

Commission for Environmental Cooperation

CEC's Sustainable Tourism in Natural Areas Project: 2000–2001

Final Report

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Executive Summary

This report summarizes the CEC's project on sustainable tourism from its inception to its closure in 2001. Previous and new material is presented in three sections: CEC Sustainable Tourism in Natural Areas Initiative, Market Study of Sustainable Tourism in North America, and Whale Watching as a Case Study. In the first section, the six main outputs of the project in 2000–2001 are presented. These include: 1) the publication of a searchable database on eco- and sustainable tourism on the web; 2) the publication of a compendium of best practices found in eco- and sustainable tourism in North America; 3) the realization of a market study of sustainable tourism in North America (results included here); 4) organization of a workshop on sustainable whale watching in La Paz, Mexico; 5) creating a listserv for stakeholders to exchange information and stay in touch; and 6) providing the resources to bring the ecotourism sector, an important constituency, into the marine protected areas (MPA) network of the Baja to Bering (B2B) region. A history of the project at the CEC is also presented, in which may be found the rationale for the focus of the project and the results from the La Paz workshop. The second section presents results of a market study commissioned by the CEC on Sustainable Tourism in Natural Areas. This section compares primary and secondary data collected and analyzed by Fermata Inc. for the CEC. The last section presents market-related information on whale watching and whale watchers, along with information concerning whale watching in B2B that was discussed at the La Paz workshop. Before presenting the recommendations from the La Paz meeting, previous initiatives and workshop on which this workshop builds are presented. Recommendations on socioeconomic factors, education, management and protected areas made at the workshop are then presented. The report concludes with current regulations and potential market-based approaches to foster sustainable whale watching.

PREFACE

The Commission for Environmental Cooperation (CEC) is a trinational government organization representing Canada, Mexico and the United States. The CEC facilitates cooperation and public participation to foster conservation, protection and enhancement of the North American environment, in the context of increasing economic, trade and social links between the three member countries.

The CEC, through its green goods and services projects, emphasizes strategies that pursue the twin goals of conservation and economic opportunity. This work on market-driven solutions to environmental protection complements other work at the CEC on environmental reporting and law and policy. Current goods and services being studied are shade-grown coffee, renewable energy, sustainable tourism and sustainable *chamaedorea* palm cultivation. This report documents efforts undertaken by the CEC in 2000–2001 to conclude its sustainable tourism project.

The mandate of the CEC is not to promote sustainable tourism. Instead, it is to find alternative and innovative ways to facilitate the development of regional approaches which support environmental protection through sustainable use of resources, reduced pollution, and biodiversity conservation. North America is home to one of the world's richest variety of flora and fauna. Mexico is particularly diverse, with over one-tenth of the world's entire heritage of biodiversity. However, this biodiversity is disappearing at alarming rates. The United States and Mexico are among the top 19 countries with the greatest number of threatened species (Tuxill 1999) and among the top 10 with the largest numbers of threatened plants. Habitat loss and degradation are the leading threats to biodiversity and half of North America's most diverse ecoregions are now severely degraded (CEC 2000).

In marine ecosystems, chronic overexploitation of commercial fish species continues to threaten these ecosystems. In 1996, 35 percent of fish species were overexploited and 25 percent were close to being exhausted (Platt McGinn 1999, WRI et al. 1998). An added pressure in coastal areas—the richest habitat of marine biodiversity—is population increase and tourist activities. In the United States, coastal populations are growing at four times the national rate, 23 percent of the Canadian population live in coastal communities, and in Mexico tourist destinations on the Caribbean and Gulf Coasts are attracting an increasingly heavy tourist trade.

Tourism is currently the world's largest industry and also one of the fastest growing. It is estimated that in 2000, tourism accounted for approximately 10 percent of global GDP, or US\$4.7 trillion (World Tourism Organization WTO 2001). According to the WTO there were more than 663 million international travelers in 1999, with the Americas remaining one of the main tourist-receiving regions in the world (WTO 2000). In a ranking of the world's top 15 tourist destinations, the United States was third (market share 7.3 percent); and Canada and Mexico were seventh and eighth respectively (each with a 2.9 percent market share). International arrivals to the three North American countries in 1999 totaled nearly 87.3 million (Canada 19.6, Mexico 19.2 and United States 48.5 million arrivals respectively) (WTO 2000).

This report documents the work conducted at the CEC in 2000–2001 in the sustainable tourism project. It includes a background to the focus on whale watching in the Baja to Bering region, a

background document prepared for the CEC-organized and sponsored La Paz workshop on whale watching in Baja to Bering, including recommendations from the meeting participants, results of a market study on sustainable tourism in North America, to determine if and how sustainable tourism may be maintained, and steps taken to conclude the project and meet those recommendations. This material was rearranged into the three following sections: CEC Sustainable Tourism in Natural Areas Initiative, Market Study of Sustainable Tourism in North America, and Whale Watching as a Case Study.

The starting hypothesis is not that sustainable tourism, nor any other green goods or services, is the panacea to North America's environmental problems. Market-driven sustainable tourism is an additional tool to complement traditional conservation methods through the creation of protected areas or enactment of regulations to protect endangered species.

I. CEC SUSTAINABLE TOURISM IN NATURAL AREAS INITIATIVE

In 1998, the CEC began an initiative on Sustainable Tourism in Natural Areas; this project started by exploring ways this industry could help preserve natural areas in North America. The project was designed to take place in three phases between 1998 and 2001.

The first phase, from 1998 to 1999, consisted of a scoping exercise comprising two main activities. The first was the preparation of a background paper that outlined the state of sustainable tourism in North America and underscored the major issues. *The Development of Sustainable Tourism in Natural Areas in North America: Background, Issues and Opportunities* (CEC 1999a) was prepared in large part as a discussion paper for the participants of a multistakeholder workshop, held 27–28 May 1999, in Playa del Carmen, Quintana Roo, Mexico. This background document covers the definition and context of sustainable tourism in terms of demand and natural and cultural resources to meet this demand in North America, the actors involved in sustainable tourism, and the policy/regulatory framework surrounding sustainable tourism. The workshop “A Dialogue on Sustainable Tourism in Natural Areas in North America” comprised the second activity in the scoping phase of the project. It was chaired by Geoffrey Wall, president of the International Academy for the Study of Tourism, and the invited speakers and participants represented government, NGOs, and academia.

Approximately 80 key stakeholders from the three countries attended the workshop, which was designed to encourage discussion among a diverse group on some of the issues of importance to the sustainable development of tourism in North America's natural areas. It also helped to lay the groundwork for future work by the CEC's sustainable tourism project and provides information for other collaborative efforts dedicated to developing a synergistic relationship between tourism and environmental conservation. An English version of the meeting's proceedings, including an executive summary, was prepared by the CEC as a working paper and sent to all those who participated in the meeting (CEC 1999b). Highlights of this document, along with the next steps for the CEC, were taken into account and used to produce the report *Promoting Sustainable Tourism in North America's Natural Areas: The Steps Forward*, which is available on the CEC web site at <http://www.cec.org/programs_projects/trade_environ_econ> in NAFTA's three official languages and is intended to serve as a follow-up to the Playa del Carmen workshop.

The workshop highlighted existing opportunities to foster or modify tourism activities in natural areas in North America so that they contribute to conservation and promote sustainability. Numerous gaps in the state of knowledge about tourism were also identified and a matching list of potential roles for the CEC in developing sustainable tourism in North America's natural areas was elaborated. Based on the advice and information gathered during the Playa del Carmen workshop, the CEC launched the following sustainable tourism activities in 2000 and 2001:

- 1) The compilation of a searchable online database of sustainable and ecotourism certification programs, voluntary guidelines and codes of conduct, which are relevant to North America. Thus far the database includes over 50 fields ranging within the categories of global, regional, activity specific and certification programs (<www.cec.org/databases>).
- 2) The preparation of a compendium of "best practices" found within the sustainable and ecotourism sector in Canada, Mexico and the United States, which documents available sources of information from the three countries. The document, entitled *From Principle to Practice: A Compendium of In-situ Sustainable Tourism in North America*, is available in the three Languages of the NAFTA countries at:
<http://www.cec.org/programs_projects/trade_envIRON_econ/index.cfm?varlan=english>.
- 3) The commissioning of a continent-wide market study of the sustainable and ecotourism sector in North America, addressing: 1) the current and potential economic value of nature-based and sustainable tourism, including whale watching, 2) the obstacles and motivating factors affecting the nature-based and sustainable tourist, and 3) the sociological and economic profile of this tourist (results are presented in section III.2 of this report).
- 4) The development of a project which targets a specific tourism activity and geographic region. Focus was placed on whale watching and synergy with other projects conducted by the CEC's Conservation of Biodiversity program. In March 2001, the CEC organized the workshop "Sustainable Tourism and Whale Watching in North America: A Baja to Bering Case Study" in La Paz. The purpose of this workshop was to assess the potential for sustainable tourism as a tool for biodiversity conservation, to develop a market-based strategy to support the conservation of shared species and critical habitat in the Baja California to Bering Sea region (an area of ecological significance and conservation opportunity), and to present market study results on the state and extent of nature-based tourism in North America. Stakeholders from all sectors in the three countries were represented including local governments, NGOs, local and indigenous communities, tourism industry, and tour operators (see Appendix 1 for a list of participants). Discussions by multidisciplinary groups led to a series of recommendations which are presented in Section III.2 of this report.
- 5) Based on recommendations included in this document, the CEC tourism project will be concluded through an initiative to bring the ecotourism sector, an important constituency, into the marine protected areas (MPA) network of the Baja to Bering (B2B) Initiative to: (a) strengthen the network and demonstrate its value, as well as that of the MPA and B2B frameworks; and (b) support sustainable tourism initiatives and the communities that benefit from them by bringing them into the MPA/B2B process. This effort will open a dialogue

regarding what constitutes sustainable tourism in and around MPAs and build an educational and promotional Toolkit to reach out to tourists and local communities.

- 6) In response to the La Paz workshop recommendations, the CEC has included Sustainable Tourism and Whale Watching on the *MariNet* web site <www.orchestrabycrossdraw.com/marinet> (a North American Marine Conservation Initiative which is linked with the Marine Protected Areas Network and the Baja to Bering initiatives). Messages and reports can be posted and will be used to further discussions concerning sustainable tourism and whale watching. To participate and post messages to *MariNet*, please visit <<http://www.crossdraw.com/marinet>> or send an email message to <<mailto:www.b2b@mail.orchestrabycrossdraw.com>>.
- 7) In addition, the CEC's North American Fund for Environmental Cooperation (NAFEC)—created in 1995 as a means to fund community-based projects in Canada, Mexico and the United States that promote the goals and objectives of the CEC—during 1995–2000 has funded 16 tourism-related projects, totaling over \$600,000 (US). For a listing of these projects please visit <http://www.cec.org/grants/grants_awarded> and keyword search “tourism.” Since the La Paz workshop, the following grants were awarded in the category of “Conservation and sustainable use of biodiversity involving Marine Protected Areas (MPAs)”:
 - Community strategy on fisheries and tourism management in the Parque Nacional Arrecifes de Xcalak Protected Natural Area. Mexico. \$25,000
 - Developing economic incentives for marine resource conservation in two Marine Protected Areas of the Baja California peninsula, Mexico. United States. \$25,000
 - Iqalituuq: community stewardship of a bowhead whale sanctuary. Canada. \$13,175
 - Marine Protected Areas initiative. A project to engage the public and solicit its input on MPA site designation and implementation. Canada. \$25,000
 - On the path of the gray whale. Linking local MPA efforts from Baja California to the Bering Sea. Canada, United States. \$25,000
 - Orca Pass international stewardship area. Outreach and involvement campaign. Canada. \$25,000
 - Strengthening public participation in the conservation of the Cozumel Protected Natural Area. Mexico. \$25,000

