

Challenges to Ecotourism Development in Sri Lanka: An Assessment

P. U. Ratnayake

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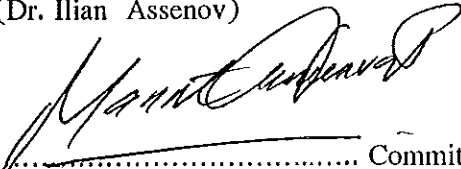
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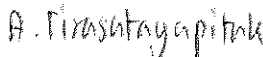
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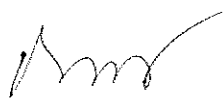
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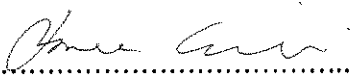

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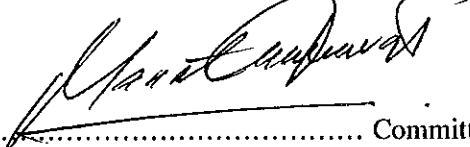

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ชื่อวิทยานิพนธ์	ความท้าทายของการพัฒนาการท่องเที่ยวเชิงนิเวศในประเทศไทย : การประเมิน
ผู้เขียน	นายอุปาลี รัตนายาเคอ ปาราเปลาเก
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บทคัดย่อ

ประเทศไทยเป็นเกาะอยู่ใกล้กับอนุทวีปอินเดียเป็นที่รู้จักกันดีที่มีชายหาดอันสวยงาม ประเทศไทยมีความอุดมสมบูรณ์ในความหลากหลายทางชีวภาพ ธรรมชาติ ทรัพยากรทางวัฒนธรรมและมีมรดกโลกทางวัฒนธรรมเจ็ดแห่ง ประเทศไทยจึงมีศักยภาพทางการท่องเที่ยว การท่องเที่ยวจึงเป็นอุตสาหกรรมที่มีความเข้มแข็งในการสร้างเงินตราต่างประเทศและการจ้างงาน แต่ในช่วงทศวรรษที่แล้วมาภาคส่วนการท่องเที่ยว คือการท่องเที่ยวมวลชนในช่วงยุคลำบาก สาเหตุจากสถานการณ์ความไม่แน่นอนของความเสี่ยงภัยของประเทศ ดังนั้นความตกต่ำของอุปสงค์ต่อการท่องเที่ยวจึงส่งผลกระทบต่อประโยชน์ทั้งทางตรงและทางอ้อมที่ได้รับจากการท่องเที่ยว ในช่วงเวลาเดียวกันอุปสงค์ต่อผลิตภัณฑ์การท่องเที่ยวที่มีความเป็นมิตรต่อสิ่งแวดล้อมยังคงมั่นคงอยู่ได้แม้ว่าการท่องเที่ยวมวลชนได้รับความยากลำบากที่เกิดขึ้น ขณะเดียวกันรัฐบาลศรีลังกาได้มีความพยายามที่จะกระจายผลิตภัณฑ์การท่องเที่ยวออกไปและส่งเสริมฐานการท่องเที่ยวทางธรรมชาติ วัฒนธรรมและกิจกรรมด้วยความมุ่งหวังที่จะไปสนองตอบต่อทิศทางของตลาดและรักษาความยั่งยืนจากฐานทรัพยากรการท่องเที่ยวของประเทศ แต่การเปลี่ยนตลาดจากการท่องเที่ยวชายหาดไปสู่แหล่งท่องเที่ยวที่เป็นมิตรกับสิ่งแวดล้อมยังไม่มี ความก้าวหน้าอย่างสำคัญ

วัตถุประสงค์ของการศึกษา คือ (1) เพื่อศึกษารูปร่างทรัพยากรการท่องเที่ยวเชิงนิเวศในประเทศไทยเพื่อการพัฒนาการท่องเที่ยวเชิงนิเวศในอนาคตซึ่งประกอบด้วยสัตว์ป่า พื้นที่ป่า พื้นที่ชายฝั่ง เขื่อนกักเก็บน้ำ และพื้นที่โบราณสถาน (2) เพื่อบ่งชี้ถึงสิ่งที่ท้าทายการท่องเที่ยวและสาเหตุ และ (3) เพื่อเสนอแนะต่อภาคการท่องเที่ยวเชิงนิเวศและผู้มีส่วนได้ส่วนเสียเพื่อการพัฒนาในอนาคต

ประชากรที่ใช้ในการศึกษาเป็นผู้มีส่วนได้ส่วนเสียที่เกี่ยวข้องกับการท่องเที่ยวเชิงนิเวศ 5 กลุ่มจาก 9 กลุ่ม คือ นักท่องเที่ยวนานาชาติ ชุมชนท้องถิ่น ผู้ให้บริการการท่องเที่ยวเชิงนิเวศ หน่วยงานการจัดการทรัพยากรท่องเที่ยว และนักวิชาการ เพื่อบรรลุวัตถุประสงค์ที่กล่าวแล้วได้นำเอาวิธีการศึกษาผสมผสาน การสัมภาษณ์และแบบสอบถามได้นำมาใช้เพื่อเก็บข้อมูลที่เกี่ยวข้อง จากนั้นจะใช้เครื่องมือทางสถิติในการวิเคราะห์ รวมทั้งการวิเคราะห์เนื้อหาและการวิเคราะห์จุดแข็ง จุดอ่อน โอกาส และภัยคุกคาม

ความได้เปรียบในการแข่งขันการท่องเที่ยวเชิงนิเวศน์ของประเทศ ความได้เปรียบเหล่านี้ประกอบด้วย (ก) เป็นที่รวมของสัตว์ซึ่งประกอบด้วยนก ช้างและสัตว์อื่นๆที่หลากหลายชุกชุม (ข) ความหลากหลายของถิ่นที่เกิดของพรรณพืชของป่าไม้ที่จะให้ผู้มาเยี่ยมชมได้รับประสบการณ์ในความหลากหลายในระบบชีววิทยาและความหลากหลายทางนิเวศน์วิทยา (ค) เป็นเกาะขนาดกลางที่ผู้เยี่ยมชมสามารถเข้าถึงฐานทรัพยากรต่างๆได้ง่ายภายใน 2-3 ชั่วโมง ทั้งนักท่องเที่ยวเชิงนิเวศน์ที่มีประสบการณ์และผู้เยี่ยมชมทั่วไปมีความประทับใจกับฐานทรัพยากรต่างๆ เหล่านี้ เขามองเห็นว่ามียุคสมัยสูงสำหรับการท่องเที่ยวเชิงนิเวศน์และเขาจะกลับมาท่องเที่ยวใหม่ในฐานะนักท่องเที่ยวเชิงนิเวศน์ ชุมชนท้องถิ่นไม่มีความพึงพอใจกับความขัดแย้งทางสังคมและสิ่งแวดล้อมของการพัฒนาการท่องเที่ยวในปัจจุบัน

การศึกษาวิจัยนี้ได้บ่งชี้ถึงความท้าทายต่อการพัฒนาการท่องเที่ยวเชิงนิเวศน์ในประเทศศรีลังกาจำนวนหนึ่ง คือ (ก) ความร่วมมือระหว่างผู้มีส่วนได้ส่วนเสียยังไม่เพียงพอและทำงานเป็นเอกเทศโดยไม่มีหน่วยงานกลางเป็นผู้รับผิดชอบ (ข) ขาดมาตรฐานและข้อบังคับตามกฎหมายที่ให้การยอมรับผู้ให้บริการจากรัฐบาลจึงจำกัดอำนาจต่อการตลาด (ค) ขาดการสนับสนุนจากรัฐบาลอย่างเพียงพอจึงจำกัดขอบเขตการพัฒนาการตลาด (ง) การมีส่วนร่วมจากชุมชนต่อการท่องเที่ยวเชิงนิเวศน์ค่อนข้างต่ำจึงมีผลให้ขาดความตระหนักซึ่งจะให้ผลประโยชน์ในอนาคตต่ำ

เพื่อโต้ตอบต่อความท้าทายการท่องเที่ยวเชิงนิเวศน์เหล่านี้ การศึกษาจึงมีข้อเสนอแนะ คือ (ก) สร้างความร่วมมืออย่างใกล้ชิดระหว่างผู้มีส่วนได้ส่วนเสียทั้งหมดและติดต่อสื่อสารเป็นประจำเพื่อการมีส่วนร่วมในแผนรวมสำหรับการพัฒนาการท่องเที่ยวเชิงนิเวศน์ในอนาคต (ข) ต้องให้ความสำคัญต่อความจำเป็นต้องการของชุมชนเพื่อให้มีส่วนร่วมในผลประโยชน์ที่เกี่ยวข้อง (ค) เพื่อที่จะจัดการกับฐานทรัพยากรที่เปราะบาง เป็นเรื่องสำคัญยิ่งที่ต้องให้การศึกษาแก่ผู้มีส่วนได้ส่วนเสียทั้งหมดและต้องทำงานร่วมกันไปสู่เป้าหมายรวมด้วยวัตถุประสงค์ที่วัดได้ (ง) ความยั่งยืนของฐานทรัพยากรที่พึงพิงเป็นสิ่งสำคัญสำหรับการตลาดและภาคส่วนการพัฒนาการท่องเที่ยวเชิงนิเวศน์ในอนาคต (จ) ความสมดุลระหว่างความยั่งยืนและการพัฒนากับการท่องเที่ยวเชิงนิเวศน์ยังเป็นสิ่งที่ไม่สามารถที่จะวัดได้และมีข้อจำกัดที่หลายประเทศต้องทำการศึกษาเพื่อการพัฒนาการท่องเที่ยวเชิงนิเวศน์ในอนาคต

คำสำคัญ: การท่องเที่ยวเชิงนิเวศน์ การท่องเที่ยวอย่างยั่งยืน การท่องเที่ยวชุมชน
ความยั่งยืน ประเทศศรีลังกา

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Author	Mr. P. U. Ratnayake
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Academic Year	2007

ABSTRACT

Sri Lanka is an island country situated close to the Indian subcontinent known for its fine beaches. Its rich bio-diversity, nature, cultural resources and seven world heritage sites contribute to the tourism potential of the country. Tourism is a strong industry in generating foreign exchange and employment in Sri Lanka. But for over a decade its major segment, mass tourism, has been experiencing a difficult period due to the uncertain security situation in the country. Thus, direct and indirect beneficiaries of tourism are being adversely affected by sluggish tourism market demand. In the meantime the demand for environmentally friendly products and nature-related niche market has been sustained irrespective of the difficulties experienced by mass tourism. Meantime, Sri Lanka has made an attempt to diversify its product range and promoted nature, culture and activity-based products for several years, with the aim of meeting market trends and maintaining sustainability of the country tourism resource base. But the shift of the market from a beach destination towards a nature-friendly destination has been insignificant.

The objectives of this research were: (1) to study the ecotourism resource base in Sri Lanka for future ecotourism development, including wildlife, forest, coastal areas, irrigation reserves, and archaeological sites; (2) to identify main challenges to ecotourism development and the reasons behind them; and (3) to make recommendations to ecotourism sector and stakeholders for future development.

The study identified nine stakeholders in ecotourism; the main five of them were the target population to this research. They are: the international tourists, local community, ecotourism service providers, tourism resource-managing organizations and scholars. To achieve the aforementioned objectives, a mixed method approach has been adopted, and interviews and questionnaires have been used to collect relevant data, which was then analysed using statistical tools as well as content and SWOT analysis.

The findings showed that Sri Lanka has a rich resource base, which brings comparative advantages to the country for ecotourism. These advantages were (a) high density of wildlife with birds, elephants and various other faunas (b) the natural flora variety that enables visitor to experience many different habitats, rain forest, ecosystems and bio-diversity (c) being a medium sized island gives visitors easy accessibility to any resource bases within a few hours journey. Both general tourists and experienced ecotourists were impressed by the resource base. They felt there is a high potential for ecotourism and they would like to come back as ecotourists. However, local communities are not happy with the current situation of development of tourism and a number of social and environmental problems have been identified.

This research identified a number of challenges to develop ecotourism in Sri Lanka. (a) The cooperation among stakeholders is insufficient and they work in isolation with no central organization to take up responsibilities. (b) Lack of standards and legal provisions to recognize the service providers by the government curtails their marketing power. (c) Insufficient government support impedes development of markets. (d) Local community participation is very low in ecotourism as a result of lack of awareness, which entails low interest in future involvement.

To meet the challenges in ecotourism, the study recommends: (a) closer cooperation among all stakeholders and regular communication for participating in corporate plans for future ecotourism development; (b) the local community, which is currently left out of tourism participation, needs to be given prominence to share tourism related benefits; (c) In dealing with fragile resource base, education for all stakeholders, and working together towards a collective goal with measurable objectives, are very important; (d) Sustainability of the resource base, on which all stakeholders are dependent, is the key for market and ecotourism sector development in the future; (e) The balancing of bi-directive sustainability and development with ecotourism is still an immeasurable but desirable limitation where more country-specific studies are required for future ecotourism development.

Keywords: ecotourism, sustainable tourism, community tourism, sustainability, Sri Lanka

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P. U. Ratnayake

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LIST OF ABBREVIATIONS AND SYMBOLS

AEO	Australian Ecotourism Organisation
AGA /DS	Assistant Government Agent / Divisional Secretary
AGDEH	Australia Government Department of the Environment and Heritage
Arch. Dept	Archaeology Department
ASMET	Association of Small and Medium Enterprises in Tourism Sri Lanka
CBO/CBTO	Community Based Tourism Organisations
CCD	Coast Conservation Department
CEA	Central Environment Authority
DCS	Department of Census & Statistics
DWLC/WLCD	Department of Wildlife Conservation / Wildlife Conservation Dept.
EAA	Ecotourism Association of Australia
EAA	Ecotourism Association of Australia
Eco. Con. NGO	Ecotourism Concern Non Governmental Organisations
FD	Forest Department
IETS	International Ecotourism Society
Irri. Dept	Irrigation Department
LA / PS	Local Authority / Pradesiya Saba
MOT	Ministry of Tourism
NOG	Non Governmental Organisation
PC	Provincial Councils
Pvt. Sector	Private Sector
SD	Standard Deviation
SL	Sri Lanka
SLTB	Sri Lanka Tourist Board
SME	Small and Medium Enterprises
UDA	Urban Development Authority
UN	United Nations
UNEP	United Nations Environment Programme
VFR	Visiting Friends and Relations
WTO/UNWTO	World Tourism Organisation
WTTC	World Travel & tourism council

CHAPTER 1

INTRODUCTION

Today tourism is the world largest single industry which has being almost continuously grown for the last 20 years. In the global economy, travel and tourism sector generated a combined gross domestic product (GDP) of about US \$1,542 billion and 74 million jobs directly. In broader sense i.e. including indirect impacts, travel and tourism economy reached in 2003 at total of US \$4,218 billion revenue that is equivalent to little over than 10 percent of the world's GDP and accounted for 215 million jobs, or 8 percent of the world's employment (WTTC, 2004). These figures are forecasted to rise to 11.7 percent of the world GDP share and 255 million employed amounting to one in every twelve jobs in the world, in 2020. The World tourism demand was 710 millions international arrivals in 2002 and it is predicted to be at one billion in 2010 and 1.5 billion in 2020. Moreover, an annual real growth rate of over 5 percent in total demand is expected for the next ten years. The market share distribution is given in table 1.1. Also tourism was responsible for US\$ 4.4 trillion worth world economic activities which will grow to US\$ 8.6 trillion in 2012.

Table 1.1 World Tourism Forecasts for 2010 & 2020

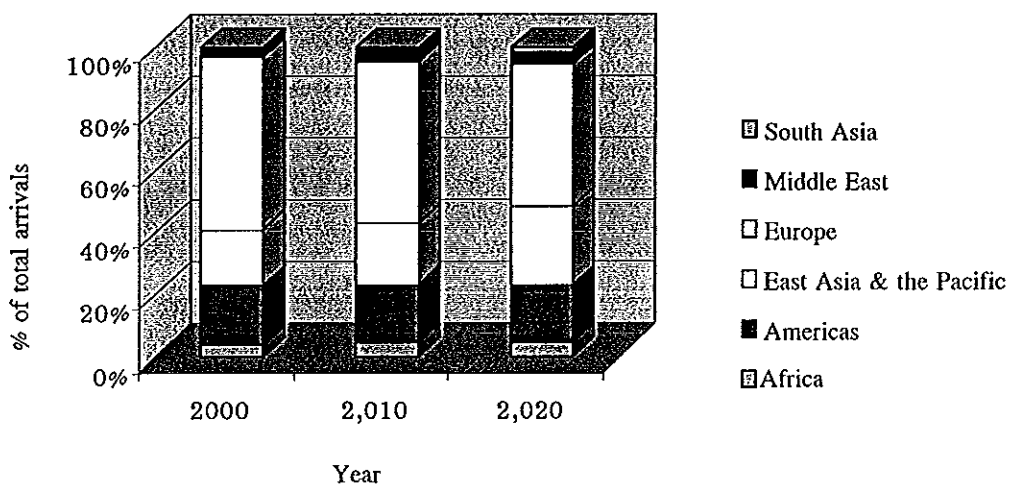
Year	Base year in Mn.	Forecasts in Million		Market share in %		Average annual growth rate in %
		2010	2020	1995	2020	
World	565	1006	1561	100	100	4.1
Africa	20	47	77	3.6	5.0	5.5
Americas	110	190	282	19.3	18.1	3.8
East Asia the Pacific	81	195	397	14.4	25.4	6.5
Europe	336	527	717	59.8	45.9	3.1
Middle East	14	36	69	2.2	4.4	6.7
South Asia	4	11	19	0.7	1.2	6.2

Source : WTO, 1999 & WTTC, 2004

Although Europe inherited the highest market share (Figure 1.1), the demand growth rate is leading in Asia and the Pacific region with six per cent annual

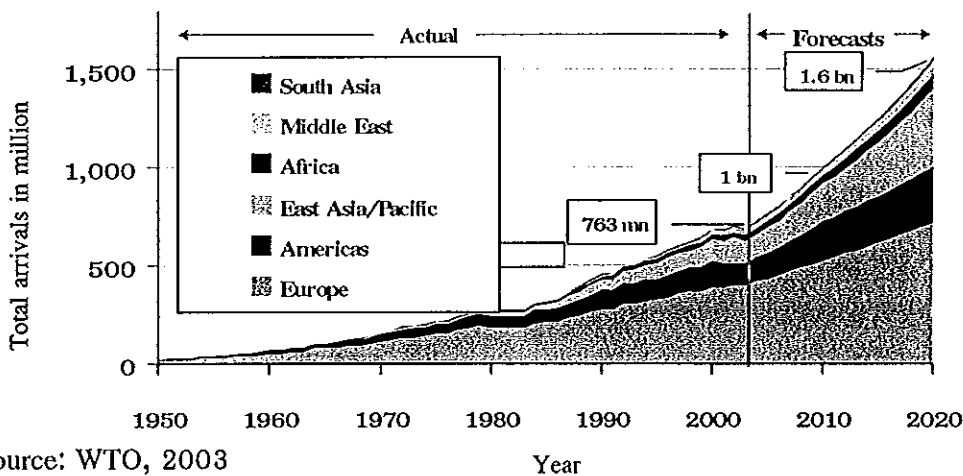
increase much higher than Europe's at three per cent. During the current decade (2000 - 2010), the World Tourism Organization (WTO,2004) forecasts that the number of international visitor arrivals will grow five times more rapidly in developing countries, particularly in the Asia & the Pacific, than in more established destination markets such as Europe and North America (Figure 1.2).

Figure 1.1 World Tourism Arrivals by Region



Source: World Tourism Organisation, 2004

Figure 1.2 World Tourism Arrivals and Forecasts



Source: WTO, 2003

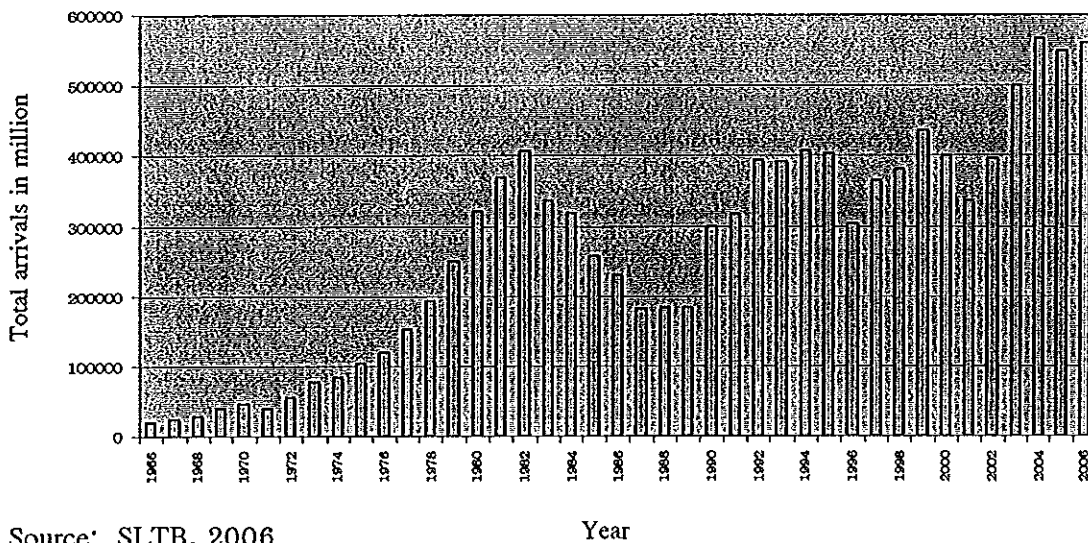
Over the last twenty years, ecotourism has become both an important sector of the tourism market and an increasingly important set of principles and practices for socially and environmentally responsible travel that is serving as a catalyst for reform of the entire tourism industry. The World Tourism Organization estimated that ecotourism and all nature-related forms of tourism now account for 20% of all international travel and that ecotourism is worth some \$20 billion a year (WTO, 1998). Beginning the 1990s, ecotourism (together with nature tourism) became the fastest growing sector of the industry, growing at about 20-30% per year (The Nature Conservancy, 2002). The tourism industry as a whole was growing at about 9% per year during the 1990s. The United Nations' declaration of 2002 on the International Year of Ecotourism signified that ecotourism has taken on global importance. There are no definitive statistical data on the overall size of the ecotourism market. However, various estimates and studies of the ecotourism market and of the larger nature tourism market all indicate that the market is large and growing. For example, in 1992 Filion (1992, cited in Honey, 2003) estimated that 40-60% of all international tourists are nature tourists and 20-40% are wildlife-related tourists.

1.1 Statement of the Problem

In Sri Lanka (SL) tourism plays a major role in the economy as a generator of foreign exchange and employment opportunities. It has been ranked as the 4th highest foreign currency earning industry in the country (Pathirana, 2006). The employment generation rate is one for every five tourists visit Sri Lanka, which is better than the world average of one employment for every nine tourists (SLTB,2005 & WTTC,1999). To the economy, tourism is a relief, to reducing high unemployment due to its labour intensive nature and generating foreign exchange for the country imports. Thus, since 2000 the government has recognised tourism as one of the thrust industries in its economic development plan and taken continuous initiatives to develop physical infrastructure while granting incentives to the private sector for tourism facility development (Task Force, 2000). Irrespective of all efforts, industry is struggling to sustain with unstable security situation with long standing terrorism in the country. As a result, tourism growth both by number of arrivals and foreign exchange earnings has experienced fluctuations and slow growth in 1990s and 2000s (Figure 1.3). This development badly affects investors and

direct & indirect domestic beneficiaries of tourism. Particularly employees risked to becoming unemployed and underemployed in many sub-sectors such as hotels and self employment, in Sri Lanka tourism. In addition, new investments and investors have been relatively conscious about investments in the sector (CBSL, 2002).

Figure 1.3 International Tourist Arrivals to Sri Lanka 1966 – 2006



Source: SLTB, 2006

Year

Sri Lanka is predominantly known as a beach destination for mass tourism and has been sold as such by the major foreign tour operators who have been able to achieve deeper discounts in situation of instability and security concerns. From the total arrivals in 2005, about 70% international tourist to Sri Lanka travel for leisure purpose (Table 1.2). From this 70% visitor's majority comes as group travellers. The groups are mainly either all-inclusive or package tourists (Figure 1.3). In short, the majority of international tourist to Sri Lanka arrives as larger groups organised by tour operators (Bultjens, 2003). For the mass tourism i.e. tours organised and sold in mass scale, foreign tour operates offer many destinations with tour brochures at the time of selling. Often, one brochure features similar destinations in different countries at competitive prices among destinations and tours. The tourist can select counties, destinations and tours depending on their own rationale of selection. When there is problem in a destination or country human tendency is to select a destination for the tour avoiding such places. The security situation of a destination is not the only reason for tourist not to select that destination but it has power to discourage in the decision making process. International

tourists are sensitive to the travel advisories issued in their countries. In addition, mass media and internet also play an important role in this regards. As such, tourist demand fluctuations could be expected when a destination is highly dependant on mass tourism. On the other hand, one can not assure that other forms of tourism (alternative tourism) are not sensitive to security aspect. However, in comparative sense between mass tourism and alternative tourism, the first category is more sensitive to any major problem including uncertainty in a destination (Buultjens, 2003).

Table 1.2 Tourist Arrival in Sri Lanka by Purpose

Tourist Arrival by Purpose in %			
Purpose of visit	1995	2000	2005
Pleasure/Leisure	94.9	90.1	69.6
Business	2.9	4.8	16.9
Visiting Friends & Relations (VFR)	0.9	2.1	8
Religious & Culture	0.4	1.7	1
Others	0.9	1.3	4.5
Total	100	100	100

Source: SLTB, 2005

Alternatively, when considering the country tourism resources, Sri Lanka has ample opportunities to attract tourist from niche market such as Nature tourism, Adventure tourism and Culture tourism etc.

Gunapala highlighted that:

“Earlier the main attractions to tourist were beaches and the coastal region. The resent trend indicates a move to diversify the tour products such as ecotourism , adventure tourism, sports, and community tourism. Since Sri Lanka is endowed with abundant tropical rain forest and enough natural heritages like Sinharaja, we have been able to attract this segment of market” (Gunapala, 2000, pp. 19-20)

Buultjens (2003) indicated that national parks, forest reserves, such as Uswattakele and Sinharaja world heritage wildness areas, their flora fauna and bio-diversity have attracted tourist for many years but he critiqued mentioning that nature base and

ecotourism products have not yet been developed in Sri Lanka. Being a bio-diversity hot spots. Sri Lanka gain a greater opportunity to attract tourist, if the products and services being placed with care thus, it is yet to be studied & utilised (De Silva, 2004). Gurusinghe (2001) mentioned that Sri Lanka has multifaceted attractions with nature and great cultural heritage as a cradle for alternative tourism and ecotourism in particular. Most of researchers concluded that the country has not yet utilised its rich nature and culture for tourism in the country.

Also niche markets such as ecotourism, adventure tourism and water sports are arguably less sensitive to the unstable security situation in a destination. The visitors come in smaller groups or individuals and mainly travel to undisturbed nature environments and places with rich culture and heritage. They are concerned about security but they understand better than others, that terrorism in Sri Lanka is in a distance part in the country and not everywhere. Since they are keen on new places every environment they visit is unique by its flora fauna population, diversity, climatic and soil conditions etc. So that one location is not easily comparable with other. Even though they are in smaller number, those tourists bring higher income to the destinations they visit (Gurusinghe, 2001). According to WTO and UNEP future tourist demand of these niche markets is about 7.3 per cent which is much higher than tourism growth in other categories (UNEP, 2002).

While Sri Lanka continues emphasising conventional tourism products, neighbouring competitors such as Thailand, Malaysia and India take action to diversify their product range. In tourism, when one country has a problem, tourism demand shifts to a neighbouring destination. Following the fact, Maldives, Malaysia, Phuket gained an advantage on the leisure segment. Also lower demand discourages future tourism investment and makes existing products & services less competitive in the market.

Sri Lanka tourism suffers from external factors such as lower demand and less investor initiative on niche markets resulting in less competitive advantages in catering to nature related major world tourism demand trend. Due to the uncertainty, Sri Lanka has less opportunity to tune its products and services to gain maximum benefits by way of direct and indirect to the economy (CBSL, 2002).

On top of these developments, the December 2004 Tsunami devastation damaged most of tourist service establishments on both East and West coast of Sri Lanka. Continued terrorist activities also continued in spite of peace efforts of various political initiatives. But terrorism did not allow any peace development in the country of which had direct negative impact on overall tourism demand.

Having taken into consideration the situation, Ministry of Tourism and Sri Lanka Tourist Board (SLTB) have taken measures to promote niche markets such as ecotourism, adventure and water sports in the country (SLTB, 2000, 2001). Some of those initiatives are listed below:

- Introduction of new theme for all Sri Lanka Tourism Promotions “Beyond Beaches.... Culture, Nature and Adventure.... ”
- Completion of Ecotourism study with National Ecotourism Policy, Regulations, Guidelines and Strategies for Sri Lanka in 2003.
- Maintaining of land bank information to assist investors to find potential land for product development in different areas in Sri Lanka.
- Conducting of Community awareness to minimise tourism negative impacts and to combat with negative attitude of the community towards tourism.
- Training of Ecotourism Guides selected from National Tourist Guides to serve particularly to Ecotourist market.
- Production of ‘Sri Lanka Nature’ broacher and promotional Compact Disk (CD) with ecotourism products.
- Incorporation Eco, Adventure activities in future mega tourism projects such as Dedduwa and Kalpitiya initiated by the Sri Lanka Tourist Board.
- Promotion of Nature and Ecotourism wed pages linked with SLTB website

(SLTB, 2003 b, 2004 & 2005)

Irrespective of all efforts, during last a few years progress has been made to develop nature related and ecotourism ventures in Sri Lanka was very low (Ratnayake,

2002). In-comparison to the progress made by Australia, Thailand, Malaysia and Indonesia, from international ecotourism year of 2002 to date, Sri Lanka's progress is inadequate. Therefore, today it is far behind to its competitors in attracting those potential niche markets such as ecotourism.

Sri Lanka is yet popular as a destination for beach, heritage and culture. However, similar offers have become common in most tropical courtiers, resulting in diminishing competitive advantage for Sri Lanka. Recent development in tourist generating markets suggests that tourism future is not going to depend only on traditional products (WTO, 2002). On the other hand, net return by traditional tourism is minimal due to high leakage factor with import imputes. In total about 70 percent accounted as leakage in mass tourism (Vidanage, 1995 & Gurusingha, 2001).

Understanding the trend and interest of the future market, most of the countries in Asia have already done researches and initiated formulation of products in accordance to the trend. Those studies reveals that future tourism would mainly be nature friendly, activity based, educational oriented and focusing on studying and admiring nature etc. In other words the three "E" concept i.e. Education, Excitement and Entertainment, is going to be the highlight in future tourism (Nam Ng, 2000).

In Sri Lanka, little initiative for further research and study and the present unstable security situation do not provide sufficient inducement to investors. As a result, the industry may continue with its present difficulties. As a result, gradual loss of advantages on new emerging world tourism trend is evident. Further, the Ecotourism Study (SLTB, 2003a) shows that the majority of tourists visiting wildlife parks and nature reserves would like spend more time with nature activities (SLTB, 2003b). But the availability of such offers is limited.

In nutshell:

International Ecotourism market and nature concern tourism demand are continuously growing and its enormous opportunities are available to receiving destinations. Existing incomparable resource base is a nature blessing for ecotourism in Sri Lanka.

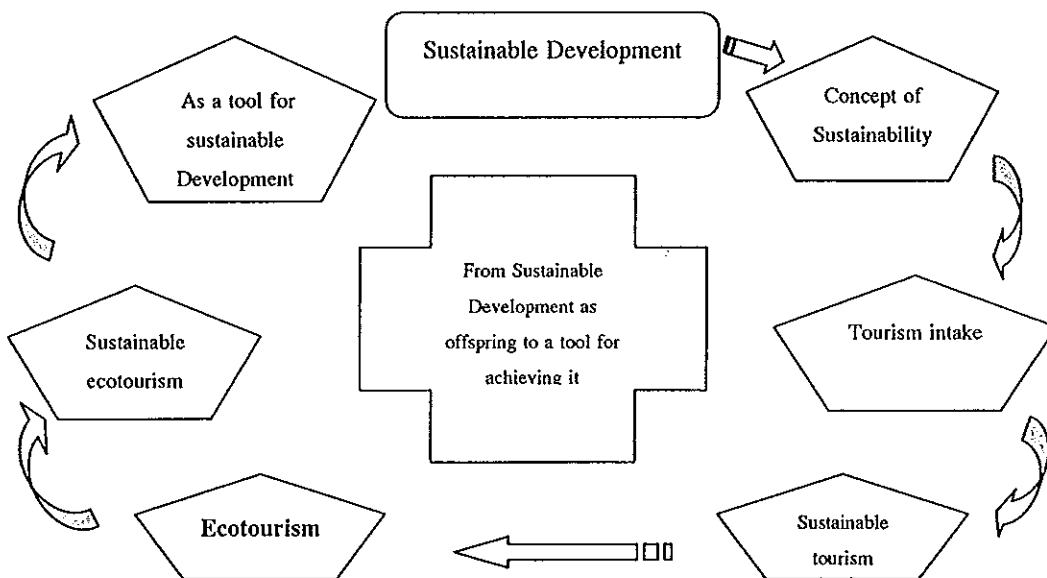
Present tourist willingness to engage in culture, nature and wildlife indicates the potential and prevailing demand. Inadequate facilities and offers for ecotourist limit gaining its capable benefits to the destination. Setting the system in order is a challenge for Sri Lanka.

This research aims at investigating the reasons behind this development. Moreover it will identify future challenges to attract present lucrative market trend in the world. Also, it will examine needed stakeholder contributions and finally recommend each sector and overall effort required to face challenges to develop ecotourism in Sri Lanka. Nevertheless, this study tries to fill the gap of study research for ecotourism development in Sri Lanka.

