that an area might offer in comparison to other existing products should be identified. From knowledge of the market, an initial profile of target visitors should be drawn up. Attention needs to be paid to the different opportunities and requirements of experienced ecotourists, more general mid-market visitors who enjoy seeing nature and local culture, backpackers, and educational markets. In some areas, the domestic visitor market may offer more potential than international travellers.

The level and nature of marketing should also take into account the environmental and cultural integrity of the area and implications for visitor numbers (see Guideline 6).

A marketing plan should be prepared for all projects, which relates market research to a promotional programme.

A vital ingredient for many projects is to form a close working relationship with one or more specialist tour operators. These should be selected carefully to ensure they are well established and are delivering reliable business. Contact, directly or through handling agents, should be made in the early stages, before the development of the offer has occurred, so that the operator can advise on what can be sold and adjustments, if necessary, can be made. Setting up a fully saleable programme can take time. An initial step may be to test market the programme with one or two groups. This also has the advantage of acquainting the community with the experience of handling guests.

WWF-UK has been building relationships between field projects and a specialist tour operator to develop tours to those projects, and the experience has been a valuable learning experience for all parties (see adjacent). Incoming tour operators play a strong part in the marketing of the Silves project in Brazil (see p.9).

It is not sufficient for community-based ecotourism projects to rely simply on tour operators to supply visitors. For example, although pre-arranged groups may be easier to handle, backpackers or independent travellers may

often be better suited to the product in question, but tend not to purchase inclusive packages through operators in their home country. The marketing plan, therefore, will also need to address issues such as local information delivery, internet promotion, media and guidebook coverage, linkages with other projects, and promotion through national tourism campaigns.

J WOODHEAD, WWF-UK



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### Joint action with a tour operator

WWF-UK has been keen to ensure that ecotourism projects it supports are well positioned in terms of the international market from an early stage. They have signed a contract with the specialist operator Discovery Initiatives to develop and promote tours to field projects in China and Namibia.

Care was taken in the selection of the operator. Discovery Initiatives is well established. Its mission statement covers support for conservation and fair trading with the communities it visits. It charges a significant premium to each visitor in return for access to expert field staff who give a comprehensive insight into the conservation programme. The tours are each limited to a maximum of 12 people.

It was found that considerable time is required to set up such arrangements. WWF started negotiations with DI in early 1999. An agreement was signed in 2000 for launch in the 2001 brochure, and DI expects that two years will be needed for a good level of business to be established. It is important for each party to be clear about what is expected of it in terms of product delivery, provision of experts' time and promotional activity. It is also crucial that what is marketed to tourists is actually available on location.

Further external contacts can help to strengthen the programme. WWF-UK is working with the Nature and Ecotourism Accreditation Programme (NEAP), an ecotourism certification programme based in Australia, to monitor and (it is hoped) certify the tours. The first tour to China presented many challenges for participants and staff alike: a considerable amount of capacity building, specifically training for guiding and interpretation, is required if future tours are to be successful.

One component of promotional activity is provided through linkages between Discovery Initiatives and appropriate websites. For example, [www.responsibletravel.com](http://www.responsibletravel.com) gives exposure to programmes, such as those run by Discovery Initiatives, that meet responsible tourism criteria. This website publishes feedback from clients as a transparent method of evaluating and promoting the products.

Above left: Ecolodge, Wanglang reserve, Pingwu County, China.

Above: Resting for lunch in Zhugencha valley, Wanglang Reserve, China.

## 8 Putting forward quality products

All community-based ecotourism products should offer a high quality of visitor experience and be subject to a rigorous business plan.

A second common reason for failure concerns the quality of execution of the project, both in terms of what is offered and proper business planning.

Quality is about delivering an experience that meets or exceeds visitor expectations. These, in turn, will vary according to the type of visitor coming, which reinforces the need for effective market research. Although luxury and sophistication may not be sought, an important section of the ecotourism market, often handled by tour operators, is looking for a rich wildlife experience, comfortable and reliable accommodation and efficient business handling. It can sometimes be difficult for communities to deliver this. On the other hand, the special sense of discovery, welcome and privilege which a community visit can provide is something valued by many visitors.

There are three key requirements.

- 1 Attention to detail, ensuring that what is offered, at whatever level, is well delivered.
- 2 Quality and accuracy of promotion and information, giving reassurance but also ensuring that expectations match reality. All visitors in this market are increasingly looking for a high level of information provision.
- 3 Authenticity and ambience. Ecotourists respond to genuine and traditional values and experiences and they do not want this to be manufactured for them.

Some issues relate to specific components of the offer.