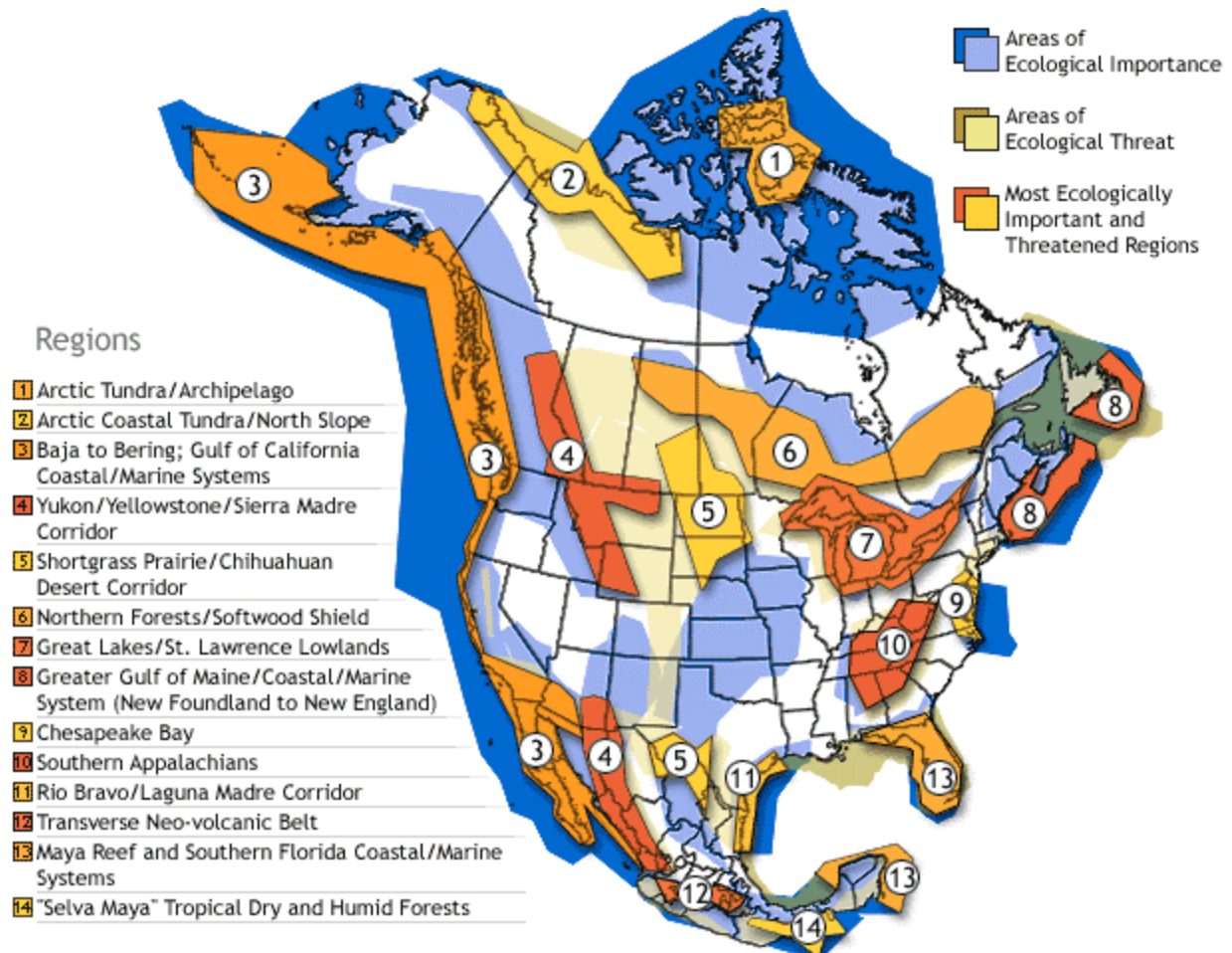
Finally, the CEC is exploring the possibility to present the work conducted thus far at the United Nations “2002 Year of Ecotourism” summit which will take place in Quebec City.

I.1 BUILDING ON PREVIOUS RESEARCH INITIATIVES

The CEC's comparative advantage is in cross-border collaboration and in bringing together relevant stakeholders that may not otherwise reach out to each other. The combination of whale watching as an activity and the Baja California to Bering Sea region (see Map 1) were selected to build upon other CEC biodiversity conservation initiatives, including MPAs and eco-regions. The focus of whale watching as a case study is based on recommendations from stakeholders at the Playa del Carmen workshop and other CEC government meetings. Given the species'

trintational migratory patterns—in particular, that of the gray whale, a keystone species—whale watching offers a perfect North American case study to demonstrate the potential for merging trans-border, shared species biodiversity conservation with economic benefits.

Map 1: North America’s Most Ecologically Threatened and Endangered Regions (criteria based upon ecological significance, threat and the opportunity for conservation, CEC 2001).



CEC North American Marine Protected Areas Network Project

MPA initiatives have been proliferating on the coasts of North America over the past couple of decades. Canada, Mexico and the US all have well-developed, legislated federal MPA programs, at varying stages of implementation (see Appendix 2 for North American federal and regional MPA programs and legislation). There is already considerable momentum on MPAs in both the governmental and NGO community along the Pacific Coast. The State of California has embarked on an ambitious initiative to deal with its disparate group of MPAs. The federal and provincial governments on Canada’s Pacific Coast have developed an MPA strategy and are moving on a number of new MPA sites. The recent designation of the Clayoquot Biosphere

Reserve in British Columbia, which included a marine component, gave international recognition to existing terrestrial and marine protected areas. In California, Washington and British Columbia, there is an active constituency of nongovernmental organizations, communities, First Nations and other stakeholders that are participating in various MPA initiatives. Mexico's President Vincente Fox recently announced initial plans to develop a Biosphere Reserve in the Sea of Cortez. Driven in part by international commitments to marine biodiversity conservation, policies for MPAs have been developed and adopted by federal agencies, often in partnership with state and provincial jurisdictions. However, at a continental scale the trilateral initiatives to protect marine ecosystems or species are scarce and not coordinated, and the needs of migratory species, such as the gray whale, may be neglected as a result.

In 1999, the CEC launched an initiative to develop a North American MPA Network, to better link existing and future MPA initiatives in the three countries, with a view to facilitating the exchange of information and strategies. In addition, the ecological linkages between MPAs through migratory patterns or in supporting different life history of various species suggests the need for better collaboration in the establishment and management of MPAs in order to provide better protection of marine biodiversity than can be achieved by managing MPAs in isolation.

At the November 1999 workshop "Building Linkages for Marine Protected Areas in North America" convened by the CEC, representatives from Canada, Mexico, and the United States developed an ambitious action plan framework, which identified the following seven components:

- Valuing economic benefits of MPAs
- Defining marine bioregions of North America
- Guidelines for measuring MPA effectiveness
- Integrated management planning
- Expanding applied research for MPAs
- Developing an "ocean ethic"
- Protection standards.

The sustainable tourism project contributes to valuing economic benefits of MPAs and developing an "ocean ethic." The MPA Steering Committee has come to the conclusion that focusing the implementation efforts on a region of significant ecological importance, and in which there are shared conservation objectives among the three participating countries, would permit us to better achieve some concrete results, and could serve as a pilot study for future work in other marine regions in North America. Given the obvious ecosystem linkages on the Pacific Coast of North America, the MPA Steering Committee recommended that this project focus in the Baja California to the Bering Sea region.

CEC Regional Initiatives

The "Bight of the Californias Global Program of Action" project and the NAFEC-funded project to establish a transboundary marine protected area in Puget Sound/southern Strait of Georgia are both located in the Pacific region. In addition, the recent biodiversity workshop on "Strategic Directions for the Conservation of Biodiversity" identified the Baja California to Bering Sea region as one of 14 regions of conservation priority in which to focus the CEC's biodiversity program (see Map 1). This highly diverse region reflects ecosystems that are continuous across

national boundaries or are vital to shared species or critical ecological processes. While recognizing the extreme importance of many national priority areas, experts at the biodiversity workshop felt that these international corridors and linked ecosystems required a new approach based on continental-scale cooperation and planning initiatives.

Over the past two years, the Canadian Parks and Wilderness Society (CPAWS) has been collaborating with government agencies and nongovernmental organizations in Canada, Mexico, and the United States in developing the Baja California to Bering Sea Marine Conservation Initiative. As Keith Symmington from CPAWS stated in the La Paz whale watching workshop, “the goal of this initiative is to establish a linked network of MPAs, together with other conservation strategies, on the west coast of North America.” More than 60 individuals/organizations have expressed interest in this initiative. Three meetings have been convened thus far to discuss the scope, goals and organizational structure of the B2B initiative; the outcome of these meetings is outlined in the *Draft Strategic Plan*, which may be viewed and accessed through the *MariNet* web site (<www.orchestrabycrossdraw.com/marinet> in the “Integrated Management Planning” category).

The advantages of linking the CEC MPA project with the B2B initiative and sustainable tourism include:

- existing trilateral connections have been established within both the government and nongovernmental communities;
- existing broad network of interest, especially in the government and NGO community in B2B;
- new funding has been secured from the Goldman Fund in San Francisco (US\$50,000 over the next two years), and other funding requests are pending that could leverage support from the CEC;
- the overall objectives and goals in both the CEC and the B2B initiatives are very similar and quite compatible;
- it is early enough in the development of the B2B initiative to incorporate the CEC action plan elements;
- excitement and interest in Baja to Bering is growing; and
- by including the industry early on in the process, recommended solutions and policies are more likely to be viable for all stakeholders and thus more easily implemented.

It is important to remember that by focusing on this region we will not be able to address other important issues along other North American coasts, including species of international interest, such as bluefin tuna and right whales.

II. THE TOURISM INDUSTRY AND SUSTAINABLE TOURISM IN NORTH AMERICA

The travel and tourism economy in North America represented 11.6 percent of total GDP, 12 percent of total employment and 10 percent of total capital investments in 2000 (WTTC 2001a). In terms of international tourism receipts, in 1999, the tourism industry generated US\$74.4 billion in the United States, US\$10 billion in Canada, and US\$7.6 billion in Mexico. In Mexico, tourism is the second-most important generator of foreign currency, with visitor spending

exceeding that of residents, and capital investment in travel and tourism expected to continue growing at an annual rate of 13.8 percent. In Canada, the industry represents a higher percentage of total GDP than it does in the United States or as the world average (WTO 2000).

Most of this tourist activity is what is known as “mass” or “conventional” tourism, which for the most part pays little heed to its impacts on host environments and cultures. There is a great deal of evidence, however, that many forms of this “mass” or “conventional” tourism cause varying degrees of harm to the environment as well as to local populations, especially in areas of natural beauty and in small communities of cultural significance. Table 1 below lists some of these environmental effects.

Table 1: Environmental Effects of Tourism

| Impact | Examples |
|---|---|
| <i>Air pollution</i> | From transportation and increased electricity consumption |
| <i>Water pollution</i> | Sewage from hotels and boats, and discharge of hydrocarbons from motorized vessels |
| <i>Solid waste</i> | In the form of litter left by tourists and tourism workers, as well as garbage |
| <i>Loss of natural landscape and biodiversity</i> | From the construction of buildings (tourist facilities and accommodation), infrastructure (roads, paths, transmission lines), tourist use and behavior (collection of plants, shells, rocks/fossils, etc.) (disturbance of natural ecosystem coral reefs, beaches, forests) |
| <i>Noise</i> | From increased traffic, airplanes, recreational vehicles, and entertainment facilities |

Source: adapted from Environment Canada 1996 and Tolba et al. 1992

II.1 Sustainable, Ecotourism, and Nature-based Tourism

The responsible development and proper management of sustainable tourism in natural areas will benefit the economies of all three nations and has the potential to provide important financial resources to some of North America’s poorest regions. There is no universally agreed-upon definition, set of criteria, list of indicators, or single recognized seal or certification system for sustainable tourism in North America (CEC 1999b). The lack of consensus or consistency in definitions of terminology hinder the production of robust data about the market characteristics of the industry and the concerted efforts to promote sustainable tourism.