1.2 The Literature Review

This section reviews the origin of sustainability concept and its application into tourism by UNWTO where sustainable tourism came into existence. The birth of ecotourism, as a tool for sustainable tourism development, and its evolution of the concept as a form of tourism and then a management tool is illustrated. Ecotourism principles, components, stakeholders, markets and visitor characteristics are also discussed.

Figure 1.4 Evolution of Ecotourism concept



Source: The author

1.2.1 Concept of Sustainability, Sustainable Development its Evolution and Tourism Relationship

The emergence of the concept of sustainable development marked a convergence between economic development and environmentalism. This convergence was officially illustrated at the Stockholm Conference on Human and Environment in 1972. It was the first time UN assembly prompted the concept of eco-development where by cultural, social and ecological goals were integrated with development. Subsequently it was incorporated into strategic plans of many industries including tourism (IUCN, 1980).

Much has been written about the rise in conservation and economic development being precursors to the development of the term sustainable development, and ultimately sustainable tourism. Less appears to be written about the role of socio cultural aspects such as local community involvement in the development of sustainable tourism (e.g. Agenda 21 for sustainable development but into tourism taken as sustainable tourism as one industry in economies), (WTO, 1998). Sustainable development appeared with a strong environmental and economic focus. The *World Conservation Strategy* (IUCN, 1980), which was endorsed by various countries further developed ideas to link the environment with economic development. This document was followed by United Nations Environment Programme (UNEP), World Wide Fund for Nature (WWF). The other significant factors that contributed towards the evolution of sustainable development is the World Commission on Environment and Development (WCED, 1987) bringing the sustainable development first definition as “a process to meet the needs of the present without compromising the ability of future generations to meet their own needs’ (WCED, 1987 p. 8).

The definition of sustainable development acknowledged by the UN is:

“Development that meets the needs of the present without compromising the ability of future generations to meet their own needs.” (WTO, 1998a, p. 21)

The following analysis will concentrate on the literature involved and attention given to incorporating sustainable development into the tourism industry.

1.2.1.1 Concept of Sustainability

The concept of sustainable and sustainability was first highlighted by the International Union for the Conservation of Natural Resources in 1980 at its World Conservation Strategy (IUCN, 1980). Link between tourism and sustainability was fostered by many advocates in late 1980s. They suggested that the environment and tourism should be integrated in order to maintain environmental integrity and successful tourism development. Later they reasoned appeal for holistic view and highlighted need of integration of community concern and involvement in tourism development. The underlying concept of sustainable tourism is equating of tourism development with ecological and

social responsibility. It aims to meet the need of present while protecting and enhancing environmental, social and economic values for the future. Sustainable tourism is envisaged as leading to the management of all resources in such a way that it can fulfil economic, social and aesthetic needs while maintaining cultural integrity, essential ecological processes, biological diversity and life support system (Dowling, 2003).

The sustainability goals by Organisation of American States (OAS) are:

1. To develop greater awareness and understanding of the significant contribution that tourism can make to environment and economy
2. To promote equity in development
3. To improve the quality of life of the host community
4. To provide high quality experience for the visitor
5. To maintain the equality of the environment on which foregoing objectives depend.

(Organisation of American States, 1997)

This include avoiding all actions that are environmentally irreversible and undertaking mediatory or rehabilitation actions where the environment is degraded while promoting appropriate environmental uses, activities, and establishing and attaining environmentally acceptable tourism. Since then, there have been many variations and extensions on this basic definition. Many argue that sustainability has been hijacked and twisted to suit government and business that really want to continue with business as usual.

As there is no universally agreed way in which sustainability can be achieved, many different views spread over the world. The concept has been applied in different organizations and industries by developing own definition based on the UN idea. Quotes of some ideas what constitutes sustainable development and sustainability developed by others are listed below:

"A process of change in which the exploitation of resources, the direction of investments, the orientation of technological development and institutional change are all in harmony and enhance both current and future potential to meet human needs and aspirations" (WCED, 2003).

"Sustainable development is a dynamic process which enables people to realise their potential and improve their quality of life in ways which simultaneously protect and enhance the earth's life support systems" (FFF, 2002).

"The environment must be protected to preserve essential ecosystem functions and to provide for the wellbeing of future generations; environmental and economic policy must be integrated; the goal of policy should be an improvement in the overall quality of life, not just income growth; poverty must be ended and resources distributed more equally; and all sections of society must be involved in decision making" (UNEP, 2002).

"The first and perhaps most difficult problem, one that seldom gets addressed, is the time frame is a sustainable society one that endures for a decade, a human lifetime, or a thousand years?" (Global Ecology, 1993)

In summary "Sustainability" means:- It is a systemic concept, relating to the continuity of economic, social, institutional and environmental aspects of human society and non-human environment. It intends to be a means of configuring civilization and human activity so that society, its members and its economies are able to meet their needs and express their greatest potential in the present, while preserving biodiversity and natural ecosystems, and planning its ability to maintain in the long term. Sustainability affects every level from the local neighbourhood to the entire planet (IUCN, 2001).

1.2.1.2 Concept of Sustainable Development into Tourism

Tourism was given limited attention in its role for sustainable development at the Earth Summit in Rio de Janeiro. Chapter 11 of Agenda 21 recommended that governments promote ecotourism as a method to enhance sustainable forest management and planning (United Nations Conference on Environment and Development, 1992). In response to this, in 1995 *Agenda 21 for the Travel and Tourism Industry* was developed by World Travel and Tourism Council, the World Tourism Organisation and the Earth Council (1995). This document outlined priority areas for action and objectives for moving

the tourism industry closer towards achieving sustainable development, in line with the principles set out in Agenda 21 of the United Nations (WTO, 2001, p. 170).

1.2.1.3 Agenda 21 and Sustainable Development

Agenda 21 is a 'comprehensive plan of action to be undertaken globally, nationally and locally'. The extensive document covers social and economic issues, such as poverty, and environmental issues ranging from the protection of the atmosphere to the safe management of waste. The drive towards cataloguing diversity, identifying 'biodiversity hotspots' and highlighting the commercial value of ecological resources was a major task on under this concept. An emphasis is placed on access to the marine environment with its sustainability.

In applying the sustainable concept into tourism, WTO has defined sustainable tourism as:

"Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities 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" (WTO, 2001, p. 21)

Alternative concept for sustainable development of tourism by UNEP (2002) is as follows:

"Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability". Thus, sustainable tourism should:

1. Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes, and helping to conserve natural heritage and biodiversity.
2. Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
3. Ensure viable, long-term economic operations, providing socioeconomic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary. Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability and promoting sustainable tourism practices amongst them (WTO, 2003).

The UN defines sustainable tourism as 'the tourism industry must be profitable and environmentally sustainable if it is to provide long term benefits, but this will not be achieved without a new and different approach to industry planning and development' (UN, 1999).

The Concept includes the following objectives:

- ❖ The natural, historical, cultural and other resources for tourism are conserved for continuous use in the future, while still bringing benefits to the present society.
- ❖ Tourism development is planned and managed so that it does not generate serious environmental or socio-cultural problems in the tourism area.

- ❖ The overall environmental quality of the tourism area is maintained and improved where needed.
- ❖ A high level of tourist satisfaction is maintained so that the tourist destinations will retain their marketability and popularity.
- ❖ Preservation of bio-diversity and life support for all natural habitats
- ❖ The benefits of tourism are widely spread throughout the society.
- ❖ Preservation of indigenous knowledge and ways of living and respect of the spiritual and cultural traditions of different people.

In fulfilling these objectives WTO (2001) suggests that the environmental, social, cultural and Economic aspect has to be sustained in the long run. In achieving sustainability, stakeholder co-operation and coordination is also important.

Moving one step forward the World Travel and Tourism Council (WTTC) and WTO have develop action plan call Agenda 21 for tourism, which was the first effort a single industry initiation for the implementation of sustainable concept.

In achieving fifth goal of sustainability defined by OAS (1997) indicated in section 1.2, environmental conservation includes providing for intergenerational equity in resources utilisation. Ecotourism is often use synonymously with sustainable tourism but in reality, ecotourism fits with a larger concept of sustainable tourism (Ceballos Lascurain, 1998). It can be argued that ecotourism is a niche form of tourism which fosters sustainable principles. It started as a type of tourism and later developed as an approach which means a process that drives tourism. Thus ecotourism encompasses sustainable principles and in fact should be regarded as an example of the sustainable approach within tourism in general.

1.2.2 Concept of Ecotourism

1.2.2.1 Historical Evolution of Ecotourism

1.2.2 Concept of Ecotourism

1.2.2.1 Historical Evolution of Ecotourism

Ecotourism began in the early 1980s as an untested idea to contribute to the conservation of natural resources worldwide. Rain forests, coral reefs and other nature habitats became subjects of biological studies and nature film documentaries. These studies help to accelerate more specialised business opportunities in pristine and remote zones.



On the other side, in the 1980s international business began to flourish with a growing interest in outdoor travel and the environment (Wood, 2002).

The term '*ecotourism*' was originally defined as:

“travelling to relatively undisturbed or uncontaminated areas with the specific object of studying, admiring, and enjoying the scenery, its wild plants and animals, as well as any existing cultural manifestations found in these areas”. (Ceballos-Lascurain, 1987 and Boo, 1990).

According to Ceballos (1998), an evaluation of ecotourism, initially, requires its definition. Notwithstanding, there are many definitions and concepts of ecotourism, elaborated by different scholars with different interest. Still there is no globally accepted definition exists, however. The Nature Conservancy (2002) was on the view that each sector involved with ecotourism (NGO's, local communities, academics, governmental organizations etc.) tends to create their own idea of the activity, based on their specific interests and points of view.

Consequently, in 1991, the International Ecotourism Society produced one of the earliest definitions of ecotourism:

'Ecotourism is responsible travel to natural areas that conserves the environment and sustains the well being of local people (TIES, 1991).

The World Conservation Union (IUCN) (1996) defines it as: “ecotourism is environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (any accompanying cultural features—both past and present) that promote conservation has low negative visitor impacts, and provides for beneficially active socio economic involvement of local populations.”

The definition of use by the Ecotourism Society of United State is:

“Responsible travel to natural areas that conserves the environment and sustains the well being of the local people.” (ETUS, 1991)

The UNEP and International Ecotourism Society defined ecotourism as:

“Responsible travel to natural areas that conserve the environment and wellbeing of local people” (Wood, 2002, p. 9)

Ecotourism Association of Australia (EAA, 2000) defines ecotourism as:

“Ecologically sustainable tourism, with a primary focus on experiencing nature areas that foster environmental and cultural understanding, aspiration and conservation”

The first definitions of ecotourism stressed the proximity with nature that tourists looked for, more recent definitions aimed at placing the accent on a variety of principles associated with sustainable tourism. For example, rather than suggesting nature based or ecotourism is a separate sector of the industry, the Ecologically Sustainable Development Working Group (ESDWG) on Tourism in Australia suggested that ecotourism is a situation where ‘the idea of a symbiotic relationship between tourism and environment becomes most apparent. The tourism facilities and services exist in a natural resource dependent for their operations are nature base tourism. In ecotourism, those facilities and service’s are independent although it employs natural resources. Ecotourism and nature-based tourism can form part of many types of travellers’ experiences varying from a few hours of nature-appreciation through to intensive long-duration tours of a month or more (ESDWG, 2006).

Summing up all ideas ecotourism concept including culture has been finally defined Weaver:

“Ecotourism is a form of a tourism that foster learning experiences and appreciation of the natural environment, or some component there of, within its associated cultural context. It has the appearance (in concert with best practice) of being environmentally and socio-culturally sustainable preferably in a way that enhance the natural and cultural resources base of the destination and promote the viability of the operation” (Weaver, 2001a, p. 15)

There are many other definitions sprinkled throughout the literature and an academic industry which has thrived on the analysis of the ‘ecotourism’ phenomenon. Consequently, a historical overview will assist to understand the relationship between tourism and the nature, socio-cultural environments.

Since there is no universally recognised ecotourism definition, it is required to seek definitions of organisations and countries to find what it is (Wight, 2001). Blamey (2001) viewed that when tourism taken as a whole, the terms ‘ecotourism’ and ‘nature-based tourism’, are almost always used interchangeably and indiscriminately. Since the concept of ecotourism has already matured and developed beyond the original attempts at definition, it is intentionally avoided adhering strictly to any definitions. Accordingly, Wood (2002) argues that not only destinations even regions need to develop their own ecotourism definition and principles base on available international knowledge and documents. Taking the whole ideas and concepts into consideration Sri Lanka has developed its simple definition with recent study on Ecotourism National Policy Guidelines and Strategies. The cultural component highlighted in the ecotourism literature has given equal attention hereto.

“Responsible travel to natural and cultural areas that conserves the environment and improves the well-being of local communities” (SLTB, 2003a, p. 1)

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With evolution, the ecotourism concept has widened its horizons from a kind of tourism activity to a tourism sub-sector and today it is a form of a management process within the main tourism scenario. It composes six main criteria to comply as basic principles. The first of the four 'form of tourism which meets the basic criteria of ecotourist'. Second, the attractions use constitutes primarily on natural-based environment but it can include associated cultural resources, attributes and influences as a criteria. Third, motivation and interaction with the attraction provide experience that centred on learning; education and appreciation outcomes are fostered. Fourth, whole ecotourism process must appear to be environmentally (ecological sustainability - bio centric) and socio-culturally sustainable (anthropocentric) perspective based on best practices as (criteria) Fifth, pursuit of enhancement of sustainability is desirable but not a essential criteria. (Preferably in a way it enhances the destination). Sixth, The importance of an operations financial sustainability is recognised (Weaver, 2001a). In practical sense, ecotourism is the planning and development of tourism infrastructure, facilities and activities with marketing focused on environmental, social, economic and cultural sustainability criteria. In relation to the above, the tourism industry can develop ecotourism in line with its principles based on global environmental and sustainable movements.

Underline principle of ecotourism has been insight as the current philosophy which is concurrent with knowledge base platform restricting restrictive and prescriptive definitions. The elusive criterion of sustainability as a principle in environmental and cultural dimensions of the destination is addressed and aims to be achieved. Simultaneously service operator and community well-being are considered in the light of sustainability.

Over 20 years evolution of ecotourism concept explains what conceptual components make ecotourism a complete management concept according to current literature (The Nature Conservancy, 2002, p. 13). The main components include knowledge-based flat form and its ideal and sustainable tourism reflects the apparent synthesis of ideas from both dominant western environment paradigm and green paradigm. New Emerging green paradigm gives a cautionary platform and its rejection of dominant paradigm through the core concept of unsustainable mass tourism (Weaver 2001a, pp. 36-37).

1.2.2.2 Principles of Ecotourism

The International Ecotourism Society (TIES) has made an attempt to compile some of the most important principles, such as:

- (i) Minimise the negative impacts on nature.
- (ii) Educate the traveller.
- (iii) Stress the importance of responsible business.
- (iv) Direct revenues to conservation areas.
- (v) Emphasise the need for regional tourism.
- (vi) Monitor programmes
- (vii) Maximise the economical benefits for the host country
- (viii) Ensure that tourism development does not exceed the social and environmental limits
- (ix) Relies on infrastructure that has been developed in harmony with the environment.

Subsequently in collaboration with TIES, UNEP proposed the following:

- (i) Conservation of biological diversity and cultural diversity, through ecosystems protection
- (ii) Sustain the well-being of local people
- (iii) Includes an interpretation/learning experience - environmental & cultural knowledge
- (iv) Involves responsible action on the part of tourists and the tourism industry
- (v) Is served primarily by small-scale businesses?
- (vi) Minimises to lowest possible level the consumption of non-renewable resources
- (vii) Stresses local participation, ownership and business opportunities, particularly to rural people

(Wood, 2002)

Even though it is difficult to define ecotourism, it derives the meaning of presents several principles/characteristics such as (Blamey, 2001);

- (i) Protection of natural areas
- (ii) Education
- (iii) Generation of money
- (iv) Quality tourism
- (v) Local community participation

Consequently, many definitions have appeared. However, by finding common aspects among the definitions ESDWG (2006) defines and explains four main principles of ecotourism, which are outlined below:

- (a) Promote environmental conservation

Ecotourism is generally developed in intact or little disturbed natural areas. Thus, the development of the products should be planned and controlled, opting for a rational use of resources and for quality in its management. Ecotourism should minimize impacts to wildlife, soil, vegetation, water and air quality through the use of management procedures. It should also promote the use of alternative energy resources, adequate waste and Gray water disposal, recycle, landscape architecture, alternative technologies (composting and low flush toilets, water collection, recycle materials, etc), and follow an environmental educational program. In addition, environmental protection involves small group size in order to obtain low visitor density thus maintaining an adequate carrying capacity. At the same time, the activity must maintain and emphasize the cultural traditions of residents.

- (b) Promote an interpretative educational experience

While visitors are enjoying nature, they should also be motivated and educated by participatory activities, which have the objective of stimulating their ecological conscience and transmitting knowledge about the regions visited. The Nature Conservancy (2002) stated that they also should experience authentic two-way interaction with local residents, as well as having experiences that help them consider sustainable development, conservation and wildlife protection issues in both the host and the home country.

(c) Community Involvement

Fundamental to ecotourism is the participation of local residents. Their involvement should generate material, social and personal benefits.

- (i) Material benefits - employment opportunities; the increase of community and individual' revenues; natural and cultural resources economical gains; agricultural, commercial and handicraft production.
- (ii) Social benefits - improvements in education; medical assistance; communication and transportation facilities;
- (iii) Personal benefits - self-esteem, responsibility and sense of belonging.

By observing negative impacts of tourism (loss of cultural identity; prostitution; social inequality, increased cost of living), it is possible to conclude that some of these impacts are a consequence of changes caused by the presence of visitors from different cultures and social levels. Involving the community at the beginning in tourism development can minimize impacts. This involvement to exist, it is necessary to establish committees, partnerships, and others means of providing input to public and private interests (The Nature Conservancy, 2002).

From the moment local people perceive that the ecotourism is a source of revenue and depends on natural attractions, they will immediately start to value and preserve it. Ecotourism should be an additional source of revenue to local people. It should not substitute traditional economic practices such as fishing and agriculture. Local people can become more involved in ecotourism: by running their own business, be it lodging, handicrafts, supplying food or other products or by being employed by a lodge as guides or canoe drivers. They can also be consultants in architectural design.

(d) A lucrative business

Like other forms of tourism, ecotourism is also a commercial activity and as such it should be economically viable for both the local community and the operators. However, ecotourism requires low visitor density and small group size, therefore its profits are modest and over the long contrary to mass tourism.

SLTB (2003b) provides a useful summary of ecotourism components:

1. All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas
2. It contains educational and interpretation features
3. It is generally, but not exclusively organised for small groups by specialised and small, locally owned businesses. Foreign operators of varying sizes also organise, operate and/or market ecotourism tours, generally for small groups.
4. It minimises negative impacts upon the natural and socio-cultural environment
5. It supports the protection of natural areas
6. It generates economic benefits for host communities, organisations and authorities managing natural areas with conservation purposes
7. provides alternative employment and income opportunities for local communities
8. Increases awareness towards the conservation of natural and cultural assets, both among locals and tourists

Nowadays, it is commonly admitted that ecotourism includes the principles of sustainable tourism regarding the impacts on economy, society, and environment. This research will emphasise the following specific principles which distinguish ecotourism:

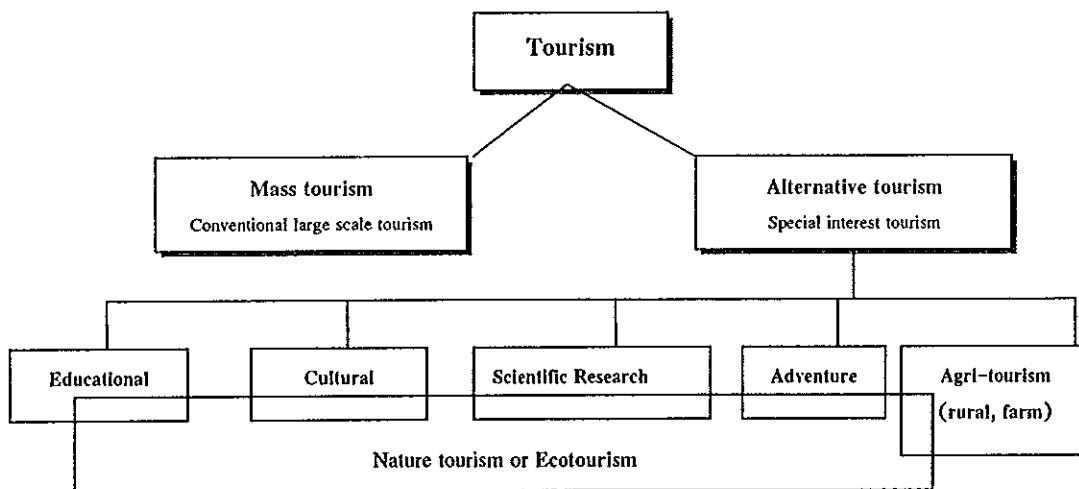
- (i) ecotourism actively contributes to the natural and cultural heritage protection;
- (ii) ecotourism includes local and native populations in its planning, development, and exploitation, and it contributes to their well-being;
- (iii) ecotourism offers to visitors an interpretation of the natural and cultural heritage;
- (iv) ecotourism lends itself better to individual travelling and travelling organized for small groups.

1.2.3 Ecotourism in Comparison with Other Forms of Tourism

1.2.3.1 Mass Tourism, Alternative Tourism and Ecotourism

Alternative tourism sounds opposite to conventional mass tourism, in other words, all forms tourism other than mass can call as alternative tourism. Wearing (2000) finds five categories of alternative tourism as shown in figure 1.5 and tries to introduce both alternative and ecotourism possess similar characteristics with no due consideration on sustainability and educational/learning aspects in ecotourism.

Figure 1.5 All Types of Tourism by Wearing



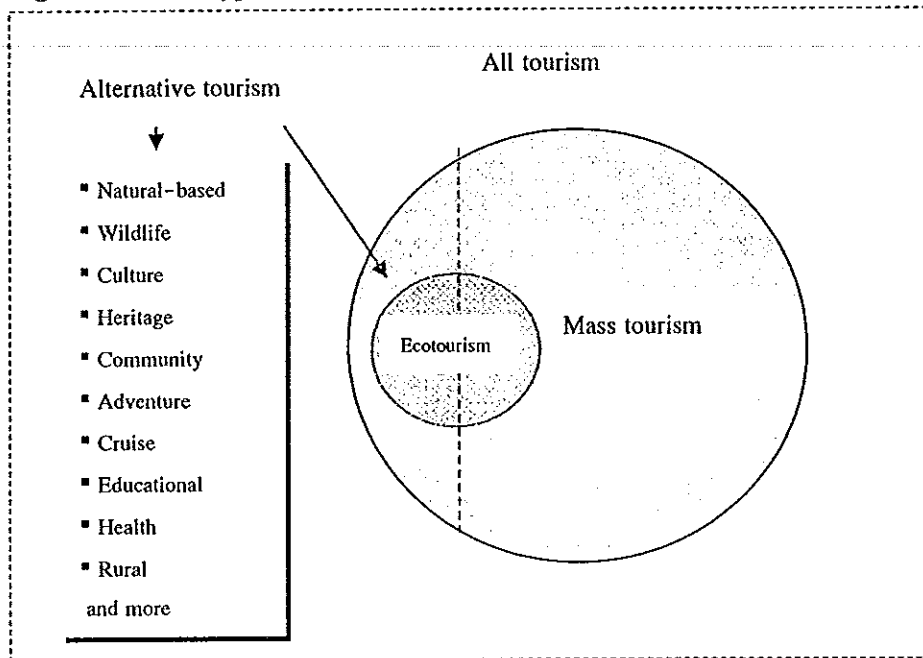
Source: Wearing, 2002, p. 3

Ecotourism can overlap some cases with other forms of alternative tourism such as; educational, cultural, Research, Adventure and Agro/Agri tourism. He views ecotourism as a complete alternative to mass tourism.

Weaver (2001) has combined all forms of tourism with circular format which is more developed and meaningful illustration, to compare and differentiate the ecotourism concept (figure 1.5). In contrast to Wearing's idea, it clearly mentioned that all forms of alternative tourism are not necessarily ecotourism while it moves closer and

sometimes overlap. In order to have clear insight or idea on ecotourism stand, best way is to compare each of alternative forms of tourism with ecotourism.

Figure 1.6 All Types of Tourism by Weaver



Source: Weaver, 2001a, p. 20

1.2.3.2 Ecotourism, Nature-Based Tourism and Sustainable Nature Tourism

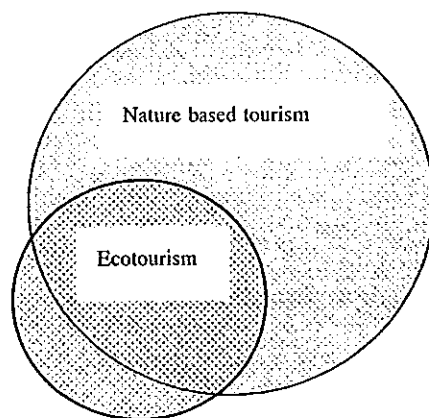
The word 'ecotourism' is used in a variety of ways often to simply promote a recreational experience to a natural area (Fennell, 2001). Unlike ecotourism, nature-based tourism does not imply sustainability, conservation, or other value-laden nature's role in ecotourism development. The nature-based tourism concept simply serves as a broad description of ways tourism and recreation might use natural environments. Since not all nature-based tourism operations live up to the ecotourism definition, ecotourism can be considered a small subset of the broader nature-based tourism concept (Weaver, 2001^a).

While nature-based tourism is just travel to natural places, ecotourism provides local benefits – environmentally, culturally and economically with care on their sustainability. A nature based tourist may just go bird watching while an ecotourist goes bird watching with a local guide, stays in a locally operated ecolodge and contributes to the

local economy etc. (AGDEWR, 2006). According to National Ecotourism Strategy of Australia nature base tourism involve education interpretation of the natural environments that manage to be ecologically sustainable. In this definition ecologically sustainable refers to cultural components of the society (Weaver, 2001a). The World Conservation Union (1996), defines the nature tourism as the visit of natural environments remained relatively intact including inspiring on nature, eco systems and biodiversity with socio-economical implication on local populations which is active and beneficial.

Finally it envisages that nature base tourism is any types of tourism that relies on attractions directly related to the natural environment. Although ecotourism is mainly based on natural environment its component of cultural attributes and learning aspects are not observed in nature-based tourism. In addition the sustainability approach is not compulsory component in nature based tourism but instead a desired one (Weaver , 2001a, P. 16).

Figure 1.7 Nature Based Tourism and Ecotourism



Source: Weaver, 2001a, p. 16

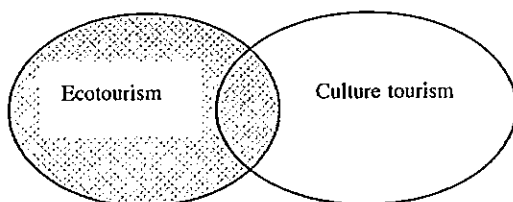
Sustainable nature tourism is very close to ecotourism but does not meet all the criteria of true ecotourism. For example, a cable car carrying visitors through the rainforest canopy may generate benefits for conservation and educate visitors, but because it represents a high degree of mechanization and consequently creates a barrier between the visitor and the natural environment, it would be inappropriate to describe as an ecotourism initiative. In altered and heavily-visited areas, sustainable nature tourism may be an appropriate activity. For example, larger “eco” resort development would not be considered

low impact if it required significant clearing of native vegetation but may contribute to conservation financially and provide conservation education. The line between sustainable nature tourism and ecotourism is subtle but very important. A project/service must meet all of the necessary principles and criteria stipulate for a country or region accurately to define as ecotourism. If not principle's and criteria are met, the project do not truly benefit conservation or the people involved over the long term. Though, ecotourism is one alternative form of nature tourism, the rationale behind ecotourism is that local tourism businesses would not destroy natural resources but would instead support their protection and offer a viable strategy to make money and conserve resources (The Nature Conservancy, 2002).

1.2.3.3 Culture Tourism and Ecotourism

Culture tourism is based on cultural attraction and activities. Also in ecotourism internal attributes link with culture when it takes holistic approach. In practical sense on the surface of the earth bears some evidence of human or cultural intervention. Rather than dealing only with non human element, ecotourism provides much realistic and deeper experience to ecotourist (Weaver, 2001). Learning exercise or the experience is an essential component in ecotourism of which could be a motivation to attract ecotourist, where as in culture tourism beyond the information on culture, learning can be a desire but the necessity of learning takes low priority. It is not easy to separate the cultural and natural components in one environment. E.g. in an indigenous culture both culture and nature components co-exist base on one on the other (Fennell, 1999). Circumstances, it is evident that both types of tourism linkup with cultural component which means overlap the two concepts while maintaining their identity as separate concepts sometimes.

Figure 1.8 Co-existence of Two Concepts - Culture Tourism with Ecotourism



Source: Weaver, 2001a p. 16

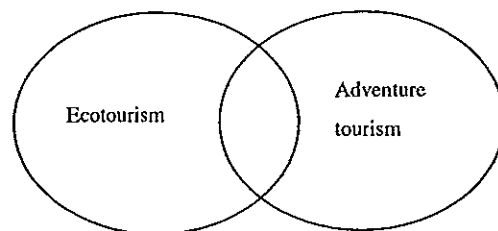
1.2.3.4 Adventure Tourism and Ecotourism

There are three elements that distinguish adventure tourism:

- An element of risk
- High level of physical exertion
- Need of a specialised skills particularly skills of successful participation and safety.

The tourism literature e.g (Weaver, 2001a) identifies two types of adventure activities i.e. soft and hard. There is no clear demarcation to separate one from other but when the level of requirement of the above three elements are higher particularly risk element, it is considered as a hard adventure. (a) Most of adventures are nature based but there are others exercised in non nature bases e.g. adventuring to a dangerous place with civil war. (b) On the other hand, adventure does not concern necessarily the sustainability. (c) Thirdly, the interaction of the visitor with his attraction of adventurer is quite different from ecotourist. Adventurer's desire is experience the risk; face the challenge with physical exertion etc. The ecotourist intention is to gain educational/learning experience while concentrating sustainability aspect etc. Although the two concepts are very close to each other there are characteristics to distinguish one from the other. Similar to the two concepts overlaps on the other more ecotourist engage and prefer to undertake adventure activities in their tour.

Figure 1.9 Co-existence of two concepts - Ecotourism and Adventure tourism



Source: Weaver, 2001a, p. 16

1.2.3.5 Community Based Tourism and Ecotourism

Community Tourism Definition:

“Community Tourism is both an integrated approach and collaborative tool for the socio-economic empowerment of communities through the assessment, development and marketing of natural and cultural community resources which seeks to add value to the experience of local and foreign visitors and simultaneously improve the quality of communities” (Country Style International, 2007)

Community Tourism is about new levels of relationships between the host country and the visitor. What is appealing to the visitor is found among the varied natural attractions, local resources and talents, and indigenous attributes of a community or area. Through visitor-community interaction, respective cultures are explored, ideas and information are exchanged, and new friends are made. Community Tourism fosters opportunities at the community level for local people wishing to participate more fully in the tourism industry. This may range from establishing bed & breakfast accommodation in a rural home to creating income-generating tourism opportunities for an entire village.

In ecotourism most of characteristics of community tourism are included such as interaction, experience village culture way of life etc. Although community tourism expect the whole village to be tourism centred- economic setup, ecotourism has a clear cut to distinguish that tourism should not change their traditional culture and become tourism businessman neither individually nor collectively. Village culture sustainability is primarily requirement ecotourism to exist while community benefits by tourism are ensured. Where as community tourism total experience on village set up and wholly dependent on tourism as a economic activity. In the long run community tourism may change the base community cultures into mix or different from where they started. When two cultures strongly interact (often and close inter-exchange) the host culture tends to adopt with other gradually.

Hathurusingha explained the same:

“There can be hidden cost during any kind of tourism operations as two divers cultures clashing (interacting). On party has a strong possibility of loosing their social cultural values.” (Hathurusingha, 2004 p. 2)

Ecotourism try to maintain the balance of unchanged or minimum change with highest benefits to the community. Finding of this balancing line of sustaining and wellbeing of local community is also a challenge in ecotourism.

It was noted that community participation and their role in ecotourism development have been sometimes identified with different views by scholars in local environment. Some scholars believe that the whole ecotourism planning, development and maintenance have to be undertaken by the local community where as an other recognise them as a necessary stakeholder whose benefits to be maximise etc. In this situation, the researcher was on the view that misunderstanding in this nature can also lead to disputes and different interpretations which might emerge conflict in the practical environment.

Therefore, the same was searched in the ecotourism literature for clarification:

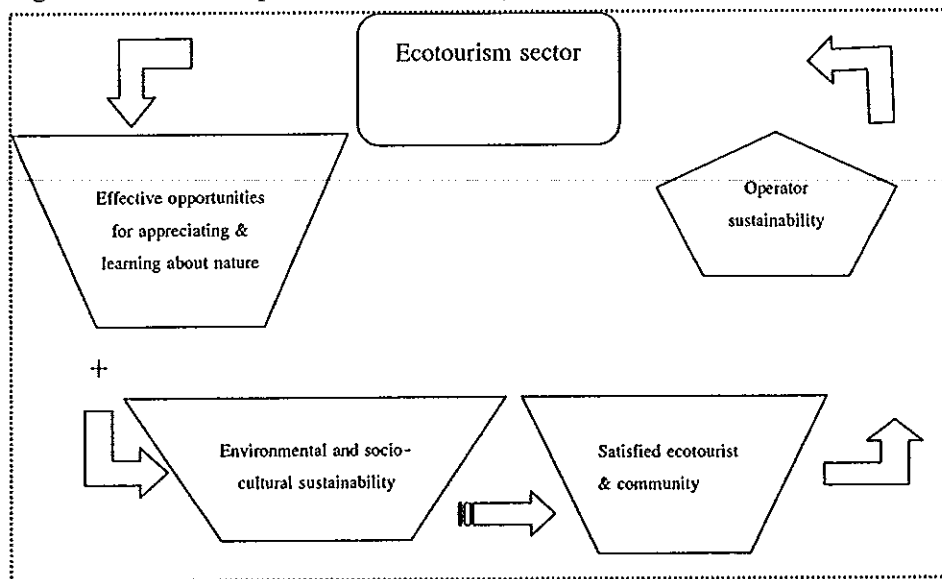
.... “Both community-based and private sector ownership of ecotourism products is possible, and ecotourism ideally occurs within a moderate capitalist system that attempt to accommodate financial as well as environmental and socio-cultural sustainability. Further more to meet these objectives ecotourism requires sophisticated management strategies that include the use of scientific methods...” (Weaver, 2001, p. 37)

According to this idea both community based and private owed ecotourism products can exist and more importantly it consider environmental and socio-cultural sustainability for which scientific methods are incorporated.

