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Volume 21, numéro 3, automne 2002

Écotourisme

URI : <https://id.erudit.org/iderudit/1072500ar>

DOI : <https://doi.org/10.7202/1072500ar>

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Éditeur(s)

Université du Québec à Montréal

ISSN

0712-8657 (imprimé)

1923-2705 (numérique)

[Découvrir la revue](#)

Citer cet article

Wight, P. A. (2002). Ecotourism in the Americas in the International Year of Ecotourism. *Téoros*, 21(3), 28–37. <https://doi.org/10.7202/1072500ar>

Ecotourism in the Americas in the International Year of Ecotourism

Pamela A. Wight

The Americas represent several global regions which are geographically, administratively, and culturally extremely diverse. Thus it is not possible to aggregate destinations, products, or challenges. The intent here is to paint a broad picture with select examples of destinations, products, and challenges, to give a snap shot of the situation in the International Year of Ecotourism.

Destinations

It has been a long-standing tradition to regard the developing and less developed countries (LDCs) as main destinations for ecotourism. In many ways, that image has not changed much. In reality, some ecotourism is found in almost every country in the Americas. What differs is the extent and the mode of development of destinations.

South America

Ecotourism destinations in South America continue to increase. Two of the early destinations of choice for ecotourism were the Amazon in Brazil and the Galapagos Islands in Ecuador. Those destinations are still leaders, but a number of others have joined them, strengthened by the cultural diversity of South America.

Ecuador's core icon product is still the Galapagos Islands National Park and Marine Reserve. That is not surprising, since it is also a World Heritage Site and a World Biosphere Reserve, and the very

designation of parks increases the attractiveness of a place. There is no lack of visitors, despite the increase in visitor fees in 1993; indeed, visitor numbers have been increasing steadily. However, there are still conflicts from other resource uses, especially inshore fishing, and concern about tourist numbers. Ecotourism in the mainland areas of Ecuador is also developing, supported by an Ecuador Ecotourism Association, and supportive government policy and legislation.

Brazil has been systematically striving to develop and support ecotourism, both from the top down and bottom up. It goes without saying that the Amazon, with its ecolodges and interpretation of tropical rainforest, is a core focus for ecotourism. Now the Pantanal joins the Amazon as a strong international contender, and it has more diversity. There is a strong rural tradition in the Pantanal, which makes it ideal for rural farm-ranch experiences in combination with nature interpretation. Current initiatives mark Brazil as an American, even global leader in attempting to introduce sustainable tourism projects systematically, in the face of significant challenges. Brazil recognises that ecotourism projects have challenges of scale and operations, and research in the late 1990s found a lack of training for ecotourism workers. In response, Brazil developed impressive capacity through its Best Practices in Ecotourism Program (BPE), a partnership program that includes contributions and support from the business sector.

It aims to train human resources in ecotourism best practices. Training is pro-

vided on-site, and focuses on turning ecotourism into a sustainable economic alternative. It shares potentially successful practices with service providers and interested groups such as traditional communities. That is intended to encourage renewable energy and value-added economic activities, and to be applied by people with little or no operational experience. The program trains multidisciplinary teams of "monitors" for eight months on the ground, and locals are trained in BPE (operations and finances). Then monitors (58 by 2002) apply their skills and share their knowledge in pre-selected projects (Mourão, 2002). That ecotourism skill-transfer process is already reaping rewards in Brazil.

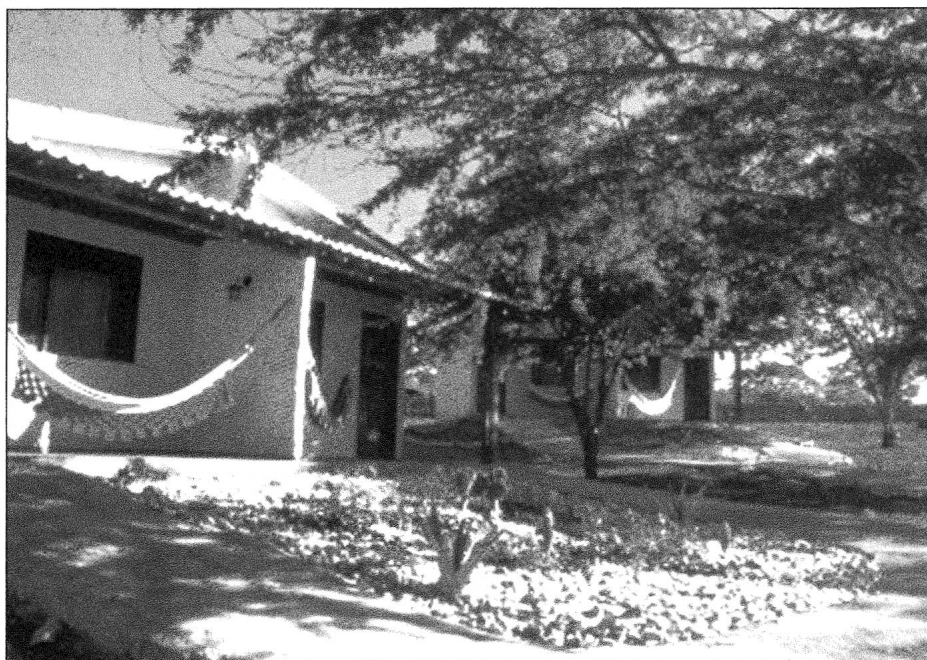
Other South American countries are developing ecotourism, but not necessarily systematically. Argentina extends through tropical rainforests, Antarctic environments, Andean mountains, pampas, and marine habitat. It could develop a significant ecotourism industry if there was political will, and if the current economic crisis was overcome. Peru encourages product renewal through dollar support and program development; but there are political problems. The perceived lack of safety means that it is not currently regarded as a safe destination. Similarly, a campaign to promote biodiversity and ecotourism in Colombia's national parks is faltering due to inadequate infrastructure and growing insecurity caused by armed conflict (Garcia, 1998). Security risks are undoubtedly a huge concern for many in South America promoting ecotourism as an alternative path of development.