Sustainable tourism, as defined by the World Travel and Tourism Council (WTTC), the World Tourism Organization and the Earth Council, “meets the needs of present tourist and host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life-support systems” (WTTC/WTO and Earth Council 1999). A review of leading

publications since 1995 reveals that there is worldwide agreement on the components of sustainable tourism (Wood 2001). Sustainable tourism:

1. contributes to conservation of biodiversity,
2. sustains the well-being of local people,
3. includes an interpretation/learning experience,
4. involves responsible action on the part of tourists,
5. is delivered to small groups by small-scale businesses,
6. Requires lowest possible consumption of non-renewable resources, and
7. stresses local ownership and business opportunities for local, particularly rural, people.

Ecotourism is a subset of sustainable tourism, and, as Hector Ceballos-Lascurain noted in his presentation during the workshop, is defined as “...environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features—both past and present), that promotes conservation, has low negative visitor impact, and provides for beneficially active socio-economic involvement of local populations” (Ceballos-Lascurain 1996).

“The ecotourism industry should play a role, through education on conservation issues, to move the average-mass tourist from an uninitiated participant to an avid (environmental and socially responsible) tourist. . . Most (tourists) don’t know a dodo from a duck!,” explains Ted Eubanks, of Fermata Inc., during the workshop.

Nature-based tourism has been defined as representing the full range of tourism activities and products taking place in natural areas, particularly in parks and protected areas, but including all wildlands where nature has been conserved, such as indigenous lands. Nature-based tourism can be either large- or small-scale and is defined by its destination—nature. It is simply tourism taking place in natural areas. It does not have to be sustainable.

Wight (1994) suggests that the inconsistency in defining ecotourism throughout the Americas may be due in part to the many stakeholders involved in ecotourism, all bringing their own perspectives and motivations. As an example, Edwards et al. (1998) conducted a comprehensive survey of national and state government tourism agencies in Canada, the United States, Latin America and the Caribbean. They found that 76 percent of the agencies created their own definition or adapted a published version to meet their needs or understanding of the term. This leads to each region and sector developing its own standards.

In *Understanding the Market for Sustainable Tourism*, Eagles (1995) writes, “Sustainable tourism refers to a broad range of recreational activities occurring within the context of a natural environment. An emerging consensus is that sustainable tourism has four identifiable niche markets—ecotourism, wilderness use, adventure travel, and car camping—each with a unique set of characteristics and identifiable and important differences. The World Tourism Organization predicted that by 2000 most of the 86 percent increase in worldwide tourism receipts would come from active, adventurous, nature- and culture-related travel (Reingold 1993). Because of

the many people involved in these activities, a tourism industry has developed around each of these four groupings. In most studies of sustainable tourism, these four categories are merged into one grouping, usually called ‘ecotourism,’ ‘adventure tourism,’ or ‘sustainable tourism.’ This approach is confusing and needlessly mixes distinct activity classes. It is important to recognize that the market for sustainable tourism is large enough that the specific submarkets are best managed with their specific characteristics in mind.”

Ecotourism is closely tied to government (Eagles 1995). Because of the need for natural environments with a set of specific characteristics, governments set aside land from the public domain that has these characteristics. Government agencies are responsible for allocating access, for managing the natural environment, and for setting behavioral objectives.

According to Wood (2001), “Ecotourism is a growing niche market within the larger travel industry with the potential of being an important sustainable development tool. It is a real industry, with billions of dollars in sales that seeks to expand and take advantage of market trends. At the same time, it frequently operates quite differently than other segments of the tourism industry because sustainable tourism is defined by its sustainable development results: conserving natural areas, educating visitors about sustainability, and benefiting local people.” Understanding the market for sustainable tourism requires recognition of the uniqueness of the recreation product. Parks and recreation products are service products that are fundamentally different from most consumer products. Eagles (1995b) suggests that once tourism planners and managers recognize these differences, there is apt to be a better integration of tourism demand and supply.

Wood (2001) further states that, “Because sustainable tourism is defined by its objectives to conserve nature and contribute to local people, it has been very difficult to measure. As yet, no in-depth studies have attempted to determine how many nature tourists are actually motivated to make travel decisions based on sustainable tourism principles. Sustainable tourism is widely researched as nature tourism, leading to false assumptions on the size of the market. Excellent research on nature tourism has shown that as much as 50 percent of the total travel market wants to visit a natural area during a trip, which might include a short day stop in a national park. While this is a very large market, it is quite different from the market that is actually motivated to travel in small groups, learn about wildlife and culture with a local guide, and help support conservation and sustainable development.”

II.2 Sustainable Tourism Market Study¹

In 1998, the World Tourism Organization stated that eco-tourism and all nature-related forms of tourism accounted for approximately 20 percent of total international travel. Sustainable tourism is estimated to be growing at anywhere between 7 to 30 percent per year (Wight, in press). To examine this growing market segment, the CEC commissioned a market study of current and potential Canadians and Americans (United States) participating in nature-based or sustainable tourism activities within the three North American countries. The study compiles and synthesizes the primary and secondary data sources that exist for different North American regions. In addition to assessing the potential market of the United States and Canada as a source of nature-

¹ This section is based upon data collected and analyzed by Fermata Inc. for the CEC.

based and/or sustainable tourists, the study addresses: (1) the obstacles and motivations for the aforementioned nature-based and sustainable tourists, (2) the profile of this tourist (e.g., age, sex, status, income, education), and (3) the current and potential economic value of nature-based and sustainable tourism. Whale watching is singled out when possible.

Market research shows that ecotourists are particularly interested in wilderness settings and pristine areas (Wood 2001) and that 40–60 percent of all international tourists are nature tourists, while 20–40 percent are wildlife-related tourists (Filion et al. 1992).

Demographics

“Ecotourists,” according to Eagles (1995b), have an environmental philosophy that is well developed and that is reflected in many other cultural forms, such as literature and art. It is a powerful group, and it is rapidly gaining more influence.”

In the United States, the Roper Organization classifies about 22 percent of Americans (about 40 million adults) as “true environmentalists.” They separate this group into two categories:

1. *true-blue greens*, representing 20 million Americans, whose behavior is consistent with strong environmental views, and
2. *green-back greens*, also 20 million Americans, willing to pay substantially higher prices for “green” products (US Travel Data Center 1992).

In general, these individuals have higher than average incomes and are college educated. The study also shows that women are generally more environmentally conscious than men. It is this group that can be equated to the target sustainable tourism market (Wood 2000).

“Ecotourism has a strong focus on learning and discovering nature” (Eagles 1995b). The primary environmental attitudes about ecotourism concern the issues of wilderness, national parks, birds, tropical forests, and wildlife (Eagles 1992). Activities such as bird watching, wild flower photography, and reef snorkeling are reflections of these attitudes. According to a 1996 survey of 753 frequent vacation travelers conducted by the research organization, American Lives, 53 percent of all ecotourism vacation travelers are part of a demographic category called “cultural creatives” (Ray and Anderson 2000). Cultural creatives’ lifestyles are experiential, authentic, and holistic. They are “aggressive consumers of the arts and culture” (Ray and Anderson 2000). Cultural creatives are consumers of experiences such as weekend workshops, spiritual gatherings, vacation-as-spiritual-tour, vacation-as-self-discovery, and other experiential vacations. Cultural Creatives “define the leading edge of vacation travel that is exotic, adventuresome, educational, experiential, authentic, altruistic, or spiritual.” As could be expected, this demographic category is not really interested in going on cruises, staying at classy resort hotels, or taking part in canned or packaged tours.

The American Lives research found that travelers who are interested in eco- or nature-based vacations want specific kinds of vacation activities. Table 2 presents the various activities and the percentage of travelers interested in those activities.

Table 2. Activity Preferences

| Activity | Amount of interest (%) |
|--|-------------------------------|
| Nature and camping | 69 |
| Travel to exotic locales or activities | 61 |
| Minimal activity (do and spend little) | 53 |
| Intense experiences | 51 |

Similar to the 50 million cultural creatives worldwide are the “bourgeois bohemians”—the new affluent group in society. The bourgeois work for corporations and love order; the bohemians are creative types who love freedom. But these two groups have merged and it is difficult to determine in a café who is the banker and who is the artist. They want not just to see sights, they want to “try on other lives” (Brooks 2000). Brooks identifies a distinct set of travel preferences and motivations for this group. This group is naturally industrious and ambitious and seeks travel experiences that are intellectually and spiritually enhancing and often physically challenging. They look for adventure vacations and eco-tours that are “high-status” and “low-amenity” to feel more alive. They are likely to go on these challenging trips to authentic, undiscovered destinations so that they’ll have something unique/different to talk about back in their corporate worlds. They buy gear at LLBean, Travelsmith, and REI and continue to wear it back in their work world. This group brings a counter-culture to the business world, including the travel industry and providers of ecotourism experiences, that mixes together the corporate order and free and creative thinking. An entire industry, including tourism, is emerging around providing new experiences to these consumers.

Changing demographics however, may have the opposite affect on the industry. According to Eagles (1995b), the changing population demographics, both in North America and in Northern Europe, will have profound implications for sustainable tourism. The median age of the population is increasing as the large baby-boom generation moves into late career and retirement ages. Researchers agree that baby boomers will have a powerful impact on travel in the 1990s, both because of their sheer numbers and the impact their choices and preferences will have on the travel market. The passage of the baby-boom generation through different life stages has had an influence on business like no other phenomenon before it. In the 1960s, teenage baby-boomers fostered the growth of the music industry. When they were young adults in the 1970s, outdoor recreation flourished, including ski vacations and the newly developed Club Med, and family-oriented destinations like Disney World were popular. The 45-plus age group has both the time and money for travel relative to their younger counterparts. Age is an important factor in recreation participation. Foot (1990) points out that as people age, active, dangerous recreational activities are less attractive, while appreciative and passive outdoor recreational activities are more attractive. He predicts that facility-based activities (skating, skiing, swimming in pools), snow-based recreation (skiing, sledding), and recreational sports (water-skiing, climbing) will experience decline in participation. Conversely, participation in bird watching, pleasure walking, pleasure driving, and sightseeing will increase (Foot 1990). Thus, Eagles believes that sustainable tourism may benefit the most from the demographic changes as older citizens seek less strenuous and less dangerous activities. Both wilderness travel and adventure travel may see decreased demand. Discretionary income—the most important factor for travel—is 28 percent higher for this older baby-boomer generation than for the younger age group.

Profile

Fermata Inc. compared its primary research results conducted between 1998 and 2000 in four regions of the US² to the 1994 HLA/ARA study (see page 19, below), and the findings of 6 other researchers. Results of this comparison are presented in Table 3. In addition to this profile, Fermata also gathered and examined other data regarding the travel habits of ecotourists (i.e., party composition and trip duration) that had not as much similarity with other findings (Table 4).

² Avitourism in Texas, Wildlife -associated Recreation on the New Jersey Delaware Bayshore, two California Nature Festivals, and the Platte River Nature Recreation Study. See CEC Forthcoming for details.

Table 3. Profile of an Ecotourist

(All dollars are in US at the time of the surveys or interviews)

| | 1998–2000 Fermata [Eubanks 1998— 2000] | 1998 Luzar et al. | 1989 Hvenegaard et al. | 1997 Scott et al. | 1994 HLA and ARA Consulting | 1995 Eagles and Cascagnette |
|---|--|----------------------------|--|--|--|---|
| Age | 52.1 years | | 49.3 years | 53.6 years | 35–54 years | 53.5 years |
| Gender | Male = 48.3% Female = 51.7% | Male = 46% Female = 54% | Male = 59% Female = 41% | Male = 65.9% Female = 34.1% | Male = 50% Female = 50% | Male = 45.5% Female = 54.5% |
| Income | \$61,962 | 16% >\$50,000 (\$US) | \$57,175 (\$CA) | \$72,707 | | \$60,828 (\$CA) |
| Household size | 2.45 persons | 1.83 persons | | | | |
| Education | 16.36 years (four years of college plus some graduate school) | | 15.8 (almost four years of college) | 16.16 years (four years of college plus some grad school) | 16 years (college graduates) = 82% | 16 years (college graduates) = 62.5% |
| # of other conservation organizations | 3.7 | | | 3.29 | | |

Table 4. Birding and Wildlife Trip Data

| | 1998–2000 Fermata [Eubanks 1998—2000] | 1998 Luzar et al. | 1989 Hvenegaard et al. | 1997 Scott et al. | 1994 HLA and ARA Consulting | 1998 World Wildlife Fund | 1995 Eagles and Cascagnette |
|--|--|------------------------------|---------------------------------------|--------------------------|--|-------------------------------------|--|
| Travel alone | 23.5% | | | | 13% | 21% | 31% |
| Travel with family or friends | 81.5% | | | 86.7% | 75% | 59% | |
| Travel with tour group | 11.7% | | | | | 20% | |
| Number of trips per year | 10.83 trips | | 28.6 trips | 19.5 trips | | | |
| Average length of trip | 2.33 days | | 5.4 days | 1.99 days | 11 days | 13 days | |
| # of days, last trip | 3.31 | 3 | | | | | |
| # of nights, last trip | 2.38 | 2.3 | | | | | |
| Time spent viewing wildlife - last trip | 2.75 days | | 3.4 days | | | | |
| Time spent birding in past 12 months | 44.04 days | | 35.6 days | 38.8 days | | | |

The differences shown in the preceding tables may relate to other factors not analyzed in these assessments, but making these correlations is important in order to understand the market more fully. The Fermata surveys and work of other researchers also collected data regarding other variables such as place of origin, travel distances, and motivations for ecotourists. These findings are summarized in Table 5.