In sustainability concept, local community benefits are assured for their wellbeing but it does not encourage making tourism as their main economic activity. In addition, majority of the community should not involve either direct or indirectly in tourism. If so, the community identity can be probably dissolve in the long run. Big idea

came to attract tourism with community because of nature and socio-cultural resources associated with community. Also they are part and parcel of that environment. By making community tourism oriented while nature and culture are preserved, the social value of them for tourism can be degraded. Then the tourism product value also can come down. If socio-cultural identity is lost while community dependence remains on tourism, the community may start imitating their former or indigenous traditions. (e.g. in Sri Lanka, Dambana indigenous community sometimes imitate to show, how they were in the past.) The demonstration of traditions to visitors is a kind of cheating. Ecotourist desire is to study and experience traditions but not to change their life style. This development is against sustainability. Ensuring community wellbeing ecotourism does not expect community or its associated environments to be changed. In this sense, community involvement has limits depending on the environment on which the product exists. On the other hand, in the ecotourism process there are some activities such as marketing, maintenance of minimum standards demands kind of developed skills and knowledge on market and its minimum standards. For marketing communication, experience and knowledge on market are needed which mean external skill associated knowledge support is required. It reveals that community alone may not be able to ensure total management & visitor satisfaction. The challenge is how to manage ecotourism as a high yielding product within those limitations while maximizing community benefits. Here, what is important to understand is local community benefit is an essential component in ecotourism but may not be the only component attended. The ecotourism goes beyond that as a holistic concept treating all aspects in the society, i.e. culture and nature approaching sustainability as its essential reach. (Figure 1.10) In other words, community involvement in ecotourism from top to bottom is essential for their wellbeing but ecotourism may not necessarily work only for community replacing community tourism in the place of ecotourism.

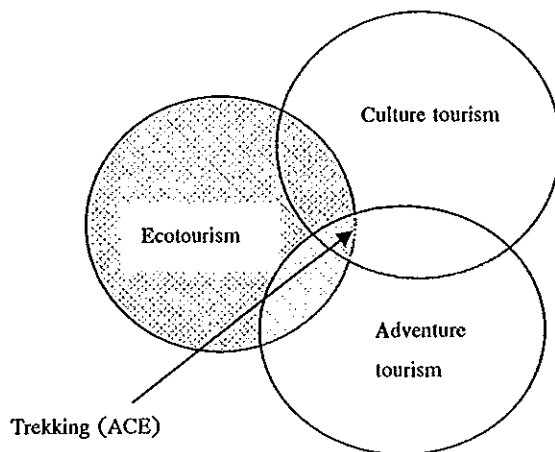
Figure 1.10 The Optimal Ecotourism Cycle (Modal)



Source: Weaver, 2001a, p. 25

1.2.3.6 ACE tourism -Adventure, Culture with Ecotourism

Figure 1.11 Adventure, Culture and Ecotourism - ACE tourism



Source: Weaver, 2001a, p. 18

Sometimes, it is hard to find single form of tourism in ecotourism practices. Closer link, association and overlapping complicate to differentiate and understand the concept behind. Even literature interpretation varies with confessions and synthesis. One such example is, 'ACE tourism'. Figure 1.8 explains seven different characteristics which consists three individual forms, three two form combinations and all in one exercise.

1.2.3.7 Nature based, Eco and Adventure Tourism- NEAT tourism

NEAT tourism describe the combination of nature based, adventure and ecotourism e.g. Whale watching or swimming with Whale. In comparison to 3S tourism (Sea, Sand & Sun tourism), this is completely different use of ocean for tourism. It is natural environment, taking a risk and physical exercise and learning as well as benefits can be use for environment and community enhancement.

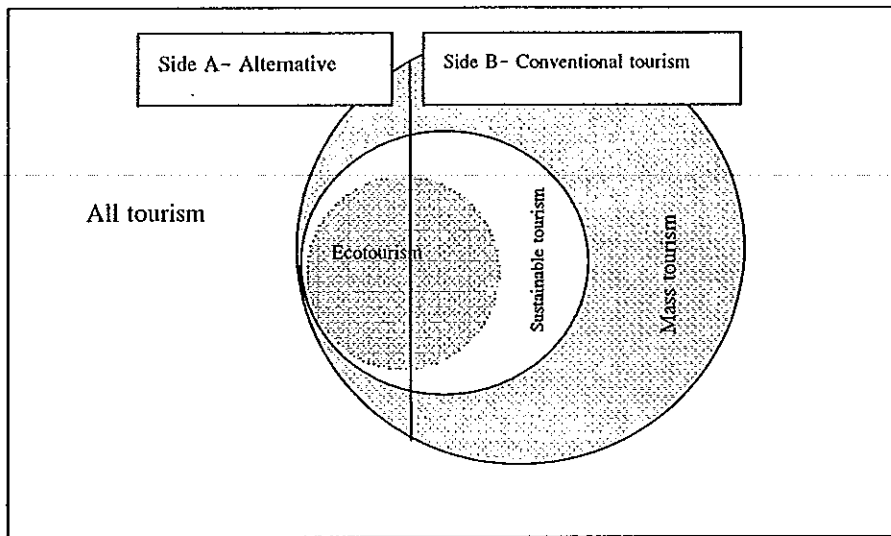
1.2.3.8 Sustainable Tourism and Ecotourism

Sustainable Tourism embraces all segments of the industry with guidelines and criteria that seek to reduce environmental impacts, particularly the use of non-renewable resources, using measurable benchmarks, and to improve tourism's contribution to sustainable development and environmental conservation (WTO, 2001). This appeared to be the common platform that all forms of tourism need to be directed towards in future. Some concerns still need to be wholly addressed in ecotourism, such as:

- land tenure and control of the ecotourism development process by host communities
- efficiency and fairness of the current concept of protected areas for protection of biological and cultural diversity
- the need for additional precautions and monitoring when operating especially in sensitive areas
- indigenous and traditional rights in areas suitable for ecotourism development

Thus, ecotourism could be considered as a "sustainable" activity, one that does not diminish natural resources being used, while at the same time generating income. The sustainability refers to environment and all its associate nature components, eco and other systems, cultural associates including heritage. Also include the local community who are partly bound with the resource base as a stakeholder and service provider either individuals or group of the community. Importantly visitor satisfaction in comparison to their expectations as a demand factor sustainability. Finally the whole system of activities bound with financial sustainability to continue as a sustainable tourism activity concerning all its dependents.

Figure 1.12 Mass, Alternative, Sustainable Tourism and Ecotourism



Source: Weaver, 2001a, p. 16

Based on existing literature, incorporating the sector potential and its responsibility, ecotourism can be defined for this research as follows:

[Ecotourism is a form of tourism centred on learning experiences which based and respects the natural environment and cultural associates and ensures the wellbeing of local community while being environmentally and socio-culturally sustainable, preferably in a way that enhances the natural and cultural resources in the destination as a viable economic activity].
(The author)

1.2.3.9 Sustainable Development, Sustainability in Tourism and Ecotourism - Summary

At the United Nation's Conference on Environment and Development, popularly known as Earth Summit in Rio de Janeiro in 1992, the sustainable development approach was widely discussed. It was further elaborated with adoption of Agenda 21 by the conference. There onwords, governments have adopted sustainability as a fundamental development policy in their national planning process. The World Tourism Organisation has applied this concept into tourism with its planning and development exercises. Today tourism is not behind to any other world industries in applying sustainability concept in to

its practicality. This means, irrespective of many criticisms, tourism has high approached its arms to sustainable development and continue to do so; taking sincere effort to make the world a good place for present and future generations. While being a form of tourism, the ecotourism has fully committed to respect and apply the sustainability concept as the principle discipline of its management process. As a result, ecotourism has become a management concept and tool for sustainable tourism development in the light sustainable development in many parts of the world.

The Sustainable development and sustainable tourism development are defined as “the development that meets the needs of the present generation without compromising the ability of future generations to meet their own needs” and “sustainable tourism development meets the needs of tourist and host regions while protecting and enhancing opportunities for the future. It envisage as leading to management of all resources in a such a way economic and social and aesthetic needs can be fulfilled while managing cultural integrity, essential ecological processes, biological diversity and life support systems” respectively (WTO, 1998, p. 21). The development and socio-economic objectives are balanced with the constraints that nature sets. Thus, it is based on the principles of self reliance, fulfilments of basic needs and emphasis on the quality of life.

In the Rio declaration, sustainability is seen as staying within the capacity of the natural environment while improving the quality of life and offering our children opportunities at least as good as those available to us. The UN declaration confirms this view, when it mentions that we are socially, culturally, and economically interdependent. Sustainability in the context of this interdependence requires partnership, equity, and balance among all parties. The Sustainability and sustainable development involve two domains that should not be ignored or oversimplified, economic / environmental on one side, and socio cultural on the other (UN, 1999). One impotent question could be raised at this point is: What is the relationship between ecotourism and sustainable development?

Tourism as a global phenomenon has emerged as a relatively new social activity. Before the emergence of tourism as business and industry, interaction between different societies took place through commercial trading or migrations. Thus, cultural exchange was relatively limited. With the development of communication and transportation means people began to travel for the sake of travelling, which launched a process of cultural

globalisation that has been accelerated in recent years by further developments of information industry. Concomitantly, tourism has become a major source of impact on the social, cultural, built, and natural environments. It is an attractive phenomenon that affects both the hosts and the visitors. Being one of the fastest growing industries in the world, more and more countries are recognizing this issue and are developing measures to ensure that tourism should not have negative impacts on cultural and natural environments (WTTC, 2006).

The latest trend in travel industry is ecotourism, a newly emerged type of tourism that combines preserving natural environments and sustaining the wellbeing of human cultures that inhabit those environments. Ecotourism, said to be first devised as a term by Hector Ceballos Lascurain, promotes environmental responsibility and ensures that visitors take nothing but photographs, and leave nothing but footprints. The activities of ecotourists range from visiting archaeological digs, bird watching, photo safaris, expeditions into desert regions, to historical tours, and interaction with indigenous cultures.

Ecotourism is a responsible way of travel; it is an alternative to traditional travel, but it is not for everyone. It appeals to people who love nature and local cultures. It allows those people to enjoy an attraction with an impact in such a way that local culture and environment are unimpaired. Thus, it should be stressed that tourism industry should care for the visitors and for the places they visit. It preserves and conserves nature and culture. Thus, it can be argued that it is a key player in the understanding of human history and its interaction with the natural environment; it is also a key player in the spread of environmental knowledge and awareness. In this respect, sustainable development is the backbone of ecotourism. However, the question that remains challenging for the future is: How much change in or alternations of natural and cultural environments be acceptable?

1.2.3.10 Sustainable Ecotourism

Nature tourism or cultural tourism is not ecotourism without embodying the elements of conservation and sustaining of the well-being of local people. Ecotourism is both a concept under a set of principles and a specific market segment refers as sustainable ecotourism. The principles are:

- Minimizes environmental impacts using benchmarks
- Improves contribution to local sustainable development
- Requires lowest possible consumption of non-renewable resources
- Sustains the wellbeing of local people
- Stresses local ownership
- Supports efforts to conserve the environment
- Contributes to biodiversity

Finally the whole ecotourism concept can be summarised as: **Ecotourism is a sub - component of the field of sustainable tourism with following components of travel:**

- Contributes to conservation of bio-diversity and ecosystems
- Sustains the well-being of local people
- Includes an interpretation/learning experience
- Involves responsible action on the part of tourists and the tourism industry
- Delivered to small groups by small scale businesses
- Requires lowest possible consumption of non-renewable resources

(Weaver, 2001a & Wood, 2002)

1.2.3.11 The Hard Core/Deliberate Ecotourist, Soft Ecotourist and Eccidental Ecotourist

Hard core also called deliberate ecotourists have a strongly bio centric attitude that entails a deep commitment to environmental issues. They believe that his/her activities should enhance the resource base and desire for closer interaction with natural or cultural environment gaining challenging personal nature contact and experience (Weaver, 2001a). Their characteristics are: prefer making own arrangements, small group and special trip with enough time access to undisturbed venues are the preference. They are educated and demand is more specific and education during eco- activity prominence (Dearden, 2000)

Soft ecotourists are not dedicated as hard ecotourist. Usually half of their tour allocated for ecotourism activities. Generally Demand is not specific (Dearden, 2000).

Their desire engaging in environment is relatively low. They are supported with accommodation, eating and toilet facilities. Soft ecotourist don't mind accompanying other ecotourist. They typically engage in ecotourism as a one component of multipurpose trip and mainly focus on one day trip. They prefer mediation such a interpretation or interpretation centre services. More likely make formal arrangement with travel agency and tour operators (Weaver 2001). Even with mass tourism characteristics to certain extent their preference and purpose of visit has clear deference with Conventional form of tourist.

Table 1.3 Compression between Hard Core and Soft Scotourist

HARD (active, deep) ←	(passive, shallow) SOFT →
The ecotourism spectrum	
Strong environmental commitment	Moderate or superficial
Enhance sustainability	Environmental commitment
Specialised trips	Environmental commitments
Long trips	Multipurpose trips
Small groups	Larger groups
Physically active	Physically passive
Physically challenge	Physically comfort
No services expected	services expected
Deep interaction with nature	Shallow interaction with nature
Emphasis on personal experience	Emphasis on mediation
Make own travel arrangement	Rely on travel agent and tour operators

Source: Weaver, 2001a, p. 44

“... it should be noted there are varying degrees of overlapping of both hard and soft ecotourism in orientation and combinations. Both hard and soft ecotourism may nevertheless, incorporate some ecological aspects and techniques into their orientations...” (UN-ESCAP, 1998, p. 193)

Even with differences, as indicated, there are similarities in those two kinds of tourist in ecological interest and techniques used to approached in the ecotourism exercise.

Accidental ecotourist are little different from soft ecotourist. The distinction between hard core and accidental ecotourist are more than the previous group. Sudden decision or decision with no prior expectation to engage in ecotourism activity call accidental ecotourist. Mostly they spend limited time on ecotourism activity, expect intermediatory services and expect pre hand information. They can be apart of a group and admire the environment than enhancing the nature setup. Similar to other groups care for nature and culture and its sustainability. The ideology is closer to soft ecotourist but the interest, as per the ecotourism concept, and the intention of being to a specific ecotourism location or destination is lower than soft ecotourist (Wight, 2001a).

1.2.4 Market Characteristics of Ecotourists – Trends and Motives

1.2.4.1 World Ecotourism Trends

Until recently ecotourism was considered niche market, but one that is among of the fastest growing segments of the tourism industry (WTO, Sep/Oct 1998c). The WTO expects ecotourism along with cultural tourism and adventure tourism to be the hottest tourism trends for the 21st century.

The whole tourism industry is changing rapidly and the elements of nature-based and ecotourism inspiring in all segments of the tourism market. Today, the industry of travelling and tourism is growing enormously. As the United Nations Environmental Programme reports, there were about 710 million international tourist arrivals worldwide in 2003, nearly 50 million (7.3%) more arrivals than in 1999 – the highest growth rate in nearly a decade (UNEP, 2006). However, the growing tourism industry also poses a threat to the environment, by accelerating the development of previously unknown destinations opened up by mass tourism (Weaver, 1991).

With time visitors began to demand more environmentally sound and eco-friendly holidays, a number of companies started to develop environmental guidelines for travellers. The main objectives of such guidelines, include: pay due regard to environmental concerns such as design, planning, construction and implementation; be sensitive to the conservation of environmentally protected or threatened areas; practice energy conservation;

reduce and recycle waste; practice freshwater management; control and diminish air emissions; monitor, control and reduce noise levels; eliminate environmentally unfriendly products such as asbestos, CFCs, pesticides and toxic wastes. Exercise due regard for interests of local populations; and consider environmental issues as a key factor in the overall development of travel and tourism destinations (WTTC, 1994).

Moreover, several new trends in the tourist industry can now be identified, for example, there is a continued growth in domestic and international tourism; a shift in destinations from developed to developing countries; an increased interest in activity holidays as opposed to traditional beach holidays; and an increased interest in travelling to more natural settings and less disturbed areas. Change of characteristics shown in Table 1.4

Table 1.4 Characteristics of OLD and NEW Tourist

Old Tourists	New Tourists
search for the sun	experience something different
follow the masses	want to be in charge
here today, gone tomorrow	enjoy, not destroy
just to show that you have been	just for the fun of it
having	being
superiority	understanding
like attractions	like sports
cautious	adventurous
eat in hotel	try local fare
homogenous	hybrid

Source: WLEDC, 2001, p. 30

One of the most important trends influencing the demand for ecotourism overall is the aging of populations in the developed world, especially in those regions where the international market demand for ecotourism is centred: North America, Northern Europe and, to a lesser extent, Japan. This change in demographics was identified in 1990s and early 2000s as creating more demand for ecotourism trips (Williams Lake Economic Development Commission, 2001).

Another trend fuelling the growth of ecotourism is the growing tendency of travellers to take life enriching vacations that involve education, the outdoors and nature. The desire to learn and experience nature is influenced by at least three major factors: the changing attitude to the environment, which is based on the recognition of inter-relationships among species and ecosystems; the development of environmental education in primary and secondary schools and; the development of environmental mass media. The trends toward depersonalization of the workplace and high technology work and living environments are also seen as contributing to a greater demand for life enriching ecotourism experiences (Williams Lake Economic Development Commission, 2001).

Research and studies on flora, fauna, habitats, species, bio-diversities, ecosystems and socio-culture culture related are becoming more and more popular. It contributes around 10% of the total ecotourism market. The growth rate in this particular segment is higher than the overall ecotourism market growth. As per Weiler, 95% of the research ecotourists sampled were students in full-time higher education. Majority of the research ecotourists (63%) were female, whilst most students (75%) were reading for a degree in the natural sciences with the remainder enrolled in environmental courses such as geography or environmental management. The most popular statements as a whole related to the benefits of ecotourism expressed with reference to the environment and host community (Weiler & Richins, 1995).

Soft adventure travel is also a trend with wide variety of ecotourism activities prompted by the desire of tourist to challenge themselves and push their physical energies (TIAA, 1998). Ecotourism growth is also influenced by the increasing desire of today's urban, desk-bound society to be more physically active. The Travel Industry Association of America (TIAA) found that about one-half of the US population said that they have participated in some form of "adventure travel", principally a wide variety of activity-based soft adventure and ecotourism activities, in the last five years alone. The trend is driven by the desire of vacationers to challenge themselves and push their physical energies, as well as their desire for camaraderie among friends and quality time with family (TIAA, 1998).

These trends indicate not only that there is growing demand for ecotourism, but also that it is moving away from being a niche market towards the mainstream. While

ecotourism initially attracted wealthier, more educated and well-travelled people, its client base is now expanding to include a wider range of incomes, educational backgrounds and travel experience. Evidence of this market expansion is provided by a survey of North Americans which found that 77% of general consumers are interested in ecotourism (HLA/ARA, 1994). North American eco-tour operators indicate that their clientele is both broadening and deepening to attract inexperienced travellers (Wood, 1998). These trends indicate not only that there is growing demand for ecotourism, but also, that a wider range of tourists are involved.

A further indication of ecotourism becoming main stream is provided by the growing involvement of the mass market travel trade in the development and sale of ecotourism packages. Whereas ecotourism operators previously relied on niche marketing strategies – such as word of mouth and promotion through the specialty travel trade – to market their products, but now there is a movement towards the sale of ecotourism by travel agents, a group generally more focused on mass market tourism. As well, investor groups with ties to traditional mass-market tourism have recently entered the ecotourism market (WLEDC, 2001).

1.2.4.2 Size of the Ecotourism Market

The World Tourism Organisation (1998) stated that ecotourism and all nature-related forms of tourism account for approximately 20 percent of total international travel.

Table 1.5 World Tourism and Ecotourism Estimates

Year (Taken from Table 1.1)	World Tourism demand (Arrivals in Mn.)	Ecotourist estimate at 10% (Mn.)
2000	692	69.2
2010(estimates-WTO)	1006	100.6
2015(estimates- WTO)	1561	156.1

Source: The author estimated base on WTO data

Ecotourism, although growing by 20 to 30 percent a year, still represents less than one-tenth of the total tourism industry. Accordingly the ecotourism demand approximately can be calculated as in Table 1.5.

Sources of Ecotourism Market Demand: There are no definitive statistical data on the overall size of the ecotourism market. However, various estimates and studies of the ecotourism market and of the larger nature tourism market all indicate that the market is large and growing. For example, in 1992 Filion estimated that 40-60% of all international tourists are nature tourists and 20-40% are wildlife-related tourists. More recently, in 1997 the World Tourism Organization estimated that ecotourism and all nature-related forms of tourism now account for 20% of all international travel and that ecotourism is now worth some \$20 billion a year (WTO, Jan/Feb, 1998). Wright (2001) and TIES estimated that 40% of tourists travel to see wilderness

In terms of the demand for ecotourism experiences in Canada, the recently released Environment Canada study *The Importance of Nature to Canadians* reported that 20 million Canadians 15 years of age and over spent \$11 billion on nature-related activities in Canada in 1996. This included \$6 billion for nature travel-related items, \$3 billion for equipment and \$2 billion for other items needed to pursue nature-related activities (Environment Canada, 1999). These statistics indicate that the North American ecotourism market is very large. Unfortunately, there are no studies providing information on the size of the European ecotourism market, either as a whole or on an individual country basis (WLEDC, 2001).

1.2.4.3 Popular Ecotourism Motives

The diverse of interest could be noted among different nationalities, which has also been confirmed by Wright (2001) with her study. In general most of ecotourist travel motivations, activates preferred and accommodation expected are:

a. Travel Motivations

Nature, including flora, fauna and geography, is the primary travel motivation of ecotourists. They not only wish to see it, but also to experience and learn about it within a natural setting. They also want to learn about history and other cultures, have new experiences, be physically active and participate in outdoor activities. Ecotourists also have a desire to be physically active and to have social contact and the opportunity to meet new people.

b. Activity Preferences

Ecotourists enjoy a very wide variety of activities, from nature viewing and interpretation to soft and hard adventure to historically and culture based activities. They are looking for new, life-enriching experiences related to nature, adventure and culture. Activities common to many surveys of ecotourists include visiting national parks, wildlife viewing and cultural/aboriginal experiences.

c. Accommodation Preferences

Ecotourists prefer intimate, adventure type accommodations, such as cabins, lodges/inns and bed and breakfasts. In terms of luxury standards, they like mid-range, followed by basic/budget level accommodations (WLEDC, 2001, pp. 35-36).

1.2.4.4 Market Characteristics of Ecotourists

Ecotourists are not a homogeneous market segment (Wright, 2000). However, the profiles and other related research indicate that some broad generalizations can be made about the market characteristics of ecotourists.

- Age** - Ecotourists are more likely to be baby boomers, but they also come from all other age groups.
- Gender** - The split between male and female ecotourists is relatively even.
- Income** - Ecotourists tend to have a higher level of income than mainstream travellers.
- Household** - In terms of household composition, ecotourists tend to live as couples or in families.
- Education** - Ecotourists are generally highly educated, with a high proportion being college/university graduates.
- Occupation** - Those studies that have collected information on occupations have all found that a high percentage of ecotourists are managers or professionals.
- Memberships** - Many ecotourists are supporters of nature-based organisations.

Publications - Ecotourists tend to be consumers of outdoor and/or nature-oriented Publications.

Source: WLEDC, 2001, p. 35

Detailed surveys on ecotourism are limited for European and Asian countries. The ecotourist to Canada from key destinations are given in Table 1.6

Table 1.6 Principal Activities of Interest for Key Canadian Ecotourism Markets

USA	<ul style="list-style-type: none"> ● Sea kayaking (37%) ● Nature observation (36%) ● Whale watching (30%) ● Scuba diving (29%) ● Other wildlife viewing (24%) 	<ul style="list-style-type: none"> ● Bird watching (19%) ● Canoeing (14%) ● Rock & ice climbing (13%) ● Hiking (12%)
Germans	<ul style="list-style-type: none"> ● Canoeing (31%) and trail riding ● Other wildlife viewing (11%) 	<ul style="list-style-type: none"> ● Nature observation (6%) ● Scenery, national parks, forests & wildlife
French	<ul style="list-style-type: none"> ● Culture and nature 	<ul style="list-style-type: none"> ● Bird watching
British (UK)	<ul style="list-style-type: none"> ● Canoeing 	<ul style="list-style-type: none"> ● Wildlife safari
Japanese	<ul style="list-style-type: none"> ● Nature observation, soft adventure/ecotourism locations "abundant in nature" ● Climbing, hiking and scuba diving 	<ul style="list-style-type: none"> ● National parks (88%) ● Mountainous areas (88%) ● Seeing wildlife (83%)
Canada	<ul style="list-style-type: none"> ● bird watching ● canoeing 	<ul style="list-style-type: none"> ● sea kayaking ● Natural attractions (96%)
British Columbia	<ul style="list-style-type: none"> ● Hiking (39%) ● Sea kayaking (17%) 	<ul style="list-style-type: none"> ● Whale watching (15%) ● Nature observation (14%)

Source: Tourism Canada, 1995 cited in WLEDC, 2001, p. 34

1.2.4.5 Trip Characteristics

William Lake Economic Development Commission discusses the following trip characteristic:

Trip Length - Trip lengths vary due to factors such as destination, activity and ecotourism experience, but overall ecotourism trips seem to be longer than non-ecotourism trips.

Time of Year - Ecotourists travelling to Canadian ecotourism destinations tend to travel during the summer months, with fairly strong interest in the shoulder season and some interest in winter travel.

Expenditures - Ecotourists tend to spend more than the average traveller, and spend a considerable amount on non-consumptive travel related expenses, such as equipment, dues, magazines and donations. They are prepared to spend money for quality vacations, but demand quality service.

Sources of Information - Ecotourists show a high reliance on the recommendations of others (word of mouth or friends/family), and various forms of printed material are also an important source of information for ecotourists. There are also indications that personal experience from past trips plays an important role in the travel decision. In addition, the Internet is becoming increasingly important in planning ecotourism trips.

Trip Booking - Many ecotourists are confident enough about travelling to make their own trip arrangements. (WLEDC, 2001, p. 36)

The Nature Conservancy (2002) provide Socio-demographics of ecotourist as per William's Lake Economic Development Canada:

Figure 1.13 Characteristics of North American Ecotourists

The International Ecotourism Society constructed the following ecotourist market profile in 1998 based on a survey of North American travellers.

- Age:** Ranged from 35-54 years old, although age varied with activity and other factors such as cost.
- Gender:** 50% were female and 50% male, although clear differences by activity were found.
- Education:** 82% were college graduates. A shift in interest in ecotourism was found from those who have high levels of education to those with less education, indicating ecotourism's expansion into mainstream markets.
- Household composition:** No major differences were found between general tourists and experienced ecotourists.**
- Party composition:** A majority (60%) of experienced ecotourism respondents stated they prefer to travel as a couple; only 15% preferred to travel with their families and 13% preferred to travel alone.
- Trip duration:** The largest group of experienced ecotourists (50%) preferred trips lasting 8-14 days.
- Expenditure:** Experienced ecotourists were willing to spend more than general tourists; the largest group (26%) was prepared to spend \$1,001- \$1,500 per trip.
- Important elements of trip:** Experienced ecotourists' top three responses were: (1) wilderness setting, (2) wildlife viewing, and (3) hiking/trekking.
- Experienced ecotourists' top two motivations for taking their next trip were: (1) enjoy scenery/nature and (2) new experiences/places.

Source: The Nature Conservancy, 2002, p. 25.

1.2.5 Ecotourism Trend in the Asian Region

World tourism arrivals trend from develop to developing countries and higher arrival growth to Asia and the Pacific underline the importance of Asia - Pacific region in the world tourism scenario. One of the main reasons for this development is rich natural and cultural resources availability in this region. Both East and South Asian regions have unique tourism potential for conventional tourism.

To develop ecotourism, a destination needs certain special characteristics with its resource base, which is also the uniqueness in Asian region. Undoubtedly, it is the foundation for future ecotourism. As such, Asia region has competitive advantage in the world ecotourism market with its resource base for ecotourism development in future (UN-ESCAP, 1999).

“It is certainly possible that ecotourism, as a distinctive segment of the tourism industry, could provide considerable opportunities for future tourism development in ways that highlight the regions’ diverse cultural heritage abundant resources and unspoiled environments.. ”(UN- ESCAP, 1999, p. 1)

There is also evidence on a regional basis of growing market demand. Japan, South Korea, Thailand, India, Nepal, Malaysia and Indonesia have already take measures to gear their product to attract within Asian region. In addition to market opportunity, ecotourism develop strong commitment towards sustainability concept on its natural and cultural resources it exists (WTO, 1993b). As UN ESCAP findings (1999) the countries in the region has unique resources to offer and places to organise ecotourism activities. Study find China, Philippines, Singapore, Viet Nam and Pakistan are in the process of gearing its product while previous group were being pioneers. The others such as Bangladesh, Cambodia, Lao, Mongolia, Bhutan, and Sri Lanka are still in the initial stage in ecotourism development.

The global importance could be maximised if those countries share their ideas and experiences among them as a region while being independent with country specific resources and features that could be set as products to the international ecotourism markets (UN ESCAP 1999). From country specific definition onwards research base careful investigation on ways and means of management of environmental and cultural resources and balancing its developments areas where all can share the knowledge.

Promotion of ecotourism as a region mutually and individually helps to countries in creating an image in the generating market on top of present general tourism practices continue in almost all these countries. Not only external but also tourism within the region will bring a considerable impact on international tourism. Instead inter-regional travel intra-regional travel which is at a higher growth rate, would be definite edge on

ecotourism to all countries in the Asia region (WTO, 1997). Sri Lanka can definitely make use of these trends with appropriate initiatives.

1.2.6 Review of Tourism Development in Sri Lanka

Sri Lanka tourism which possesses a long history over 70 years, reserved official recognition with the establishment of Government Tourism Bureau in 1936 (Gunapala, 2000, p. 18). The formal tourism development in Sri Lanka started in 1966 with the establishment of Ceylon Tourist Board (CTB) (presently called Sri Lanka Tourist Board-SLTB) under the parliament Act.No.10 in 1966. The Board started its' initial operations with more attention on tourism promotion. Simultaneously product development and tourism facilities & services standardisation were carried out forming a logical frame for the Sri Lanka tourism development with powers vested to the CTB by the Tourism Development Act. No. 14 in 1968. The rationale behind these functions were, by promotions induce the demand in tourist generating markets while planning and development takes care of required supply of product & services at required quality according to those markets. Maintaining the service quality standards and regulation including supervision came under trade standardisation functions. The two latter activities targeted supply side management. Later many other supplementary functions such as community relations, domestic tourism were added in the light of industry requirements and national interest.

Since 1966, tourism continued with a steady growth in late 1960s and 1970s. The tourist demand development came to a momentum in 1982 and 1994 with all time high arrivals from its inception (Table-1.3). The first ten year Tourism Master Plan for 1967-1976 called 'Ceylon Tourism Plan was initiated leisure focused resort and private sector investment motivation on tourism investment (SLTB, 1967 cited in Hall, 2000, p. 237). Private sector was reluctant to invest heavy capital demanded for tourism facility development particularly standard accommodation in the country. Government incentives such as tax concessions and land for facility development coupled with infrastructure development for tourism resorts, geared the private sector involvement in tourism business. Meantime destination marketing in western countries continued as the Ceylon Tourist Board

main faction. As a result tourism development in both demand and supply continued to grow until mid 1980s.

The second ten year 'Tourism Mater Plan' (WTO, 1993) was relatively a comprehensive study covering all aspects of tourism in Sri Lanka. The National Tourism policy, strategies, product development and regional development were introduced for the first time with that study. The target markets and marketing strategies base on country tourism resources were some of the eminent features in the second Master Plan. The plan set some specific objectives and targets for the subsequent ten years (1992-2001) in the tourism industry. They are:

- Tourist arrival target of 874,000 by 2001 from 317,703 (1991)
- Increase average income by tourist from US\$43 -1991 to \$86 in 2001
- Growth in foreign exchange earnings from US\$156 to \$706 in 2001
- Doubling existing room capacity from 9,679 to 18,953 in 2001
- Employment to rise from 54,000 in 1991 to 136,000 in 2001
- Increase of Government revenue by tourism from Rs. 983 Mn to 6,171Mn.
- Tourism Product and facility diversification
- Enhance local community benefits by tourism

Source: WTO, 1993a

From mid 1980s unfavourable security situation had been affected on tourism industry time to time for over two decades. Major incidents such as terrorist attack at Central Bank of Sri Lanka (CBSL) in January 1996 and Colombo Airport July 2001 resulted fluctuations on tourism demand (Figure 1.13). Of course, US World Trade Centre Attack in September 2001 had worsened the situation in 2001.

Although the Master Plan approached to make Sri Lanka tourism industry sustainable in the long run, due uncertainty and various other reasons industry was par behind to its targets. Initial forecasts were set at 874,000 arrivals for 2001 but even in

2005, after additional 4 years, Sri Lanka tourism was unable to reach this target (Table 1.3).