Central America and the Caribbean

Central America—specifically Belize and Costa Rica—was a global leader in ecotourism development over a decade ago. Those countries are still outstanding ecotourism magnets. Costa Rica is famous for its system of national parks, wildlife refuges and biological reserves, which cover more than 25% of the country. In the 1960s, Costa Rica tackled its conservation needs by encouraging domestic park visitation, developing educational facilities, and school programs. That contributed to the emergence of the ecotourism industry and strong national appreciation for the country's natural resources. Despite fee increases, the park system is the foundation for Costa Rica's successful ecotourism industry, and approximately two thirds of international tourists visit them.

Belize also led conservation and ecotourism. Originally, select projects were featured, particularly the Community Baboon Sanctuary, a community-owned and managed operation, set up with the assistance of the World Wildlife Fund. The intent of the sanctuary was to meet both conservation and community sustenance needs, and it implicated considerable community involvement in the development process. It expanded to include over 120 landowners and 8 villages, and was an early example of the recent trend to increased community participation in ecotourism. Guatemala is well known for its cultural tourism, but other countries of Central America do not have international profile for ecotourism.

Caribbean countries are not significant players and focus more on nature or cultural tourism. However, the Caribbean is well regarded as having marine tourism opportunities. Not all marine tourism is ecotourism, although exceptions might include the Netherlands Antilles (Bonaire Marine Park whose fees raise funds for conservation) and St. Lucia (Soufrière Marine Management Area). The latter involved lengthy negotiations between Government, local fishermen, dive operators, and shore-based interests. Park tourism income replaced some local re-



Cariri Pai Mateus Ranch, Brazil.
Source : Manary Ecotours.

liance on fishing in return for a range of community benefits. Now the reserve has excellent fishery, spawning, and conservation functions, attracting thousands of yachts, boats, snorkellers, and divers each year.

The Dominican Republic represents a Caribbean destination making strong efforts towards ecotourism. It has had a National Program for Ecotourism since 1996, but most current offerings are soft adventure with cultural components. Jarabacoa is the highland municipality at the centre of those activities, where rural communities organised to form activity centres with lodgings, restaurants, art galleries, ranches, garden attractions, waterfalls, rivers, swimming, mountains, and agrotourism. Adventure/ecotourism is what interests 80% of international visitors (Morales, 2001) and numbers are growing (1,200 in 1998; 2,500 in 2000). Local communities and employment benefit through the use of guides, horses, transportation, and development of micro-enterprises. The Dominican Republic is trying to increase the number of protected areas, as well as the number of guides and their capabilities. They are also trying to address the conflicts with other sectors and

to integrate ecotourism activities. Their top down support and assistance in setting up groups, foundations, guidelines, and community-led initiatives, all bode well for the future of ecotourism in the region.

Cuba is *the* Caribbean destination for international travellers. Unfortunately, its economic and political situation means that it caters to mass tourism, whose needs may conflict with those of nature tourists and ecotourists. Some areas have potential, such as around Vinales, with horse riding, nature, soft adventure, mountain climbing, and agrotourism. But, while some tours are oriented to nature and culture, most environmental practices in the country require considerable improvement.

North America

There has been an emergence of ecotourism in Mexico, apparently supported from the top down, and organised from the bottom up. Mader (1998) indicates that the national Association of Adventure Travel and Ecotourism is leading the way in promoting natural destinations, and working on developing regulations to assure quality control in ecotourism. With the resultant more consistent product, Mexico was

able to embark on more innovative programs, such as Aeromexico's, which just launched the "Gran Plan de Aventura" packaging responsible adventure tourism with airfare and lodging. Many small investors in Mexico are hoping to tap into ecotourism's potential, since ecotourism currently only accounts for 5% of annual inbound visitor expenditures, but is growing.