Table 5. Ecotourist Travel Data

| | 1998–2000 Fermata [Eubanks 1998–2000] | 1987 Hvenegaard et al. | 1997 Scott et al. |
|--|--|-------------------------------|---|
| Tourist's origin | <ul style="list-style-type: none"> • Urban = 28.9% • Suburban = 47.6% • Rural (farm) = 4.3% • Rural (non-farm) = 9.1% | Urban or suburban = 82% | |
| Distance to reach destination from home residence | 160.4 miles (one-way) | | 128.1 miles (one-way) |
| Importance of birding as motivation for most recent trip | <ul style="list-style-type: none"> • Primary (only reason) = 49.2% • Secondary (important reason) = 27.6% • Incidental (one of many reasons) = 8.5% | Primary (only reason) = 41% | |
| Self-described avidity of nature-tourist | <ul style="list-style-type: none"> • Committed birder = 13.3% • Casual birder = 46.4% • Active birder = 40.3% | | <ul style="list-style-type: none"> • Expert or relatively expert = 33.8% • Novice or near novice = 7.5% |

The measure of avidity, shown in this table, compared with the number of trips per year (see Table 4) and expenditure information (see Table 9) combine to paint a powerful picture of the North American ecotourist as an individual very dedicated to pursuing this type of tourism. The 1987 Hvenegaard research for Point Pelee National Park shows that the number of visitors from Ontario and other Canadian provinces (47.8 percent) almost equals those traveling from the US (48.4 percent). The idea that the United States and Canada are attractive destinations for North American ecotourists is supported by a recent Tourism Canada (1995) survey, where nature-based operations had North Americans as their primary markets (Canada 57 percent, United States 23 percent, overseas 20 percent). Experienced ecotourists were more likely to select Canadian than US destinations. Since Canadian and US citizens do not need a passport to travel to each other's countries, Canadian and US residents are prime markets for North American ecotourism opportunities.

In their 1994 study, HLA Consultants and the ARA Consulting Group asked consumers about the location of their last ecotourism vacation: North American destinations were prominent. Only a small percentage of general consumers had gone to the more exotic destinations, such as South and Central America, Africa or Asia. Wight's (1997a) summary of the 1994 HLA Consultants and the ARA Consulting Group assessment further describes and compares the North American travel consumer based on level of commitment. The general consumer is interested in nature, adventure, and culture in the countryside or wilderness as part of a vacation or tour, in contrast to the experienced ecotourist who chooses more specialized activities (e.g., hiking, walking, or trekking). Table 6 provides a comparative view of the sustainable tourism market profile and trip characteristics for both general and experienced North American travel consumers.

Table 6. Comparison of North American Consumers

| Characteristic | General Consumer | Experienced Ecotourist |
|-------------------------------|---|---|
| <i>Residence</i> | Urban areas throughout NA | Urban areas, particularly West Coast cities |
| <i>Age</i> | Primarily 25–54 | Primarily 25–54 (76%) |
| <i>Gender</i> | Male and Female equally represented | Male and Female equally represented |
| <i>Household</i> | Most couples, 1/3 with families | Most couples, 1/4 with families, 1/4 alone |
| <i>Education</i> | Well educated; generalist | Well educated; generalist and specialist |
| <i>Preferred season</i> | Summer, with some shoulder season travel | Summer, with some shoulder and winter season travel |
| <i>Types of travel groups</i> | 50% as couples; 26% with family | 61% as couples; 15% with family; 13% singles |
| <i>Length of trip</i> | From 4–7 days to over 2 weeks; with ecotourist portion likely 8–14 days | From 4–7 days to 8–14 days for total trip |

(Source: Wight 1997a)

Motivations

The six surveys conducted by Fermata Inc. identified the top five motivations for nature-tourists: 1) to enjoy sights, smells, sounds of nature, (2) to be outdoors, (2) to see wildlife species not seen before, (3) to get away from the demands of life, and (5) for family recreation.

These findings are generally consistent with the findings of a 1997 Texas A&M University study (Scott et al.) conducted for the American Birding Association, with Wood (2001a) and Wight (1996b), based on the 1994 survey by HLA and ARA Consulting firms, and with Eagles and Cascagnette (1995) research on Canadian ecotourists' motivations.

According to Wight (1996b), both the more generally interested consumers and the experienced ecotourists enjoy multiple activities. General consumers tend to prefer more passive activities and cultural experiences, while experienced ecotourists are more active and prefer modest, intimate accommodations. Wight also notes that parks and protected areas were identified as one

of the reasons for taking an ecotourism vacation. That is to say, visiting parks is viewed as both a reason for the trip and an activity on the trip. Table 7 compares the most important elements of a nature-based vacation for both the experienced ecotourist and the general consumer.

Table 7: Elements of an Ecotourism Vacation

| | Important element/feature for trip |
|------------------------|---|
| Experienced ecotourist | <ol style="list-style-type: none"> 1. Wilderness setting 2. Wildlife viewing 3. Walking/hiking/trekking 4. Visiting national park/other protected area |
| General consumer | <ol style="list-style-type: none"> 1. Casual walking 2. Wildlife viewing 3. Learning about other cultures 4. Visiting national park/other protected area 5. Wilderness setting |

There are multiple motivations and reasons for ecotourism travel, and they vary by target market (Wight 1996b). Distinguishing attributes include: uncrowded, remote/wilderness, learning about wildlife/nature, learning about natives/culture, community benefits, viewing plants and animals, and physical challenge. Reingold (1993) cites sources that refer to the “growing dissatisfaction with traditional sightseeing” and give “life enhancement” as the chief vacation goal for 40% of travelers interviewed. Hall and Weiler (1992) discuss the special-interest tourist’s “common desire for authenticity, immersion in the cultural and/or physical environment, and the pursuit of environmental and experiential quality.”

Ziffer (1989) combines the results of several outdoor recreation and travel research surveys to develop four categories of primary motivations for consumer participation in specialty travel.

They include:

- excitement-mystique,
- personal growth,
- social aspects, and
- physical fitness.

The contemporary special-interest travelers seek new experiences in more remote places and cultures. In many cases, they also seek adventure and risk, although that varies considerably, by a matter of definition, from one traveler to another. Intellectual stimulation through expert interpretation is important for personal growth, as are opportunities to have emotional and spiritual experiences in nature and among exotic cultures.

The people in that same generation that launched the environmental movement in North America in the 1970s still consider themselves environmentalists. Research shows that over 23 percent of American consumers make their purchases based on environmental decisions. Green marketing and, to varying degrees, actual environmental reforms are occurring at all levels of the travel industry throughout the world in response to changing values of consumers.

Bruskin Goldring Research (1999) reports that a survey of 3342 households nationwide found that regardless of their vacation destination, 48.1 percent of the respondents participated in at least one nature-based activity during their vacation. Thirty percent planned trips that focused some or a majority of time on nature-based activities. World Wildlife Fund Study of visitors to Latin America (Belize, Costa Rica, Dominica, Ecuador, and Mexico) in 1988 (Boo 1990) found that the majority of visitors were interested in learning more about the natural and cultural history of the area they were visiting. Table 8 presents the most common nature-based vacation activities for both groups.

Table 8. Ecotourist Vacation Activities (from most popular to least popular)

| Research | Activity |
|---------------------------|--|
| Bruskin Goldring (1999) | <ol style="list-style-type: none"> 1. Visiting parks 2. Hiking 3. Wildlife viewing 4. Walking nature trails 5. Visiting unique natural places 6. Bird watching |
| World Wildlife Fund Study | <ol style="list-style-type: none"> 1. Wildlife observation 2. Bird watching 3. Hiking and trekking 4. Botany |

Expenditures

The primary research conducted by Fermata Inc. provides some measure of how much North American ecotourists are spending and how much more they might be willing to spend. These findings and those of other studies are presented in Table 9.

Table 9. North American Ecotourist Expenditures

All dollars in the years of the surveys or interviews

| | 1998–2000 Fermata Inc. [Eubanks 1998—2000] | 1987 Hvenegaard et al. | 1997 Scott et al. | 1988 World Wildlife Fund | 1996 USFWS |
|---|---|--|----------------------|-----------------------------|-----------------|
| Total expenditures— last trip | \$467.63/person | \$224.00/person (CA\$) | \$156.62/person | | \$396.62/person |
| Daily spending— last trip | \$138.45/person | \$66.00/person (CA\$) | \$78.71/person | \$264/person (US\$) | |
| Additional costs willing to pay for last trip | \$202/person/trip \$69/person | \$256/person/trip \$76/person/day (CA\$) | | | |

Respondents in the HLA and ARA study (1994) were asked how much they would be prepared to pay per person for their previous nature/culture/adventure vacation in the countryside or wilderness, inclusive of transportation, food, accommodation, and all other vacation costs (Wight 1997). The findings in Table 10 show that experienced ecotourists are willing to spend more for their ecotourism experience than general consumers.

Table 10. Willingness to Spend

| | General consumer | Experienced ecotourist |
|--|-------------------------|-------------------------------|
| Willing to spend more than \$1500/person | 38 percent | 45 percent |
| Willing to spend more than \$2000/person | 22 percent | 24 percent |

There seems to be no typical pattern of expenditure. However, Eagles and Cascagnette (1995) reported that, on average, Canadian ecotourists spent considerably more per day than general Canadian travelers. The essence of the two studies is similar: *Experienced ecotourists spend more than the general consumers.*

Ecotourists have been more frequently described as higher-spending markets and have been identified as having a higher-than-average income (over \$50,000) (Backman and Potts 1993; Eagles and Cascagnette 1995). Reingold (1993) quotes research showing that about 7 million US travelers were willing to pay \$2,000 to \$3,000 for a nature-based tour. Another survey by the US Travel Data Center (1992) found that travelers were willing to spend, on average, 8.5 percent more for services and products provided by environmentally responsible suppliers (Cook, Stewart, and Repass 1992). Products included transportation, accommodations, food services, attractions and sight seeing tours. The survey also reveals that 43 million US travelers could take an ecotourism trip in the next three years.

There was, as expected, a strong relationship between expenditure and length of trip. Those who indicated a willingness to spend more than \$2,000 per person on a trip also indicated preferences for length of stay. A Montana survey of tourists found that those interested in wildland-based activities spent 25 to 50 percent more per day than non-wildland tourists while visiting Montana (Yuan and Moisey 1992). The amount spent varied by activity of interest, as shown in Table 11.

Table 11. Expenditures by Activity

| Activity | Expenditure |
|------------------------|--------------------|
| Backpackers | \$92.61 |
| Anglers | \$101.44 |
| Nature study travelers | \$83.03 |
| Non-wildland visitors | \$64.44 |

In 1993, the average price of nature observation trips in Canada was CA\$172 per day, whereas wildlife-viewing trips varied in cost by activity, ranging from \$12.50 per hour to \$337.50 per day (Tourism Canada 1995). Many of the 13 million Americans who travel to Canada each year for

leisure participate in outdoor activities (*Time* 2000). Eco- and adventure tourists were expected to spend more than \$6.5 billion in 2000 in British Columbia. In the seven years between 1993 and 2000, the number of Canadian-based sustainable tourism operators has increased more than three times to over 2100 companies.