- 1 The quality of the wildlife and landscapes, in terms of relative uniqueness, attractiveness and abundance. If this is high, a project has a greater chance of success. Without it, the quality of the associated facilities and derived experiences becomes more important.
- 2 The mix of natural and cultural experiences. Many visitors are looking for a combination.
- 3 Accommodation: cleanliness is of primary importance, but issues such as ablution and toilet arrangements, general functionality, privacy and overall design and ambience can be significant. Different requirements in terms of investment and sophistication exist between lodges and camping grounds.
- 4 Guiding and interpretation: a fine balance between local colour and story telling, and scientific knowledge and accuracy is often sought. This may require involvement of different people, including an opportunity for local people to be trained as guides and interpreters.
- 5 Local produce and handicrafts: although visitors may look for authenticity, it is very important to avoid the depletion of cultural artefacts and other resources. Quality products can be made and sold which reflect an area's traditions and creativity without devaluing them.
- 6 General experience of village life, including folklore: this can prove an experience highly valued by visitors. It can provide an incentive to keep local culture and pass on local knowledge.
- 7 Participation: some visitors value the opportunity to participate in activities. Conservation participation programmes are a specific sub-sector of ecotourism and can be community-based.

The WWF-backed projects in Sabah (see p.5) and the Carpathians (see adjacent) both contain specific tourism components developed with attention to detail.

Ways of improving the delivery of quality include the following.

- Skills training (covered under Guideline 10).
- Working with private sector operators – a model involving private sector operators providing some components (especially marketing and handling arrangements, and often lodges) with the community providing others, has often proved successful (see p.17).
- Linkages between projects, with different locations providing different elements, according to availability and aptitude. This can also lead to savings on certain costs, including marketing. Sometimes communities can work in conjunction with other organisations such as park authorities.

Irrespective of the type of product on offer, each component should be the subject of a carefully prepared business plan. This should develop the market assessment and marketing approach, cover practical details of delivery, address personnel and responsibilities, and include a full costing and risk assessment. Environmental impact assessments should also be undertaken as referred to under Guideline 6.



Walking in the forest, Carpathian Mountains, Romania.

### Creating integrated tourist offers in Romania

WWF-UK and WWF-Switzerland have joined a number of environmental organisations in supporting the Carpathian Large Carnivore Project in Romania. This is an integrated management project combining research, management, rural development and education. The project has developed a tourism programme in order to demonstrate to local communities that wolves, bears and lynx have an economic value.

Considerable attention to detail has been applied to the development of the programme, including:

- initial hosting of 'pilot' tour groups to test the offer and community response;
- focusing on one community, Zarnesti (27,000 population), which has a fragile economy and has been very supportive of the project;
- working with individuals in the community to develop tourism services cautiously, with expansion based on successes achieved;
- training local people as guides, using specialists with certification by the national tourist agency;
- combining carnivore conservation themes with mountain hiking and visits to major heritage sites;
- establishment of a Zarnesti Ecotourism Association to take the project forward;
- building contacts with a range of specialist international tour operators; and
- seeking funding for a carnivore visitor centre in Zarnesti to secure economic benefit from casual visitors and the domestic market as well as international groups.

The programme attracted 40 groups in 2000 and interest from operators has risen steadily.



Barsa Valley, with the backdrop of the magnificent Piatra Craiului mountain, Zarnesti, Romania.

## PART D Strengthening benefits to the community and the environment

The final four guidelines address measures that can be taken to improve the performance of community-based ecotourism initiatives, in terms of the delivery of social, economic and environmental benefits.

### 9 Managing impacts

Specific steps should be taken within the community to minimise the environmental impact and maximise the local benefit of ecotourism.

Attention to detail in a number of aspects of both the development and operation of ecotourism projects can significantly improve their delivery.

The design of all new buildings should be carefully considered. Traditional styles and locally available materials should be used. In some communities, useful income has been earned through, for example, the supply of thatching. Often it can be better to use existing buildings rather than engaging in new development, and this should be considered first.

Action should be taken, both at the development stage and in operating facilities, to reduce consumption of water and energy, reduce waste and avoid pollution. Low energy technologies appropriate to the location should be applied where possible. Recycling should be encouraged and all forms of waste disposal should be carefully managed, with a principle of taking as much waste away from the site as possible. Use of environmentally friendly transport should be positively favoured, both in the planning of programmes and in the information supplied.

In order to minimise economic leakage, every effort should be made to use local produce and services, and to favour the employment of local people. This may require action to identify local, sustainable sources. Producers can be assisted through the formation of local groups and networks, and help with contacts, marketing and pricing.

Local communities should be encouraged and helped to take account of these issues themselves without any effect on their living standards, through information, training and demonstration. Feedback to them from visitors will help. Influencing the actions taken by visitors and tour operators is very important (see Guideline 11). Some elements of good practice can be included as firm requirements in contracts with the private sector.