However, Mexico is felt to be inadequate at promoting itself as an ecotourism destination, compared with other countries. That means it is difficult for operators to focus *only* on green markets. Also, it is difficult for the Mexican Government to justify moving away from its traditional emphasis on mass tourists. So while ecotourism is only beginning to expand, adventure tourism has taken off. Adventure operations (e.g. rafting and hiking) have expanded considerably, and so have the number of companies operating. Similarly, the trend to investing in lodges is now attracting *large* investors (which often causes economic leakage). Grupo Posadas, a Mexican hotel group, invested \$12 million to open two resorts on the Caribbean targeting high-income markets. Set in the jungle next to a Mayan site, the hotels offer "soft adventure" (everything from lessons in Mayan stargazing to scuba diving and jungle walks). They have tried to develop environmentally friendly hotels, train local guides, and promote natural areas, but some suggest that this does not really represent ecotourism (Malkin, 1999). However, it is at least helping to raise market consciousness of Mexico's natural and cultural products.

The USA is a popular destination for many travellers. However, tourism tends to follow the mass tourism template. It is viewed less for ecotourism, than offering adventure or nature-based products. Alaska is its preeminent adventure destination, and of course the entire Rocky Mountain chain provides an attractive destination for many types of nature/adventure activities, with key destinations being Colorado, as well as the Grand Canyon and Wyoming. According to the Director of the Institute for Ecological Tourism at Humboldt State



Inga Prehistoric Rock Art, Brazil.
Source : Manay Ecotours.

University, there are no projects in the USA that would qualify as true ecotourism. Reasons include (Sweeney, 2002):

1. Many critical natural areas in the USA have protected status established by law, so the need to support conservation of such areas through ecotourism is not as great as in LDCs in Latin America.
2. The need to provide economic benefits to local communities adjacent to protected areas is not as critical in the USA as in LDCs, where conservation non-governmental organisations (NGOs) have embraced ecotourism as a sustainable alternative, and Governments view it as an opportunity for economic sustenance earning foreign dollars.
3. Most ecotourists in the West are from North America, and the attraction of warmer, sub-tropical, or tropical environs is more appealing (especially in winter) than USA or Canadian destinations.
4. In the USA, numerous constraints on ecotourism include: expensive liability insurance requirements for operators; permits for tours on federal or state lands; land use restrictions on lodging and food service in areas zoned for agriculture, timber, natural resources, etc.

Sweeney further states that many of the popular protected areas (e.g. Yellowstone or Yosemite National Parks) attract huge numbers of visitors and vehicles, so ecology-minded tourists who seek solitude in natural areas, authentic experiences, and opportunities for personal growth and development avoid them. And while many nature tour companies in the USA provide opportunities for backcountry trekking, white water rafting, bird watching, etc., they are seldom connected to any effort to conserve natural areas, provide local economic benefits, or provide educational programs for tourists.

Canada offers a spectrum of tourism experiences, and its great open spaces and magnificent scenery make it well placed for a strong ecotourism industry. The dominant types of tourism are: nature-based tourism (including ecotourism and adventure tourism), cultural tourism, and conventional tourism. Certainly, Canada appears better known for its adventure, wildlife viewing and nature-based product (e.g. paddling in Ontario, hiking in the Arctic and mountains, kayaking at both coasts and Northern waters, rafting in the mountains/Ontario/Quebec, wildlife viewing opportunities across the country) than for ecotourism. A recent survey for the



Cultural Program, Bathurst Lodge (Canada).
Source : Bathurst Inlet Lodge.

World Tourism Organisation found that only half the Canadian operators who offer ecotourism products use the word “ecotourism” in marketing, although their ecotourism markets are growing (Pam Wight & Ass., 2002). Operators essentially feel that there is a lot of confusion in the marketplace and among operators about definitions. Some provinces, too, are reluctant to use the term ecotourism, preferring “soft adventure.”

In addition, Canada has no national ecotourism organisation. Various provincial/territorial associations have developed to meet industry needs, but their focus varies: wilderness (BC, YK), adventure (NL, QU), or ecotourism (SK, QU). Perhaps that diverse focus partly explains why Canada doesn’t have a strong destination image. Quebec has made most strides in advancing ecotourism. It supports and monitors the emerging product, and feels that Quebec’s operational definition and quality standards help tourism opera-

tors meet customer expectations (Kingsmill, 2002). Quebec works with industry, implementing partnerships, consulting, and supporting. For example, the province continued the focus on certification that was initiated by Le Québec Maritime (Couture et al., 2001) to work towards a certification program for all provincial ecotourism products. Quebec supports industry in an annual ecotourism conference, and provides considerable research information. Interestingly, an industry partnership (the Outdoor Tourism Product Club) has evolved into Aventure Écotourisme Québec.

Ecotourism Products

Most ecotourism products in the Americas involve nature, but products vary with the destinations, focussing on: forests, water and marine resources, archaeological sites, and living cultures. The following highlights a few product types and associated destination.

Exploring Biodiversity

Brazil, currently a leader in the Americas, recently decided to develop its ecotourism product more systematically, focussing on areas with good potential. It initiated a comprehensive program for ecotourism development, which is well incorporated into industry, employees, communities, and agencies, and is systematically supported, despite many economic and physical challenges. It focuses on nodes (poles) for ecotourism and supports planning, financing, and training, so ecotourism is likely to continue to develop throughout the country.