Among consumers, there were some marked variations in willingness to spend, depending on origin, age, household composition, or destination. For example, respondents from San Francisco, Los Angeles, and Toronto were more often in the higher expenditure categories, while those from Winnipeg were most often in the lowest. Older respondents indicated a greater willingness to spend more. Those living with children were more frequently in the less-than-\$500 category, while singles were less frequently in this category. Similarly, there were variations by destination; when those who expressed interest in visiting Alberta and British Columbia were examined for willingness to pay, there were lower-than-average responses in the higher expenditure categories. Given the diversity of the industry, prices naturally vary, sometimes wildly (Tourism Canada 1995). Indications are that expenditures differ a great deal, both from a willingness-to-pay and a product-pricing perspective. More research is needed to better understand each sector of this large industry market.

III. WHALE WATCHING AS A CASE STUDY

Whale watching is a tourism activity that is gaining popularity in the three NAFTA countries. The activity contributes both economically and socially to many communities. Many of the whale species being observed in the B2B region migrate between the three countries in the coastal waters which link the regions together. Depending on the way this activity is conducted, whale watching can either help or hinder conservation efforts. However, little scientific evidence is available which shows the impact and links between whale watching and whale behavior. This section presents results of economic valuation of whale watching, scientific inquiries, and regulatory tools already used in the three countries and those that could be used to ensure whale watching is a tool for conservation.

III.1 The Magnitude and Economic Value of Whale Watching in North America and in the B2B Region

Hoyt (2000) reports that whale watching is now a billion dollar industry for 87 countries, attracting more than 9 million participants annually. This industry depends mostly on humpback whales, gray whales, northern and southern right whales, blue whales, minke whales, sperm whales, short-finned pilot whales, orcas, and bottlenose dolphins. The most common means of whale watching are boat-based (72 percent) and land-based (28 percent). Nearly 48 percent of whale watching occurs in the US. Whale watching has grown at an annual rate of 12.1 percent through the 1990s, accelerating toward the end of the decade and outpacing the world tourism growth of 3–4 percent. It is expected to continue to grow past 2000. Rate of returns of approximately 10 percent have been reported for the industry, which is considerable for a primary industry.

The US led the world and North America in terms of number of whale watchers and total expenditures (see Table 12). Total expenditures include only tourist expenditures during their

whale watching trips. Hoyt (2000) reports numerous other benefits to the 182 communities in North America involved in whale watching (90 in the US, 78 in Canada, and 14 in Mexico). These benefits include foreign currency earning, increased awareness of the environment and the whales, increased research, and conservation incentives. Costs to the environment have also been identified, such as too many boats in a confined area at the same time, pollution from boats, litter in the water, and disturbance of whale populations.

Of the total 268 whale watching tour operators in the US, 167 are located within the B2B region, 65 in California, 10 in Oregon, 26 in Washington, and 66³ in Alaska. Sixty-eight percent of total expenditure from whale watching is generated in that region. In Canada, of the total 237 operators, 47 are in the B2B region (British Columbia). This region generates 35 percent of the total expenditures. In Mexico, 17 of the 38 operators are in the B2B region, 5 in Ensenada, 4 in Laguna Ojo de Liebre, and 8 in Laguna San Ignacio (4 are camps only), and an unknown number from the Sea of Cortes/Gulf of California, collecting less than 10 percent of the total expenditures related to whale watching in Mexico.

Several whale watching tour operators from the B2B region participated in the workshop and captured some of the distinct local features of their operations (for a list of tour operators that attended the workshop, please see Appendix 1: participant list). Many of these operators are actively involved in promoting whale watching in a sustainable manner. Some of their efforts include: developing regional best practice guidelines; joining forces with researchers to share resources and knowledge; education and interpretation; encouraging the establishment of new MPAs; and involvement in community economic development projects. In terms of environmental-biodiversity impact, and community and sustainable development the whale watching industry would greatly benefit if these practices could be expanded to the whale watching industry as a whole, as recommended by the participants in several discussion groups (listed in the section III.2 of this report).

“There is a multiplier factor for hotels, restaurants etc.,” explains Dan Kukat of Springtide Charters, which operates out of Victoria. “For example, maybe \$50 is spent for the actual whale -watching tour, but \$100s of dollars more are staying in the community”

The Hoyt Whale Watching 2000 study provides information on whale watching expenditures—both direct and indirect—for the North American region (Canada, US and Mexico). Hoyt defines direct expenditures as the amounts spent on whale-watching tours for the year. In most cases, these are based on minimum or average unit cost (ticket price) of the tours. Total expenditures is the sum of direct and indirect expenditures, where indirect expenditures are all the additional money spent by whale watchers in the course of going whale watching, including food, travel, accommodation, film, special clothing, and souvenirs, but not international air travel. When indirect expenditures are not available, Hoyt (200) uses multiplier factors of 3.5 times the direct expenditures per day near urban centers with a day (or less) trips and 7.67 times the direct expenditures in remote centers requiring more spending on travel, food and accommodation.

³ This value includes all operators with some involvement in whale watching, not just dedicated operators (Hoyt, 2000).

Resulting direct and total expenditures figures for North America and the World are presented in Table 12.

Table 12. 1998 North American Whale Watching Visitor Expenditures *

| | No. of whale watchers | Direct expenditures | Total expenditures (USD) |
|--------|------------------------------|----------------------------|---------------------------------|
| US | 4,316,537 | \$158,385,000 | \$357,020,000 |
| Canada | 1,075,304 | \$27,438,000 | \$195,515,000 |
| Mexico | 108,206+ | \$8,736,000 | \$41,638,000 |
| | 5,500.654 | \$194,575,000 | \$594,267,000 |

Source: Hoyt (2000)

*The definition of whale watching used is “tours by boat, air, or from land, formal or informal, with at least some commercial aspect, to see, swim with, and/or listen to any of the some 83 species of whales, dolphins and porpoises.”

Benefits to Local Communities

While recreational whale watching has grown into a multimillion-dollar industry along the Baja California peninsula of Mexico, a very small proportion of tourism revenues remains in the communities involved (Young 1999). Indeed, the economic impact of gray whale tourism is much greater at the regional and national levels, (as evidenced by the examples that follow). The same situation may exist in other popular sustainable tourism destinations in North America and should be addressed in considering the expenditures by ecotourists and the potential positive impacts to local and regional economies.

According to research by Young (1999), tour boat and whale camp operators based outside both Laguna San Ignacio and Bahia Magdalena control a large share of the recreational whale-watching market in Baja California Sur. There are few local restaurants, shops, hotels, or other local businesses that cater to tourists in either area. Consequently, tourists who come to these areas to see whales spend little of their money locally. In addition, outside tour companies spend little of their revenues for local salaries, supplies, or restaurant services, as seen in Table 13 examples.

Table 13. Spending Examples

| Package whale-watching tours in 1994 | Tourist spending | Revenues spent by tourist companies in community |
|---|-------------------------|---|
| Laguna San Ignacio | \$3.3 million | \$40,000 |
| Bahia Magdalena | \$5 million | \$33,000 |

By comparison, the three fishing families and one individual in Laguna San Ignacio who work in tourism operate on a much smaller scale, providing guided boat tours, camping facilities, and home-cooked meals to a growing number of visitors who come to the area on their own to see the whales. During the 1994 season, these local enterprises netted between \$2,000 and \$6,000

from recreational whale watching, which represents about one-quarter to one-half of their yearly incomes. The 44 local residents of Bahia Magdalena who were employed in tourism as boat drivers reported net average earnings of \$1,400 per person, or as much as half of their total annual income.

A much larger portion of outside tourism companies' revenues is spent on direct operating costs within Mexico, but outside Laguna San Ignacio and Bahia Magdalena. Some companies estimated that such costs ran between 50 and 65 percent of their gross income from recreational whale watching. For instance, land-based tourism companies spent approximately \$94,000 in the town of San Ignacio on restaurants, supplies, dining, lodging, and taxi services. In San Carlos and Ensenada, cruise ships and tour boats spent an estimated \$87,000 on port costs before tours of Laguna San Ignacio. Fermata offers a quote from Wight (1997) as a conclusion:

"It seems there are too many variables at play to make expenditure predictions. It is clear, however, that ecotourists are willing to pay more than general travelers."

III.2 Scientific Findings concerning the Effects of Whale Watching

The cetaceans' marine habitat complicates the identification and understanding of disturbance to these mammals much more than for terrestrial mammals. Their habitat, coupled with a limited understanding of cetacean behavior and the difficulty in continually observing their diving habits, limits the application of scientifically-based management initiatives. The increasing popularity in and concomitant growth of commercial whale watching compounds this issue by creating an immediate need for immediate and effective actions.

Currently, very few examples of scientifically-based whale watching management exists anywhere in the world. Few research projects focused on exploration into vessel impact on whales have produced useful results. Although researchers have concluded that impacts such as faster swimming, longer dive duration, shorter dive duration, and directional changes have occurred in the presence of whale watching vessels, extremely small sample sizes, faulty research designs, improper use of statistics and weak cause/effect linkages call most of these conclusions into question (Duffus and Baird 1995). For example, selecting and observing focal whales eliminates the randomness required to obtain experimental data, for which statistical techniques are necessary. In addition, it is often difficult to obtain the control data (i.e., behaviors with no boats present) needed for comparison. Even in cases where robust research has been carried out and statistically significant results obtained (e.g., Bass 2000, Heckel 2001), one must be careful when connecting statistical significance to biological significance. It is definitively identified biological impacts which dictate the need for short- and long-term management practices. Statistically significant results most often require further investigation that integrates factors such as prey studies and other oceanic variables into a more holistic understanding of whale behavior before results based mainly on the interplay between boats and whales can be transferred into management practices.

Two other important points which make the development of scientifically based whale watching management difficult were also raised during the workshop. Many participants noted that there is important behavioral variation on a site-by-site basis. Gray whales while in Baja California Sur

behave differently from the same animals when they are along the coast of British Columbia or in the Bering Sea. As Jim Sumich, of Grossmont College, explained in La Paz, “The main behavioral traits of the gray whale in each of the three nations’ waters are:

“The whale watching experience means something very different in each of the 3 countries along the gigantic coastline even if you are seeing the same whale” explains David Barkin of UAM during the workshop

- Canada—a combination of feeding and migratory,
- United States—migratory animals, and
- Mexico—reproductory.

“This may require the development of different guidelines, as the whales are behaving differently in each location.” Similar concerns regarding the behavioral differences between different whale species were also voiced during the workshop. These species-species variations also need to be taken into consideration when developing management practices, guidelines and/or regulations.

Secondly, Jim Sumich made the observation that the general migratory pattern of gray whales has moved farther offshore in the San Diego area in recent years. This variation in spatial pattern is not understood. Whale watching can not be immediately claimed as the culprit, due to limited understanding of oceanographic variations and the way in which gray whales respond to such variations. At present, the level of oceanic observation and understanding is much too coarse to make any conclusions on such spatial pattern changes.

In order to go beyond precautionary approaches to scientifically-based management schemes, integrated, long-term scientific studies must be developed. This requires long-term economic funding and political cooperation. During the workshop, Dave Duffus, of the University of Victoria, suggested that a scientific advisory group, composed of scientists from all three NAFTA countries, would be the most effective method to direct such a project. The group could identify needed research and foster communication between researchers and dissemination of results along the North American West Coast.

In response to the growing whale-watching industry and the possible effects this industry is having on the whales, academia, NGOs, industry and government bodies have initiated whale watching workshops and conferences, developed (or are considering updating) regulations to better suit the current whale watching market, utilized market-based approaches, and developed voluntary codes and guidelines.

Summary of Previous Academic and NGO Whale Watching Workshops⁴

- The Thethys Research Institute, in collaboration with IFAW and Europe Conservation, organized the First International Workshop on the Scientific Aspects of Managing Whale Watching, in Montecastello di Vibio in 1995. The workshop report, intended for scientists who study cetaceans, contains: (1) a framework to guide new and improve existing rules, (2) recommendations for further research, and (3) a list of all variables associated with whale watching.