A number of national and international tourism certification schemes provide formal recognition of good practice in managing impacts on the environment and local communities. In selecting a scheme, the criteria it uses should be carefully considered. In particular, certification should be based on action taken rather than simply expressed intention. WWF-UK has made an assessment of certification schemes and is involved in pilot initiatives in this field (see p.17, and Further information, inside back cover).

## 10 Providing technical support

Communities will require ongoing access to advice and support in the development, management and marketing of responsible, good quality ecotourism products.

Many of the issues raised in these guidelines point to the importance of capacity building and training programmes with local communities. It is important to get the level of delivery and content right. This should be carefully discussed with the communities themselves. In general, it has been found that short, technical courses have had little impact. Longer courses, including learning by doing and on the job training, have proved necessary. Important topics to consider include:

- product development issues;
- handling visitors, customer care and hospitality skills;
- marketing and communication;
- environmental management;
- working and negotiating with commercial operators;
- management skills, legal issues and financial control;
- guide training, including content and delivery; and
- basic language training.

A useful way of generating ideas, giving confidence and putting across knowledge is through contacting, visiting or meeting other projects which are already experienced in community-based ecotourism. There are various examples where this has been particularly successful.

Most projects require some form of financial support. However, the nature of the financial assistance must avoid inhibiting incentive and causing problems within and between communities. Soft loans and long-term credit, well targeted to local needs, may be most appropriate. The use of local committees to approve financial offers has proved successful in some areas. It is important to demonstrate to governments and donor agencies the success of small community-based projects, including appropriate credit schemes, in order to encourage more financial assistance programmes.

The importance of effective marketing has been covered under Guideline 7. As well as technical marketing advice, projects can be assisted through access to national research data, help with visitor surveys, and linkages to marketing outlets such as national tourist board promotions and websites. The establishment of registers of community-based ecotourism projects, if possible backed by efficient reservation systems, should be encouraged.

A very valuable way of providing technical support is through establishing networks between projects. Some countries have associations of community-based tourism initiatives. These not only raise awareness and provide marketing support but can also promote common quality standards, deliver training and financial assistance and generally represent the sector in the commercial and political arena.

Many WWF-supported ecotourism projects have considerable experience of training, especially those in Namibia (see p.7) and Brazil (see p.9).



Necklaces made from palm fruits by Himba women for sale in the 'Traditional Village' Purus Conservancy, Namibia.



Chef preparing delicious spicy Sichuan food at Wanglang ecolodge, Pingwu County, China.

## 11 Obtaining the support of visitors and tour operators

Ecotourism experiences should raise awareness of conservation and community issues among visitors and tour operators and include mechanisms for enlisting their support.

Significant additional benefits can be achieved through improving communication with visitors themselves and with the tour operators who bring them. These benefits include greater awareness of environmental and social issues, modifying behaviour when visiting, and generating direct support for local communities and conservation causes.

In almost all cases, the experience of a community-based tourism programme will have an impact on how people think in future about the area and habitats they have visited. However, this can be made more or less meaningful depending on the information they receive before, during and after the visit, and how it is delivered. Careful attention should be paid to the messages put out by tour operators to their clients and to the quality of guiding and interpretation on site. Mechanisms for follow-up contact should be explored. Visitors should be encouraged to 'multiply' their experience by writing and talking about it. Many websites now offer this opportunity (see [www.responsibletravel.com](http://www.responsibletravel.com)).

A number of codes of conduct for visitors have been produced. Some are generic, others are area or site specific. These tend to cover questions such as prior reading and understanding, selection of operators and destinations, respect for local cultures, minimising environmental impact, purchasing decisions, activities to avoid, and conservation issues to support. Similarly, codes for tour operators cover issues such as particular environmental and cultural issues in the destination concerned, selection of sites, relationship with indigenous communities, messages to put across to staff and clients, and more specific instructions and regulations. These codes can be adapted for all ecotourism destinations. The WWF Arctic Programme has particular experience with codes (see adjacent).

Raising finance or other forms of support from visitors (such as participation in research) has become quite a common practice in ecotourism destinations. This is often through a levy applied by tour operators or through inviting donations. Although some operators resist this, the effect on tour prices can be relatively small. Visitors appear to applaud the opportunity to make a contribution, creating a marketing advantage for the operator. Money may be put into a local development fund. Visitors may be invited to discuss beneficiary schemes and to get to know them. These can be conservation initiatives or social programmes within the community.





Local community members in the Arctic.

### Codes of conduct in the Arctic

The Arctic's large wilderness areas and unique communities are attracting increasing numbers of tourists. More than a million people visited the Arctic in 2000. While the increase in Arctic tourism poses threats to the region's sensitive environment, it also presents opportunities to educate visitors about the Arctic, create greater global awareness of the region, and increase the share of tourism revenue that goes to Arctic communities.