However, the National Tourism Organisation (SLTB) and industry has taken number of initiatives to drive the products range in the country towards Culture, nature, hill country, adventure, waterspouts and other sports.

The industry progress when country situation improves and vis-a-vis (figure 1.13). Irrespective of continues destination promotion efforts by the Sri Lanka Tourist Board and product promotion initiatives by the private sector the industry heavy dependent segment of mass tourism was continuously volatile.

Table 1.7 Sri Lanka Tourism Data:1966-2006

Year	Arrivals	FE earnings US\$ Mn.	Avg. income US\$ per day	No of Rooms	Employments Dir't & Indir't
1966	18,969	1		720	-
1970	46,247	4	7	1,408	12,078
1975	103,204	22	22	3,632	23,848
1980	321,780	111	31	6,042	47,900
1982	407,230	147	36	7,539	64,200
1985	257,456	82	35	9,826	54,600
1990	297,888	132	41	9,556	59,000
1994	407,511	231	54	10,742	81,400
1995	403,101	225	56	11,225	84,000
2000	400,414	253	62	13,311	91,000
2004	566,202	417	72	14,322	129,000
2005	549,308	362	75	13,162	125,000
2006	559,603	-		-	-

Source: SLTB, 2005 & 2006

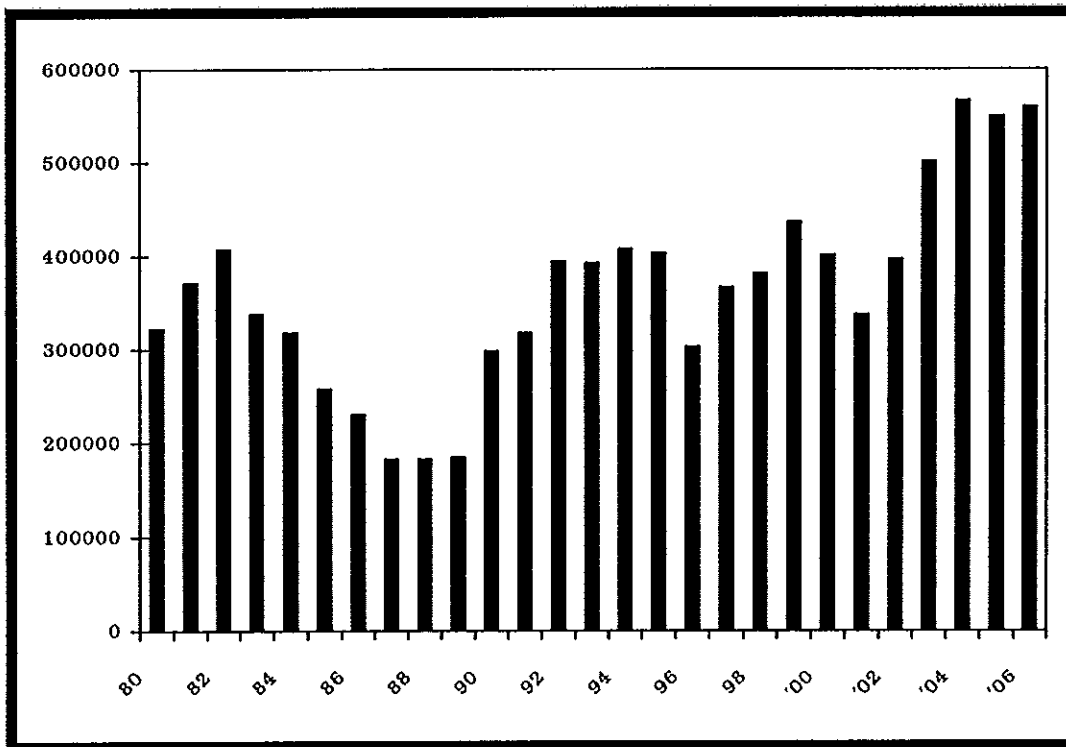
In marketing and promotion other than traditional European markets, Scandinavia, East & South Asia and Middle East were also added. As a result, composition of traditional European market share came down. But those markets still dominate and comprise over 50% of the total tourism demand. In the recent past, market leadership by

tourist arrivals changed from UK to India leaving Germany in third market to Sri Lanka. But revenue gain (value of Indian tourist market) from India has not yet been properly evaluated. Further high arrival growth rate is maintained from East Asian countries such as Japan, china and Singapore. (SLTB Annual Statistical Report-2000-2003)

Due unstable arrivals during 1990s and 2000s, several negative impacts such as unemployment, under employment, lowering Foreign Exchange earnings and government revenue were emerge in the tourism sector.

Tourism starts to grow again in 2000s and reached to all time high amounting 566,000 arrival and over 129,000 employment opportunities in 2004. Although the growth expected to be continued to 600,000 in 2005 deterioration of the security situation resulted a sluggish in arrivals and foreign exchange earnings amounting 549,000 and US\$362 million with 3% and 13% down turn respectively compare to 2004 (SLTB, 2005).

Figure 1.14 International Tourist Arrivals to Sri Lanka, 1980 - 2006



Source: SLTB, 2006

Tourism Economic impact study shows that tourism leakage is around 23% in Sri Lanka (ESCAP, 1999) It means \$ 23 of every \$100 earn goes out of the county. Comparatively in the region this is a better situation. But its underline meaning is, over 1/5 of accounted gains of tourism, leakages. Thus, net gain by tourism is only 77% (approx.).

1.2.7 Ecotourism in Sri Lanka

Sri Lanka earned international reputation as the 'pearl of the Indian ocean' and its multifaceted attractions with blessed nature and rich cultural heritage has given high value to tourism. When compared with other South and East Asian countries such as India, Pakistan , Bangladesh, Thailand and Malaysia, it is centrally located in the Indian ocean with unparalleled natural attractions blend with unique ecosystems and high bio-diversities. Sri Lanka possesses several nature and cultural tourist attractions with immense nature related tourism potential.

Sri Lanka can also be considered as a cradle of one of the great civilisation in Asia. The history and start long ago as 3rd century B.C. with introduction of Theravada Buddhism to the country. Because of Buddhism, the country has continuous written history over 2500 years with matchless heritage, archaeological monuments, arts and architecture, rear Buddhist and Hindu monuments and colossal irrigation reservoirs (SLEF, 2002).

'Ecotourism', which is closely linked with nature tourism, is a relatively recent phenomenon in Sri Lanka. Nature tourism is distinguished from mass tourism or resort tourism by having a lower impact on the environment and by requiring less infrastructure development. Ecotourism includes a wide spectrum of options, ranging from serious, scientific studies to casual visits to natural areas as weekend activities or parts of more general trips.

Similar to other developing countries, the infrastructure developments are mainly confined to the urban areas in Sri Lanka. This allowed the tourism facility to develop around urban areas by the urban population. Meantime the rural areas people were concerned about their culture; and did not want to take the risk of investment in tourism related projects. As a result, even in rural areas tourism services are setup by the people

live in urban centres with very minimal community participation. The community involvement was mainly confined to limited supply of their products, and unskilled employment in very low grades.

In addition, usually ecotourism demands relatively large land area. In Sri Lanka, because it is a small country, it is important to utilise the land very carefully. Limited infrastructure, lack of community participation, low investment initiatives and demand of relatively larger areas of scarce lands for ecotourism facilities and activities, slow down taking tourism to rural areas. As such, still limited tourism facilities development closer to National Parks, Forest Reserves and Lagoons can be seen in the country.

Although ecotourism is a popular and increasingly attractive component of tourism in many countries (Costa Rica, Laos, Malaysia, Kenya etc.), Sri Lanka has yet to develop and promote this form of tourism. A primary advantage for Sri Lanka is that there is easy access to a number of different ecosystems within a short distance to each other. Sri Lanka is a small country but it has a diverse array of easily accessible ecosystems which are only two or four hours from each other by motor vehicle. Thus tourists can visit several different ecosystems and see more wildlife quickly and easily.

English is widely spoken and understood, which overcomes the language barrier prevalent in some other countries. The main problems are the lack of infrastructure and support services and a lack of on-site accommodation and interpretive services that would actively promote ecotourism. However, it is acknowledged that there is a great potential for ecotourism in Sri Lanka, which can be capitalised, if the necessary services and infrastructure are made available.

The world heritage committee has included 6 of the Sri Lankan cultural sites in the World Heritage List under the protection of the world cultural and natural heritage (ICOMOS, 1993). They are: the sacred city of Anuradhapura, the ancient city of Polonnaruwa, the ancient city of Sigiriya, the sacred city of Kandy, the old town of Galle and its fortifications and the golden temple of Dambulla. The Sinharaja most diverse evergreen rain forest in the region is also a world heritage site in Sri Lanka. These unique resources also offer a great potential when linked to ecotourism in Sri Lanka.

Sri Lanka's diverse ecosystems and biological and cultural richness have attracted the professional interests of numerous scientists, who have conducted field research in ecology, zoology, botany, sociology and anthropology over the past several decades. The long list of Sri Lanka's protected areas can play a major role in developing this sort of tourism although most of them are currently in a state of deterioration.

Taking the whole concept its evolution developed in the world and regional level into consideration (also discussed in this research) , Sri Lanka has developed its simple definition for Ecotourism as:

“Responsible travel to natural and cultural areas that conserves the environment and improves the well-being of local communities” (SLTB, 2003a)

1.2.7.1 Ecotourism Motives in Sri Lanka

- Bird watching
- Visiting National Parks & Protected Areas
- Hiking
- Water based activities such as rafting, canoeing
- Admiring Nature (visits)
- Camping
- Typical culture education and Experience

(SLTB, 2003b)

1.2.8 Past Research and Studies on Ecotourism

Research and studies on ecotourism in Sri Lanka are still at its young age. Among the studies available Tourism Master Plan (WTO, 1993a) and Ecotourism Study (SLTB, 2003a & b) are relatively important. The Master Plan indicates that SL tourism policy should focus on the following:

Tourism development and marketing should highlight the country's distinctive religious traditions, cultural and historic attractions, and its natural beauty and diversity;

Conservation and enhancement – tourism development should promote the conservation and enhancement of Sri Lanka's natural environment, and its historical, social and cultural heritages, avoiding any harmful effects;

Socio-cultural compatibility – all tourism services and activities should be compatible with the religious, social and cultural traditions of the people of Sri Lanka;

Economic benefit – tourism should result in optimal economic benefit to Sri Lanka's economy by way of maximum net foreign exchange income, spreading of development throughout the country and creating significant employment for Sri Lankans;

Economic linkage – tourism development should stimulate related economic activity, such as fishing, agriculture, handicrafts, souvenirs, light industry, fruits and flowers, and support local services and activities;

Community involvement– in tourism should be ensured through a programme of community education, consultation and active participation.

All these policy components are ecotourism initiatives. Apart from these policies, development strategies of the Master Plan emphasis on environmental, social, cultural and economic aspects to ensure that development of the tourism sector is sustainable and meet needs of the local population and tourists while enhancing future potential (WTO, 1993a). Even though it does not spell out the word ecotourism, all those instruments are ecotourism initiatives with sustainable approach.

Taking Ecotourism one step forward, the SLTB has formulated Ecotourism policy, Regulations, Guidelines and Strategies for Sri Lanka in 2003. The study revealed, that future potential and scope of Sri Lanka for ecotourism was enormous. According to the study there are nine stakeholder groups which have been further summarised into four

groups (SLTB, 2003b). The same four stakeholder groups have been identified for the survey in order to analysis the future ecotourism development challenges.

The study introduced a simple ecotourism definition for Sri Lanka and National Policies, Guidelines and Strategies were studied. The ecotourism potential rich resource in the country and means of sustainable utilisation were also been highlighted.

De Silva (2004) expressed that world tourism demand was over 230 Mn. (1999) visitors who were looking for nature, wildlife and culture (The principle components of ecotourism). Also, WTO had shown that majority of them travelled to South & East Asia. Rich resource base in nature and culture has been highlighted. Where as Vidanage and Kotagama (1995) confirm that there is a significant potential for development of ecotourism in Sri Lanka. The survey focused on three major tourist generating European markets: the UK, Germany and France.

Drawing concern on resource base and its potential Gunapala & Aslum (2000) and Schockman (2005) have shown ample opportunities available and there is a comparative advantage with rich resources to Sri Lanka. Hathurusinghe (2004), and Dearden (2000) have studied potential in specific forest reserves such as Kanneliya, Snharaja respectively fo ecotourism and nature tourism. Further Boers (2000) has done a study and action plan for DWLC for ecotourism initiatives in wildlife management areas. Further, Ratnayake (2002) and Premaratna (2003) highlighted ecotourism resources, considering county as a whole and North Central & Central Provinces respectively, that can be explored with ecotourism initiatives.

Gurusingha (2001) has shown some challenges to be faced by ecotourism sub sector and made his recommendations. According to Gurusinghe main challenges in ecotourism are: Absence of National policy, Low government recognition, Need small scale service providers in the country.

Tantirige (1995) highlighted ecotourism value of income generation for conservation by ecotourism. It is of environment enhancement income by ecotourism and he sighted value of government agency involvement in this exercise. Conservation contribution

and value of community involvement by ecotourism was shown by Wickramanayake (1995) and he comment that ecotourism can enhance nature with its sustainability measures. Looking at sustainability aspect Amararathna (1996) recommend to have good guide books at sites.

1.3 Aim and Objectives of the Study

The aim of this research is to identify the main challenges to ecotourism development in Sri Lanka and seek possible solutions for them.

To reach the aim, the following objectives were identified:

- (i) To Study, the Ecotourism resource bases in Sri Lanka for future ecotourism development including Wildlife, Forest, Coastal, and Irrigation reserves and Archaeological sites
- (ii) To identify main challenges to ecotourism development and the reasons behind them.
- (iii) Finally, make recommendations to (a) ecotourism sector (as a whole) and (b) stakeholders for future development.

In achieving ecotourism development by facing the challenges clear identification of the potential resource base of a destination is of vital importance. It is the main reason and comparative advantage of an ecotourism destination. Thus, the first objective of this study is to gather information on resources exist which are either already in use or feasible in employing for ecotourism. It may not be the full list of resources or its assessment but is an overview on the rich and diversified backbone ecotourism capital foundation (resource base) in the country. Anything found interesting to many tourists becomes an attraction, therefore, it is also not practically possible to have a full list on ecotourism resources.

In order to reach its aim, any development needs to overcome its challenges by facing them. Similarly in Sri Lanka tourism, to develop ecotourism and gain destination

reputation and ecotourism destination status in the mind of potential ecotourists, identification of challenges requires research studies. Tourism and its all surrounding environments and market situations and technology constantly change. Circumstances, this research tries to identify the main challenges those need to be addressed in reaching its aim.

Importantly any problem needs a solution and way of approaching it. This study third objective is to find out feasible and potential measures to be taken by key stakeholders individually and the ecotourism sector as a whole in the country to reach the final aim of development of ecotourism in the country.

1.4 Significance of the Study

a) The study provides information and review ecotourism resource base considering ecosystems, flora, fauna, and archaeological and historical sites & their values as a ecotourism resource.

b) Locally there are different organisation entities to manage, supervise or care for each resource base in the country. Sometimes the area of supervision overlap and not clear at the outset. The study will identify what resource managing organisations need to work together and what are the possible benefits of developing ecotourism that may better accommodate in reaching those organisation's conservation or development objectives.

c) Ecotourism concept is inherent to many stakeholders. When there are too many, they do not voluntarily gather to work together. If one party felt they are not sufficiently or comparatively benefited, general tendency is to work independently or to avoid cooperation. This development can create barriers to share ecotourism long term benefits to that stakeholder first, ecotourism sector and second the tourism industry. Therefore, this study makes efforts to investigate barriers, bottle-necks and setbacks behind the ecotourism sub-sector progress.

d) Collective effort almost always benefits the tourism industry. In ecotourism, it is an essential component as per the concept and cares on resource base its sustainability. As such, the study highlights the importance of stakeholder co-operation and collaboration for ecotourism development in the country.

e) Collective effort but individual gain is the general expectation of stakeholders. Even with complex interdependency among stakeholders, working together is

good for all of them to reach sustainability which is the long term objective of ecotourism exercise. e.g. if local community can organise a study tour with wild life conservation authorities for ecotourist in a professional way, all (wild life authority, local community, ecotourist and resource base environment) can gain benefits. For that, every one need to play an important role making this exercises a continuous success. While maintaining objectives of the resource base managing organisations and others, the study seek possibility of gaining more sustainable benefits through ecotourism.

f) Successful business always keeps an eye on the market situations while managing internal forces and external forces. The conditions of the market and external forces are ever-changing, so that updated data, information and studies are always necessary to survive. In tourism, the international environment (the market) is changing fast every day. To be up-to-date with ecotourism studies, Sri Lanka effort and initiatives are minimal. In filling the research gap in ecotourism studies to some extend, in the light of sustainable tourism development and ecotourism sector development as tool for substantiality in the destination, this study attempts to provide an assessment to face future challenges in the ecotourism sector. The study will also help to enhance knowledge among and within stakeholders of ecotourism in Sri Lanka. It shows value of working together and necessity for sustainable tourism development as a mean of conservation of natural and cultural resources. It highlights how mutual understanding and collaboration can help to overcome sustainable ecotourism development challenges in Sri Lanka.

1.5 Scope of the Study

1.5.1 Scope of Time

The scope the study period was limited to the period from November 2006 to July, 2007. Distribution of questionnaires and in-depth interviews were carried out to collect necessary primary data during February and March 2007 among selected ecotourism stakeholders.

1.5.2 Scope of Geography

For tourists, distribution of questionnaires and interviews were carried out at the Colombo International Airport (Bandaranayake International Airport) and the community groups were selected from Dedduwa and Maduganga areas in south of Sri Lanka. Collection of data from government agencies (Tourism Recourse Managing

Agencies- TRMO) was done in and around Colombo. Information from Scholars of different disciplines and organisations, was collected with no specific geographical area but depending on the place they are stationed.

1.5.3 Scope of Content

Study on the resource base which is the cradle for ecotourism, as an eye opener for future potential development. Primary focus is to identify current issues in ecotourism and find reasons behind. Seek values and means of collaboration among natural and cultural resources managing government agencies. Highlight the ways in which protection and conservation objectives of those agencies can be achieved with ecotourism. Find out the stakeholders willingness to work together in fulfilling their objectives with ecotourism.

1.5.4 Scope of Demography

International tourists who were leaving after their holiday/vacation in Sri Lanka randomly selected and surveyed at the Colombo international Airport departure lounge. To meet tourist from different countries, specific flight times were selected from weekly flight schedule of the airport.

For local community two areas were selected (Dedduwa, Maduganga) as the sample with community living near existing Bentota tourism resort and proposed Dedduwas Reortst area area. For Maduganga community both involved in tourism and none engaged but living in and around Maduganga estuary selected.

Data were gathered from Tourism Service Providers (TSP) in many parts of the country consisting companies, individuals representing accommodation, tour organisations, travel arrangement, restaurants, guiding, interpretation and others.

Tourism Resources Managing Organisations (TRMO) data were collected from senior and relevant officers of Natural and cultural resources managing government agencies located in Colombo.

1.6 Definition of Key Terms

Active Ecotourism: ecotourism that enhance sustainability

Challenge: is a status that seems to be difficult but can achieve moving forward with courage

Ecotourism: a form of a tourism that foster learning experiences and appreciation of the natural environment, or some component there of, within its associated cultural context. It has the appearance, in context of best practice, of being environmentally and socio-culturally sustainable preferably in a way that enhance the natural and cultural base of the destination and promote the viability of the operation.

Ecotourist: a tourist who participates in ecotourism activities. Ecotourists are commonly segmented into hard and soft ideal types and are found mainly in more developed regions such as North America, Western Europe, Australia and New Zealand.

Development: a systematic up-liftment of physical environment to facilitate/accommodate human use

Paradigm is a collective world view or constellation of beliefs, values, techniques and so on shared by the given community.

Sustainable development: the development that meet the needs of present generations without compromising the ability of future generations to meet their own needs.

Sustainable tourism: tourism that adhere to the principle of sustainable development and to associate criteria of environmental, socio - cultural and economic sustainability.

CHAPTER 2

METHODOLOGY

2.1 Introduction- Methodology

This study is a survey research in order to review potentials, possibilities and challenges to develop ecotourism in Sri Lanka. Both secondary data and primary data gathered during the period of December 2006 - July 2007. For primary data multi faced sampling methods were employed depending on the varied characteristics of the stakeholders. The main five stakeholders (tourist, community, service providers, resources managing organisations and scholars) were used to gather data with their views, opinions and comments. For international tourist and local community systematic random sampling method, tourism resource managing organisations-convenience sample, Tourist Service providers-snowball sample and scholars-purposive sample methods were used. Data were gathered from international tourists and community with distribution of structured questionnaires & interviews, and from other categories with semi-structured questionnaires with face to face interviews except in long distance cases. The surveys were carried out during the months of February and March 2007. The analysis was done with SPSS (Statistical Package for Social Sciences) programme and assessment with statistical methods and SWOT analysis. The data collection methods and research elaborations are given below.

2.2 Data Collection Methods

2.2.1 Secondary Data Sources

- Detail literature search on sustainability, sustainable development, sustainable tourism, ecotourism and sustainable ecotourism concepts from international printed material, Faculty of Service Industries of Prince of Songkla University, Phuket Campus, graduate school studies and internet.

- Current ecotourism developments, potentials, case studies and review on international tourism statistics from WTO & WTTC publications and available online documents
- Concepts and developments in comparison to environment, conservation and tourism from United Nations Environmental Programme (UNEP), World Wide Fund (WWF), The World Conservation Union (IUCN), The International Ecotourism Society (TIES) and Nature Concern & internet
- Sri Lanka tourism statistics, tourism plans, policies regulations from Sri Lanka Tourist Board (SLTB) and locally published news paper articles
- Statistics on Sri Lanka economy tourism impacts and other related statistics from Department of Census & Statistics and Central Bank of Sri Lanka
- Various other ecotourism studies, assessments and information on ecotourism resources from Ecotourism Foundation of Sri Lanka, University of Colombo and other related Government Departments in Sri Lanka

2.2.2 Primary Data Sources

The Ecotourism sector is relatively small & demand is low in Sri Lanka. Little any specific data is available on ecotourism. Only limited research studies such as Ecotourism Study by SLTB (2003) research papers (in section 1.2.8) were available but their purposes and objectives were different to this study. It was an additional challenge to study on future challenges of ecotourism development with limited data. In addition, none of those surveys considered more than one main stakeholder in the study. Due to these limitations and absence of actual data required for the analysis, an empirical data collection field survey was conducted for the five main stakeholders during February and March 2007.

This study focuses on the available resource base for ecotourism, the country potentials and ecotourism development challenges. It demands information from all stakeholders in the ecotourism sector in the country. Past experiences, views on present

setup and future expectation are primary important factors while views of each stakeholders gaining validity for the study. To collect primary data, understanding the population of the research & different stakeholders their characteristics and careful selection of appropriate method are important at the start.

2.3 Population of the Research

As yet there is no clear agreement on what tourism activity and to what extend is ecotourism, clear identification and defining of the population of this survey was not easy. Further the stakeholders in ecotourism are yet be agreed by researchers, and different scholars' researchers' opinions and views still have similarities and differences.

"It was observed that their involvement and kind of expected benefits are divers among and between different with stakeholders" (Weaver, 2001a, p. 135).

The varied views on stakeholder group size, their level of involvement, level of benefit and type of benefit share with ecotourism are also unable to quantify. Therefore, obviously, the length and breath of the population is not clear. Since the research focuses on whole ecotourism sector, it was further difficult to agree or conclude the total population. As a result, it was not easily possible to identify the total population of the survey. However, this study considers the following list of stakeholders as a yard stick, which is subject to question in justification.

2.3.1 Selection of Stakeholders

As indicated before stakeholders in ecotourism is yet be agreed by researches. On this issue some eminent ecotourism writers such as D. B. Weaver and Fennel still have not commented much. However, research by Pam Wight (2001) has identified nine stakeholders in ecotourism and they are:

- (i) All service providers in the ecotourism industry
- (ii) Visitors (international & domestic)

- (iii) Governments: National, Provincial and Local
- (iv) Agencies (e.g. SLTB)
- (v) Protected area managers & land owners
- (vi) Non governmental organisations
- (vii) At location and neighbouring local communities
- (viii) Academic institutions and researchers
- (ix) Other special interest groups

The Nature Conservancy has identified ecotourism partners for a successful ecotourism development. They are:

Protected Area Managers/ Site Managers

- (i) Nongovernmental Organisations (NGOs)
- (ii) Government Agencies
- (iii) Local Communities
- (iv) Tourism Industry (service providers)
- (v) Other supporting players
 - a. Ecotourist
 - b. Funders
 - c. Education sector

It indicates mainly six partners and three players as supporting categories. Altogether nine partners found as important. (The Nature Conservancy, 2002, p. 21)

The IUCN (The World Conservation Union) study on ecotourism plan for Anavilundawa Wetland which is a Ramsar site in Sri Lanka, has indicated eight ecotourism stakeholders as listed below (IUCN, 2004, p. 4):

- (i) Tourist industry
- (ii) Ecotourism industry
- (iii) Visitors
- (iv) Government Departments
- (v) Local Authorities
- (vi) Natural Resources Managers including property owners
- (vii) Community
- (viii) Educational Institutions and other interested groups including NGOs

Meanwhile Sri Lanka Tourist Board also has done a study to work out national policies, guidelines and strategies for Sri Lanka in 2003 where, similar to Wight (2001), nine stakeholders were listed and further summarised into four broader categories. The four were:

- (i) The business community (operators, investors & developers)
 - (ii) Visitors (international or domestic)
 - (iii) Host population (local residents)
 - (iv) Public sector and government (agencies who manage the destination)
- (SLTB, 2003b, p. 26)

In identifying stakeholders for this study the researcher had to consider the time and resources available for the survey. On the other hand it was noted that the above studies sometimes, separated one stakeholder category into two. E.g. (i) in IUCN study Ecotourism industry is a part of tourism industry, (ii) Since Sri Lanka has no private protected areas, obviously protected area managers and land owners listed in Wight (2001) study falls into Governments: National, Provincial and Local category in the case of Sri Lanka.

This study considered the broader categories identified by the Sri Lanka Tourist Board study broader categories and one additional category of scholars/researchers. With the additional group the researcher expected to gather data from universities, tourism trainers, scholars, researchers, Nongovernmental Organisations (NGO) and interest groups etc. As such representation of almost all major categories can participate in providing data. The five stakeholders are:

- A. Visitors (international tourist)
- B. Host population (local residents or local community)
- C. The business community (Tourism service providers)
- D. Public sector and government (tourism resources managing organisations)
- E. Researchers and Scholars

(A) to (D) stakeholders have been selected as they are directly involved in ecotourism. Although other stakeholders also relatively important in identifying future challenges, due to practical and time limitations, the researcher is on the opinion that the scholar group (E) will adequately fill the gap as stakeholders whose knowledge and understanding is in wider perspective.

Since there is no way or system to identify and interview eco/nature interested tourists, all international tourists were considered under the category of tourists/visitors.

The local community, either involved in tourism or not, but living in close proximity to tourism developed areas (Bentota - Dedduwa and Maduganga) were included into local community/host community category.

With the business community (Tourism service providers) all kinds of service providers such as tour operators, travel agencies, accommodation providers, restaurants, professional organisers of all tourism related activities, tourist guides, and shops were taken into accounts under the name of tourism service providers.

All public sector tourism resources managing or any kind of holding organisations were included in tourism resources managing organisations. Education institutions, universities, NGOs, researches and individual interest groups were included into the fifth category of scholars and researchers.

2.4 Research Methods - Design and Instruments

Due to multi faced stakeholders and their differences in characteristics, the research got apparently complex. Moreover, when some stakeholders have similar characteristics but different types of sub groups, e.g. under scholars & researchers- universities, NGO and other interested groups were represented, the research method got further compound. The population size of different stakeholders is varying from one to the other. The number of resource managing organisations was neither comparable to international tourist sample nor with local community sample. Therefore, researcher had to

seek for different sampling and data collection methods for each sample. Questionnaires were designed considering the nature of different stakeholders. Taking into account the diversity and different nature of survey samples the researcher decided to employ the mixed method in order to collect sufficient level of effective data for the research. Accordingly, the research has been conducted with mixed method to collect both qualitative and quantitative data.

When there are differences in sample sizes and responses, the mixed method could gain better results by minimising disadvantages of each method and incorporating the alternative method instead. There are four application methods suggested for mixed methods suggested in the tourism research literature:

- ❖ *The simultaneous and integrated collection of qualitative and quantitative data during the first phase of work*
- ❖ *Qualitative field work undertaken alongside a multi wave survey with the first wave survey informing the field worker of the focal point observation- similarly field work may refine survey foci in future waves*
- ❖ *Alternative between qualitative explanatory research that informs the construction of qualitative data collection tool- for e.g questionnaire followed by a further qualitative field work to achieve a deeper understanding of the quantitative finding.*
- ❖ *A quantitative starting point such as a survey used to determine the focal point for a qualitative study, which may be followed by quantitative study to clarify conflicting findings*

(Jennings, 2001, pp. 134-135)

Instead of having quantitative and qualitative surveys separate the questionnaires were design to gather both type of data accommodating the time available for the survey. Also, where ever possible, additional comments were gathered with the surveys.

Note: Next 'The Questionnaire Design & Pilot Survey' and 'Population, Sample Size and Methods' topics are listed under the same heading for the five stakeholders with A, B, C, D & E.

2.4.1 (A) Questionnaire Design & Pilot Survey - International Tourist

Ecotourism sector is not yet developed as segment or market in Sri Lanka. Nevertheless, most of the tourists for a part of their vacation or sometimes for the whole, stay, visit resources which are potential for ecotourism sector. Therefore, it is not possible to identify ecotourist or nature interest visitors in the destination. One possibility is to find out the perception of all tourists and how many of them are interested and on nature/ecotourism etc. In addition, as a crosscheck, search what other ecotourism destinations they have visited in the past. The research focus only on international tourists as domestic tourists are mainly excursionist as well as practical difficulties of selecting data collecting point from them during limited time given for the survey.

International visitors are a primary important stakeholder whose respondent number is high; therefore it was decided to use distribution of questionnaires and interview methods. Considering the respondent time factor and type of information required for the survey a structured questionnaire was designed with four sections in order to group data for analysis. The four sections were:

- Part 1: visitor preferences, activities engaged and expenses incurred
- Part 2: views of the visitor on the ecotourism resource base in the country
- Part 3: tourist suggestions and opinions for the future
- Part 4: visitor profile

The first three sections were targeted to gather data as per the objectives of the study where as the fourth part is to find out demographic information of which is comparatively less important even if respondents do not answer it. Part one is to gather visitor perception prior to the visit and during the tour his experiences and expenses in the destination. Second part consists of visitor assessment on the potential resource base and impression on the destination (used rate scaling method to gather information). The third and most important part in the questionnaire is to get direct inputs of visitor's suggestions, opinions and recommendation to face challenges to ecotourism in Sri Lanka.

2.4.2 (A) Population, Sample Size and Method – International Tourist

Past research has identified that there are 1 to 3 percent of all tourist visiting Sri Lanka are ecotourists (Hathurusingha, 2004 & Gurusinghe, 2001). As such, it was estimated the ecotourism population size was about 5,000 per year (1% of average 500,000 arrivals) Since there is no socio - demographic data on them, it was decided to adopt stratified random sampling technique to select the sample. Stratification was done between tourist different market by detecting departure flights to those destinations. Thus, all tourists from one market (country) get equal chances to be interviewed in the survey. Pilot survey was conducted with three international tourists visited at Sri Lanka Tourist Board head office information counter and the actual survey was carried out at the departure lounge of the Colombo International Airport. The timing of the survey was critically important as the sample used stratified random sampling technique irrespective to strict security control at the airport. Since the permission was to enter and exit only one time within a day for the survey, the researcher selected the highest flight departure time slot of the day to tourist generating countries from the weekly flight schedule. Normally, visitors reach the airport at least three to four hours earlier to their departure time so that enumerators were able to distribute questionnaires and interview them at the waiting area of the departure lounge after tourists finished their travel formalities. Tourists, who were leaving after their visit/holiday, came from UK, Germany, France, Netherlands, other European, Scandinavian countries; and flights to South & East Asia and Australasia were covered. There were three enumerators to collect data during rush hours of departing visitors.

The sample size was calculated using Taro Yamane formula (1973)'s found the size of sample group from the tourist population formulary as follows:

(At the confidence level of 95%, 0.05 population variable)

$$n = \frac{N}{1 + Ne^2}$$

n : sample size

N : Population size - target number of tourists

e : Inexactness from sample at confidence level at 95%

$$n = \frac{559,603}{1 + 559,603 (0.05)^2} = 399.97$$

Thus, the estimated sample size was 400. Even though the researcher planned to collect data from 400 tourists, it was possible to collect data from only 113 respondents which was lower than the estimate. That was mainly due to poor security situation with fighting with terrorist in the North and East.

Government has lounded a battle against terrorist to secure civilians in the Eastern region of which apparently considered as war by some visitors. As a result tourist arrivals were low during that particular insurgency period February - June 2007 (table 2.1). In March 2007 arrivals were less by 36% when compared with the corresponding period of last year. Also, March was the second worst month during the first six month of the year. However, the data sample was sufficient to assess the respondent at the confidence level of 90%, 0.10 population variable. Calculations at 0.10 level sample size (with the same formula indicates that 99.98 (approximately 100) respondent are needed for the survey where as data has been collected from 113 (Table 2.3).

2.4.1 (B) Questionnaire Design & Pilot Survey - Local Community

Tourism in Sri Lanka is still concentrated to South West Coast and Cultural Triangle areas. Even in those areas community economic activities are mixed with tourism. Therefore, separation of tourism area is difficult. This survey it was targeted to collect data from community who has some means of interaction with tourism. Thus researcher has selected two locations in the Southern Province, namely Bentota - Dedduwa and Maduganga.