The Pantanal is a massive river delta where annual floodwaters cover about 70% of the land (it is often referred to as the world’s largest freshwater wetland system). It is very beautiful, has greater diversity than the Amazon, more viewable product, and a strong rural culture. Ecotourism in the Pantanal is being developed to benefit the Pantaneiros of the wetlands and the sur-

rounding towns. Despite conflicts with other resource uses (e.g. agriculture, ranching, and mining), there have been recent successes in economic diversification through ecotourism. For example, Araras Lodge, in the Mato Grosso Region of the Pantanal, provides ecotourists many ways of exploring the fauna, flora, and culture (e.g. hikes, boardwalk trails, viewing platforms, land safaris, adventure, cruises, photo safaris, bird watching). The owner is conscious of the need for strong community benefits and conservation efforts, and conducts research, rehabilitation, and other projects of interest to ecotourists.

Ecotourism and Culture

The Maya Forest of Mexico, Guatemala, and Belize is the largest block of humid, subtropical forest remaining in Central America. Those three countries are also tied by the rich cultural roots of the Mayan people, who turned that apparent wilderness into the biological foundation for a society that was one of the most developed civilizations of its time. The many cultural resources left by the Mayans (cities, temples, and roadways) provide the potential to be one of the world's premier cultural and ecotourism destinations. Perhaps the greatest of all classic Mayan cities is Tikal, in Guatemala. Set in the jungle, the site consists of over 3,000 buildings, including impressively tall temples. At its peak, Tikal was home to an estimated 100,000 Mayas; it is in a national park, where the native flora and fauna still flourish relatively undisturbed. For ecotourists interested in culture, that provides a wonderful opportunity for interpreted cultural tours in a tropical forest environment in the Petén. Tikal is the only place in the world that has been declared both a World Natural and Cultural Heritage Site.

In North America, when culture is involved, the product is less identifiable as ecotourism. For example, it may involve rural, heritage, or agrotourism. Ecotourism may play no role in those products or it may be incorporated. There are also many opportunities to link aboriginal culture and ecotourism, which could strengthen and differentiate North American products.

However, that is not done in a cohesive, identifiable way. There are isolated examples of quality aboriginal operations, offering both nature-based and cultural experiences. A good example of an ecotourism operation in which historic and living culture are strongly integrated into the interpretation of the environment, is Bathurst Inlet Lodge in the Arctic, Canada's oldest naturalist lodge, based in historic Hudson's Bay Fur Trading Post building. It is co-owned by the Inuit of Bathurst Inlet, who are involved in all aspects of its operation, management and decision-making. It is one of the best examples of a quality ecotourism experience in the Americas integrating conservation, culture, and ecotourism. There are opportunities for partnerships in many places in North America to enable that type of product to be offered.

Ecotourism Linked with Research

Outstanding ecotourism facilities may offer research opportunities to scientists or guests. In Belize, the Lodge at Chaa Creek Adventure Centre, Rainforest Reserve and Spa combines research, natural resources, and ecotourism. It is a private 330-acre nature reserve which provides a rainforest experience for visitors, providing physical and intellectual challenges, where guests can explore the river, trails, Mayan temple sites, or go hiking, canoeing, horseback riding, mountain biking, or bird watching.

Inland, Lamanai Outpost Lodge, is located on the largest body of freshwater in Belize. The lodge supports the Lamanai Field Research Center (LFRC), a non-profit organisation, to provide an educational facility for long-term, academic-based research projects in which international students and professors from throughout the world can participate, and then share their valuable knowledge with Belizeans and ecotourists. The Lamanai Archaeological Reserve is also close to the LFRC, ideal for archaeological, biological, and environmental studies. LFRC research, conservation, and resource management are ongoing in Maya archaeology, primatology, ornithology, Morelet's Crocodile, and bat and tarantula ecology, all supported by the

Lodge. A portion of the ecotourism revenue generated by each guest goes directly to supporting researchers and their projects. In return, researchers often give lectures about their projects and include guests on data-gathering missions.

Ecotourism as Adventure

Adventure seems to be a popular positioning theme for ecotourism initiatives. For example, the Chaa Creek operation in Belize has a name that focuses on *adventure*, not ecotourism. Costa Rica is internationally known for its efforts to conserve ecosystems through ecotourism. Now it is expanding into adventure. The Sky Walk-Sky Trek project is located in Monteverde, with a system of trails, suspension bridges, and zip lines offering visitors the opportunity to observe and appreciate tropical vegetation from different vantage points. Sky Walk is a mountainous hike; Sky Trek is designed for adventure, with two kilometres of cables, zip lines up to 1,400 feet long, platforms, suspension bridges, and trails. Visitors can alternate between cable rides and hiking with "nature as a backdrop for adventure." Yet that project is designed to enable conservation and provide community benefits and employment.

North America, overall, is generally better known as providing adventure opportunities than ecotourism. Here, too, adventure may "sell" ecotourism operations. Indeed, the varied ecosystems, rugged landscapes, and climatic extremes position Canada and Alaska well for adventurous experiences. Operators may also be providing an ecotourism experience. Indeed, many of the best practice operators in Canada have the word "adventure" in their names, and many ecotourism operators prefer to use the term "soft adventure." Adventure and ecotourism are not mutually exclusive (e.g. Gros Morne Adventure Guides follow the Tourism Industry Association of Canada Guidelines for Sustainable Tourism). It is likely that this tendency will continue, with North America positioning its product as adventure in nature, but with a stronger future focus on sustainable operations.