⁴ Presented by Dave Duffus and Chris Malcolm of the University of Victoria Whale Research Lab at the La Paz meeting.

- IFAW (1997) convened a meeting in Provincetown Massachusetts with 23 whale watching experts to write a report on the educational values of whale watching. The report contains an assessment of current educational efforts, identifies problems in the transfer of education material, the training of guides and boat operators, methods of assuring quality information (including certification) on whale watching, whale watching in a formal academic setting, the role of NGOs, and the role of local communities in whale watching education.
- IFAW (1997) convened a meeting in Kaikoura, New Zealand to discuss the socioeconomic aspects of whale watching. Participants discussed issues such as economic, social and environmental impacts of whale watching, elements of measuring valuation of the whale watching industry, and enhancement of the whale watching industry through various stakeholders such as the whale watching and tourism industries, regulatory bodies, local communities and NGOs. A series of fifteen detailed recommendations addressed all aspects of researching and integrating ecological, social, economic and political elements aimed to develop sustainable whale watching on a global scale.
- A whale watching workshop was held during the World Marine Mammal Science Conference in Monaco in 1998. The workshop, organized by the University of Victoria Whale Research Lab, in British Columbia, identified four priority issues: (1) the dichotomy between managers needing quick-and-dirty research and the long-term research programs needed to provide a basis for management, (2) the need for an integrated, participatory, holistic approach to solving the whale watching problems that includes all stakeholders, (3) the need for exchange between experienced managers and managers in areas where whale watching is in its infancy, and (4) the need for enforceable regulations (University of Victoria 2001).
- A whale watching workshop organized by Parks Canada (Saguenay-St. Lawrence Marine Park), in cooperation with Fisheries and Oceans Canada and Transport Canada, was held in Tadoussac, Quebec, in May 1998 (Gilbert and Saguenay-St. Lawrence Marine Park 1998). The workshop had a multi-stakeholder group discussion format in which issues such as boat operation (safety concerns), codes of conduct (e.g., approach guidelines and vessel number restrictions), zoning, role of education, research and protection of marine mammals, and the long-term viability of marine mammal watching were discussed. A working group was created in September 1998 to address specifics regarding: 1) codes of conduct, 2) boat aggregations, 3) zoning, 4) permits and 5) training and certification in interpretation. Plans were also made to begin developing a comprehensive management plan.
- A workshop organized by the University of Victoria Whale Research Lab and Fisheries and Oceans Canada in April 1999 had as its objective “{t}o set in place a management framework in British Columbia to ensure the long term protection of marine mammal populations and their habitats, and the sustainability and viability of the wildlife viewing industry.” The six issues discussed were: (1) controlling the magnitude and scope of wildlife viewing activities, (2) the tour operators, (3) public perception of the eco-tourism industry, (4) maintaining quality of visitor experience, (5) communication and education of the boating

public, and (6) economic value of marine wildlife viewing. The format of the workshop was modeled on the Tadoussac workshop. Discussions identified various main points:

- Lack of enforceable regulations and inadequate management of the industry
- Degradation of the marine environment
- Lack of education on the part of operators and the recreating public
- Absence of co-operative framework for the industry, government and the public to appropriately manage whale-watching and wildlife-viewing.

Specific actions to be taken included the following:

- More research to define harassment
- Literature review of current research; identify data and knowledge gaps
- Encourage self-enforcement
- Encourage collaboration among and training of enforcing agencies
- Collect and review existing laws and regulations
- Mechanisms for monitoring and enforcement
- Balance enforceable with flexible
- Precautionary principle
- Collections and analysis of existing guidelines
- Establish stewardship programs
- Lobby for additional regulations
- Positive press releases
- Distribution of guidelines
- Umbrella association

(University of Victoria 1999)

This initiative led to the creation of a British Columbia Advisory Council “to make recommendations for actions that ensure the conservation and protection of marine mammals and their environment, and to ensure the sustainability of the marine mammal viewing industry” (Searle & Associates 2000). A comprehensive set of operator guidelines addressing species specific codes of conduct has been developed by the Victoria/San Juan Islands, Washington area industry operators.

- As a follow-up to the Victoria workshop, a regional marine mammal viewing workshop was held in Tofino, British Columbia, in February 2000. The workshop was organized by Parks Canada (Pacific Rim National Park). The workshop focused on reviewing industry-developed guidelines addressing species specific codes of conducts, current research and education aspects of marine mammal and bird watching in the area. Proceedings are forthcoming.

CEC March 2001 La Paz Workshop Recommendations

The CECs “Sustainable Tourism and Whale Watching in North America: A Baja to Bering Case Study” workshop is the first to focus on the B2B region and economic valuation of MPA and whale watching, building upon the experience and recommendations of the previously listed workshops.

The following sets of recommendations are the output from four discussions groups on socioeconomic factors, education, and management and protected areas that were held during the second day of the workshop. They are geared for the CEC, industry, NGOs, researchers, government bodies, and/or collaborative efforts between the various stakeholders. Additional

recommendations resulted from a discussion among the entire group after each discussion group had presented its recommendations.

SOCIOECONOMIC RECOMMENDATIONS

- 1- Expansion of whale watching to shoulder seasons (beginning and end of the season).
- 2- Redefinition of whale watching as part of the larger experience of tourism market.
- 3- Promotion and targeted marketing to achieve above.
- 4- Investment in infrastructure improvement to expand capacity and limited inputs.
- 5- Experimental social integration of tourism benefits and control at the community level.
- 6- Development of models that respects social demands and economic realities.
- 7- Consumer education to favor above.

EDUCATION RECOMMENDATIONS

- 1- Compile information on best practices (codes of conduct, guidelines, regulations etc.), natural history, and destinations; review and identify gaps.
- 2- Develop template for training guides (a guide for guides).
- 3- Develop a viewers' basic (framework) code of ethics/conduct.
- 4- Develop a marketing code of ethics—link with existing regulations.
- 5- Create web sites for tourists and others.
- 6- Educate and provide info to policy makers.
- 7- Encourage/facilitate community education/outreach with verified message and materials appropriate to region; include access to related web sites.
- 8- Develop publications/brochures with consistent designs and regional input, brand logos, direction promotional logistics (ethical marketing), on-site info (natural history and best practices).
- 9- Develop network abilities facilitated by CEC, *in situ* exchange of experience.
- 10- Create/design signage for: harbors, ramps, launch areas, overlooks, and conduct reminders.

MANAGEMENT AND PROTECTED AREAS RECOMMENDATIONS

- 1- The CEC should continue the “Baja to Bering Sea Marine Conservation Initiative” (the CPAWs effort) as a multistakeholder effort. The CEC should strongly encourage the B2B initiative to incorporate a focus on tourism.
- 2- Create an accessible database of legislation (including guidelines), research initiatives, inventory of ecotourism attractions, facilities, and services, as well as the identification of biological hot spots and the creation of a directory of tour operators.
- 3- Establish broad guidelines for an eco-regional planning framework, which should include both protected and nonprotected areas as well as infrastructure, physical facilities and zoning concepts based on expanding current eco-mapping effort of the CEC Baja to Bering process.
- 4- Creation of a virtual information/education network with the purpose of archiving and sharing information from this event and related conferences to inform stakeholders of current research and meetings. This network will also serve as a forum for a creative exchange of ideas and brainstorming.

ADDITIONAL RECOMMENDATIONS FROM THE ENTIRE GROUP:

- 1- Undertake pilot demonstration projects regarding whale watching, through a transparent, competitive process, for which CEC will seek private and other moneys to invest in these

pilot projects. Focused on long-term basis (> 5 years), attempt to keep communication among these pilot projects. Support for this idea and 2002 year of ecotourism.

- 2- Information flow and transparency. Establishment of an informational web site and links to ecotourism sites. Distribution of the recommendations and databases on the web.

Because participants felt that they had a greater impact in talking to the governments directly than the CEC, they express the desire to elevate tourism within the CEC priorities and ask the commissioners to ban the commercial whaling of grey whales. Finally, the CEC secretariat should try to incorporate Playa del Carmen meeting recommendations.

III.3 Financing and Community Sustainable Tourism Projects

Developing successful community sustainable tourism projects is a challenge, both in terms of monetary and social aspects. Discussions during the La Paz whale watching workshop led to socioeconomic recommendations which may help sustainable tourism projects and, more specifically, whale watching endeavors succeed (see section III.2).

There are several financing options available to develop or establish sustainable tourism projects within a specific community, for example, through private capital investments to government funding and/or NGO projects. Some examples of funding for ecotourism projects include:

- The Nature Conservancy—jointly sponsored by USAID,
- The Environmental Enterprises: Assistance Fund, and
- EcoLogic Enterprises—this organization issues micro-credit to private companies and/or cooperatives and is hoping to expand to include ecotourism projects in the future

There are also NGO programs available which may help to establish ecotourism projects within a community. An example of such a project operating within the B2B region is the RARE Center's *Programa de Capacitación de Guías Naturalistas*, which was highlighted during the La Paz workshop. RARE representative Claudia Virgen explained that the 3 main objectives of the program are to: 1) train guides in English, natural and cultural heritage, conservation, tourism, and environmental interpretation, 2) develop local participation in conservation efforts, and 3) develop economic benefits for the local community. She also noted that during 1995–98 the program in Baja California (consisting of 3 training courses with 66 graduates) generated \$159,000 for the guides and community.

During the workshop, David Barkin, of the Universidad Autónoma Metropolitana, raised the question “How do you engage the community (in particular indigenous peoples) without turning them into factory workers?” He believes that solutions include “treating the resources and the people (community) as a whole.”

The Native Cultures Institute of Baja California offers the following advise to develop or expand ecotourism in a region; a “tourism committee” can either: (1) develop long-term relationships with tour operators, (2) develop tours internally and market the product, or (3) offer concessions—develop a long-term relationship with one tour operator, providing him or her with exclusive use of the area in exchange for training and development money (CUNA 1998). The second option gives the most flexibility but is labor and capital intensive to gain market share.

The other two approaches maybe favored in a credit-constrained environment. Private financial capital would be most useful in the second case. In any case, sufficient funds are needed to adequately train community members about special needs and expectations of their customers and about archaeological sites and local flora and fauna.

III.4 Existing Government Regulations

One of the novelties of the La Paz meeting was to allow stakeholders in each country to learn about regulatory measures in the other three countries. It was found existing whale watching regulations vary considerably among the three countries.

Canada

“88 percent of respondents from a recent survey agree that the government has an obligation to protect wildlife and whales,” explains Jodie Wilson of British Columbia’s Ministry of Sustainable Resource Management, during the La Paz workshop.

Canada has the weakest legislation of the three NAFTA countries. In Canada, whales and whale watching activities are protected and managed under the authority of the Canadian Fisheries Act and the Canadian marine mammal regulation made pursuant:

Section 7 of the Marine Mammals regulations states that “*No person shall disturb a marine mammal except when fishing for marine mammals under the authority of these regulations.*”

Ed Lochbaum, Marine Mammal Coordinator at DFO, indicated during the conference that this regulation will soon be changed to reflect the current non-consumptive use of whales.

New standards & approaches?
(as outlined by Ed Lochbaum in La Paz)

Prescriptive legislation—but unenforceable
Self- regulating mechanisms?
Public watchdog approach?
More comprehensive educational approach?
More research to attempt to define our effect on these animals?

Solution: a balanced combination of the above!

DFO regulates whale harassment using penalties of fines and/or imprisonment and issues guidelines for both commercial and recreational whale watchers. The Canadian MPA policy will be accompanied by a management plan that will detail protection standards, regulations, permissible activities, and enforcement.

Mexico

Mexico has the most detailed national whale watching regulations of the three North American countries. Throughout the 1990s, Mexico underwent a regulatory evolution and consultation process, resulting in the comprehensive *Norma Oficial Mexicana* NOM-131-ECOL-1998, “*Que establece lineamientos y especificaciones para el desarrollo de actividades de observación de ballenas, relativas a su protección y la conservación de su hábitat*” (“Guidelines and

specifications for whale watching activities related to the protection of whales and the conservation of their habitat”) (*Publicada en el D.O.F. de fecha 10 de enero de 2000*) (To access the complete version of this document, please see:

<<http://www.semarnat.gob.mx/dof/textos/proy131-ecol-98.shtml>>.)