Table 2.1 Monthly International Tourist Arrivals to Sri Lanka

Month	2006	2007	% Cha. 2007/2006
January	52,103	56,553	8.5
February	52,687	43,051	- 18.3
March	54,746	35,031	- 36.0
April	49,776	33,039	- 33.6
May	43,825	26,307	- 40.0
June	44,066	30,810	- 30.1
July	55,354		
August	52,931		
September	38,485		
October	38,815		
November	37,591		
December	39,224		
Total	559,603		
Up to June	297,203	224,791	- 24.4

Source: SLTB, 2007

Bentota is the first planned tourism resort in the country. In addition proposed Dedduwa mega development project which is almost inland side of Bentota, is underway. It is planned with more conservation and nature friendly initiatives. The majority of the community living in Bentota - Dedduwa area are connected to tourism either directly or indirectly. At least they are linked to the induced benefits of tourism. Thus, four villages from Bentota - Dedduwa area is with population of 1,211 households from which 117 were taken for the survey (Table 2.2). The second, Maduganga which is the biggest inland lagoon with 16 islands of which with rare and endemic species of flora and fauna, has a few islands inhabitant but surrounding community is increasingly engaged in tourism activities and services. Maintaining traditional local culture, fishing and farming are practised as main means of living in the area. Two villages which have 111 households were selected from for data collection. Total of 1,322 households (population) were included in the survey sample of 132 (Table 2.2). Structured questionnaire has been designed with 36 questions in five sections:

- Part 1: Community profile and benefit by tourism
- Part 2: Community feeling/views on ecotourism
- Part 3: Socio cultural aspects of ecotourism
- Part 4: Environment aspect of ecotourism
- Part 5: Community opinion on economic impacts of tourism

First section is to collect demographic information and to see to what extent they are benefited now from the tourism industry. Sections 2nd to 5th are structure according to the objectives of the research and assessments. One last question added to collect community views as a qualitative data leaving all first 35 questions quantitative. The Questionnaire had been translated to Sinhala Language (local language) and tested with three staff members of the Sri Lanka Tourist Board before take into field survey.

2.4.2 (B) Population, Sample Size and Method - Local Community

Total population of the community in both areas (Bentota & Maduanga) was not easy due to present division of the village boundaries. Those demarcations hardly comply with the objective of the research. With greatest difficulty researcher managed to get the help of the officer concern with census at Bentota Divisional Secretariat. In Madugana a researcher cum retired principal assisted to get realistic information on one villages visited. Stratified random sampling technique was used for selecting respondent in the data collection. To estimate the sample, rule of thumb method was used as suggested by Neuman.

- “- Population under 1000 researches should sample 30% of the population*
- For population over 1000, minimum of 10% as the sample.”*

(Neuman, 2000: cited in Jennings, 2001 p. 147).

Total number of houses in six villages were 1,322 (Table 2.2). The researcher managed to interview 10% of them which is 132.2 & rounded figure is 132 households ($1,322 \times 0.1 = 132.2$). The actual number of respondents was 138, i.e. 117 from Bentota and 21 from Maduganaga. Depending on situation, both face to face interview and distribution of questionnaire methods (multi method) were use for data collection. Selection of local community areas and grouping them into different community and demographic character were done systematically. Researcher was confident that within

the group or the clusters random selection in six villages visited given him fair representation of the community as a stakeholder.

Table 2.2 Villages and Households in Bentota-Dedduwa and Maduganga Areas

Area	No	Village Name	No. of households	Area total	Estimated sample size	Actual Sample size
Bentota - Dedduwa	1	Yathramulla	229		112	117
	2	Warahena	295			
	3	Athuruwella	229			
	4	Dedduwa	458	1211		
Maduganga	5	Muwannaduwa	71		20	21
	6	Galmanduwa	40	111		
			Total	1322	132	138

Source: Divtional Seratariat Bentota and Balapitiya

2.4.1 (C) Questionnaire Design & Pilot Survey - Ecotourism Service Providers

Recognition, regulation and certification for ecotourism service providers yet to be developed in the country. Some services are registered under the normal tourism services (traditional method) but all can not comply with such requirement due to various reasons. Nevertheless there are a number of service establishments operating with no formal approval. Researcher decided to collect data from all layers and levels of service providers to gather information in respect to research objectives. A questionnaire was designed with six sections.

Part 1: Type of service & reasons to in this service

Part 2: Ecotourism resource base and responsibility initiatives

Part 3: Ecotourism market potential

Part 4: Service Providers initiative for education, Conservation and Community benefits

Part 5: Cooperation and collaboration in ecotourism

Part 6: Suggestions and opinions

The first section covers area of business and the reason for being to the eco/nature friendly tourism business. Sections 2nd to 6th are gather data directly relating to the research objectives. In addition sections 3 and 4 investigate to what extend respondents are close to the main concept of ecotourism. Both quantitative and qualitative data was gathered for analysis. Questionnaires were pre - tested with four service providers who came to Sri Lanka Tourist Board (SLTB) before the actual field survey.

2.4.2 (C) Population, Sample Size and Method - Ecotourism Service Providers

There are a number of tourism service establishments operating informally in Sri Lanka. The ecotourism sector is also one sub sector highly contributing to this exercise. Therefore, it is not easy to identify ecotourism service providers in the country. Hence population can not be recognised. Even an effort with different sources of information may not be sufficient.

Since recognition, identifications are difficult the researcher decided to adopt snowball sampling method for data collection. Those who provide services know each other and kind of services rendered etc. Therefore recommendations of existing service holders can save energy and time of data collection and would indicate the focal point to collect the comment. With careful recommendations the researcher managed to gather information until collected information started repeating / overlapping. By that time there were about 32 questionnaires filled with face to face interviews, post and electronic mailing method were used depend on the situation. Information gathering continued until receiving the full representation of all aspect of eco/nature friendly service providers in the country, and information is started repeating. Even with multi method of data collection the researcher mailed questionnaires only to long distance service establishments and individuals.

2.4.1 (D) Questionnaire Design Pilot Survey - Resource Managing Organisations

Resource managing organisations are one of the most important stakeholders for tourism in general and for ecotourism in particular. Their role as a stakeholder, conservator and resource manager for sustainability is the key for ecotourism sustainability. Therefore the researcher selected face to face interview method to gather information. In order to save time and send guidelines before meeting, a semi structured questionnaire was formulated with 21 questions listed in three sub sections. Those broader sections were:

Part 1: Organisation objectives and revenue from tourism

Part 2: Views on present mass tourism and ecotourism

Part 3: Views on their willingness to work together & comments on ecotourism

To understand the broader objectives of resource managing organisations and what benefit tourism brings to them was the focus of part one. Their perception & willingness to support for ecotourism development and extend of cooperation as a stakeholder were gathered from second and third sections. It was a combination of qualitative and quantitative data gathered for analysis. A important question asked was; when others co-operate, how your organisation supports them? With this, the present situation of working in isolation could be reduced and would be able to bring all organisations into one common objective in future ecotourism initiative. As a pilot survey, the questionnaire was tested with two senior officers of the SLTB before actual data collection.

2.4.2 (D) Population, Sample Size and Method - Resource Managing Organisations

The population can be worked out in different layers. If it is ministry level the population is a nominal number. At institutional level the size is much higher. If one considers the actual (practical) management level, sites in different parts of the country will be very high number. In some organisations such as CEA conservation is a one section only. Therefore, working on a population became complex. Although the tourism resources

are bases scattered around the country, the management is undertaken through central, regional or sub officers. Considering the time available and travel time to collect data, it was decided to interview either senior officers or the most important offices responsible in head office (either in Colombo or suburbs) for data collection. Thus, convenience sampling method was used while taking all relevant organisations into the sample with researches previous knowledge on such organisations. The researcher kept on collecting data to the extend, the information gathered is repeated in the survey. By then, there were 30 respondents from 19 organisations at ministry, dedicated entity and local level provided information during the survey. When one respondent was unable to provide sufficient information more officers were interviewed. In some places such as Forest Department and Irrigation Department, additional information provided other than inquires.

2.4.1 (E) Questionnaire Design Pilot Survey - Researchers and Scholars

The fifth and the important group of (E) stakeholders, was the researches and scholars. Generally they do not have particular interest or focus on their benefit by ecotourism but they have wider knowledge on ecotourism concept and practices at global, national and regional level. Therefore their capacity and contribution to find out the future challenges in the ecotourism sub sector was vital important.

This stakeholder category includes many sub groups such as Educators, Researchers, NGOs etc. The main common factor is the way they interact with ecotourism. They work with either no return benefit or very low priority on benefits where as previous four categories expect some kind of benefit. Questionnaires and interviews may not be the most effective method to collect data from this group, but as a guide or outline for them to be for discussion and comments a semi structured questionnaire was done with five sub sections to facilitate analysis. All questions were open ended with qualitative data focused.

Part 1: Significance of scholar involvement

Part 2: Views on country ecotourism resource base

Part 3: Views on international market potential

Part 4: Views on stakeholder collaboration

Part 5: Suggestions for the future

The first part aim was to find out the wide spectrum of scholar involvement in ecotourism at present, and to identify In addition to identify and do separate assessment of different sub-groups by their area of involvement. The other four sections focused to collect comments on each objectives of the research. Minor adjustments were made in the questionnaire after interviewing the Chief Executive Officer of the Sri Lanka Tourist Board instead of a pilot survey.

2.4.2 (E) Population, Sample Size and Method - Researchers and Scholars

Similar to open ended question, it was not possible to assess the length and breath (population) of this group. The researcher employed **purposive sampling** technique for this group. In a purposive sample the researcher is free to use previous knowledge, evidence and experiences to select on respondents with a specific purpose in mind. "Instead of going to cross-section or balance choice, the researcher can concentrate on instances which will display wide variety - possibly even focus on extreme cases" (Denscombe, 2003 p 15).

Following the method was selected a set of respondents who could possibly provide sufficient information and insight on the subject etc. Importantly the researcher took in to consideration that all sub groups are adequately represented in the information gathered. There again, to distance places and ones whose time does not permit for interview or discussion, posted and emailed questionnaire followed by a telephone conversation on the matter were also used. The survey continued until researcher felt the information gathered is overlapping and repeated. In total, 34 tourism scholars have given their opinion, comments and ideas with the questionnaire and addendums.

2.4.3 Sample Sizes and Sampling Methods - Summary

To collect quantitative data and qualitative data different approaches incorporated in the survey depends on the characteristic of each group of the research. A summary of each steps of the research method is given shown in table 2.3.

Table 2.3 Stakeholders, Population, Sample Selection, Methods, Sample Size

Stakeholders	(A) Tourists	(B) Local Community	(C) Tourism Service Providers	(D) Resources Managing organisations	(E) Scholars
Content					
Population	All International tourists 559,603 (SLTB,2006) (Number of ecotourists unknown) at 0.05% - 399.97-400 at 0.10% - 99.98 - 100	Areas 1.Maduganga- Two villages 2.Dedduwa- four Villages	Adventure pls. Boat services Ecolodges ET. Guides Hotel & GH (eco friendly) Sports TA Turtle Conservation	AGA Arch. Dpet. FD CCD CCF CEA DWLC Irr. Dept, LA Min. Eenvt. PC, MOT SLTB	Universities Researchers Teachers Consultants Environmentalists NGO's Eco. Concern NGO's
Sampling Method	Stratified random	Stratified random	Snowball method	Convenience method	Purposive method
Focal Point	International tourist visited Sri Lanka	People from one selected area	Manager/owner	Selected senior officials	Selected Scholars Researchers
Population size	559,603	1322	297	All represent	All represent
Sample Size (app.)	99.98 at 10% - 0.10 Appox. 100	132 (10% of total)	30 (10% of total)	22	30
Data collected	113	138	32	30	34
Data Collection Method	structured questionnaire & interview	Structured questionnaire & interview	Interview with Semi-structured questionnaire.	Interview with semi-structured questionnaire	Interview with Semi-structured questionnaire

Source: Author

CEA - Central Environment Authority
 WLCD - Wildlife Conservation Department
 Local Authority - PS - Pradesiya Saba
 Eco Con. NGO - Ecotourism Concern
 Non Governmental Organisations
 CCD - Coast Conservation Department
 AGA - Assistant Government Agent or
 Divisional Secretary

FD - Forest Department
 PC- Provincial Councils
 MOT - Ministry of Tourism
 Pvt Sector - Private sector
 CBTO - Community Based
 Tourism Organisations
 CBO - Community based
 Organisations

GH - Guest houses
 NGO - Non governmental
 Organisations
 UDA - Urban Development
 Authority
 Arch. Dept. - Archaeology
 Department

2.5 Data Analysis Methods

Statistical methods for qualitative data and quantitative analysis methods have been used for data analysis. Statistical calculations, tests on reliability of results, sample frequencies and joint frequencies were done with Statistical Package for Social Sciences (SPSS) computer programme. Content analysis was done with manual tabulation using grouping and summarising methods. In addition important performance assessment (IPA) was used where necessary. Finally, SWOT analysis method was adopted with discussions for overall content comparative analysis and assessment.

2.5.1 Sample Frequency Analysis

Initially survey data is used to examine international tourist profile frequencies and demographic analysis for better understanding on the market. Similarly local community demographics, economic factors were taken to assess the community involve in tourism and living in those areas. Base on descriptive statistics, centre tendencies, measures of dispersion with statistical values assisted analysis be lustrated for the samples of tourist and local community.

2.5.2 Joint Frequency Analysis

In the samples of tourist joint factors influence on visiting destination, duration of stay and expenses at the destination are taken for consideration with joint frequency analysis. This is for important variables that are relevant to the factors which influence tourist decision making in selecting a ecotourism destination. I the data processing analysis been done to investigate the relation to different demographic of tourist has significant differences in selecting ecotourism destination. With this it make clear what factors influence to a ecotourist in particular, selecting a destination.

In the case of local community present economic standards with tourism benefits and negative impact status etc are assesses with joint frequencies. What aspects of tourism affect on local community and whether there is a significant benefits or cost in general, community to be satisfied as mean of living or a industry good the their areas.

For tourist service providers the factors influence them to be in eco/nature tourism, level of investment, ecotourism features adapted by them are cross checked in joint analysis. For resource managing agencies present level of involvement, kind of benefits and level of organisation objective comply with ecotourism development approaches etc have been examined.

With regards to resource managing organisations joint frequency method used to see whether they find ecotourism as a sector adhere to objectives of that organisation and in which form the resource base they manage, could be utilised for the benefit of the country. Sustainability in the resource bases its usage as tourism resource with care in meeting the organisation objectives etc.

Appropriate tests such a Chi quire, ANOVA have been done where ever possible to check the level of significance of the findings as to establish the reliability. Mostly assessments based on qualitative methods except the two samples of tourist and community which were mainly base on probability sampling methods.

2.5.3 Manual Tabulation Analysis/ Content Analysis

Manual tabulation by way of grouping and merging comments, qualitative assessment tables were done for open ended questions. Descriptive assessments which had more detail were sub-grouped in a way they were useful for detail analysis in accordance with research objectives. Summarised facts were also listed in group format wherever possible for better and easy understanding. In the conclusion section, among stakeholders comments on challenges and suggested slutions, comparative analysis with summarised presentation method with tables was used to extract the final challengers of ecotourism to formulate recommendations.

2.5.4 SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)

Base on preliminary assessments the study analysis the destination internal factors in comparison to external factors with SWOT analysis in with discussions. To any industry the capacity of facing external forces are important in facing its challengers. The SWOT is used for comparative analysis to understand and propose recommendation of the study to the stakeholders and ecotourism sector in Sri Lanka. Finally in view of facing means of challengers, strategic actions would be proposed to stakeholders.

CHAPTER 3

RESULTS

3.1 Introduction

This chapter objective is to analyse both quantitative and qualitative data collected with the survey for the study. The data spreads in five samples of stakeholders considered for the research. The analysis of quantitative data gathered from international tourist, local community, ecotourism service providers and resources managing organisations along with secondary data, first used to identify the ecotourism resource base in Sri Lanka as per the first objective of the study. Further, to a greater extent, each stakeholder specific findings were also extracted from qualitative data. The quantitative data mainly from scholars and other four stakeholders and has been analysed to find future challenges and feasible suggestions by each stakeholder to meet those challenges in accordance with the second objective and third objectives of this study. Combining the finding of the study at the end of this chapter, SWOT analysis is used for better understanding and search to make recommendations in the next chapter to the ecotourism sector in Sri Lanka.

Research findings: - The study has five sample groups to investigate ecotourism resource base, potentials and current situation with future ecotourism development challenges in the country. Each sample group has different sample size depending on the population, and its sampling size and actual data collection situations are given in Table 3.1. The five groups are:

- (A) International Tourist
- (B) Local Community
- (C) Tourism Service Providers
- (D) Tourism Resources Managing Organisations
- (E) Scholars & Researchers

Table 3.1 Each Stakeholder Population, Sample Size and Actual Number of Respondent

	(A) International Tourist	(B) Local Community	(C) Tourism Service Providers	(D) Tourism Resources Managing organisations	(E) Scholars & Researchers
Population	559,603 (2006, SLTB)	1322	297	All represent	All represent
Sample Size (approx.)	399 at 95% 100 at 90%	132 at 95%	30 at 95%	22	30

3.2 Data Analysis

3.2.1 Data Analysis - International Tourists: Stakeholder Group (A)

The data from international tourists was gathered with questionnaire distributed at the Colombo International Airport in March 2007. The questionnaires were in English language and enumerators could communicate only with English as a foreign language. Initially the survey planned to interview 400 international tourists but due to low tourist arrivals following the insurgency situation during the period of the survey, the researcher managed to distribute questionnaires/interview only to 113 respondents. Although this sample is not sufficient to analyse data at 0.05 (95%) level of confidence, it is sufficient to analyse data with 0.10 (90%) confidence level (Table 3.1).

3.2.1.1 Profile of International Tourist

The main objective of the questionnaires part one was to examine factors influenced tourist to visit Sri Lanka and to find preferred places of visit during the tour. Opinions of the tourist on ecotourism resources and potential for ecotourism were collected with sections two and three of the questionnaire. Table 3.2 shows the first three highest respondents with about 32%, 20% and 15% were from UK, Germany and India

respectively. Fourth highest was the Netherlands with approximately 12 percent of the travellers. There were 67 percent male and 33 percent female in the sample. The age categories of 31-40ys and 41-50ys were the major in the sample while 21-30ys and 51-60ys falls into second highest. These four age classes consisted over 3/4 tourist in the sample.

Table 3.2 International Tourist Profile, Perception and Interest

Country of origin		Number	%	Gender	Number	%
European	UK	36	32.1	Male	75	67.0
	Germany	22	19.6	Female	37	33.0
	Netherlands	12	10.7	Age		
	Switzerland	4	3.6	less than 20 ys	2	1.8
	France	3	2.7	21-30 ys	23	20.5
	Italy	2	1.8	31-40ys	26	23.2
	Scandinavian	1	0.9	41-50ys	29	25.9
	Other European	8	7.1	51-60ys	18	16.1
S. Asian	India	17	15.2	over 60ys	14	12.5
	Pakistan	3	2.7	Education		
Others	Australasia	1	0.9	Primary	2	1.8
	Canada	1	0.9	Secondary educ'n	19	17.0
	Others	2	1.8	Diploma	29	25.9
Profession				Bachelor	27	24.1
Employed Private.		29	26.4	Post graduate	25	22.3
Professional		29	26.4	Others	10	8.9
Self Employed		20	18.2	Expenses (excluding air fare)		
Employed Gov't		13	11.8	less than \$500	17	15.0
Retired		12	10.9	\$501-1000	31	27.4
Others		7	6.4	\$ 1001- 1500	16	14.2
Number of days in Sri Lanka				\$1501-2000	26	23.0
1-4		24	21.2	\$2001-2500	11	9.7
5-9		25	22.1	\$2501-3000	3	2.7
10-14		47	41.6	over \$ 3000	9	8.0
over 15 days		17	15.0	Avg. duration of stay by tourist		
Total		113	100.0	(approximate .Estimate)	9.33	Total
					113	100.0

The majority of tourists possessed education above secondary level. Over 71 percent of them hold at least a degree or diploma. The categories of professions, employed in the private sector and professionals were the highest with 26.4 percent each. All other categories such as self employed, retired and employed in government sector were between 10 to 20 per cent.

Expenses incurred (excluding airfare) for this tour, (foreign currency gain) were grouped with seven clustered expenditure categories. It was noted, as given in Table 3.2, most of tourist (27%) spent between US\$ 500-1000 for the tour. The next highest expenditure category was US\$1500-2000 with 23 percent. Between \$ 1001-1500 and less than \$500 spend around 15% tourist. Nearly 60 percent spend at least \$1000 and more in Sri Lanka during the tour.

The highest duration of stay recorded 10-14 of days with 41 percent and 5-9 days in Sri Lanka recorded by 22 percent. Short stay within 1-4 days was also high as 21 percent. Longer stay of over 15 days in the country noted as 17 per cent. Almost 60 percent tourist spent at least 10 days or more during the current journey.

3.2.1.2 Tourist Perception & Interest

Accepting the fact that 'Sri Lanka is predominantly known as a beach destination' in literature review, 56 percent visitors selected beaches as their primary motivation. More importantly 57 percent have shown preference to nature and scenic value of Sri Lanka as their first choice. For culture and heritage interests had shown about 49 percent. Majority showed their interest on both beaches and culture heritage. Interest on wildlife alone was about 25 percent. The visiting friends and relations (VFR) and water sports were also received an interest between 13 and 10 percent respectively. Only three international tourists, which is 2.7 percent in the sample indicated their main purpose was ecotourism.

Among places visited by tourists, Kandy was the number one with 63 tourist (56%) from the sample. Beaches in the South of Sri Lanka and Pinnawala Elephant Orphanage the second and third highest interest places with 51 percent and about 42 percent respectively in the sample. The heritage places in the Cultural Triangle such as

Anuradhapura, Polonnaruwa, Dambulla/Sigiriya and hill country were visited by over 35 percent of international visitors. National parks and botanical gardens were after most visited places at about 30% each.

Table 3.3 Tourist Motivation, Perception, Interest and Ecotourism Resource Base

Motivation to Visit SL	Number	%	Other Activities engaged	Number	%
Nature & Sceneries	64	56.6	Wildlife safari	49	43.4
Beaches	63	55.8	Visit heritage & culture	48	42.5
Culture & Heritage	55	48.7	Ayurveda (herbal medicine)	31	27.4
Wildlife	28	24.8	Turtle conservation	20	17.7
VFR	15	13.3	Lagoon boat trips	20	17.7
Water sports	11	9.7	Bird watching	17	15.0
Ecotourism	3	2.7	Water sports	16	14.2
Diving	3	2.7	Adventure	10	8.8
Business & Conference	2	1.8	Ecotourism	7	6.2
Ayurveda-(Herbal Medicine)	1	0.9	Trekking	4	3.5
			Cycling	3	2.7
Places Visited in Sri Lanka			Shopping	2	1.8
Kandy	63	55.8	Most interested in which place ?		
Beaches in South	58	51.3	Yala National Park	3	2.7
Pinnawala -Elephant Orphanage	47	41.6	Beaches	3	2.7
Dambulla/Sigiriya	40	35.4	Kandy	3	2.7
Hill country	37	32.7	Shopping	2	1.8
Botanical gardens	35	31.0	Wildlife Safari	2	1.8
National Parks	33	29.2	Botanical Garden	2	1.8
Anuradhapura	27	23.9	What kind of tourism resources does Sri Lanka have ?		
Polonnaruwa	24	21.2	Nature related	73	64.6
Colombo	11	9.7	Culture related	52	46.0
East cost	6	5.3	Adventure	25	22.1
Other places	2	1.7	Water sports	16	14.2
Visited another ecotourism destination before (Coast Rica, Kenya, Galapagos)			Ayurveda (herbal treatment)	32	28.3
Answered 'YES'	36	32.1	Nice Beaches	44	38.9
Answered 'No'	76	67.9	Others	1	0.9

3.2.1.2 Tourist Perception & Interest

As shown in table 3.3, there are many activities engaged by tourists during their stay. Among them going on wildlife safari and visiting to cultural heritage places, had

high attention with 43 percent for each activity. Ayurveda (herbal treatment), Turtle Conservation and Boat trip in lagoons, had engaged 20 to 30 percent of the tourists. Also around 10 to 20 percent were interested in Water sports, Bird watching and Adventure activities. The figure for Ecotourism involvement was about 6.2 percent of tourist. To recognise the most popular places for tourist in the country, one open ended question was asked and it receives limited responses with 21 respondents of the sample. From the responses, Yala National Park was the most preferred place by international tourist.

On ecotourism tourism resource base the tourist opinions were inquired to assess the potential of the existing resource base. As shown in the table 3.3, 73 tourists which is about 65 percent, agreed that Sri Lanka has nature related tourism resources. Similarly, 52 percent from 113 tourist interviewed, indicated that Sri Lanka has rich cultural resources. They also accepted that Sri Lanka has fine beaches as a tourism resource with 44 per cent preference. 32 tourists or 28.3 percent indicated the Ayurveda (Herbal Treatment) as a tourism resource. Water sports and Adventure received 16 and 25 percent acceptance respectively as tourism resources.

3.2.1.3 Assessment by International Tourist on Existing Ecotourism Resources

Base on their experiences, tourists were asked to assess certain characteristics of tourism resources particularly that can be attracted by ecotourists shown in Table 3.4. To the quiz 'Sri Lanka has many nature sites' 85 percent of the sample respondent agreed. Responding to culture and nature resources 96 person out of 102 responded agreed i.e. 94%. Tourist accepted that Sri Lanka has unique flora & fauna and wildlife respectively by 67 percent which is 64 tourists from 93. Availability of information on ecotourism, other services, activities for tourist and knowledge of guides were the other things tourist assessed as indicates in table 3.4. Present service quality is agreed as good by majority (about 76%) The available activities for ecotourist were also agreed by over 72 percent on the sample.

About 58% of tourist interview were happy with environmental conservation measures from that less than 10 percent strongly agreed. At the same time more than 46% percent said that they were disturbed by the garbage in public places.

Responding people congestion in tourist places over 75% either disagree or gave no decision. Protection measure at cultural important places received over 62% acceptance by tourist. Responding to local community benefit situation only about 50% agreed that local community is benefited by tourism. Around 65% tourist agreed that ecotourism is a good option to Sri Lanka.

Table 3.4 Assessment on Existing Ecotourism Resources by International Tourist

Sri Lanka has many nature sites/places to see			There is enough information to ecotourists		
	Number	%		Number	%
No decision	5	4.4	Strongly disagree	1	0.9
Agree	58	61.3	Disagree	8	7.1
Strongly agree	38	33.6	No decision	26	23.0
Total	101	89.4	Agree	49	43.4
Sri Lanka (SL) has a rich culture & heritage			Strongly agree	10	8.8
No decision	5	4.4	Total Strongly disagree	94	83.2
Agree	53	46.9	Guides/Interpreters have a good knowledge		
Strongly agree	44	38.9	Strongly disagree	3	2.7
Total	102	90.3	Disagree	3	2.7
S. Lanka Community supports tourism			No decision	18	15.9
Strongly disagree	2	1.8	Agree	49	43.4
Disagree	3	2.7	Strongly agree	23	20.4
No decision	20	17.7	Total	96	85.0
Agree	53	46.9	Quality of other services is good		
Strongly agree	21	18.6	Disagree	2	1.8
Total	99	87.6	No decision	20	17.7
Sri Lanka has unique flora & fauna			Agree	57	50.4
No decision	16	14.2	Strongly agree	18	15.9
Agree	50	44.2	Total	97	85.8
Strongly agree	28	24.8	There are enough activities to experience		
Total	94	83.2	Disagree	2	1.8
Wildlife is amazing in Sri Lanka			No decision	18	15.9
No decision	21	18.6	Agree	56	49.6
Agree	46	40.7	Strongly agree	16	14.2
Strongly agree	26	23.0	Total	92	81.4
Total	93	82.3			

Responding to quiz 'Mass tourism disturbs nature in Sri Lanka?' about 46% accept the statement from that about 10 percent strongly agreed. Responding on their willingness to come back to Sri Lanka about 70% agreed that they like to come back as a holiday visitors. Very important fact was there were 61 tourists which was about 54% of the sample expecting to visit Sri Lanka as a ecotourist.

Table 3.5 Assessment on Existing Ecotourism Impacts by International Tourist

I am happy with environmental conservation in Sri Lanka			Local community gets benefits from tourism		
	No.	%		No.	%
Strongly disagree	2	1.8	Strongly disagree	0	0
Disagree	3	2.7	Disagree	5	4.4
No decision	24	21.2	No decision	31	27.4
Agree	55	48.7	Agree	44	38.9
Strongly agree	11	9.7	Strongly agree	12	10.6
Total	95	84.1	Total	92	81.4
I was bothered by garbage in public areas			Ecotourism is a good option in Sri Lanka		
Strongly disagree	4	3.5	Strongly disagree	0	0
Disagree	18	15.9	Disagree	1	0.9
No decision	17	15.0	No decision	20	17.7
Agree	42	37.2	Agree	51	45.1
Strongly agree	11	9.7	Strongly agree	21	18.6
Total	92	81.4	Total	93	82.3
Too many people in the places I visited			Mass tourism disturbs the nature in Sri Lanka		
Strongly disagree	6	5.3	Strongly disagree	2	1.8
Disagree	35	31.0	Disagree	6	5.3
No decision	22	19.5	No decision	32	28.3
Agree	24	21.2	Agree	42	37.2
Strongly agree	4	3.5	Strongly agree	11	9.7
Total	91	80.5	Total	93	82.3
Culture and heritage are protected sufficiently			I would like to visit SL again for a holiday		
Strongly disagree	0	0	Strongly disagree	1	0.9
Disagree	7	6.2	Disagree	2	1.8
No decision	22	19.5	No decision	12	10.6
Agree	56	49.6	Agree	44	38.9
Strongly agree	6	5.3	Strongly agree	36	31.9
Total	91	80.5	Total	95	84.1
I would like to visit again Sri Lanka as an ecotourist					
Strongly disagree	1	0.9	No decision	28	24.8
Disagree	2	1.8	Agree	42	37.2
			Strongly agree	19	16.8

3.2.1.4 Analysis of Ecotourists Visiting Sri Lanka

Responding to most important question for this study 'Whether they visited before any other famous ecotourism destination such as Costa Rica, Galapagos Islands, Nepal?' About 32 percent answered 'yes' (Table 3.3). The underlining meaning of this is they have some previous experience on ecotourism and they are potential ecotourist. Form the tourist who visited before other ecotourism destination, the majority 1/3 were from UK (Table 3.6).

As shown in table 3.5, the experienced German ecotourist number was 9 from the 36. There were 5/36 also from India. Additionally four tourists from 36 ecotourist interviewed, were from Netherlands and others from rest of European counties.

The comparison between the tourists who were a ecotourist before and average duration of stay in Sri Lanka during current tour was longer that other tourist (Figure 3.1). From the total of 17 long stay tourist in the sample, 10 can be considered as ecotourist which is almost 59 per cent (Table 3.2 & 3.3). Further analysis on ecotourist, duration of stay and expenses incurred in the destination highlight that eco-experienced travellers are tend to stay longer (Table 3.9) and spend more money in the destination visited than average tourists (Tables 3.6, 3.7 & 3.8).

Table 3.6 Country of Origin and Spending Pattern of Experienced Ecotourist*

	less than \$500	\$501- 1000	\$1001- 1500	\$1501 -2000	\$2001 -2500	\$2501- 3000	over \$ 3000	Total
UK	0	4	2	4	0	0	2	12
Germany	0	3	0	3	1	1	1	9
Netherlands	0	2	0	0	0	0	0	2
Italy	0	1	0	0	0	0	0	1
Switzerland	0	0	0	0	0	0	1	1
Other European	0	0	0	2	0	0	0	2
Other Scandinavian	0	0	1	0	0	0	0	1
India	2	3	0	0	0	0	0	5
Canada	0	0	0	1	0	0	0	1
Any others	0	1	0	0	0	0	1	2
Total	2	14	3	10	1	1	5	36
% of 36	6%	39%	8%	27%	3%	3%	14%	100%
Spent \$1000 and less	45%		Spent over \$1000				55%	100%

* ecotourist - tourist who visited at least once, a popular ecotourism destination as a ecotourist

Table 3.7 Country of Origin and Spending Pattern of Tourists None Ecotourist

	less than \$500	\$501- 1000	\$1001- 1500	\$1501- 2000	\$2001- 2500	\$2501- 3000	over \$ 3000	Total
UK	1	5	9	4	1	2	2	24
Germany	3	1	4	2	2	0	1	13
Netherlands	0	2	0	1	0	0	0	3
Italy	0	2	0	8	0	0	0	10
Switzerland	0	1	0	0	0	0	0	1
Other European	0	1	0	0	1	0	1	3
Other Scandinavian	0	1	0	0	5	0	0	6
India	9	2	0	1	0	0	0	12
Canada	1	2	0	0	0	0	0	3
Any others	0	0	0	0	1	0	0	1
Total	14	17	13	16	10	2	4	76
% of 76	18%	22%	17%	21%	13%	3%	5%	100%
Spent \$1000 and less	40%		Spent over \$1000				60%	

Table 3.8 Country of Origin and Spending Pattern of Experienced Ecotourist* (Excluding Indian Ecotourist)

	less than \$500	\$501- 1000	\$1001- 1500	\$1501- 2000	\$2001- 2500	\$2501- 3000	over \$ 3000	Total
UK	0	4	2	4	0	0	2	12
Germany	0	3	0	3	1	1	1	9
Netherlands	0	2	0	0	0	0	0	2
Italy	0	1	0	0	0	0	0	1
Switzerland	0	0	0	0	0	0	1	1
Other European	0	0	0	2	0	0	0	2
Other Scandinavian	0	0	1	0	0	0	0	1
Canada	0	0	0	1	0	0	0	1
Any others	0	1	0	0	0	0	1	2
Total	0	10	3	10	1	1	4	29
% of 29	0%	34%	12%	34%	3%	3%	14%	100%
Spent \$1000 and less	34%		Spent over \$1000				66%	

* ecotourist - tourist who visited at least once, a popular ecotourism destination as a ecotourist

These findings confirm to earlier research by The Nature Conservancy (2002), Gurusinghe (2001) and De Silva (2004). They also found that ecotourists tend to spend more money than other tourists. It made to understand that ecotourists are comparatively high spenders and than mass tourists. In this research, the idea was not clear

Spending

with tables 3.6 and 3.7. But when Indian Ecotourists were exempted and then results proves the idea of previous researchers. In approving the idea table 3.8 shows that UK, German and other European ecotourist are better spenders (average) than a general tourist. But ecotourist from India found as low spenders and stays for shorter period (tables 3.6 & 3.9).