Ec lodges and Environmentally-Sensitive Accommodation

In the last few years, there has been a focus on ecolodge development with environmentally-sensitive design and operational standards. That coincides with the overall trend for ecotourists to seek accommodation that reflects the type of experience they seek, rather than to be the *driver* of the experience (Wight, 1997). Ec lodges are most common in Central and South America. Maho Bay Camps in the US Virgin Islands must surely be the best known example of environmentally-sensitive lodgings for ecotourists, and is a global leader (Sellengut, 2002). It also has the considerable advantage of being located inside a National Park.

There is a further trend towards lodgings associations. While some are only marketing groups, others have an environmental and ecotourism quality component. The Roteiros de Charme (Charming Hotels) Association of Brazil is a non-profit group of independent hotels, inns, and ecological refuges devoted to quality standards and an Environmental Code of Ethics and Conduct, covering: implementation, energy, water, solid wastes and effluent (Charming Hotels, 2002). Many members also participate in local projects for the protection of environmental or cultural heritage. Hotel Rosa dos Ventos, in Rio de Janeiro State, is located in a mountainous 250-acre private park, of which 100 acres constitute a preserved tropical forest. It stopped vegetation burning upon acquisition, builds only in cleared areas, and uses solar heating. At least one hotel has an inbound ecotour company; Manary Ecotours (2002) follows environmental principles: group size under twelve, use of qualified natural sciences guides, donating a portion of tour revenues to conservation of the areas visited and local community development.

Marine Ecotourism

Although the protection of marine areas has lagged behind terrestrial areas, that tourism product is strong and growing. Marine ecotourism emerged from simple



Manary Praia Hotel, Brazil.
Source : Manary Praia Hotel.

diving and snorkeling and is seen to be a way to generate revenues for protected areas. Collaborations between protected area agencies and operators help in management. For example, at Bonaire Marine Park, park entry is sold through tour operators, when divers arrive at their resorts.

Belize and its islands offer a range of diving opportunities, from shallow coral head diving to wall diving and wrecks. It has the second largest barrier reef in the world. That, combined with its clear waters and warm temperatures, makes the reef a strong destination for divers and snorkelers, whether in protected areas or not. Blue Hole National Park offers karstic features such as underground streams, rivers, sinkholes, cenotes, and extensive subterranean caves systems, covered with primary and secondary forest growth. A principal attraction is the Blue Hole, probably Belize's best known diving attraction. The reef on which it is located also has Belize's first nature reserve, which is managed by the Belize Audubon Society. The ocean floor at Hol Chan Marine Reserve is shallow, providing strong opportunities to enjoy marine wildlife. Very often, there is a strong relationship between hotels and dive shops or water sports centres. Some small lodges cater to serious divers and fishermen, and at least one, Blackbird Caye Resort, offers ecotourism plus functions as a research station for the Oceanic

Society. Very often though, ecotourism grows up adjacent to famous attractions, which are more recreation attractions.

Canada has the world's longest ocean coastline, the second largest continental shelf, rich fishing grounds, and globally important marine mammal and marine bird populations, all of which have great potential for ecotourism. In 1992, Canada committed to protecting areas representing Canada's 29 marine natural regions. So far, five are represented. A number of Canadian operators currently offer marine or land-ocean experiences, which are particularly important for British Columbia and the Maritimes. Operators use east, west, and Arctic waters to offer kayaking, diving and other experiences, particularly in some of the biodiverse waters. Operators sometimes have difficulty working within protected area policy and regulations, which perhaps require re-examination in light of likely future protected area designations.

Private Nature Reserves and Ecotourism

Ecotourism is known to be associated with protected areas. An increasing number of ecotourism experiences are being developed on private nature reserves. In Costa Rica, although private reserves tend to be small, they play an important role, partly because the country enjoys political

stability as well as stable land ownership laws. Most owners are more concerned with quality of management than size of the reserve, and many have conservation and land stewardship as their primary drivers. Occasional large reserves (e.g. the Monteverde Cloud Forest Reserve) attract thousands of visitors annually, despite high entry fees. Because many of the private reserves are run more efficiently than those managed by government agencies, they are able to respond quickly to the markets (Church and Brandon, 1995).

The Program for Belize (PFB) is a conservation NGO. The Rio Bravo Conservation and Management Area is its flagship project, representing 4% of Belize's land area, where ecotourism is the key revenue generator. PFB develops sustainable land uses to leave the forest intact, involving local people, and 60% of the support comes from ecotourism. It also functions as an inbound tour operator.