Highlights of NOM-131, as described by Gustavo Danneman of Pronatura during the workshop:

- covers all whale watching activities in Mexican waters
- permits issued by National Institute of Ecology (INE) to registered boats
- zoning, season length, max # of boats, observation time limits, boarding areas and sign system may be established annually for each location
- boat operation specifications for commercial and non-commercial parties.

United States

In the United States there are two federal laws that protect wild marine mammals:

- 1) Marine Mammal Protection Act (MMPA)—which includes all species of whales, and
- 2) Endangered Species Act (ESA)—includes whale species that are listed as endangered or threatened.

MMPA Regulations

50 CFR §216.3 defines “take” as: . . . *to harass, hunt, capture, collect, or kill or attempt to harass, hunt, capture, collect, or kill any marine mammal. This includes -- the negligent or intentional operation of an aircraft or vessel, the doing of any other negligent or intentional act which results in disturbing or molesting a marine mammal, feeding or attempting to feed a marine mammal in the wild.*

§3(18)(A) of the MMPA defines “harassment” as: . . . *any act of pursuit, torment or annoyance which: (i) has the potential to injure a marine mammal or marine mammal stock in the wild (Level A harassment); or (ii) has the potential to disturb a marine mammal or marine mammal stock in the wild by causing disruption of behavioral patterns, including but not limited to, migration, breathing, nursing, breeding, feeding, or sheltering (Level B harassment).*

Section 3.18 of the ESA provides a broader definition of the term “take” than the MMPA and defines the term “take” to mean: harass, harm, pursue, hunt, shoot, wound, kill, trap, capture, or collect, or to attempt to engage in any such conduct.

As Gene Nitta, of NOAA, explained during the workshop, there are also state protective regulations currently in place in Hawaii (e.g., a minimum 100-yard approach distance for all boats, kayaks, swimmers, etc.) and efforts are being made to enact these regulations in Alaska as well. (For a complete listing of state laws and regulations, please refer to Spalding and Blumefeld 1997, which is available for viewing on the *Marinet* web site

<www.orchestrabycrossdraw.com/marinet> in the “Valuing Economic Benefits/Sustainable Tourism” category.)

III.5 Potential Market-based Approaches to Set the Whale Watching Industry on a Sustainable Path

Regulations to protect wildlife resources are costly, difficult to enforce, and uncertain in their effectiveness (Isaac 2000). The enactment of policies to protect local interests may also face legal difficulties and/or violate international trade agreements (Isaac 2000). The three NAFTA countries also have different land ownership regimes—Canada and the United States mostly federal or state/provincial, and Mexico mainly public, privately owned or managed by *ejidos*—as Hans Herrmann of the CEC explained during the workshop, and this can create problems when attempts are made to coordinate regulations amongst the regions

Market incentives such as charges, subsidies, marketable permits, ecolabeling, performance bonds, and other traditional voluntary contractual agreements may protect biodiversity at lower costs to society than command-and-control or regulatory approaches.

Government-driven

Economic or financial schemes offer an incentive to change industry practices. In theory, trading approaches are superior to taxes and subsidies in many respects. If taxes or subsidies are constant over time, their value and effectiveness erode. They also need to be adjusted for population and economic growth, otherwise the same taxes applied when there are more industries and people generate less than the desired result. This is especially true with subsidies, which increase industry profits and hence attract more producers. Tax and charges could always be adjusted but adjustments are tedious and politically costly.

Trading systems accommodate population and economic growth. For instance, if more scientifically-based information were available to determine the maximum number of vessels that could be allowed without disturbing the whales, authorities could issue a number of permits equal to this number (perhaps adjusted for size, time of the year, and other criteria) and access to whale watching areas could be auctioned off to the highest bidders. Certain restrictions, obeying trade agreements, could be added to ascertain that local communities do have access to these permits. This is the case in San Ignacio Lagoon, Baja California and could also work in other areas within the Baja California to Bering Sea coastal waters where whales navigate throughout the year. Perhaps the Baja California to Bering Sea Marine Conservation initiative could play a role in instigating such a measure.

Market adjustments are dynamic. Growth and inflation raise permit prices but the desired goal is secured. If prices are too high, new firms relocate to areas with less demand for permits and develop new markets. The central theme, and major advantage, of trading is that an incentive is created to achieve more than the set goal, thus generating credits that can be sold to other operators. For instance, if operators could develop alternative technologies (e.g., noise or vibration control) that would allow them to take out bigger (thus fewer) boats verifiably without disturbing the whales, they could be allowed to sell their extra boat permits.

The three aforementioned principles share the common advantage of offering dynamic incentives to further reduce disturbance, which would not be the case with a design or performance standard that

merely dictates which equipment can be used or how many boats are allowed. In other words, these economic instruments encourage prevention rather than remediation.

Certification Programs

Economic incentives could also be provided to increase the economic appeal of sustainable tourism over conventional tourism. In the service sector, third-party ecolabeling creates a market for a service-given in a way that reduces impact on the environment and protects biodiversity. The label assures consumers that the service is rendered with an improved level of performance.

Ecolabeling uses a decentralized market system to convey information about the level of environmental performance associated with a service, which consumers can use to make informed choices, and the service provider is free to furnish this environmentally enhanced service or not. In that respect, ecolabels do reduce information asymmetry and create a market-based approach to addressing environmental issues. The success of ecolabels depends on consumer awareness and acceptance of the label. Acceptance is in turn determined by: (1) the credibility of the agency providing the label or certification, (2) consumers' understanding and perception of the link(s) between product choice and environmental impact, and (3) an accurate and clearly understood meaning of the certification. For the industry, it is important that labels or engagement to buy sustainable goods increase the value of the products, provide competitive advantage, or provide significant PR opportunities (Center for A New American Dream 2000).

To increase the success of tourism ecolabeling and address the problems created by the proliferation of ecolabels in the tourism industry, the Mohonk agreement (which aims to provide criteria and indicators for sustainable tourism and ecotourism certification systems that may be applied globally) was drafted during the Ecotourism and Sustainable Tourism Certification workshop in New Paltz, NY, November 2000 and accepted by numerous stakeholders (see appendix 3). Honey and Rome (2000) identified over a hundred different certification initiatives offering a logo, seal or approval, or award to signify socially or environmentally superior tourism practices. The participants of the New Paltz workshop identified general certification criteria and developed the agreement, which consists of a framework and principles for ecotourism and sustainable tourism. Lynnaire Sheridan, formerly of the International Ecotourism Society, highlighted the framework developed during the New Paltz meeting to the La Paz workshop participants.

Honey and Rome (2000) do differentiate between sustainable tourism certification and ecotourism certification. Both are performance-based certification schemes using questionnaires covering environmental, socio-cultural and economic areas. Ecotourism, however, covers businesses that describe themselves as ecotourism and are located in or near protected or fragile ecosystems. This latter puts more weight on the impact of the activity on the local community and conservation.

Four of the five sustainable tourism ecolabeling schemes available in North America currently only certify accommodations, not activities or tours (CEC 2001c). However, many certification programs are in the making. For example, an ecolabel based on the Australian Nature and

Ecotourism Accreditation Program (NEAP) approach is supposed to be implemented in Quebec in 2002, which highlights eco-tours. In addition, the Oceans Blue Foundation (OBF) is in the first phase of a four-phase process to develop a Cruise Ship Stewardship Initiative, explained by Tracy London of OBF in La Paz, which will include a certification aspect. Angel Herrera, from Cibnor (Northwest Biological Research Center), shared with the La Paz participants the experiences and process involved in the creation of the Certification in Sustainable Tourism Program (CST) in Costa Rica, which is one of the world's best tourism certification programs.

Certification programs can also play an important role in educating tourists about conservation and environmental issues, as well as be a tool for disseminating information (a reoccurring theme in the La Paz workshop's recommendations). Some of the existing schemes, such as Australia's NEAP, include education as part of their criteria for certification.

Codes of Conduct, Guidelines and Education Programs

So far, in North America, voluntary approaches to whale watching have been led by government, industry and/or NGO codes of conducts and guidelines rather than third-party certification programs. Some examples include: the Coastal Management Code of Conduct; the International Whale Watching Guidelines; the *Coloqui Internacional ecoturismo en areas naturales protegidas de centroamerica y México* effort; the Bay of Fundy: Marine Tour Operators Whale Watching Code of Ethics; the Rules of Conduct for whale watching in Quebec; the Canadian Whale Watching Federal Guidelines; Whale Watch Operators Association—North West Best Practices Guidelines; and in the US, the Northeast Whale Watch Guidelines. Many of these guidelines are included in the CEC's Sustainable Tourism database:

<<http://www.cec.org/databases/certifications/Cecdata/index.cfm?websiteID=2>> (click on the "whale watching" section within the "activity" category). Another good resource for existing whale watching guidelines and codes of conduct is Carlson (2000), *A review of whale-watching guidelines and regulations around the world*.

Education programs—which promote ethical viewing guidelines and good boating behavior—are an important tool in raising consumer and public awareness. IFAW (1997) reports that one of the most valuable impacts of whale watching is its potential to educate people of all ages and backgrounds to appreciate, value and understand marine mammals and make a connection with these marine mammals. The Whale Museum's Soundwatch Boater Education program (San Juan Islands, US) and the Marine Working Group within the nonprofit organization Watcheable Wildlife are examples of such education programs operating in the B2B region. Education programs may be used to fulfill some of the recommendations outlined by the La Paz participants.

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Appendix 2: A journey through North America’s MPAs

Canada—Federal

Federally, Canada has six legislative instruments to establish MPAs, as set out in the table below (CEC 1999).

| MPA Designation | Agency | Legislation |
|---|--|---|
| Marine protected areas | Fisheries and Oceans Canada | Canada Oceans Act, 1997 |
| Whale Sanctuaries | Fisheries and Oceans Canada | Marine Mammal Regulations |
| National wildlife areas Protected marine areas | Canadian Wildlife Service within Environment Canada | Canada Wildlife Act, 1973, 1994 |
| Migratory bird sanctuaries | Canadian Wildlife Service within Environment Canada | Migratory Birds Conservation Act, 1917, 1994 |
| National parks and national marine parks | Parks Canada | National Parks Act, 1974, 1988 |
| National marine conservation areas | Parks Canada | Proposed Marine Conservation Areas Act (Bill C-48) |
| Saguenay-St. Lawrence Marine Park | Parks Canada | Saguenay-St. Lawrence Marine Park Act |

Fisheries and Oceans Canada (DFO), is also responsible for coordinating MPA initiatives between agencies and between federal and provincial jurisdictions. Key federal legislation is recent and is currently being implemented. Some of the provinces in Atlantic Canada, and British Columbia on the West Coast, also have conservation or environmental protection programs that establish MPAs, although the emphasis tends to be coastal and near-shore, in tune with jurisdictional responsibilities. Parks Canada, a Canadian government agency under the Ministry of Heritage, has the lead role under the National Parks Act in federal government activities related to establishing, administering, and managing places that are representative of Canada’s natural and cultural heritage. Environment Canada, through the Canadian Wildlife Service (CWS) is another key player; its main focus is on selected species rather than marine habitats, and on MPA management, marine planning and assessments, marine habitat science and information, and enforcement and monitoring (CWS 1999, 28).

The goals of the DFO MPA Program are: to proactively conserve and protect the ecological integrity of each MPA site, to contribute to the social and economic sustainability of coastal communities by providing for uses that are compatible with the reasons for designation, and to further knowledge and understanding of marine ecosystems (DFO 1997).