Table 3.9 Comparison of Duration of Stay between the Experienced Ecotourists* and Other Tourists (Including & Excluding Indian ecotourist)

Type		Duration of Stay (number of days)				Total
		1-4	5-9	10-14	over 15	
a. Experienced Ecotourists* (including Indians)	Frequency	7	3	16	10	36
	% of 36	19%	8%	44%	28%	100%
	%	Upto 9 days 27%		Over 9 days 73%		
Experienced ecotourist (excluding Indian ecotourist)	Frequency	5	-	16	10	31
	% of 31	16%	-	52%	32%	100%
	%	Upto 9 days 16%		Over 9 days 84%		
b. Other tourists	Frequency	17	21	31	7	76
	% of 76	22%	28%	41%	9%	100%
	Cumulative %	Upto 9 days 50%		Over 9 days 50%		
Total (a +b)		24	24	47	17	112

Note 1: - * Experienced ecotourist - one who was a ecotourist before

Note 2:- 9 days is average days of stay - 9.33 (Table 3.2) approximate estimate by author

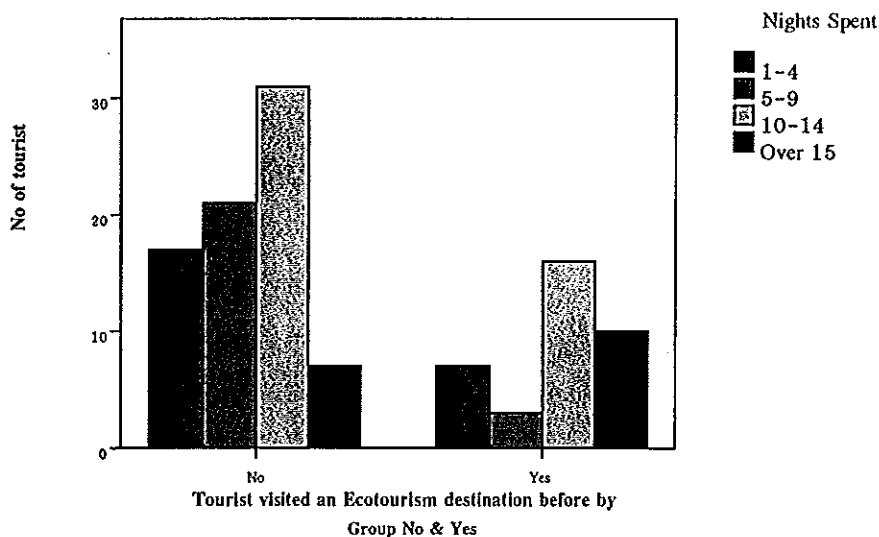
As shown in figure 3.1 & table 3.9, duration of stay of ecotourist is longer than general tourist. Out 36 ecotourists interviewed, more of them had stayed longer than none ecotourists (table 3.9). Only 27% of ecotourist stayed lower duration than average where as other tourist were equal with 50% between less than 9 days and over 9 days of stay. When Indian ecotourists were excluded from the sample the tendency was further clear (significant) and proves that more ecotourists 84% stayed longer than 9 days where as 16% stayed less than 9 days.

It is important to know from the tourists who had already being to an ecotourism destinations, what impression or opinion they have on Sri Lanka ecotourism resources base. Summary of their comments are shown in table 3.10. Both tourists who had

ecotourism experience and others have agreed (78%) that to Sri Lanka; ecotourism is a better option out of them 23% strongly agreed. The comment by experience tourist is quite acceptable as they assess Sri Lanka ecotourism resources on comparative basis. (by agreeing with statements of 1- 4 in table 3.10) and other comments (to statement 5-7 in table 3.10) on comparative term.

- Amazing wildlife in Sri Lanka 77%
- Sri Lanka has unique flora and fauna 83%
- Sri Lanka has rich culture & heritage 95%
- I would like to visit Sri Lanka for a holiday 84%
- I would like to visit Sri Lanka as an ecotourist 67%
- There are enough information to ecotourist 63%

Figure 3.1 Tourist Visited (yes) and not Visited (no) Ecotourism Destinations(Duration of Stay Comparison between Group 'Yes' & 'NO')



Further, it was analysed to see how many prefer to come back as ecotourism to Sri Lanka. The idea has been tested with both tourist who visited a famous ecotourism destination before and those who were not visited before. The tourists who had not been to such destination also expressed greater enthusiasm with 38 agreed (60%) - (9

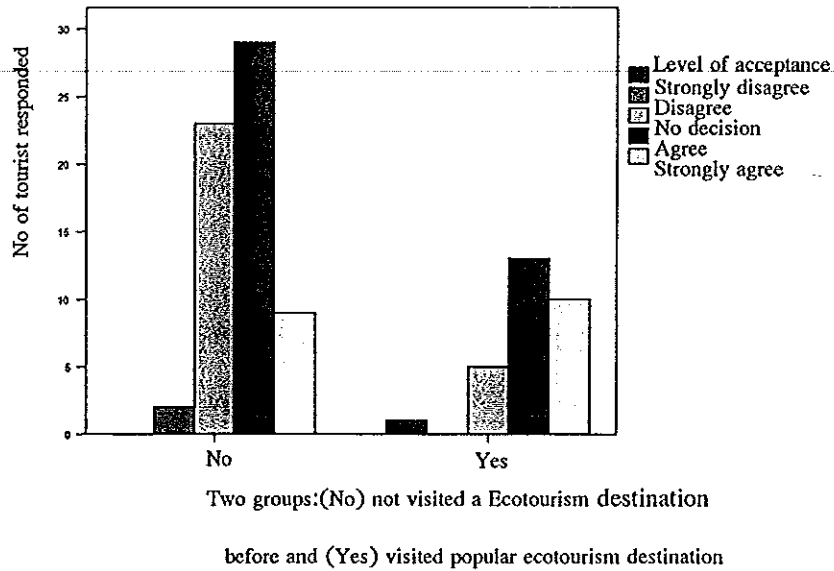
strongly agreed) from 63 responded (Figure 3.2). Only 2 persons disagreed while 23 (36%) (mentioned 'no decision'). The most important group, those who had been to ecotourism destination responses were quite impressive. From 29 who responded 23 agreed (79%) to return back as ecotourist. Out of 23 tourists, 10 (43%) strongly agreed to come back as ecotourist. Only 5 were unable to give a decision. Importantly one said strongly disagree and commented that Sri Lanka has double pricing which was not fair with visitors. Altogether 10 do not agree to come back of which need careful attention to find out why?

Table 3.10 Comparative Assessment between General Tourist and Ecotourist on Sri Lanka Potential, Ecotourism Resource Base & Wiliness to Visit again as a Holiday Visitor, Ecotourist

Statement	Option	Strongly disagree	Disagree	No decision	Agree	Strongly agree	Total
1. Ecotourism is a good option in Sri Lanka	Yes	-	1	8	13	8	30
	No	-	-	12	38	13	63
	Total		1	20	51	21	93
			1%	22%	55%	23%	(78%)
2. Wildlife is amazing in Sri Lanka	Yes	-	-	7	17	7	31
	No	-	-	14	29	19	62
	Total			21	46	26	93
				23%	49%	28%	(77%)
3. Sri Lanka has unique flora & fauna	Yes	-	-	5	17	8	30
	No	-	-	11	33	20	64
	Total			16	50	28	94
				17%	53%	30%	(83%)
4. Sri Lanka (SL) has a rich culture & heritage	Yes	-	-	2	19	11	32
	No	-	-	3	34	33	70
	Total			5	53	44	102
				5%	52%	43%	(95%)
5. I would like to visit SL again for a holiday	Yes	1	1	2	12	15	31
	No	-	1	10	32	21	64
	Total	1	2	12	44	36	95
		1%	2%	13%	46%	38%	(84%)
6. I would like to visit again SL as an ecotourist	Yes	1	0	5	13	10	29
	No	0	2	23	29	9	63
	Total	1	2	28	42	19	92
		1%	2%	30%	46%	21%	(67%)
7. There is enough information to ecotourist	Yes	1	6	5	16	2	30
	No	0	2	21	33	8	64
	Total	1	8	26	49	10	94
		1%	9%	28%	52%	11%	(63%)

Note :- agree + strongly agreed total given in total column within parentheses

Figure 3.2 Tourist Expectation to Visit Again Sri Lanka as a Ecotourist :Two Group Comparison

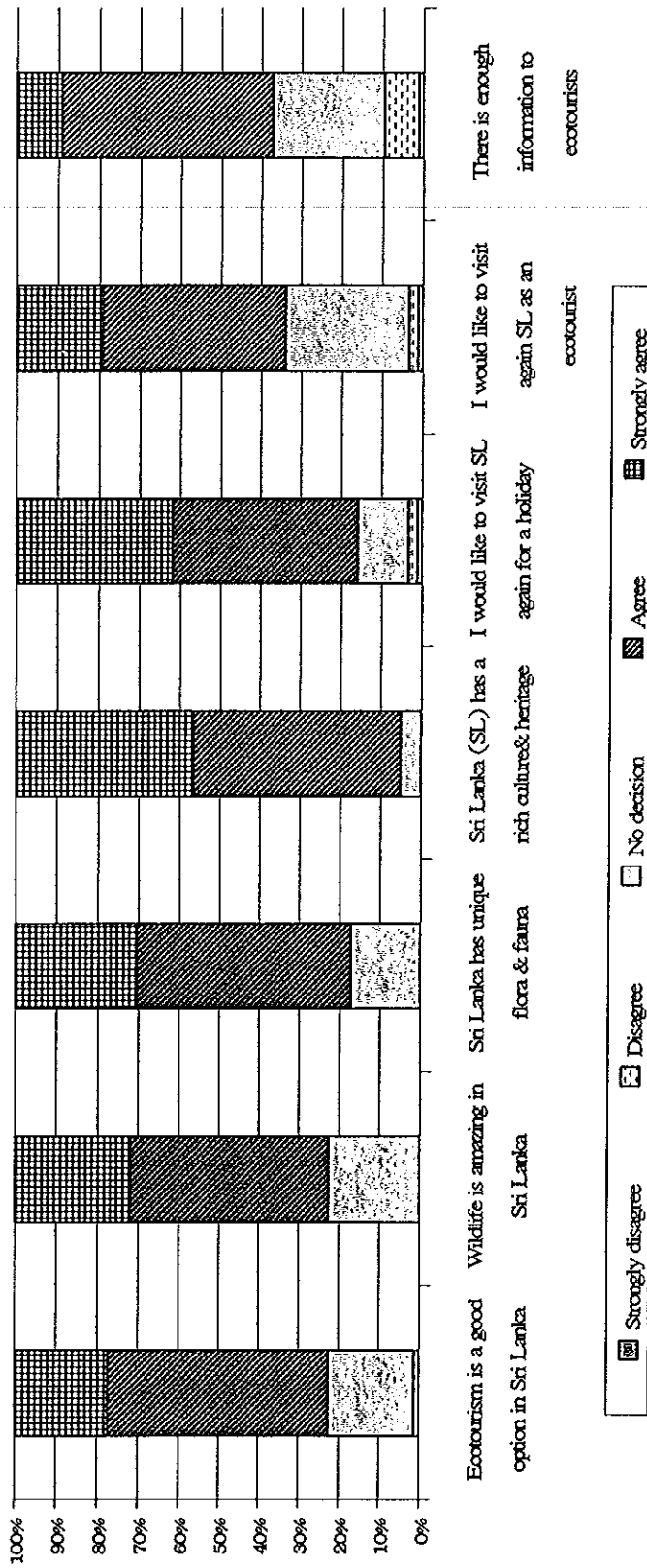


3.2.1.5 Summary of Descriptive Content Assessment

Tourist suggestions to market present natural & cultural resources

- Promote cultural and Nature places with prominence and continuous
- Develop nature lodges
- Improve security in the country
- Train guides to be more knowledgeable
- Promotions with good information on resources and security
- Garbage bins in public places & near attractions
- Implement sings for independent travellers
- Promote wild life in Europe

Figure 3.3 Assessment by Tourist on Sri Lanka Potential, Ecotourism Resource Base & Willness to Visit Again as a Holiday Visitor as Ecotourist



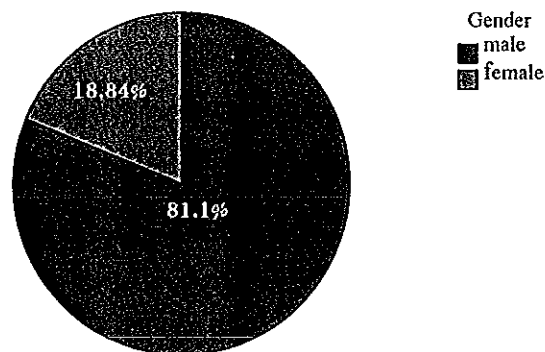
Challenges	Solutions suggested by tourist to face those challenges
<ul style="list-style-type: none"> ➤ Unplanned development in near some nature areas ➤ Develop public transport trains ➤ Bad/ Adverse publicity ➤ Dump garbage in public & nature places ➤ Ask yourself how many ecotourists know Sri Lanka ? ➤ Chargers are high for foreigners ➤ Get away from double pricing ➤ Sound and over crowd controlling 	<ul style="list-style-type: none"> ➤ Develop good informative travel magazine & produce DVD and VCDs ➤ Specific education to target communities ➤ Develop at least a few trains for tourist ➤ Develop more green park instead abundant lands ➤ Train guide in other languages (other than English) ➤ Please do not built in nature areas ➤ Educate community all others to do well for tourist ➤ Promoting by SLTB people trust it ➤ Develop youth hostels ➤ Educate employees ➤ Stop double pricing ➤ Develop facilities for different ecotourism activities

3.2.2 Data Analysis - Local Community/ Host Community: Stakeholder Group (B)

Six villages from two tourism areas were selected to carry out the local community survey. The selected two areas were Bentota-Dedduwa tourism area (four villages) and Maduganga lagoon area (two villages). The villages (6) were randomly selected considering its location of neighbouring to those tourism areas. There were 1,322 households in those six villages as per the information of the respective Divisional Secretariat sources. Structured questionnaire had been designed and translated into local language (Sinhala) and distributed for data collection. Estimated sample size was 132 and data collected from 138 households which was six more than the estimate during the field survey. Both distribution of questionnaires and interview methods were applied to gather data depending on respondents' request. Where ever possible the chief (bread winner) of the household was interviewed to collect data. The survey was carried out in February 2007.

The objective of section one of the questionnaire was to collect data on local community demographic, socio-economic data, perception on current tourism impacts and get opinions on community participated, ecotourism concept and practices. The gender compositions of respondents were 81 percent male and 19 per cent female (Figure 3.4).

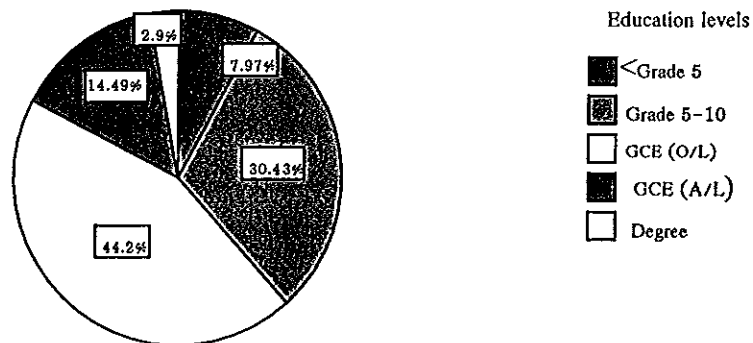
Figure 3.4 Male, Female Composition of the Community



Data on age collected with 6 class intervals as given in Table 3.11. According to the survey, there were 12 percent with age is lower to 30 years and between 31-40 years 21 percent. The highest percentage of 28 percent was for 41-50 years category and 15 percent were over 60 years in the sample.

Education level of the community: Majority has GCE (O/L) which is 44% of the sample. Between grade 5 -10 qualified were about 30 %. About 15 had GCE (A/L) qualification. Grade 5 and above comes to over total of 90% in those villagers.

Figure 3.5 Education Level of the Local Community



Detail on present occupations of the local community is given in Table 3.11, which is useful to understand their interaction with tourism industry. The data shows 60 percent of the people in the sample are self employed. Only 20 percent work for the private sector while seven percent in the government sector. Both retired and unemployed accounted to 4.3 percent each in the sample. All others categories were less than one percent.

In the three main categories observed, what kind of benefit they get from tourism was also questioned. Paying particular attention on the primary occupation relationship with tourism, data gathered asking direct question: 'is your primary occupation tourism related or not?' It was noted that tourism related number was 69 which was 50 percent of the sample. There were 47 percent employed in non tourism related means of income. Also it was noted that, some community was not faithful in answering to occupation. On several occasions the number of unemployed claim by the respondent was higher than the actual observes by the researcher. Those data can disturb the actual findings of the study.

The study further investigated whether they had a secondary income and if, was it tourism related? Over 55 percent of the community in the sample did not have a secondary means of income. From the balance only about 29 percent had tourism related secondary means of income and about 17 percent had non-tourism related secondary income. When consider the whole income of the household, whether there is significant contribution from tourism was inquired from community. Among them, about 38 percent do not get any income from tourism industry. About 23 percent consented that tourism contributed as a part of their income and 12 percent of households earn about half of their income from tourism. Around 27 percent (38 households) earn their total income from tourism industry.

35 percent (46 persons) answered that all have employments in family. Almost 42 percent of the sample replied that 1-2 persons in their household are unemployed. About 11 percent of households had 3-5 person's expecting employments. Even 14 percent found with 5 and above persons are unemployed in the house hold.

Table 3. 11 Local Community Profile & Socio Economic Characteristics

	No.	%		No.	%
Gender			Primary source of income		
Male	112	81.2	Tourism related	69	51.1
Female	26	18.8	Not tourism related	66	48.9
Total	138	100.0	Total	135	100.0
Age categories in years			Secondary source of income		
<20	2	1.4	Do not have	75	54.7
21-30	15	10.9	Have tourism related	39	28.5
31-40	29	21.0	Have none tourism related	23	16.8
41-50	39	28.3	Total	137	100.0
51-60	32	23.2	Contribution of tourism to total income		
>60	21	15.2			
Education level			None	53	38.7
<Grade 5	11	8.0	A part of income	31	22.6
Grade 5-10	42	30.4	About half income	15	10.9
GCE (O/L)	61	44.2	All of my income	38	27.7
GCE (A/L)	20	14.5	Total	137	100.0
degree	4	2.9	House hold income		
Occupation			<5000	50	36.2
Self Employed	83	60.1	5,001-10,1000	51	37.0
Employed in Government.	10	7.2	10,001-15,000	18	13.0
Employed in Private sector.	27	19.6	15,001-25,000	10	7.2
Professional	1	0.7	25,0001-50,000	8	5.8
Overseas	1	0.7	>50,000	1	0.7
Retired	4	2.9	When you started living here?		
House wife	6	4.3	Living from birth	124	89.9
Unemployed	6	4.3	1-2 Years before	4	2.9
Unemployment in households			2-5 year before	1	0.7
All employed	46	34.1	5-10 years before	3	2.2
1-2	56	41.5	Over 10 years before	6	4.3
3-5	14	10.4	Total	138	100.0
All unemployed-Over 5 persons	19	14.1			

The researcher felt that unemployment rate in those areas were little less than given statistics as some of them did not understand what unemployment mean irrespective of explanation given in the questionnaire.

To seek whether community had tendency to migrate into tourism developed areas, they were asked number of years of living in that house. It showed 89 percent of them live there from birth and two to six percent are living for 5 to 10 years. But those who live for a period of less than five years, particularly between one to two years had some indication of migration. Cross investigation on period of living in that house, primary employment and the sector employed showed that there were 2 persons with 1-5 years of living in the area and one employed in tourism related private sector and self-employed in tourism. Thus, the investigation was insignificant.

Level of income of the community is one of the indications to assess their living standards. 37 percent of households earn less than five thousands rupees (approx. US\$ 45) per month. About 36 percent households gain income between Rs. 5000 to 10,000 (approx. US\$ 45-90) monthly (Table 3.11). In the category of Rs. 15,000 to 50,000 (approx. US\$ 136 - 454.5) monthly income, there were about 26 percent households. In total there were more low income gaining households than high income earners. Noted about 75% households get less than Rs. 10,000 (\$100) per month. This finding indicates that majority were low income gaining population in village areas.

3.2.2.1 Community Perception on Current Tourism and Understanding on Ecotourism

Community knowledge on ecotourism was low. 45% of them did not know about it, another 41% were known a little and the balance 13% only admitted that they were aware about it (Figure 3.6). Even though they know a little about ecotourism their willingness to learn about it and readiness to co-operate, are important for future development. As shown in the figure 3.7, most of them either agreed or strongly agreed on willingness to know/learn about ecotourism.

They were not much happy to learn but willing to work with ecotourism. Majority think positive on ecotourism as a good concept. With comments it shows that they have trust, it would develop and maintain sustainability in their area.

Figure 3.6 Local Community Knowledge on Ecotourism

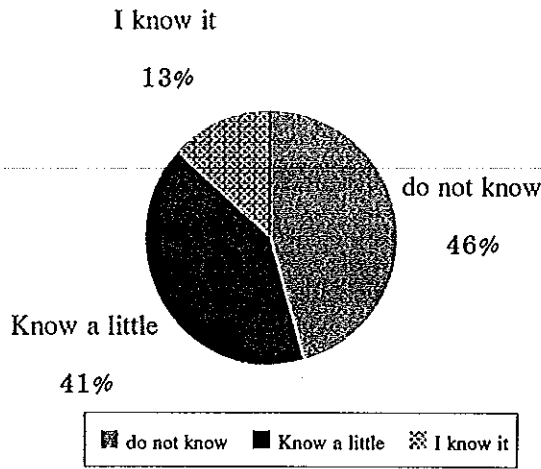
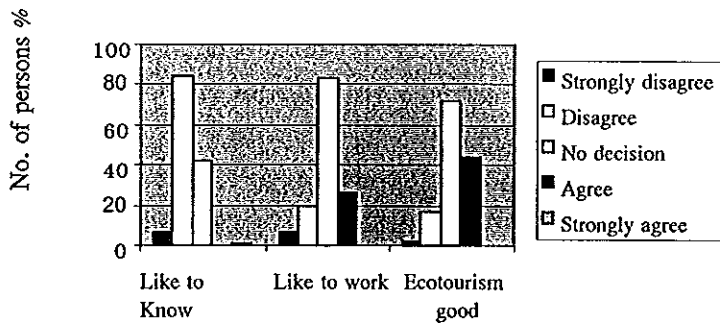


Figure 3.7 Community Perceptions on Ecotourism



Tourism interaction with socio-culture and traditions of the community was also asked during the survey. Almost 83 percent (104 respondents) agreed that tourists like to see village culture from which 22 percent strongly agreed. In addition about 61 percent accept that tourism help to improve our cultures.

There were about 74 percent agreed that tourists like to see their traditional economic activities (fishing, farming etc.) Finally they admitted ecotourism was a better option to preserve their culture (about 67 percent i.e. 92 persons). From this, 72 persons 'agreed' and 20 'strongly agreed' as ecotourism was a better option (Table 3.12).

Table 3.12 Local Community Socio-Culture & Traditions with Tourism

Socio-Culture & Traditions with Tourism - feelings of the community					
	Number	%		Number	%
Tourists like to see our culture			Tourists come to see our traditional activities		
Strongly disagree	0	0.0		1	0.7
Disagree	6	4.3		6	4.4
No decision	18	13.0		28	20.4
Agree	84	60.9		83	60.6
Strongly agree	30	21.7		19	13.9
Total	138	100.0		137	100.0
Tourism improve our culture			Tourism help to preserve traditions		
Strongly disagree	5	3.6		1	0.7
Disagree	18	13.1		9	6.5
No decision	31	22.6		22	15.9
Agree	70	51.1		86	62.3
Strongly agree	13	9.5		20	14.5
Total	137	100.0		138	100.0
Tourism motivate children to foreign languages			Ecotourism is a better option to protect our culture		
Strongly disagree	1	0.7		2	1.4
Disagree	6	4.4		10	7.2
No decision	16	11.7		34	24.6
Agree	82	59.9		72	52.2
Strongly agree	32	23.4		20	14.5
Total	137	100.0		138	100.0
Social cost is higher than economic benefits in tourism					
Strongly disagree	1	0.7			
Disagree	16	11.6			
No decision	25	18.1			
Agree	63	45.7			
Strongly agree	33	23.9			
Total	138	100.0			

Meantime they agreed (about 79 percent, 96 respondents) that tourism has a social cost which is higher than economic benefits. Environment concern by the community was quite high which is also highlighted in comments given by them at the survey (Table 3.13). About 64 percent agreed that international tourism helps to preserve nature. (Comments given that domestic tourists do not care about nature). Meantime about

17 percent do not agree that tourism preserves environment. Also tourism helps to conserve wildlife and ecosystems received 67.7 percent acceptance. Commenting on ecotourism, about 73 percent agreed that ecotourism preserves their surrounding nature.

Table 3.13 Environment & Tourism – Local Community Concern

	Number	%		Number	%
Tourism help to preserve our nature			Now there are organisations to preserve nature		
Strongly disagree	1	0.7		7	5.1
Disagree	22	15.9		29	21.0
No decision	25	18.1		29	21.0
Agree	73	52.9		52	37.7
Strongly agree	17	12.3		21	15.2
Total	138	100.0		138	100.0
Tourism helps to conserve wildlife & ecosystems			Ecotourism preserve our nature better way		
Strongly disagree	0	0.0		2	1.4
Disagree	15	10.9		11	8.0
No decision	31	22.5		24	17.4
Agree	76	55.1		82	59.4
Strongly agree	16	11.6		19	13.8
Total	138	100.0		138	100.0

3.2.2.2 Qualitative Data/Comments Assessment – Local Community

Commenting on present tourism and future expectation local community has highlighted three groups of ideas which were:

1. Positive developments in present tourism
2. Negative impacts (results) left with community
3. Proposal for future tourism development

(1) As positive comments senior people feel the village living standards has develop over period of 15 to 20 year because of tourism. Many self employment opportunities were generated by tourism for people specially females. Tourism should continue to develop for the villagers to have more employments and businesses to smaller businessman such as boat operators and shop owners. Those who understand to some extend the ecotourism concept were very happy if such initiative could minimise present problems.

In addition environment is not a concern presently in Bentota as per community view (Table 3.14).

(2) In the negative aspect community has more comment on economic, socio-cultural and environmental aspects. Increase of area land price and certain goods demanded by tourists such as prawns and fruits, is affect badly on community. Job creation is there but all self and low income jobs are just sufficient for survival and no additional development is deserved. The informal small business community has no protection what so ever at difficulty such as the tsunami.

Socio-cultural aspect comments: young people (specially male) with and without the knowledge of parents go after tourists for easy money and set a bad example to others. Drug usage is a popular secret in near beach area for those acts some villagers support which is a critical. Both cultural assistance and disruption exist by tourism. Village people do not have freedom to enjoy the beach with families, as they did in the due to various miss behaviour by some tourist in the Bentota beach area.

Environmental problems are every where. Specially filling of river banks for building sites and gardens as well as cutting mangroves are in a critical stage. Those lead for soil erosion on river banks, floods affect on villages where community is. Lack of solid waste disposal and plastic create environmental degradation in Bentota areas. It was noted that environmental disturbances relatively low in Maduganga area.

(3) As proposal from community awareness to young people on good and bad side of tourism received high attention. Requested authorities initiate some measures to combat drug abuse and child abuses in Benthota area. But community think still it is not a problem in Maduganga area. Speed boat is major issue in Mauganga area that has effect on fishing community and natural environment particularly on the fragile ecosystem in the Maduganga lagoon.

Table 3.14 Local Community Socio-Culture & Traditions with Tourism

	Number	%		Number	%
Tourism generates jobs in our area			Our community provides services to tourist		
Strongly disagree	0	0.0		2	1.4
Disagree	6	4.3		5	3.6
No decision	6	4.3		14	10.1
Agree	96	69.6		101	73.2
Strongly	30	21.7		16	11.6
Total	138	100.0		138	100.0
Tourism can create more jobs			Tourism related jobs are better paid		
Strongly disagree	0	0.0		2	1.4
Disagree	3	2.2		36	26.1
No decision	13	9.4		46	33.3
Agree	95	68.8		38	27.5
Strongly agree	27	19.6		16	11.6
Total	138	100.0		138	100.0
Small businessman get opportunities with tourism			Prices of goods higher because of tourism		
Strongly disagree	0	0.0		1	0.7
Disagree	8	5.8		18	13.0
No decision	14	10.2		19	13.8
Agree	86	62.8		64	46.4
Strongly agree	29	21.2		36	26.1
Total	137	100.0		138	100.0

Community requested from authorities to conduct community awareness and tourism related professional training programmes for Bentota beach area. Environmental improvement could be done, if local authority relevant officials are honestly undertaking their responsibility. Cheating tourists for short benefits by some community people damages the image of some services such a boat ride of which need to be regularise in order to prevent such development. Socio-cultural damages such as drugs & child abuse by tourists with local people support in Benthota area was highlighted by the community. Also domestic tourists acts (miss behaviour) on environment damages drown attention of the authorities.

3.2.3 Data Analysis Tourism Service Providers: Stakeholder Group (C)

Tourism service providers (TSP) play a key role as a stakeholder in any form of tourism. Similarly in ecotourism, they are the main facilitator for ecotourist. As human needs are vary from person to person and time to time, diversity of ecotourism services demanded are quite complex. By its nature related identity and interrelationship with other forms of tourism, the ecotourism diversity further gets complicated in practicality. With due consideration to these facts, the researcher made a constructive attempt to find the perception of ecotourism tourism service providers on their products, potentials and suggestions for future development. Since this sector is not yet well developed in Sri Lanka, the researcher used snowball methods to collect data for the study. Table 3.15 shows that there were 65 service provider representations (a) with 32 actual respondents (b) to provide data to the survey. Majority (18/65) were from accommodation sector such as Ecolodges, Eco camps etc.

**Table 3.15 Classification of Respondents by (a) Type of Tourism Services
(b) Number of Businesses in One Entity**

a. Type of tourism service represented in the sample			b. Number of services involved by one entity		
	Type of tourism service	No.		Type of tourism service	No.
1	Accommodation related	18	1	One tourism service/ business	15
2	Equipment for activities	9	2	Two tourism services/ businesses	6
3	Tour operator /tour organiser	7	3	Three tourism services/ businesses	7
4	Water sports & related facilities	7	4	Four tourism services/ businesses	1
5	Professional guiding	5	5	Five tourism services/ businesses	1
6	Vehicle rental	4	6	Six tourism services/ businesses	1
7	Boat services	3	7	NGO centred tourism service	1
8	Travel Agency	2			
9	Mask carving and selling	2		Total number of respondents	32
10	Hiking & Bird watching facilitator	2			
11	Tourism/Ecotourism trainer	1			
12	Turtle conservation	1			
13	Ecotourism NGO	1			
14	Food culture performance	1			
15	Catamaran Excursions	1			
16	Other	1			
	Total tourism services represented	65			

Since there are no clear criteria to select or make clear cut on ecotourism providers in the local context, the researchers obtained recommendation of services providers who are in the business either partially or fully undertaking ecotourism related services. It was observed that all of them have been in the tourism business from one year to 30 years by then. Based on comments made by some of them, it was noted that there were four groups within those respondents:

- a. Mass tourism service providers having separate business for ecotourism
- b. Tourism service providers dedicated for ecotourist market
- c. Individuals providing services to ecotourist
- d. Others

Searching on ecotourism potential, the reasons for them to do ecotourism service were inquired and the findings are summarised in figure 3.8 & table 3.16 &. In the results, it illustrates that 'high business potential' was the reply by 17 respondents which is 53 percent. The second highest as first reason, was 'earn good income' by 15 percent. The highest under second reason was 'potential and available resources'. Also these three reasons were the first highest average percentages. There were many other reason given by them which are shown in table 3.16. The findings indicate the inside from service providers point, how they see the ecotourism potential as a stakeholder who has already switched to invested in ecotourism sector.