Private reserves for ecotourism are rare in North America. However, there are numerous reserves owned by NGOs, particularly in the USA. For example, The Nature Conservancy of the USA owns more than 1,300 reserves, representing one of the largest non-governmental systems of nature sanctuaries in the world. It focuses on ecotourism as a route to long-term financial sustainability of those areas. In Canada, the Haliburton Forest and Wildlife Reserve is the largest private forest reserve in the country (20,000 ha.). It is managed for multiple activities: ecotourism, snowmobiling, adventure tourism, fishing, camping, hunting, logging, mountain biking, and tourist accommodation. Some 70% of revenues derive from ecotourism and adventure tourism activities. Their "walk in the clouds" boardwalk through the treetops (costing up to \$70) is so successful that reservations may be required at certain times.

Ecotourism Products Linked by Themes

Some ecotourism products are developed around themes and thematic linkages. The Scarlet Macaw Trail, located within the Maya Biosphere Reserve in Guatemala,

launched ecotourism hikes in 1996 through the collaboration of a national council, an international NGO, and local Petén communities. Its purpose is to promote low impact travel and community development, and to prevent further destruction of the forest and wetlands. Visitors are taken through forests and wetlands by horse, foot and boat; they are exposed to the natural and cultural heritage, climb, or take jungle walks. The trail has brought together communities in rural Petén (organised as a cooperative) and international tourism operators. The Scarlet Macaw Trail implements ecotourism guiding principles related to:

- minimising visitor impacts;
- maximising the economic and employment opportunities;
- promoting respect for indigenous cultures;
- educating ecotourists about nature and culture;
- using environmentally sound local lodgings;
- providing economic alternatives to destructive land use;
- training community members to manage their own ecotourism projects.

The Great Texas Bird Trail (GTBT) is more a nature-based tourism experience for free and independent travellers (FITs). It is a collaboration between Texas State departments, local businesses and landowners. It extends about 500 miles linking over 300 premiere bird-watching sites and many communities along the Gulf Coast. The sites vary tremendously, including wildlife refuges, state parks, national seashores, nature sanctuaries, bird sanctuaries, and other sites, and the trail has loops as well as main tracks. That birding trail idea has been modelled in at least ten states, in Saskatchewan, and Texas is currently working on three new wildlife trails (Pam Wight & Ass., 1998). Those are very popular because they cater to the specific needs and interests of FIT nature tourists. A key feature of GTBT is that it represents a partnership of interests and resources, including federal and state agencies, county and city governments, chambers of com-

merce, convention and visitor bureaus, private landholders, not-for-profit organisations, goods and service providers, and local individuals.

Issues and Challenges in Ecotourism

Inadequate Information Service Technologies

Small and medium-sized enterprises (SMEs) in underdeveloped destinations often have an inadequate presence in global information services, and limited access to information technologies (IT) because of less education, training, and technological skills. There are an estimated 40 million clients who use the Internet annually for research, online sales, and reservations/bookings. So web sites are key mediums in influencing iTravelers' decisions to visit a particular destination. Also, markets are moving from buying tourism packages to customized personal packages. Ecotourism enterprises in developing and remote areas therefore find it harder to market to the world and respond, if they have low Internet and IT capabilities.

Lack of Suitable Trained Staff and Guides

Finding trained or even reliable assistance is a challenge in many developing areas and remote locations. There may be human resource difficulties, including: training staff for appropriate interpretation methods; competing for local staff in artificially inflated boom economies; moving staff to the right place to do the right job; finding staff with good leadership skills *and* available for employment. All of that adds to the expense of operations. That problem is being tackled systematically in Brazil through their BPE program.

Difficulties Branding for Ecotourism

Larger countries have difficulties in identifying ecotourism icons, possibly because their variety of ecosystems and product choice is so great. Thus, although Canada, for example, focuses generally on nature and culture, it has poorly developed inter-

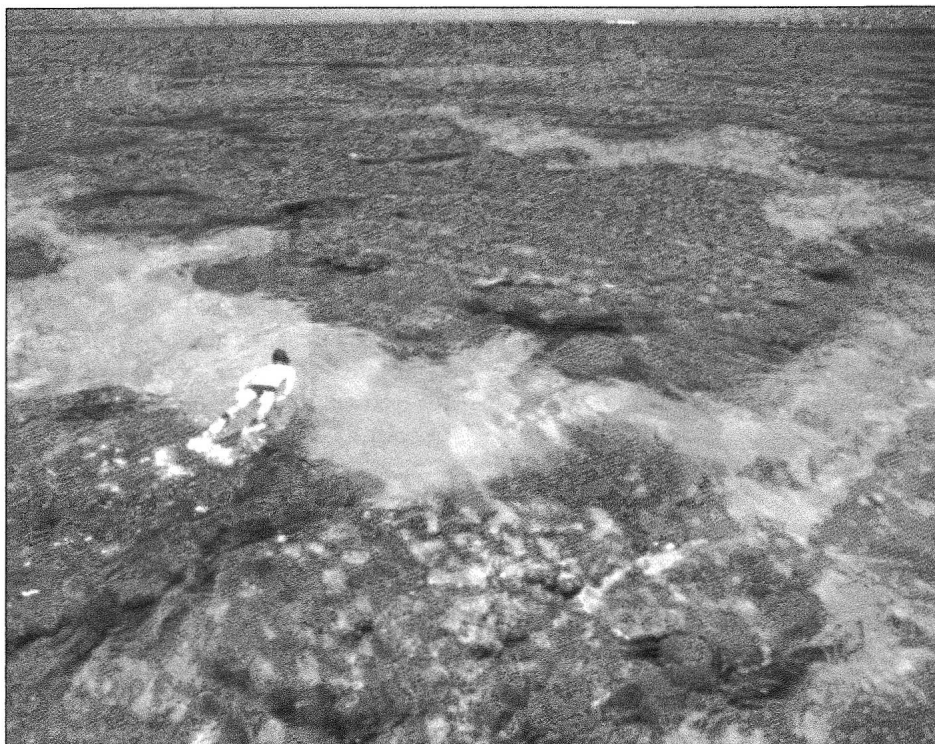
national icons for ecotourism and nature tourism (polar bears at Churchill or the Nahanni in the North would be exceptions). There is also not a great feeling among markets that Canada is "exotic," whereas its neighbour, Alaska, projects that quality. Neither national agencies nor ecotourism operators have been really clear about articulating what it is Canada offers in a differentiated way, although International Benchmarking shows the importance of "branded" products and clear differentiation, for marketplace awareness.