Under the Oceans Act legislation which came into force on 31 January 1997, one MPA, Race Rocks (XwaYeN), located in the southerly part of Canada’s Pacific Coast, has been created thus far. Three other areas are being considered as Pilot Marine Protected Areas (DFO 2001). In total, the Canadian Wildlife Service protects 3 million ha (27,567 km²) of wildlife habitat in offshore and coastal areas through 13 National Wildlife Areas and 56 migratory bird sanctuaries (CWS 1997; 1999). There are no National Marine Conservation Areas (NMCAs) legally established so far, but one marine protected area (Fathom Five) is currently managed in conjunction with Bruce Peninsula National Park and a second is governed by its own unique legislation (Saguenay-St. Lawrence Marine Park). A third area (Gwaii Haanas) is expected to be established after outstanding issues are resolved (pers. comm., Henwood 1999).

“The Oceans Act manages on an ecosystem basis rather than just species specific” explains Marc Pakenham (DFO) during the La Paz workshop

Canada—British Columbia initiatives within the B2B region

On Canada’s Pacific Coast, 111 protected areas encompass 13,476 km² of terrestrial and marine habitats; of this total, approximately 5,365 km² is marine (39.8 percent) (DFO 1999d, 7). Some of the areas fall under the federal

MPA programs discussed above, while most are under the jurisdiction of BC Parks in the provincial Ministry of Environment, Lands and Parks. Provincial parks and recreation areas, numbering 88 on the coast, cover about 1,256 km² of the marine environment and the 15 ecological reserves on the coast protect 477 km² of BC's marine environment (DFO 1999d, 8).

Mexico

(The following text is based upon personal communication with Daniella Guevara Muñoz of the National Commission of Natural Protected Areas, 2001)

In Mexico, one agency—the National Commission of Natural Protected Areas (Conanp), in the Secretariat of Environment and Natural Resources (Semarnat)—is responsible for the creation of MPAs; there are no state-level MPA agencies. Of the six categories of protected areas, three apply to the marine environment. The international designation “biosphere reserve” has played an important role in the creation of MPAs in Mexico. The National Commission for the Understanding and Use of Biodiversity (an interministerial agency) has produced a national framework to define biogeographical regions to be integrated into the National System of Protected Areas.

Conanp acts in concert with related government agencies and must coordinate its efforts with other offices and departments of Semarnat. Conanp may assign the administration of an MPA to Federal Delegations (*Delegaciones Federales*), which are representatives of Semarnat at the state level. Research programs and marine species inventories carried out by Conanp must be coordinated with the National Institute of Fisheries (*Instituto Nacional de Pesca*—INP) and National Institute of Ecology (INE).

There are currently 32 MPAs within the Mexican territory, distributed in the following categories: 11 biosphere reserves, 14 national parks, 6 Wild and Aquatic Flora and Fauna Protection Areas and 6 other areas for re-categorization.

United States—Federal

In the US there are three federal programs expressly commissioned to designate and manage MPAs, two of which are the responsibility of the Office of Ocean and Coastal Resource Management in the National Oceanic and Atmospheric Administration. Other federal programs with environmental conservation objectives can also establish MPAs. State initiatives are encouraged by the Coastal Zone Management Act. Some coastal states have several mechanisms that can establish MPAs, while others are relatively inactive.

The National Oceanic and Atmospheric Administration (NOAA), in the Department of Commerce, is the key federal government resource agency with a mandate for ocean-related matters. Within NOAA, the National Ocean Service (NOS) sets the national coastal resources management agenda by providing federal agencies, state and county governments, scientists, NGOs, and others involved in ocean-related work with scientific data, technical and management assistance, funds, and coordination.

The National Oceanic and Atmospheric Administration (NOAA) manages 12 National Marine Sanctuaries, covering 46,600 km². The Office of Ocean and Coastal Resource Management (OCRM) manages 22 estuarine reserves within the National Estuarine Research Reserves System, which encompasses 180,225 ha of estuarine waters, wetlands, and uplands. EPA is in charge of 28 estuary projects within the National Estuary Program. Out of 281 refuges within the National Wildlife Refuge System managed by the US Fish and Wildlife Service, 4 have been established for fish protection. The National Park Service and National Marine Fisheries Service could also be involved through the national parks, recreation areas or seashore and Essential Fish Habitat Projects respectively.

United States—Regional and State initiatives in the B2B region

Pacific Coast—Working through the Pacific Fisheries Management Commission and the Pacific States Marine Fisheries Commission, the states of Washington, Oregon and California are engaged in a coast-wide project to identify existing MPAs and enter their locations into a Geographical Information System (GIS) database for the entire US Pacific Coast (Robinson 1999, 2). California has 104 MPAs, managed by 7 state agencies. Nine of these MPAs prohibit fishing. Washington has 137 MPAs, managed by four state government institutions and the

University of Washington's Fiday Harbor Laboratories. Of its 250 km of shore, Oregon has 11 km of coastline designated as Marine Gardens and 18 km as research reserves (CEC 2000).

Alaska—The Alaska State Legislature has classified certain special areas as being essential to the protection of fish and wildlife habitats via Alaska Statutes, Title 16, Chapter 20. Under this legislation, in 1995 there were 7 refuges, 17 critical habitat areas and 3 sanctuaries (Kelleher et al. 1995, 79). Management of these areas, generally for multiple use, is the responsibility of the Alaska Department of Fish and Game (Kelleher et al. 1995, 79). The Glacier Bay National Park and Preserve incorporates a significant MPA, encompassing 112,850 ha of marine waters along the Alaskan panhandle.

Transboundary issues are also being addressed through bilateral agreements and international treaties (listed in CEC 2000).

Appendix 3: Mohonk Agreement—An agreed-upon framework and principles for the certification of ecotourism and sustainable tourism

Background

This document contains a set of general principles and elements that should be part of any sound ecotourism and sustainable tourism certification programs. This framework was unanimously adopted at the conclusion of an international workshop convened by the Institute for Policy Studies and held at Mohonk Mountain House, New Paltz, New York, on 17–19 November 2000.

Participants came from 20 countries, and delegates represented most of the leading global, regional, national, and sub-national sustainable tourism and ecotourism certification programs, (including Blue Flag, CST*, Green Globe Asia Pacific, CAST*, QTC*, NEAP*, TIANZ*, Kiskeya Alternativa, ISO* 14000, Alianza Verde's Green Deal, PAN Parks, Smart Voyager, and Saskatchewan) and new certification initiatives (Brazil, Fematour*, Kenya, Peru, South Africa, Sri Lanka, Fiji, and Vermont), conservation and environmental organizations (including UNEP*, ECOTRANS, EAA*, Imaflorea, Mafisa, Oceans Blue, TIES*, CREM*, CEC*, Proarca/CAPAS*, Rainforest Alliance, WWF/UK*, Conservation International, Ecotrust Canada, SOS Mata Atlantica), and others (including BEST*, Ecoresorts/African Ecolodges, Lindblad Expeditions, Rainforest Expeditions, R.B. Toth Associates, Environmental Training and Consulting International) with expertise in tourism and ecotourism certification and environmental management.

Workshop participants recognized that tourism certification programs need to be tailored to fit particular geographical requisites and sectors of the tourism industry, but agreed that the following are the universal components that must frame any ecotourism and sustainable certification program.

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*** Acronyms**

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|-------------------|---|
| BEST | Business Enterprises for Sustainable Travel |
| CAST | Caribbean Alliance for Sustainable Tourism |
| CEC | Commission for Environmental Cooperation |
| CI | Conservation International |
| CREM | Consultancy and Research for Environmental Management |
| CST | Certification for Sustainable Tourism |
| EAA | Ecotourism Association of Australia |
| Fematour | Feasibility and Market Study for a European Eco-label for Tourist Accommodations |
| ISO | International Organization for Standardization |
| NEAP | Nature and Ecotourism Program |
| Proarca/ CAPAS | Regional Environmental Program for Central America/Central America Protected Areas System |
| QTC | Quality Tourism for the Caribbean |
| RA | Rainforest Alliance |
| TIANZ | Tourism Industry Association of New Zealand |
| TIES | The International Ecotourism Society |
| UNEP | United Nations Environment Program |
| WWF | World Wide Fund for Nature (in US & Canada: World Wildlife Fund) |

Certification Scheme Overall Framework

Basis of Scheme

- The objectives of the scheme should be clearly stated.
- The development of a certification scheme should be a participatory, multistakeholder and multisectoral process (including representatives from local communities, tourism businesses, governments, nongovernmental organizations, community-based organizations, and others).
- The scheme should provide tangible benefits to tourism providers and a means for tourists to choose wisely.
- The scheme should provide tangible benefits to local communities and to conservation.
- The scheme should set minimum standards while encouraging and rewarding best practice.
- The scheme should include a process to withdraw certification in the event of noncompliance.
- The scheme should establish control of both existing and new seals/logos in terms of appropriate use, an expiration date and, in the event of loss of certification, seal/logo withdrawal.
- The scheme should include provision for technical assistance to stakeholders.
- The scheme should be designed such that there is motivation for continual improvement—both of the scheme and of the products/companies/bodies to be certified.

Criteria Framework

- Criteria should provide the mechanism(s) to meet the stated objective(s).
- Criteria used should meet and preferably exceed regulatory compliance.
- Criteria should embody global best practice in environmental, social and economic management.
- Criteria should be adapted to recognizing local/regional ecological, social and economic conditions and local sustainable development efforts.
- Criteria should be subject to a periodic review.
- Criteria should be principally performance-based and include environmental, social and/or economic management process elements.

Scheme Integrity

- The certification program should be transparent and involve an appeals process.
- The certification body should be independent of the parties being certified and of technical assistance and assessment bodies (i.e., administrative structures for technical assistance, assessment and auditing should avoid conflicts of interest).
- The scheme should require audits by suitably trained auditors.
- The scheme should require consumer and local community feedback mechanisms.

Sustainable Tourism Criteria

Sustainable tourism is tourism that seeks to minimize ecological and socio-cultural impacts while providing economic benefits to local communities and host countries.

In any certification scheme, the criteria used to define sustainable tourism should address at least minimum standards in the following aspects (as appropriate):

Overall

- environmental planning and impact assessment, considering social, cultural, ecological and economic impacts (including cumulative impacts and mitigation strategies);
- environmental management commitment by tourism business;
- staff training, education, responsibility, knowledge and awareness in environmental, social and cultural management;
- mechanisms for monitoring and reporting environmental performance;
- accurate, responsible marketing leading to realistic expectations;
- a requirement for tourism businesses to obtain consumer feedback regarding quality of the tourism experience.

Social/Cultural

- impacts upon social structures, culture and economy (on both local and national levels);
- appropriateness of land acquisition/access processes and land tenure;
- measures to protect the integrity of local community's social structure;
- mechanisms to ensure rights and aspirations of local and/or indigenous people are recognized.

Ecological

- appropriateness of location and sensitivity towards sense of place;
- biodiversity conservation and integrity of ecosystem processes;
- site disturbance, landscaping and rehabilitation;
- drainage, soils and stormwater management;
- sustainability of energy supply and minimization of use;
- sustainability of water supply and minimization of use;
- sustainability of wastewater treatment and disposal;
- noise and air quality (including greenhouse emissions);
- waste minimization and sustainability of disposal;
- visual impacts and light;
- sustainability of materials and supplies (recyclable and recycled materials, locally produced, certified timber products etc.);
- minimal environmental impacts of activities.

Economic

- requirements for ethical business practice;
- mechanisms to ensure labor arrangements and industrial relations procedures are not exploitative, and conform to local laws or international labor standards (which ever are higher);
- mechanisms to ensure that negative economic impacts on local communities are minimized and preferably there are substantial economic benefits to local communities;
- requirements to ensure contributions to the development/maintenance of local community infrastructure.

Ecotourism Criteria

Ecotourism is sustainable tourism with a natural area focus, which benefits the environment and communities visited, and fosters environmental and cultural understanding, appreciation and awareness.

In any ecotourism certification scheme, the criteria should address standards (preferably mostly best practice) for sustainable tourism (as per above) and at least minimum standards for:

- focus on the visitor's personal experiences of nature to lead to greater understanding and appreciation;
- interpretation and environmental awareness of nature, local society and culture;
- positive and active contributions to conservation of natural areas or biodiversity;
- economic, social and cultural benefits for local communities;
- fostering of community involvement, where appropriate;
- locally appropriate scale and design for lodging, tours and attractions; and
- minimal impact on and presentation of local (indigenous) culture.