Figure 3.8 Reason to be in Ecotourism Service

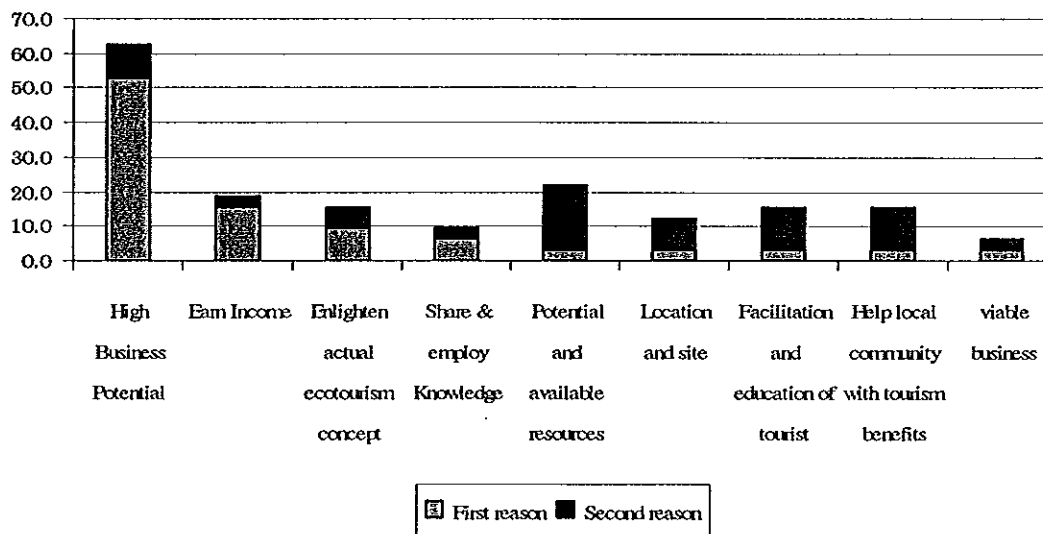


Table 3.16 Reason for Being in the Ecotourism Business or Related Activities

Reason	First reason		Second reason		Both together
	Number	% (a)	Number	% (b)	Average % (a + b)
High Business Potential	17	53.1	3	9.4	62.5
Earn good income	5	15.6	1	3.1	18.8
Enlighten actual ecotourism concept	3	9.4	2	6.3	15.6
Share & employ knowledge	2	6.3	1	3.1	9.4
Potential and available resources	1	3.1	6	18.8	21.9
Location and site	1	3.1	3	9.4	12.5
Facilitation and education of tourist	1	3.1	4	12.5	15.6
Help local community with tourism benefits	1	3.1	4	12.5	15.6
Viable business	1	3.1	1	3.1	6.3
Total	32	100	25	78.1	100

In addition, the amount of ecotourist they serve form the total tourists receive their services given in table 3.17. Out of 28 respondent, 6 mentioned over 75 percent to 100 percent they serve for ecotourist. Others over 51%-75%→ (5), 26%-50%→(9), less than 25%→(8) respondents. It shows more service providers get lower number of ecotourist among tourist receives their services.

Table 3.17 Percentage of Ecotourist from Total Tourist

%	Number	Percentage from all providers
less than 25%	8	25.0
26%-50%	9	28.1
51%-75%	5	15.6
76%-100%	6	18.8
Total	28	87.5

Looking at ecotourism resource base, demand by international tourist to Sri Lanka and initiatives taken by the government, the perceptions of service providers is summarised in table 3.18. Assessing the resource base 53 percent (No. 17) marked 'very good'. Both 'good' and above counts nearly 1/3 of responses. In general their idea seems ecotourism recourse base in the country make them satisfied. Demand selection 'Good' and above received 60 percent in which 'Good' alone 40% (No 13).

However, service providers were not happy with government initiatives for ecotourism. 72 percent felt (No.20), it was 'not good' and lower while 37 percent accepted it was at average and above to positive side.

Table 3.18 Service Provider Perception on Resource Base, Demand & Government Initiatives

	Number	%	Mean	Mode	Std. Deviation
Ecotourism Resource base			3.1	4	1.10
Poor	1	3.1			
Not Good	1	3.1			
Average	8	25.0			
Good	5	15.6			
Very Good	17	53.1			
Your assessment int'l ecotourism demand to Sri Lanka			2.7	3	1.01
Poor	0	0			
Not Good	5	15.6			
Average	6	18.8			
Good	13	40.6			
Very Good	7	21.9			
Your opinion ecotourism initiative by government sufficient?			1.2	1	0.92
Poor	9	28.1			
Not Good	11	34.4			
Average	10	31.3			
Good	2	6.3			
Very Good	0	0			

Confirming the finding, the central tendency assessment shows that on ecotourism resource base responses skewed towards positive and international potential little towards positive. But government initiative clearly skewed towards negative perception. As per these findings, there is rich resource base and good international demand for ecotourism but there is a lack of government initiative.

As a solution, what could be done? Answers from service providers are listed in table 3.19 as per the priority given by them. The section 'A' indicates

government authorities with priority. In column 'B' expected activities from government authorities with its number of respondents.

Table 3.19 (A) Authorities Need to Involve in Developing Ecotourism(B)
Responsibilities and Services Recommend to Authorities for Ecotourism
Development

A : Organisations	No.	%	B: Recommended activities	No.	%
Top priority group			Ecotourism Promotion in Overseas	13	40.7
SLTB & MOT	32	100	Regulation of Ecotourism Sector	7	21.9
Ecotourism Concern NGO	7	21.9	Awareness and Training	7	21.9
Local Authority (PS)	6	18.8	Provide Advisory services establishing a Cell of experts	6	18.8
Central Environment Authority	6	18.8	Initiate incorporate plan & work together	5	15.6
Coast Conservation Dept.	5	15.6	Asst Ventures grass root level	4	12.5
Wild Life Conservation Dept.	4	12.5	Initiate Environmental and Biodiversity conservation	4	12.5
2nd priority group			Release lads for Investors	2	6.2
CEA	8	25.0	Provide Advisory services	2	6.3
WLCD	4	12.5	Funding assistance	2	6.3
Arch. Dept.			Develop Infrastructure	2	6.3
Local Authority	3	9.4	Help at a Difficulty	1	3.1
Eco Con. NGO	3	9.4	Promote CBO	1	3.1
Asst Gov. Agent	1	3.1	Establish Cell o qualified staff to advice on ecotourism	1	3.1
Min. Small Industry	1	3.1	Educate other organisations on ecotourism	1	3.1
3rd Priority group			Promote research and Learning on Ecotourism	1	3.1
CCD	3	9.4	Do not work lethargic with new ideas	1	3.1
WLCD	2	6.3	Professional interpretation	1	3.1
Local Authority	2	6.3	Initiate an efficient approval process	1	3.1
CEA	1	3.1			
Archaeological Department	1	3.1			
SLTB & MOT	1	3.1			
4th Priority			Total	60	
Min. Small Industry	4	12.5			
Universities	2	6.3			
Eco Con. NGO	1	3.1			
MOT	1	3.1			
ASMET	1	3.1			
Eco Con. NGO	1	3.1			
Asst Gov. Agent	1	3.1			

Since different service providers have different selection, some organisations priorities overlaps with same percentage value. Under organisation need

initiate action for ecotourism development Sri Lanka Tourist Board (SLTB) and Ministry of Tourism (MOT) are listed with top priority with 100% (all service providers cited). The second highest selection was ecotourism concern NGO with 22%. Third and fourth importance has been placed on Central Environment Authority (CEA), Local authority and Coast Conservation Department (CCD) with 19% for first and two & third 16% each. According to second priority selection CEA comes in the first place with 25% of the respondents. According to third and fourth priority selection the CCD and Ministry of small industries come in front by 9 percent and 13 percent preference.

Recommended responsibilities and services from those authorities are in section 'B' of the table 3.19. Highest request is to 'carry out ecotourism promotions' with 13 requests (41%). Also authorities are requested to 'regulate the ecotourism' and 'conduct awareness and training' each by 22% of the service providers. 'Provide advisory service' & 'initiate corporate plan to work together' got 19% and 16 % respectively. There are two requests with 12.5% for initiate assistance at grass root level for new projects and initiate environment biodiversity conservation. All other important requests that comes less than fourth preference, are listed in the table 3.19.

Commenting on ecotourism market potential as per the table 3.20 about 97% agreed and 68% 'Strongly agreed'. Overall mean is 3.6 against 2.5 middle value. As per percentage and overall mean service providers feel country potential is very high. Sri Lanka can presently attract ecotourist received about 78% responses 'agreed' and above. Level of demand generation to the destination (native statement) receives over 56% above average which means country demand is not successful. Whether Sri Lanka has clear idea got more responses with 'no decision'. On market positioning and collective effort by private sector in Sri Lanka, majority replied negatively, lower than average and overall mean also lower than 2.5. It says Sri Lanka positioning as well as private sector collective effort was poor. How they understand the matching process of product with demand received higher agreed value with 62% above average. About total marketing campaign (government and private sector) service providers did not agree; the overall mean was very low 1.2. There willingness to develop more ecotourism facilities received high 'agreed' and 'strongly agree' responses. They are ready to expand the capacity of the facilities. Their idea on enough facility developer for ecotourism produces was just vague. By percentage it is above average, but overall mean is at the middle.

Table 3.20 Market Potential & Present Activities

Market, Potential and Marketing on Ecotourism	Strongly disagree %	No / Disagree %	No Decisio n %	Agree %	Strongly Agree %	Overall Mean	Std. Error of Mean	Std. Deviatio n
There is substantial international ecotourism market potential	0	3.1	0	28.1	68.8	3.6	0.117	0.66
Sri Lanka can attract enough ecotourists presently	3.1	12.5	6.3	43.8	34.4	2.9	0.195	1.11
Ecotourism potential is there but it does not generate a demand	3.1	21.9	18.8	37.5	18.8	2.5	0.201	1.14
Sri Lanka has a clear idea on our ecotourism market segment	9.4	31.3	34.4	21.9	3.1	1.8	0.178	1.01
We have positioned our destination effectively in the ecotourism markets	18.8	34.4	31.3	12.5	3.1	1.5	0.185	1.05
Collective effort of the Private Sector to attract ecotourists is sufficient	6.3	50.0	15.6	18.8	9.4	1.8	0.201	1.14
We (SL) do not offer yet what the ecotourism market expect from us	0.0	6.3	31.3	34.4	28.1	2.8	0.163	0.92
Marketing campaign by Sri Lanka is sufficient to attract ecotourists	21.9	50.0	15.6	12.5	0.0	1.2	0.165	0.93
I am planning to develop more ecotourism facilities in future	0	3.1	37.5	34.4	21.9	2.8	0.152	0.84
There are enough investors to develop ecotourism facilities	3.1	15.6	25.0	43.8	12.5	2.5	0.180	1.02

Table 3.21 Level of Acceptance & Performance by Number of Service Providers: (1) Education of Ecotourist, (2) Conservation of Nature & Ecosystems, (3) Enhancement of Culture & Heritage and (4) Community Benefits - Importance & Performance

No.	Ecotourism Component	Do none (a)	Do a little (b)	Do a lot (c)	Row Total (a+b+c)	Total No. (b+c)	% (b+c)
1	Education of ecotourists						
	Agree a Little	0	2	0	2		
	Agreed	1	7	2	10		
	Strongly Agreed	1	8	11	20		
	Sub Total of groups (1)	2	17	13	32	30	94%
2	Conservation of nature, biodiversity & ecosystems						
	Agree a Little	0	1	0	1		
	Agreed	2	5	0	7		
	Strongly Agreed	2	10	12	24		
	Total of group (2)	4	16	12	32		
3	Enhancement and preservation of culture and heritage					28	88%
	Agree a Little	1	0	0	1		
	Agreed	0	7	3	10		
	Strongly Agreed	2	9	9	20		
	Total of group (3)	3	16	13	32	29	91%
4	Improvement of wellbeing of local community						
	Agree a Little	0	1	0	1		
	Agreed	0	9	1	10		
	Strongly Agreed	1	9	11	21		
	Total of group (4)	1	19	12	32	31	97%

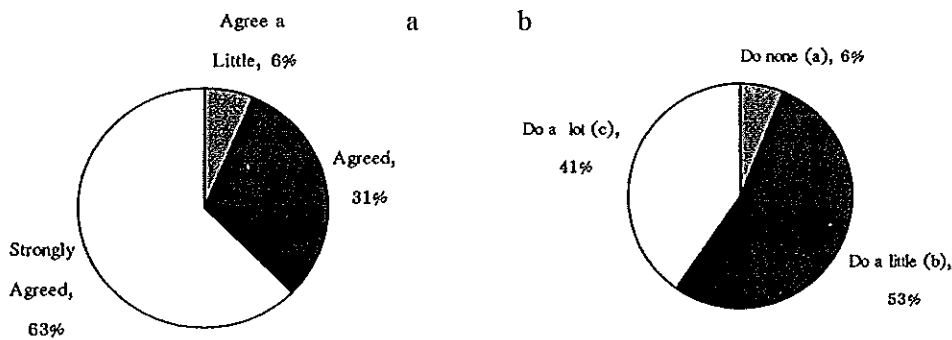
Ecotourism literature shows four main elements of ecotourism practices as list below:

- I. Education of ecotourist
- II. Conservation of nature, ecosystems and biodiversity
- III. Preservation and enrichment of culture and heritage
- IV. Improvement of wellbeing of local community

In order to assess these with how service provides feel it's important and their performance, study collected information and the findings are given in Table 3.21.

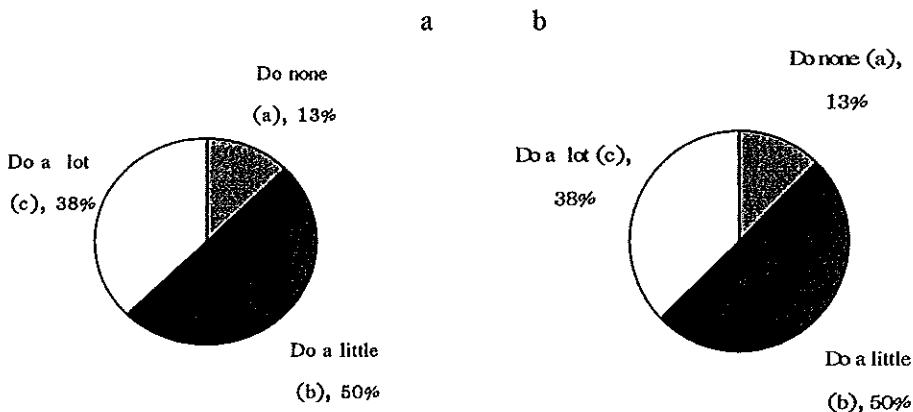
Each question with their level of importance and performance is given from figure 3.9 to 3.12.

Figure 3.9 Service Provider (a) Acceptance (b) Performance to Educate Ecotourist



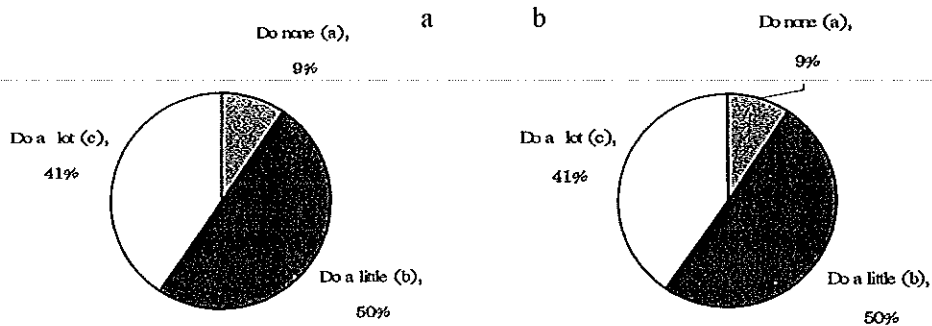
Education of tourist has been recognised by all the service providers (100%) but their performance is at lower level. Total performance is 94% but 53% do a little only. As such, overall performance was not at satisfactory level.

Figure 3.10 Service Provider (a) Acceptance (b) Performance to Conserve Environment



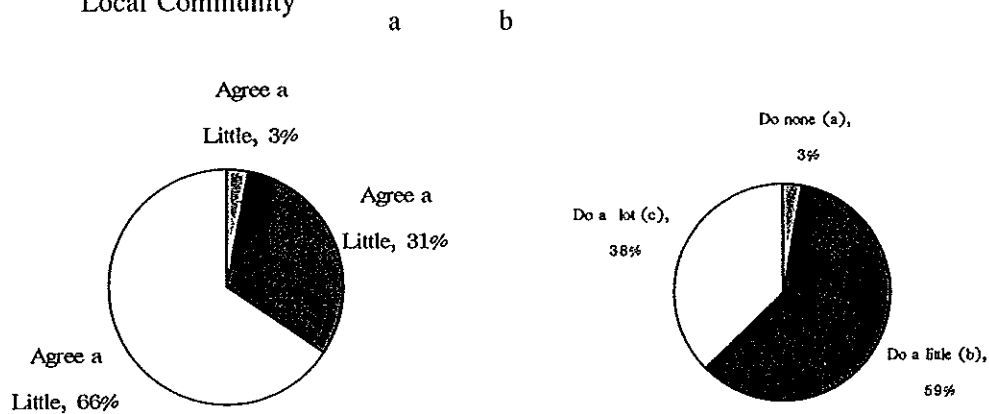
Overall conservation contribution is at 88% (38% +50%) and 50% doing 'a little'. There is 13% do not do any conservation contribution although they accept that is an important in ecotourism.

Figure 3.11 Service Provider (a) Acceptance (b) Performance to Enhance Culture and Heritage



For enhancement and protection of culture 97% total acceptance of importance but performance was less (b) do a little 50% etc. To improve wellbeing of local community there is a good acceptance with 97% and over half (59%) ‘do a little’.

Figure 3.12 Service Provider (a) Acceptance (b) Performance to Share Benefits with Local Community



For comparison, the researcher has adapted a simple weighted average method for the assessment. In comparative basis assuming ‘do a lot’ (c) performance is weighted as two times of ‘do a little (b)’. ‘do none with ‘do none (a) Accordingly it was assumed that ‘do a little = 0.5, ‘do a lot’ = 1 and ‘do none’ = -1. Since ‘Do none’ shows

no positive performance representation was given '-1'. According to this criterion the performance level is shown in table 3.22.

Table 3.22 Weighted Performance by Ecotourism Service Providers

Type of Ecotourism initiative	Do None (a) %	Do a little(b) %	Weighted value %	Do a lot (c) %	Total performance Score	% Importance 'Agreed'+ Strongly agreed
Education of ecotourists	6	53	26.5	41	61.5	100
Conservation of nature biodiversity	13	50	25	38	50.0	97
Preserve & enhance culture & heritage	9	50	25	41	54.0	94
Community benefits	3	59	29.5	38	64.5	97

Base on this calculation it is evident that the performance of ecotourism service providers towards those four main elements are between 50 and 64.5 score. Performance in educating ecotourism 61.5 score, Conservation of natural score 50, Enhancement of culture and heritage at 54 score and initiative for community wellbeing is at score 64.5. Finally it shows the performance on these aspects near and little over to its middle. This finding indicates performance is lesser than its importance based on their own assessment.

Stakeholder cooperation is also one important aspect in ecotourism development. Tourism service providers understanding and wiliness to work together tune the ecotourism sector towards one goal. The study focused on this aspect and finding are shown in table 3.23. About 11 respondents disagree to work together and one felt not sure. About 63 percent accepted to some degree and none of them was certain on working together option. As per the central tendency measures the responses skewed positively, confirming frequency findings (4-highest & 1-lowest) of high percentages, as such the ecotourism service providers accepted working together as a better option.

Primarily service providers expect to run a viable business therefore, profitability objective taken priority form the service providers point. They may have other objectives but how working together they may take as a option to reach ecotourism objective?

The ANOVA test to compare results shows that they think working together is important but reaching to their objective shows significant at 0.05 level. Underline meaning is between group they do not think same. There the results conclude that service providers think working together is important and different groups have varied ideas on reaching final goal. Their support for cooperation is not certain then.

Table 3.23 Service Provider Willingness for Ecotourism Stakeholder Cooperation

Statement responded	Frequency		Central tendency		
	Number	Percentage	Mean	Std. Error of Mean	Mode
(a). Since many stakeholders, working together is better			2.6	0.099	3
Not Sure	1	3.1			
No / Disagree	11	34.4			
Yes to some degree	20	62.5			
Definitely yes	0				
(b). Working together helps to reach our objective better			2.4	0.118	3
Not Sure	1	3.1			
No / Disagree	15	46.9			
Yes to some degree	16	50			
Definitely yes	0				
Analysis of Variance (ANOVA) Test on Answers of (a) & (b)					
	Sum of Squares	df.	Mean Square	F	Sig.
Between Groups	9.216	2	4.608	28.682	.000
Within Groups	4.659	29	.161		
Total	13.875	31			

As indicated in the table 3.24 almost 50% of respondents disagree and given ambiguous on answers with comments. Only 50% accept to some degree. But no one agreed with 'Definitely yes'. On the other hand, with comments made by service providers', majority accepted that working together was necessary in ecotourism development. Therefore, they have suggested to 'work together', the organisations given in table 3.24. SLTB, CEA, WLCD, Local Authorities and environment concern NGO's get high attention. The highest preference was to Sri Lanka Tourist Board to work together with other stakeholders in ecotourism.

Table 3.24 Service Provider Suggested to Work Together

	Number	Percentage		Number	Percentage
SLTB	31	96.9	Forest Department	5	15.6
CEA	17	53.1	Provincial Councils	3	9.4
WLCD	17	53.1	MOT	2	6.3
Local Authority	17	53.1	Guide & Boat and other associations	2	6.3
Eco Con. NGO	17	53.1	Pvt Sector	1	3.1
CCD	12	37.5	Local Suppliers and schools	1	3.1
Asst Gov. Agent	8	25.0	CBO & CBTO	1	3.1
Arch. Dept.	6	18.8	UDA	1	3.1
Irri. Dept.	6	18.8			

SLTB - Sri Lanka Tourist Board

CEA - Central Environment Authority

WLCD - Wildlife Conservation Department

Local Authority - PS- Pradesiya Saba

Eco Con. NGO - Ecotourism Concern Non

Governmental Organisations

AGA - Assistant Government Agent or

Divisional Secretary

Irri. Dept. Irrigation Department

FD - Forest Department

PC- Provincial Councils

MOT - Ministry of Tourism

CCD - Coast Conservation

Department

CBO - Community based

Organisations

Pvt Sector - Private sector

Arch. Dep - Archaeology

Department

CBTO - Community Based

Tourism Organisations

UDA - Urban Development

Authority

3.2.3.1 Future of Sri Lanka Ecotourism Sector as per Tourism Service Providers

The Tourism Service Providers provided number of useful comments and suggestions which are presented below:

(a) Opportunities in Sri Lanka to develop ecotourism

- Unique attractions, rich natural resources and amazing culture and heritage in Sri Lanka, some of which are not yet exposed, are an opportunities to become a globally competitive as ecotourism destination.
- High international demand for high quality ecotourism products
- generates irrespective of geographical distances (the products with high quality are doing well presently).

- Existing flora, fauna, ecosystems, cultural and social diversity in the country particularly their geographical distribution within smaller area, create a promising opportunity.
- Incorporation of other forms of tourism such as Agro, Community, Nature tourism with ecotourism will broaden its horizons as an opportunity.
- Developing organic food will enrich and expand ecotourism demand to the destination Sri Lanka

(b) What strengths Sri Lanka has to develop ecotourism

- Available Locations, nature, high biodiversity & their endemism, culture, heritage and climatic differences from western countries within shorter distance
- Buddhism, meditation, Ayurveda (native medicine), society, people, way of life, food, traditions are unique strengths in this island
- Existing nature loving investors are an strength to the ecotourism development
- Educated people and environment concern young generation is a strength to get involved them in ecotourism

Problems in Developing Ecotourism and Proposed Solutions

Important and Common	
Problems in Developing Ecotourism	Proposed Solutions
<ul style="list-style-type: none"> ➤ Longstanding unstable security problem in the country ➤ Lack of understanding on the real ecotourism concept by many involve and trying to involve like what it is?, how it is? and why it is? and where does it fit in? etc. 	<ul style="list-style-type: none"> ➤ Awareness & awareness, education & education and training to all who need and involved on all aspects of ecotourism is needed to broaden its inside opportunity to community & resource base ➤ Seek all possible ways of improving peace and harmony in the country ➤ Organise seminar's workshops and discussions at national, regional and local level ➤ Initiation of giving incentives through ecotourism for conservation and protection of nature and culture so that it will apparently diverted to protect the resource base
Relating to Public Organisations	
<ul style="list-style-type: none"> ➤ Important organisation such as SLTB and MOT ignore important business trend conservation opportunity and community benefit initiative though ecotourism 	<ul style="list-style-type: none"> ➤ Have a central body establish dedicated for ecotourism in SLTB with dedication to lead, assist, advice, educate, monitor and evaluate the development ecotourism and bring all 9-10 stakeholders under one umbrella and have dialogue.

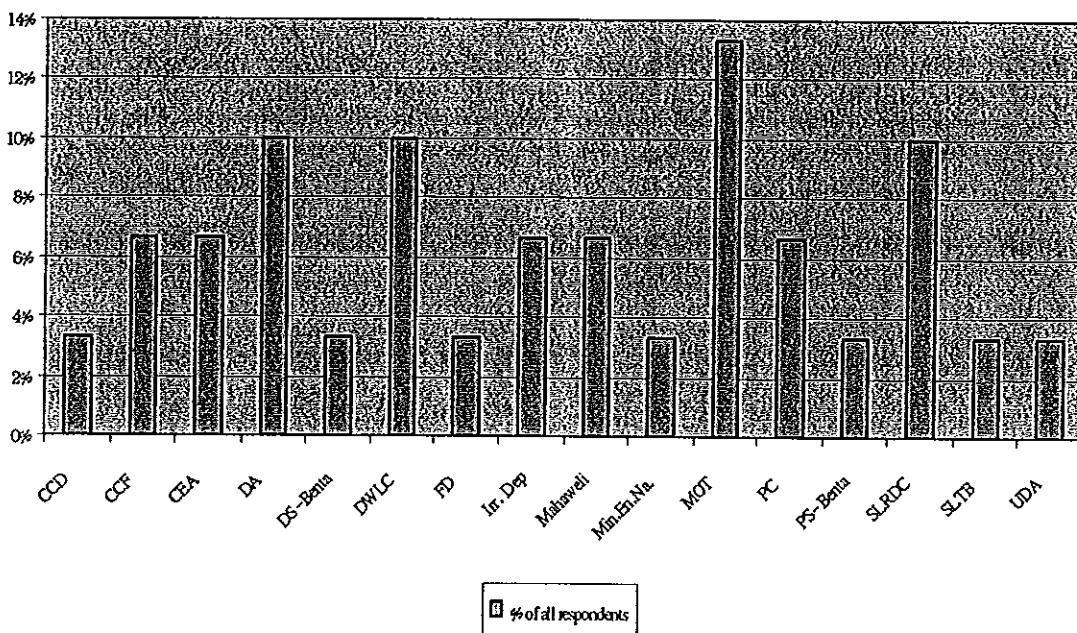
Relating to Public Organisations (continued)	
Problems in Developing Ecotourism	Proposed Solutions
<ul style="list-style-type: none"> ➤ No policy, guideline and regulation and recognition existence by government enforced other than a study of which not known to many stakeholders ➤ Even with good set of government organisations such as SLTB, CCD, Forest Dept., WLCD, Archaeological Dept. and CCF, responsible for different areas of management and supervision, they do not work together with due understanding the value of ecotourism in line with conservation, protection and be a strength to share benefits including local community ➤ Very poor understanding on ecotourism by local authorities and government red tape and respect for new ideas lead to extra delays and continues problems to the ecotourism sector 	<ul style="list-style-type: none"> ➤ Amend present old regulation fit into current situation ➤ Government sector need to assist small businessmen and initiate model projects to set an example and give a good start. ➤ Legalise ecotourism policy, guidelines already in place and introduce regulations, labelling to recognised and by authorities which is a marketing tool to the service provider and assurance to the ecotourist ➤ Enforcement of environment and nature, culture destruction rules and regulation and prevent threat from other economic activities to virgin recourse base on which ecotourism is depended.
Related to Other Stakeholders	
<ul style="list-style-type: none"> ➤ Lethargic and negative attitude by local community on general tourism prevent them collaborating with ecotourism sector and its benefit share. ➤ No smaller tour operators to provide specialised and personalised professional service to genuine ecotourist depend on their requirements ➤ Mistakes done by some of none professional investors and guides blurred the name at its beginning/start 	<ul style="list-style-type: none"> ➤ In association with private sector establish a national committee and regional coordinating committees and then network personalised quality ecotourism service providers with it.

Marketing	
Problems in Developing Ecotourism	Proposed Solutions
<ul style="list-style-type: none"> ➤ Not yet a name created internationally on Sri Lanka ecotourism ➤ No promotional support by public sector 	<ul style="list-style-type: none"> ➤ Should have good marketing plan and promotion programme aiming to create a green image in the mind of visitors while country focus and concern on environment ➤ Trust and believe on ecotourism potential and growing trend
Quotes by Service Providers	
<ul style="list-style-type: none"> ➤ Myths believes by authorities that 'ecotourism is very low spending budget tourists in very small number in the world with no financial viability' ➤ "Some organisations do not know and do not wanted to know ecotourism value to the country" ➤ "Lack of regular promotions prevent building a eco image on Sri Lanka" ➤ "Existing cheap beach destination image should be changed" ➤ " Ecotourist taking to show poverty by helpers and collect money should be stopped" 	<ul style="list-style-type: none"> ➤ "Centre body to educate all to think ecotourism is not isolated, it is part of conservation and protection of culture and nature" ➤ "we want dynamic and efficient coordination between government and private sector" ➤ "traditional rules my working with tourist & push me to be informal" ➤ "Definitely there is a high spending ecotourism market but Sri Lanka has not created name and image to say we are doing it" ➤ "Understand main environment destruction generate from poverty" ➤ "better than Forest Dept. and WLCD rules ecotourism can generate income to our nation particularly to poor people who live near ecotourism resource bases" ➤ "Let ecotourism vehicle to take poverty and go though conservation towards poverty alleviation"

3.2.4 Data Analysis~Tourism Resources Managing Organisations: Stakeholder Group (D)

Tourist places of interest and activities are the key elements in ecotourism. In addition people, societies, cultures and facilities make visitor comfortable during their time away from home. In ecotourism the nature, biodiversity, ecosystems, cultures, heritage, society and local people are the main ingredient of its practices and success. Availability of this kind of resources in a destination can be considered as a possession of ecotourism assets. More importantly, how these resources were available for tourist to experience, attain inside education and enjoy, matters for the visitors. Not only just availability of resources and facilities but also to what extend, it is arranged to meet the expectations of ecotourists respecting its main concepts, are the key successful means of access to the actual ecotourism market. With all these aspects behind, who is going to manage these sensitive and fragile resources in relation to their virginity and long time sustainability, is also important for the sustainability of its resource base and ecotourism industry. Thus, the ecotourism resources managing organisation (TRMO) are quite important for the tourism as well as other stakeholders of those resources use in a country/destination.

Figure 3.13 Representations of Tourism Resources Managing Organisations in the Study



As such, the study focused to investigate the role, objectives, perceptions and willingness to work together by ecotourism managing organisations with other ecotourism stakeholders. Composition of respondent in the survey by different ecotourism resources managing and other holding organisation is given in figure 3.13.

Altogether 16 organisations were represented in the study with 30 respondents with in the time available, geographical location of organisations and availability of senior officials for the data collection were the main difficulties in contacting focal point of this stakeholders group. However, the researcher managed to collect data until the information gathered was started repeating.

Table 3.25 Summary of Tourism Resources Managing Organisations' Tourism Related Objectives

Department / Organisation	No. of Objectives Ecotourism related	No. of Objectives tourism related but not directly Ecotourism Related	Total
Coast Conservation Department	1	1	2
Central Cultural Fund	1	1	2
Central Environment Authority	1	1	2
Dept. of Archaeology	1	3	4
Divisional Secretariat	1	1	2
Dept. of Wildlife Conservation	1	2	3
Forest Department	1	1	2
Irrigation Department	1	2	4
Mahaweli Authority	1	1	2
Ministry of Environment	1	2	3
Ministry of Tourism	3	1	4
Provincial Council	1	1	2
Local Authority (PS)	1	1	2
Land Reclamation & Deve't Corporation	1	2	3
Sri Lanka Tourist Board	3	1	4
Urban Development Authority	1	1	2

In justifying the relevancy of those organisation for the study, it was investigated their main objectives and compared their relevancy with tourism and ecotourism objectives. Summary of findings of main objectives of TRMOs are given in

table 3.25. The objectives that are not relating to tourism given by TRMO were exempted from the table.

Even though organisations are having both tourism and ecotourism related objectives and additionally they manage some resources but the financial benefit received in return from tourism/ecotourism to them was limited. Only three organisations (MOT, SLTB and CCF) receive between 76%-100% of their revenue from tourism. Local Authorities activity in the area where tourism is main economic activity, receive around 35% of their income by tourism. Some organisations receive less than 25% of annual budget from tourism. It was clear almost half (50%) of organisation did not get any financial benefit by tourism. Income by international tourism was high only with CCF, WLCD and SLTB. All others who receive income also had 'no idea' or received less than 20 % of income from international tourism. Those organisations with lesser funding assistance from tourism have regular fund allocations from government and some get Donations, loans for special projects. Certin organisation such as Urban Development Authority (UDA) had their own fund generating mechanism.

Searching on perception of TRMO on present general tourism in achieving TRMO objectives, found 30% 'to some degree' and 40% 'significantly' happy (Table 3.26).

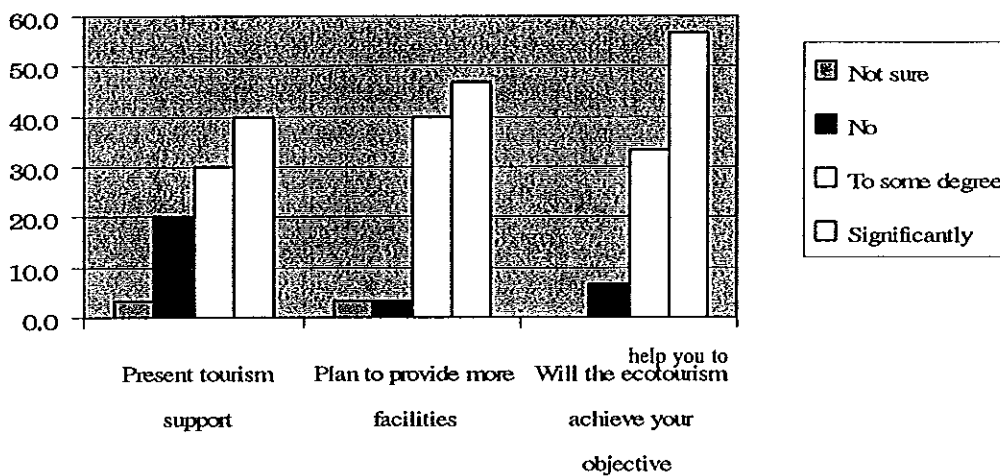
Planning to add more tourism facilities in their resource bases received 40%-'to some degree' and 47% -'significantly'. This initiative from TRMO implies, how they feel to assist ecotourist in order to develop ecotourism industry. The next finding shows what they think about ecotourism in achieving organisation objectives; 33 percent accepted 'to some degree' and about 57% accept 'significantly' ecotourism will help to achieve their objectives.