Lack of Product Transferability Between Marketplaces

Awareness problems are frequently exacerbated by the lack of product transferability to different marketplaces. As an example, certain "exclusive" trips in Northern Canada (e.g. canoeing on the Burntside or Coppermine Rivers) have to be positioned at the high end of the marketplace, due to access costs (e.g. need for floatplane charters). While many North American markets understand that type of unique experience and why it differs from, say, rafting the Yukon River, other markets simply cannot understand the cost difference and the difference in experience. That type of problem may be experienced in "mass" destinations as well (e.g. US or Japanese markets may not have any affinity to short, heritage voyageur canoe trips led by costumed interpreters in Jasper National Park, but such trips appeal to Europeans). Thus getting the right product-market mix in ecotourism is an ongoing challenge, particularly for new ecotourism operators.

Air Access Problems and Costs

Air Access is an issue for all remote regions, from the Brazilian Amazon to the Arctic. In Canada, the problem of getting air travellers from major centres to other destinations is a hot issue across the country. Even where good air routes exist, they are very costly. That adds to the difficulties for ecotourism products to successfully compete. The North has most extreme scheduling and cost problems, and has no "latent markets" such as the cruise indus-



Maracajau Reefs, Brazil.
Source : Manary Ecotours.

try brings to Alaska. Access issues cause increase operating costs.

Financing

Operating costs is one type of financial problem, but capitalization is a problem at the outset of operations for most SMEs, particularly for ecotourism initiatives. Ecotourism is not currently an attractive investment for conventional financial institutions in any part of the Americas. Thus in Central and South America it is quite common for NGOs, international donors, and government agencies to assist in financing. North American operations usually need to draw on personal resources or relationships, or other private sources. Financing ecotourism operations is a challenge.

Seasonality

Seasonality is a challenge for many ecotourism products in higher latitudes and altitudes. Not only may there be a short season, it may be the *only* one (e.g. for canoeing). Similarly in the tropics, the rainy season has relatively few visitors. Often most visitors arrive during peak season, when cities, resorts, and transportation

carriers are often fully booked. The challenge is to develop attractive products and packages for the shoulder and off-seasons.

Tourism Competes for Land

There is a need for greater valuation of tourism as a resource use, as well as protection from other land use values, which usually have precedence over tourism. A tourism resource-based land review would be helpful across Canada. An exception is in British Columbia, which has undertaken provincial mapping to identify tourism features and high potential locations. Related to that is the issue of land use, because of Native Land Claims. Even when claims are settled, access and use difficulties often continue, causing uncertainties and huge consultation expenses.

Traditional Consumptive Product Resists Repositioning

In a number of remote destinations in the Americas, the traditional product orientation is one of a land-based economy, with hunting and fishing. There may not then be

the critical mass of other ecotourism opportunities for expanding business linkages, due to non-compatible partners. There is an increasing need to extend the traditional season or reposition traditional operations to a nature-tourism focus. That is a major challenge, and many traditional operations resist or fear change. There needs to be education of traditional operators, focusing on appropriate practices, market differences, niche media, and *how* to reposition, as well as their need to develop a different value set.

In the USA, many communities could benefit from ecotourism to nearby protected areas, since

[...] local economies devastated by the decline in timber harvest and commercial fish stocks are experiencing underemployment and displacement of people. Unfortunately, these people and their elected officials see the conservation of protected areas through parks, preserves, etc. as the reason they are unemployed—taking land out of production and off the tax roles—and therefore see the parks as “the enemy.” Until these protected areas are seen as friends and a new opportunity to develop sustainable tourism, not much will be happening in ecotourism in the U.S. (Sweeney, 2002).