WWF's Arctic Programme started an Arctic tourism project in 1995, hoping to influence the development of tourism in the region. WWF assembled a broad group of tour operators, conservation organisations, nature managers, researchers and community representatives. Together the group drafted Ten Principles for Arctic Tourism and practical codes of conduct for tour operators and tourists (see Further information, inside back cover). The codes cover issues such as minimising resource use and other impacts, awareness-raising, support of conservation, relationships with communities, and safety guidance. They have been translated into a variety of languages and widely distributed.

In order to publicise and encourage adherence to the codes, WWF gives an annual award to the individual, business or organisation working in tourism whose innovative and successful efforts result in the most benefit to the Arctic. The 10 principles are used as criteria for the award. Recently, WWF, the State of Alaska and the Alaska Wilderness Recreation and Tourism Association (AWRTA) initiated an Arctic tour operator accreditation programme, also based on the 10 principles and codes of conduct.

Although the codes are aimed at industry, the principles have also been used by communities. For example, a tourism project in the Westfjords of Iceland has gained clearer direction by assessing how each element of its action programme relates to the WWF principles.

## 12 Monitoring performance and ensuring continuity

Ecotourism projects should be designed and managed for long-term viability and success.

A recurring problem with many community-based ecotourism projects that have been established as part of externally funded and assisted initiatives, has been a tendency not to continue satisfactorily after the life of the aid programme. It is very important that:

- a reasonable time span is allotted to the project so that withdrawal of assistance does not occur too early;
- an 'exit strategy' is worked out at an early stage;
- all bodies providing assistance take care to impart know-how to local individuals and organisations throughout the course of the project;
- a strategy of long-term local ownership is maintained; and
- use is made of national or local authority and private sector support that may be ongoing.

Projects will be considerably strengthened by regular monitoring and feedback to assess success and identify weaknesses that may need to be adjusted. Simple indicators should be agreed and made known to the community. These should cover economic performance, local community reaction and wellbeing, visitor satisfaction and environmental changes. Monitoring should be kept simple and feedback should be obtained from visitors, tour operators and local people. Training of local participants in monitoring processes may be required. Certification and award schemes can play a role in maintaining as well as establishing good practice. Feedback and other monitoring processes have been addressed in the project in Sabah (see p.5) and in WWF-UK's tour operator work (see p.17).

# Further information

## WWF contacts

### International coordination on tourism issues

Overall tourism coordination: Jenny Heap, WWF International, [jheap@wwfint.org](mailto:jheap@wwfint.org) +41 22 364 92 07

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### Country, Programme, and Project contacts

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Further information on tourism within WWF can also be accessed via the WWF Intranet Knowledge Folder on Tourism (<http://intranet.panda.org>) and on the WWF capacity building website, The 'K' Zone ([www.wwfknowledge.org](http://www.wwfknowledge.org))

### Organisations providing advice and contacts on ecotourism

The International Ecotourism Society (TIES), [www.ecotourism.org](http://www.ecotourism.org)

United Nations Environment Programme (UNEP), Division of Technology, Industry and Economics, [www.unep.org/tourism](http://www.unep.org/tourism)

World Tourism Organisation (WTO), [www.world-tourism.org](http://www.world-tourism.org)

Conservation International, [www.conservation.org](http://www.conservation.org)

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### Other information on specific topics

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### Information on tour operators and products

UNEP Tour Operators Initiative, [www.toinitiative.org](http://www.toinitiative.org)

Tourism Concern (2000). *The Community Tourism Guide – Exciting Holidays for Responsible Travellers*. London/UK [www.tourismconcern.org.uk](http://www.tourismconcern.org.uk)

Responsible Travel. Responsible tourism membership organisation offering free promotion to community initiatives, [www.ResponsibleTravel.com](http://www.ResponsibleTravel.com)

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# Guidelines summary flowchart

## A Considering whether ecotourism is an appropriate option

- 1 Considering the potential conservation gain
- 2 Checking the preconditions for ecotourism
- 3 Adopting an integrated approach

## B Planning ecotourism with communities and other stakeholders

- 4 Finding the best way to involve the community
- 5 Working together on an agreed strategy
- 6 Ensuring environmental and cultural integrity

## C Developing viable community-based ecotourism projects

- 7 Ensuring market realism and effective promotion
- 8 Putting forward quality products

## D Strengthening benefits to the community and the environment

- 9 Managing impacts
- 10 Providing technical support
- 11 Obtaining the support of visitors and tour operators
- 12 Monitoring performance and ensuring continuity



The mission of WWF – the global environment network – is to stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature, by:

- conserving the world's biological diversity
- ensuring that the use of renewable resources is sustainable
- promoting the reduction of pollution and wasteful consumption

Taking action for a living planet

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