Lack of Government Assistance

Since ecotourism strengthening and product repositioning are required, there is a need to assist operators and communities. In Canada, operators feel Governments are not seriously “at the table” with the ecotourism and nature-based industry, and lack convincing actions and policies for co-investment. Similarly, annual marketing plans should reflect small operator perspectives. That is process-driven planning and requires commitment of government staff-time and resources. The CTC has both marketing and product development responsibilities, but while it provides considerable marketing of Canada’s nature-based opportunities, there is a need for much more new product development pro-

grams. Planning for tourism is actually a federal *and* provincial responsibility, so developing products to respond to the image Canada sells is not a simple matter. Most Canadian Government jurisdictions advocate ecotourism as a component of their economic development strategies but few are actively assisting development. The Sustainable Tourism Association of Canada (2002) recently analysed provincial/territorial commitment to ecotourism. Few regions provided any strategies or programs for ecotourism, except Manitoba and Quebec. Quebec has also been working on certification programs in ecotourism, and is about to release an Ecotourism Strategy for the province. All governments need to spend money and staff time in developing plans which respond to ecotourism industry needs. Brazil’s ecotourism poles and BPE program are excellent examples of best practice in well-planned leveraged ecotourism assistance for operators and communities.

Lack of National Industry Organisation

An organised industry creates multiple benefits to members through advocacy, economies of scale, resource sharing (information, skills, staff, technology), and expanded product and market opportunities. Canada lacks a national organisation that would respond to the needs of ecotourism and related sector operators. Canada’s lack of industry organisation contrasts with such countries as the USA (Adventure Travel Society, Alaska Wilderness Recreation and Tourism Association), Costa Rica, Belize, Colombia, Brazil, and emerging destinations.

Future Directions

Systematic Planning and Programs Support Ecotourism

Recently, besides its BPE program, Brazil decided to develop its ecotourism product more systematically, focussing on areas where there is good potential, and providing support in the critical developmental stage. In that respect, they are leaders in the Americas. They have selected a series of

nodes (poles) for ecotourism (Soavinski, 2001). The areas were pre-selected by states and local stakeholders, and later prioritized and evaluated by:

- potential natural resource/attraction base for ecotourism;
- potential international competitive advantage;
- direct air/sea access and basic airport facilities;
- adequate hotel capacity, accommodations and amenities;
- commitment of State Government to allocate resources, plus strong local steering groups able to implement and consult with stakeholders;
- existing ecotourism activity to build on.

The program’s goal is sustainable ecotourism development, through implementing the necessary conditions (including public investments) to enable the states to responsibly manage select ecotourism destinations. That program prepares ecotourism activity plans and studies for new protected areas, finances public infrastructure, and trains for conservation awareness and for ecotourism business best practice advice. Other governments would do well to adopt such a proactive approach.

Growing Educational, Experiential, and Enrichment Travel

Ecotourism operators are best positioned to take advantage of the growing interest in education and enrichment travel, since education should be part of any ecotourism experience. Research shows almost 20% of outbound US travellers would be interested in an educational trip (Hardwick, 2000). All nature, culture, and ecotourism operators/agencies would do well to position for enrichment and experiential offerings, so the Adirondack Tourism Board in the US has increased their use of natural environments and educational concepts. The emergence of alliances built around common educational offerings is also being seen. A new marketing partnership has emerged in Canada, the Learning and Enrichment Travel Alliance. Themes vary widely, so

experiences may not actually be ecotourism (and most members are currently facilities rather than ground operators). However, it is just that sort of alliance that ecotourism operators might well be able to benefit from, provided the pricing structure and targeting is appropriate for small remote operations.

Consumer Education

It is possible that the current trend to examine accreditation at global levels will continue, before it is seen that the real problem is the lack of consumer interest and consciousness in such labels. We are likely to see more ecotourism and other travel providers trying to educate consumers about responsible, meaningful, and enriching travel that benefits destinations. That would be desirable because, too often, discussions about the nature of responsible operations focuses on *ecotourism* providers, whereas the *whole* travel industry needs to be engaged. The International Ecotourism Society has a web page devoted to consumers: "Your Travel Choice Makes a Difference" (TIES, 2002). That type of information is likely to increase, which should spread consciousness in broader markets than simply ecotourists.

Partnerships Will Become Even Stronger

The largest percentage of SMEs in tourism are insufficiently aware of the advantages of creating strategic alliances and partnerships, whether formal or informal. Added to that is the independent and self-sufficient character of the remote nature-based and wilderness operators. However, there is an increasing move to partnerships and strategic alliances. Part of that may come from assisted collaborations, from organisations that leverage memberships, or from more formal business relationships. Related activities may be business-to-business (B2B) or peer-to-peer (P2P) networking. Alliances already exist in marketing, and will likely develop in the areas of product enhancement, customized new products, or other areas.

The International Year of Ecotourism instigated gatherings of ecotourism stakeholders around the world. Many of the outputs of the global Preparatory Conferences for the World Ecotourism Summit (WES) and the Quebec Declaration itself encourage achieving social, conservation, and economic benefits through partnerships in ecotourism. As well, the output of a more recent international conference is the "Cairns Charter on Partnerships for Ecotourism" (EAA, 2002). Formal and informal alliances are likely to be the wave of the future. Indeed, they are encouraged by many of the recommendations from the World Ecotourism Summit Preparatory process, and by the Summit itself.

Note: a special word of thanks to my large network of friends and colleagues in the Americas who provided their perspectives, particularly articulating their views of challenges.

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