With positive perception by majority, it can assume that cooperating and working with TRMO may not be a difficult challenge in future. However, it is need to investigate why 6.7% think ecotourism does not support to meet their objectives. Those who kept silence with no response are also important (why they keep silence?) in facing future ecotourism development challenges (Table 3.26 & Figure 3.14).

Table 3.26 Assessment Present Tourism, Planed Facilities for Ecotourist and Ecotourism Capacity

		Number	%	Mean	Std. Deviation
Present tourism	1. To what degree present tourism support your Org, objectives?			2.1	0.891
	Not sure		1	3.3	
	No		6	20.0	
	To some degree		9	30.0	
	Significantly		12	40.0	
	Total		28	93.3	
Future plan	2. Do you plan to provide more facilities for tourism?			2.4	0.737
	Not sure		1	3.3	
	No		1	3.3	
	To some degree		12	40.0	
	Strongly yes		14	46.7	
	Total		28	93.3	
Idea on ecotourism	3. Do you think ecotourism has capacity to help in achieving your Organisations' objectives ?			2.5	0.634
	No		2	6.7	
	To some degree		10	33.3	
	Definitely Yes		17	56.7	
	Total		29	96.7	

Figure 3.14 Summarised Answers to 1, 2 & 3 Questions in Table 3.26



TRMOs' future plans to improve infrastructure facilities and visitor facilities are list in table 3.27. More originations are going to provide information facilities, basic infrastructure such as drinking water sanitary etc. Providing accommodation is also of growing interest of them.

This is a good initiative towards development of tourism particularly for ecotourism. However, question arises when some initiatives may overlap with other organisation plan of actions such as infrastructure development.

Table 3. 27 Organisation and Their Plan to Develop Facilities for Ecotourism in the Country

Organisation	Information	Infrastructure	Sanitary & Drinking water	Solid waste disposal	Scenic beauty of the area	Guiding for ecotourist	Accommodation	Other visitor facilities	Research facilities
Dept of Wildlife Conservation	√	√	√			√	√	√	
Forest Department			√				√		
Sri Lanka Tourist Board	√	√				√		√	
Provincial Council							√		
Mahaweli Authority of Sri Lanka					√				
Central Cultural Fund	√		√						√
Dept. of Archaeology			√						
Sri Lanka Land Reclamation & Devt. Corporation					√				
Forest Department	√		√						
Irrigation Department		√	√						
Ministry of Tourism	√		√				√		
Local Authority (PS)	√			√				√	
Provincial Council	√	√							
Urban Development Authority	√				√				

Not only TRMO but also other non tourism related organisation can have different plans, unless they coordinate and work together all related organisation in any specific issue, project or action. Otherwise, that can lead to conflict and waste of resources. In table 3.28 organisations have given what results could be archived by working and collaboration. In the literature review it was shown that different organisation interpret

ecotourism differently in Sri Lanka. In such situation inquiry on whether ecotourist are currently visiting to your resource base is a subject to questions. But the survey results are used, to get a general idea on current trend and present usage of each resource bases by ecotourist.

Table 3.28 Whether Planning to Attract More Ecotourist and Work Together with Other Stakeholders

Questions	Number	%	Mean	Std. Deviation
Are there ecotourist visiting your resource base now?			1.9	0.781
Not sure	2	6.7		
No	3	10.0		
'Yes' Some	17	56.7		
'Yes' Many	5	16.7		
Whether planning to attract more ecotourist to their resource base ?			2.4	0.790
Not sure	1	3.3		
No	2	6.7		
to some degree	9	30.0		
Strongly yes	16	53.3		
Will working together with stakeholder be a better option to you?			2.8	0.461
Not sure	-	-		
No	-	-		
Yes to some degree	6	20.0		
Definitely Yes	23	76.7		
Will working together be a better option to achieve your Organisation Objectives?			2.8	0.759
Not sure	-	-		
No	-	-		
Yes to some degree	8	26.7		
Strongly Yes	20	66.7		

17 respondents (about 57%) accepted to some degree and 5 respondents (about 17%) agreed with 'Yes many'. Meantime about 17% shows negative and not clear answer which is an area needs further investigation to find out why? Total of 83% are willing to invite more ecotourist to their resource base.

Responding on willingness to work together TRMO with other ecotourism stakeholders, almost all (97%) have agreed (20% - 'Yes to some degree' and 77% -

'Definitely yes'). It underlines they understand & accept the need & value of working together with stakeholders. Altogether it received 100% acceptance.

In addition, the same option has been compared with their objectives in the last column of the table. The underlining meaning of this investigation was; even if it was a good option they may not work for it, if it does not tally with organisation objectives. About 93% responded agreed, working together help to achieve organisation objectives. From 93%, 27% of them agreed 'to some degree' and about 67% (20 Nos.) 'Strongly yes'. The acceptance of working together had no certainty if it does not supported with valid reasons, thus reasons were gather from TRMO and listed them in table 3.29.

Table 3.29 How Working Together with Stakeholders Work in Ecotourism?

No.	Areas of improving in working together	Number of organisation	% of total (30)
1	It improves effectiveness and efficiency of ecotourism development	12	40
2	It minimise conflicts respecting regulations f other organisations	6	20
3	It is an opportunity to share knowledge & experiences to reach a better conclusion	6	20
4	A collective effort for community wellbeing & conserve natural resources	3	10
5	It make easy to get private. sector participation	2	6.7
6	Collective management minimise duplications	1	3.3
Variance - 5.57 Std. Deviation - 2.36 Total		30	100

From many comments, the first 6 or most important are given as per their priority of selection (shown in the table 3.29). Majority 40% correctly mentioned that first and for most important reason is to improve efficiency and effectiveness of ecotourism development. Minimise duplications, overlaps and share knowledge and experiences also given with 20% responses. It is an opportunity to share knowledge and experience also receive 20% Conservation of natural resources and work for local community wellbeing selected by 10%. The rest are to get private sector participation and minimise duplications, conflicts and respect to the regulations of other organisations.

With whom TRMO are going to work was also a important information gathered in the survey. Findings are given in table 3.30. Top priority (90%) placed on Sri Lanka Tourist Board and Ministry of Tourism while CEA also get very close request with (87%) to work together. Ecotourism concern NGO, private sector, CCD and WLCD are the balance most important partners who are required to work together in developing ecotourism in Sri Lanka.

Table 3.30 Proposed Organisations to Work Together

No.	Organisation to work together	'Yes'- Number	% of 30	'No'- Number	% of 30
1	Sri Lanka Tourist Board & MOT	27	90	-	-
2	Central Environment Authority	26	87	-	-
3	Eco. Concern NGO's	21	70	-	-
4	Private sector (Service Providers)	21	70	1	3
5	Coast Conservation Dept.	20	67	2	7
6	Wildlife Conservation Dept.	19	63	-	-
7	Irrigation Dept.	17	57	-	-
8	Local Authorities (PS)	17	57	-	-
9	AGA- Divisional Secretary	15	50	9	30
10	Archaeological Dept.	14	47		
11	Provincial Councils	14	47		
12	Non governmental Org'n	14	47		
13	Forest Department.	3	10		
14	Public transport organisations	2	6		
15	Ecotourism Concern media	2	6		
16	Community Based Organisations or Village Base Organisation	1	3		
17	Urban Development Authority	1	3		
18	Health Service Dept	1	3		
19	Central Cultural Fund	1	3		
20	Security Forces	1	3		
21	Universities	1	3		

All resources manage by different organisations is a part of main tourism resource base relating to nature culture. Therefore it is important consider that they are panders in stakeholder list in future planning of ecotourism development. This information facilitate with updated list of partners in stake holder cooperation.

In the collaboration each stakeholder has a important contribution to make ecotourism development a success. When all other stakeholders agreed to work together, how TRMOs were going to fulfil their gap. The respondents from different departments has provide a wide range of views that are summarised in the list below:

Tourism Resources Managing Organisation Role in Collaboration:

- (i) Allow to access our resource base with conservation and protection measures of it depend and control possible pollutions and destructions.
- (ii) Maintain effective management of the resource base manage with sustainability measures
- (iii) Cooperate with other stakeholder organisations and supervise our area of purview in accordance to the common goal agreed by all.
- (iv) Conduct awareness programmes to neighbouring community and own staff who need such exposure
- (v) Bring together all related organisations & have regular dialogue to share knowledge and experiences

Suggestions to implement in the joint collaboration:

- (i) Invite all stakeholders including local community and start work from bottom level
- (ii) Educate all on national plan and strategies done for the country
- (iii) Initiate integrated ecotourism action plan with clear actions suggested with wide representation
- (iv) Establish collaborative implementing body
- (v) Approach political leadership
- (vi) Have policy directions and commitment by all related organisations and interest groups
- (vii) Government initiation to identify possible sites and locations and develop infrastructure

- (viii) Carry out effective promotion campaign in target market with focus on specific segments.
- (ix) Monitor and evaluate and do necessary adjustments to the implementation plan

Major challenges to the ecotourism sector:

- Maintaining the balance between ecotourism explorations and environment & cultural conservation and protection with carrying capacity consideration
- Change the inherited method of plan after development into development with plan implementation
- Improve low level of law enforcement and pollution controls and maintain cleanliness in nature & cultural resource bases
- Active involvement provincial and local government organisations with rural/village representation to think on a collective concept
- Lower awareness of community on ecotourism and way of convincing them on benefits that could be received with active participation
- How to develop ethical self regulated discipline to minimise unplanned development & disturbances
- Means of filling the gap of specific information that ecotourist demand and kind of services develop satisfying them
- How and when to do effective ecotourism promotion

3.2.5 Data Analysis – Scholars and Researchers: Stakeholder Group (E)

To a great extent, ecotourism is closely associated with knowledge. From existing know how and experiences, it moves forwards to gather, enrich, energize, enjoy and entertain with new intelligence. Searching for virgin nature and nature secrets its flora fauna ecosystems their inter dependency with diversity in different locations and environments are some of its collection. To know about them and their potentiality, the study used scholars as one stakeholder for the survey. This study paid critical attention to collect data in line with study objectives from tourism concern scholars with vast experiences and involved in different perspectives in ecotourism. Using a semi-structured questionnaire the researcher gathered data as per a purposive sample. There were 34 scholars who gave valuable contribution with data during the survey for the study.

Initially the scholars been categorised into three groups as:

1. Ecotourism educators/ trainers,
2. Tourism researchers
3. Tourism scholars

The composition of the study sample is given in figure 3.15. There were 8 educators, 2 researches and 6 scholars. Secondly it shows 6 represent as educator and researchers, one research and scholar and one more scholar and educator. 5 respondents were in all 3 fields in the sample. It sounds that there were more than 50% of them at least contribute over two fields in ecotourism. As such their understanding and interaction in the areas of the study focused was evident. Not only knowledge but also varied involvement and experiences would give an additional value to information and comment given during the survey. Among them scholars from international NGOs such as The World Coservation Union-Colombo (IUCN), United Nations Environment Programme-Colombo (UNEP) and national associations such as Sri Lanka Ecotourism Society (SLETS), Ecotourism Foundation of Sri Lanka (EFSL), Association of Small and Medium Enterprises in Tourism Sri Lanka (ASMET) and Sawa Lanka Foundation were included. Sri Lanka – German Technical Cooperation whose one of programmes to promote SME (Small and Medium Enterprises) though ecotourism and community base tourism projects, was also included. Professors, senior lectures from University of Colombo, Sri Jayawardeanpura and Sabaragamuwa were added. Scholars who work as independent consultant to Aitkin Spence,

Walkers Tours and Jetwins, leading tour organisers in Sri Lanka, were also included. Senior officials of DWLC, FD, CCF, CCD, SLTB, MOT and eminent retired scholars of some of those organisations were interviewed. Tourism training institutions such as Ceylon Hotel School, Tourism Training Centre and independent trainers such as ecotourism guide trainers were also included in the sample.

Figure 3.15 Classification of 34 Scholars Respondent in the Survey

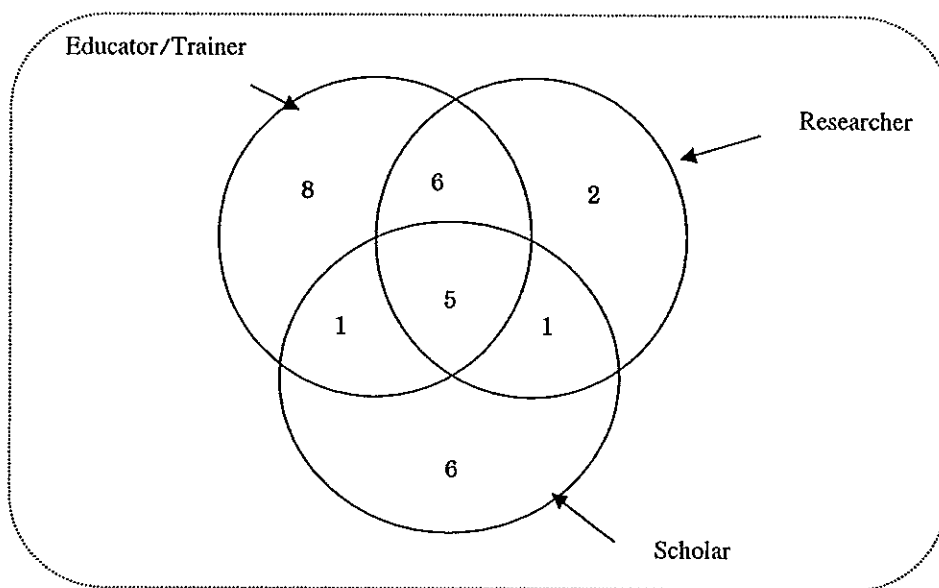


Table 3.31 Scholars' Contribution to Sri Lanka Ecotourism

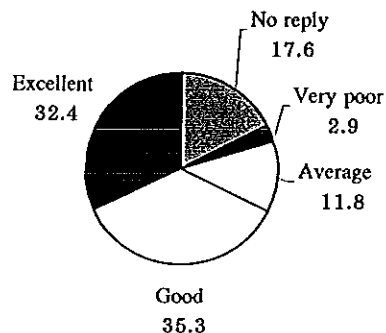
	Area of work	Number	%
a	Educating/Training	11	32.4
b	Consultation	7	20.6
c	Researching	4	11.8
	Doing all three (a, b & c)	6	17.6
	Others (other than a, b & c)	6	17.6
	Total	34	100.0

In addition, their contributions in the field that they are in, and related other fields were investigated to understand the sample composition (Table 3.31). On the other

hand, it helped to gather a mix of information through dynamic group of scholars within the selected purposive sample.

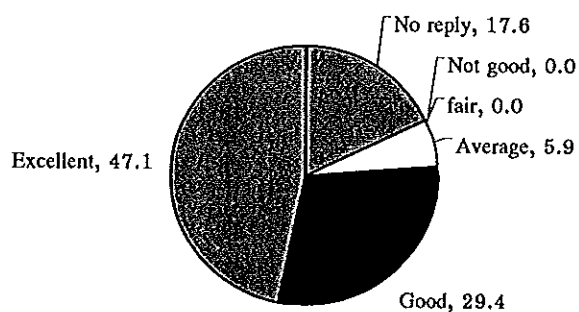
Responding to international ecotourism market potential, 1/3 of them replied 'excellent' and 35 percent mentioned as 'Good'. About 12 percent think the market potential is at 'Average'. Altogether over 2/3 of scholars were quite confident on ecotourism market potential to Sri Lanka (Figure 3.16). Based on their knowledge on international ecotourism markets and experiences with work interacting to ecotourism, scholars clearly confirm that Sri Lanka ecotourism market potential is much impressive.

Figure 3.16 International Ecotourism Market Potential (Scholars' Perception in %)



However about 3% admitted that it was very poor and six scholars had given no reply. The 3 percent is on the view with comments that international market is a very small in size.

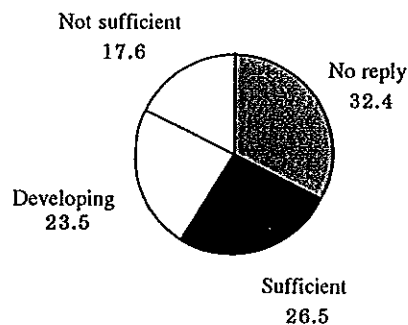
Figure 3.17 Sri Lanka Ecotourism Resource Base in General-Scholar Perception in %



To attract any tourism market there must be sufficient resources as per the expectations of the visitors. For ecotourism, almost 1/2 of scholars feel that Sri Lanka has an 'Excellent' resource base. An additional 29 percent find the resource base is 'Good'. The most important finding is from the scholar's respondent on ecotourism resource base, no single scholar selected as it was lower. As such, the underline question comes is who? and how? this resources (tourism assets) going to be marketed in a sustainable manner for the benefit of the country (Figure 3.17).

As shown in literature review, 'ecotourism' is not a new subject or word to Sri Lanka. It has been in existence with recent world developments in the market. There are services initiated by private sector and some organisations (both government and non government) which are still in progress. The survey inquired from scholars, how they see current offers for ecotourism in Sri Lanka in comparison to its market expectations. The responses are summarised and shown in Figure 3.18.

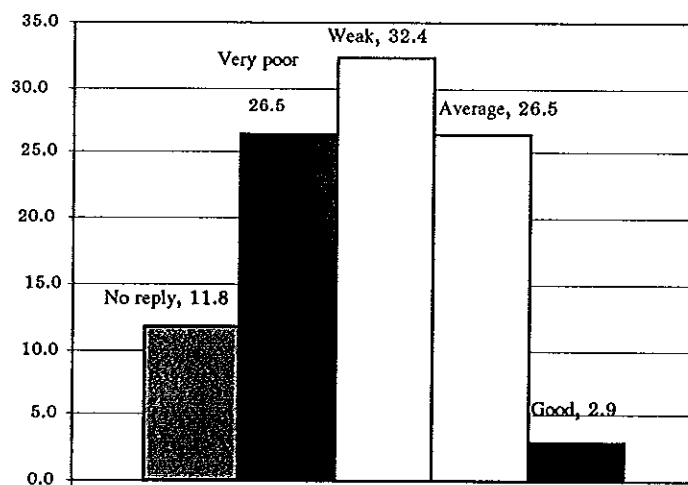
Figure 3.18 Scholar Perception, Whether Present Ecotourism Offers Sufficient?; to Attract International Ecotourism Market



On current services in ecotourism about quarter of scholars are satisfied and about other quarter said 'Developing'. About 18 percent felt 'not sufficient'. In summing the finding of researcher about 50% of scholars do not expect any extra effort to make on services development and improvement as it is sufficient but the balance 50% expect. Certainly 17.6 percent do not happy with current offers in comparison of current market.

Facilities and services assessment should be done with standards. The infrastructure assessment is not possible in the same way, the services are assessed. Instead of making country or international standards assessment of ecotourism services and related infrastructure, researcher asked scholar to do a simple assessment as they felt. The results (findings) may not be formally acceptable but for the purpose of this study used this method with two reasons (i) The study does not demand formal assessment (ii) Sri Lanka still does not have assessment method. As per findings (figure 3.19) about 1/4 of scholars found it was 'Very poor' almost 1/3 of them said weak. Over 1/2 of scholars were not happy with present ecotourism facilities, services and infrastructure. Another 25 % of scholars found present services & infrastructure were at 'Average'. However, approximately three percent (2.9%) of scholars were happy with present situation.

Figure 3.19 Assessment by Scholars of Present Ecotourism Facilities, Services & Infrastructure



When not satisfied with what is available for ecotourist, the researcher has inquired what should be done as a better option? The summarised answers are given below:

- I. Integrated plan with demand, resources and capacities with sustainable approach is a first requirement
- II. Have a policy, criteria and standards help service providers to get government recognition which is a tool for marketing their products.

- III. Establishment of separate section in the SLTB for ecotourism was also suggested to give priority to the ecotourism sector which would also be saving of natural resources while enhancing sustainable benefits.
- IV. Identify high potential ecotourism resource bases and assist local community and smaller investors to initiate facilities following the guidelines in the study done by the Sri Lanka Tourist Board (SLTB, 2003a).
- V. Development of basic infrastructure such as access road to remote locations with Local Authorities and Provincial Councils.
- VI. Information is vital important to ecotourist therefore, suggest to have some quality information publication dedicated to ecotourist.
- VII. Training of interpreters is also recommended as Sri Lanka has no sufficient quality interpreters not guides.

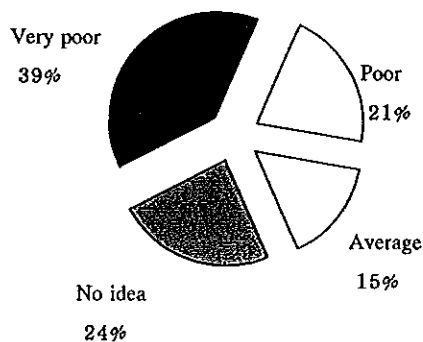
Table 3.32 Ecotourism Market Segmentation - Scholars' View

Summarised answers on market segmentation	Number	%		%
Poor	9	26.5	} Not happy	47.5%
Very poor	6	17.6		
Visitor unhappy with some product offered	1	2.9		
No idea	5	14.7		14.7%
Not developed full scale° Strategies, promotional channel need improvements	3	8.8	} Happy & fair	17.6%
Good	2	5.9		
Average	1	2.9		
Need improvement with more community involvement	1	2.9	} Not clear	5.8%
Nature culture brand approach needed	1	2.9		
Total	9	5.2		

On market segmentation scholars have given different opinions as shown in figure 3.20. It expresses different dimensions in market segmentation. When categorised all comments about 47.5 percent scholars are not happy with present market segmentation and about 17.6 percent have given positive and related comments including 6% claimed as good. There are 5.8% ides 'not sure' in which direction as different interpretation can have different meaning. It sounds that present market segmentation on ecotourism is not sufficient. Scholars commented that standards have to be assessed and improved in the existing products as a start. Then stress the necessity of an ecotourism effective promotion campaign and development of strategies with effective promotional channels was also highlighted.

In achieving market success, effective promotional programme at target market is critical important. In doing this marketers try to position themselves at markets which is strength for sustainable market performance. As per scholars, Sri Lanka ecotourism market positioning, shown in figure 3.20. There were 60% of them (poor-21% & very poor-39%) not happy and only 15 percent was found at 'average' level.

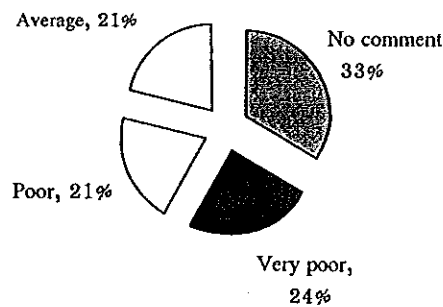
Figure 3.20 Positioning Sri Lanka as on Ecotourism Destination



Private sector is the major supplier of product and services in tourism. Similarly in ecotourism sector private sector initiative has been expanding towards nature friendly directions. Even though, most of service providers do not understand the core concept of ecotourism (scholars' comments explain later in this chapter), they had commented that some were very good. Looking at overall performance of the private sector product capacity in catering ecotourist and quality of them, 21% of scholars felt that they

were at 'Average' level, 45 percent found that they were below expectation (figure 3.21). From those who given comments, majority felt, product capacity and qualities of them need improvements.

Figure 3.21 Private Sector Product Development Capacity and Quality Sufficient & Not Scholars' View



To market any product, there must be methods of bringing to its consumer. Particularly in tourism marketing, it is an essential exercise so as in ecotourism. As such the survey made an effort to inquire from scholars their assessment on present marketing efforts on ecotourism. Answers and major comments have been summarised and shown in Table 3.33.

Table 3.33 Present Ecotourism Marketing Efforts - Scholar Perception

Answers	Number	%		Idea Category	%
Do not see any marketing yet	9	33%	}	Negative	78%
Very poor	5	19%			
Poor	5	19%			
Totally insufficient	2	7%			
Average	2	7%	→	Average	7%
Need more specific promotion	2	7%	}	Positive	11%
More to do with focus strategies	1	4%			
Before Marketing Develop. sites with eco concept	1	4%	→	Other	4%
Total	27	100%			100%

Even though, many ventures and ecotourism services are existence in the country, scholars are in the view that they do not see any formal marketing effort neither by private sector nor by the government sector in international tourism markets (about 1/3 of respondents).

In addition, majority of scholars (78%) agreed existing marketing is at low level. About 7 percent assessed as it is at an 'average' and 11 percent suggest to have improvements with little marketing does etc. To identify different roles expected to be played by different stakeholders in ecotourism, scholar's comments collected. For the following three groups of scholars comments are given below:

- a. Tourism national organisations (MOT & SLTB) whose main responsibility is market the destination Sri Lanka (Table 3.34)
- b. Ecotourism resources managing organisations such as FD, DWLC, CCF, CCD etc. (Table 3.35)
- c. Community as the main beneficiary in ecotourism (Table 3.36)

Table 3.34 Scholar Expected Roles by MOT & SLTB to Develop Sri Lanka Ecotourism

Min. of Tourism & Sri Lanka Tourist Board Role in Ecotourism	Selected as first priority		Selected as second priority		Total	
	Number (a)	%	Number (b)	%	(a+b)	%
Facilitator	13	38.2	3	8.8	16	37%
Regulatory role	6	17.6	2	5.9	8	19%
Promotions	3	8.8	3	8.8	6	14%
Coordinator	2	5.9	4	11.8	6	14%
Planning	3	8.8	1	2.9	4	9%
Partnership role	1	2.9	1	2.9	2	5%
Be a catalyts only	1	2.9			1	2%
Total	29	94.1	-	-	43	100%

First asked, what are the expected (recommended) most important two responsibilities for those tourism management national organisations (SLTB & MOT) should undertake for the development and success of the ecotourism sector. About 38% recommended 'facilitator' role and about 18 percent 'regulatory' role to play. Around nine percent wanted them to undertake both 'marketing and planning' functions while about six percent recommended them to be 'coordinators' for the sector.

Table 3.35 Tourism Resources Managing Organisations (TRMO1) Role to Develop Sri Lanka Ecotourism - Scholars' View

DWLC, CCD, Arch. Dept., Forest Dept Role in Ecotourism	Selected as first priority		Selected as second priority		Total (a+b)	%
	Number (a)	%	Number (b)	%		
Monitoring role	4	11.8	4	11.8	8	24%
Facilitator	7	20.6	-	-	7	21%
Coordinator	4	11.8	1	2.9	5	15%
Participatory role	-	-	4	11.8	4	12%
Only protection of natural & cultural resources	3	8.8	-	-	3	9%
Development/Implementation	2	5.9	1	2.9	3	9%
Regulatory role	1	2.9	-	-	1	3%
Planning	1	2.9	-	-	1	3%
Identify resources	1	2.9	-	-	1	3%
Partnership role	-	-	1	2.9	1	3%
Total	31	91.2	-	-	33	100%

Note: 1-TRMO- Resources tourist used of which managing entities such as Dept. of wildlife, Coast Conservation Dept., Forest Dept. etc.

Among the stakeholders employed in the survey, TRMO role is highly significant as they are to hold two kinds of responsibilities on their area of management. In broader sense they are the (i) maintenance & protection of the nature resource and (ii) management of human interaction in the areas of under their preview. By employing tourism in the resource bases, the intensified human impacts are to be managed ensuring sustainability of its resource base and interrelated many other impacts in the nature & environment. Taking these facts into consideration, scholars have suggested undertaking a set of roles as show in table 3.35. About 24 percent of them selected 'monitoring' role and 21 percent prefer them to be a 'facilitator'. To be a 'coordinator' for the ecotourism sector selected about 15% and 12% wanted them to work with ecotourism sector taking participatory role. Another nine percent each recommend them to be a 'protector of the very resource they manage' of which apparently they do, and 'development & implementation' functions in ecotourism.

Local community is a major stake holder in the whole ecotourism scenario where some scholars have recommended 'handing over the whole ecotourism responsibilities to the local community by assisting them to do so'. Instead of being at an extreme end, it is wise to consider ecotourism literature and many views and comments made by scholars (community involvement level of consideration in ecotourism discussed in section 1.2.3.5 of this study). Accepting local community to be a major stakeholder over 2/3 of scholars (71%) agreed by mentioning 'active participation from bottom to top' and 'play a main role to share more benefits' (Table 3.36). Since community actions as an (a) individual and (b)organised group (community based organisations) differ, both options (a & b) were included in the questionnaire.

Table 3.36 Local Community Role in Ecotourism - Scholar's View

Community & Community Based Organisation's Role in Ecotourism	Number	%	Leading role %
Active participation from bottom to top	16	47%	} 71%
Play a main role to share more benefits	8	24%	
Work join hand with tourism Authorities	1	3%	
They must protect resource around them	1	3%	
No response	8	24%	
Total respondents	34	100%	

Most of the time, environment, people, their societies and cultures are different from one country to another. Therefore, community's interaction with tourist, and tourism industry can be different from one nation to other. As such local level studies are necessary to incorporate community into ecotourism. First two key roles indicate in table 3.36 received 71% of scholar preference. The highest was 'active participation from bottom to top' with 47% of scholar recommendation.

The stakeholders involved in ecotourism and their significance often differ from country to country. Therefore, studies on local environment are important for planning and implementation of ecotourism. Thus, this study made an attempt to gather information on rest of the stakeholders important in developing ecotourism in Sri Lanka. Scholars suggested the about 12 more stakeholders whose contribution is useful in developing ecotourism in Sri Lanka (table 3.37). Comparatively high attention drowns on educational institutions with 21% of respondent. Environment concern financial & media, SME, conservation and research organisations received equal attention (9%) by scholars in recommending them as stakeholders to ecotourism.

Table 3.37 Other Stakeholder Need be Included or Incorporated When Work Jointly to Develop Ecotourism Sector in Sri Lanka – Scholars' View

No.	Other Stakeholders	Number	%
1	Education institutions-(schools , Universities and other training institutions)	7	21%
2	Environment concern Financial institutions	3	9%
3	Environment concern media Org's	3	9%
4	SME organisations such as ASMIT	3	9%
5	Conservation Organisations	3	9%
6	Tourism Research Organisations	3	9%
7	Tourist (international & domestic)	2	6%
8	International & National Eco concern NGO	2	6%
9	Ecotourism & Environment concern Foreign Travel & tour agent	2	6%
10	Central Environmental Authority	2	6%
11	Ecotourism service associations (e.g. interpreters)	2	6%
12	Others (e.g. volunteers)	2	6%
	Total	34	100%

For the success and sustainability of any market, good, strong and energetic leadership matters. According to scholars, Sri Lanka ecotourism sector can progress, if some organisations take the leadership with appropriate actions. About nine different suggestions been given by scholars that are listed in table 3.38. As per the table, about 41% favoured to both MOT and SLTB. There were about 21%(6 scholars) selected as SLTB for the centre role. MOT, COB, MOT+SLTB+PC together as well as ASMIT+SLTB together received equal 7% attention to play the central role on ecotourism management in the country. 'Although there are many organisations involved in ecotourism, the centre pin has to be with the Sri Lanka Tourist Board' commented a scholar. Though there are different opinions and many combination of organisation's with no clear suggestion, one important point is SLTB and MOT been selected in most of the cases. From the two, highest attention is to SLTB . The underline message is both MOT and SLTB have highest responsibility in developing ecotourism in Sri Lanka. As single organisation SLTB has a vital important role to play in ecotourism development in the country. As it commented in many instances cooperation with others and having accreditation and standards would be the main tools to start with. Undervaluation ecotourism demand and lack of marketing of the product available make competitors successful in the market.

Table 3.38 Organisation Need to Play the Leading role in Ecotourism Development in Sri Lanka - Scholar's View

No.	Organisation	Number	%
1	MOT & SLTB	12	41%
2	SLTB	6	21%
3	MOT	2	7%
4	CBO	2	7%
5	MOT, SLTB & Provincial Councils together	2	7%
6	ASMIT & SLTB	2	7%
7	No one	1	3%
8	AGA + UDA + SLTB together	1	3%
9	Ministry of Environment	1	3%
	Total	29	100%

3.2.5.1 Summarised comments by Scholars

- Introduce ecologies with community participation
- Develop ecotourism centres with range of information in detail near popular park entrance
- Initiation standards, accreditation and supervision and advice system needed
- Awareness to community and service providers on concept, resources, sensitivity, conservation necessity, potential,
- Create a umbrella organisation because one need to lead and take committed effort until the sector is developed to succeed
- Adhere to international standards
- Joint promotion campaign needed by private sector with SLTB
- Integrated participatory plan and link coordination needed
- Conservation of environment & cultures and community benefit have to be internalise as part of annual budget when ecotourism is done by private sector
- Knowledge base (library-printed & visual, internet) has to be established as a hub and a marketing tool in the ecotourism industry
- Local , regional and national government sector and private sector should work together
- National committee need to imitate national strategies via regional coordinating committees
- Create a good destination image with effective promotion with proper marketing
- Introduce ecotourism and conservation tool in school curriculum
- Legalise ecotourism policy, guidelines and initiate strategy implementation

CHAPTER 4

SUMMARY

The aim of this chapter is to conclude, discuss the study findings and make recommendations. The first two objectives of the study are broadly discussed drawing attention to the findings of main stakeholders in ecotourism employed for the study. The way ecotourism resources can generate a demand and how it could be extended into the benefits of country nature, culture and local community is also examined. The challenges to ecotourism development are surfaced and critically discussed to find feasible solutions for them in future. Finally, recommendations are made to meet those challenges in the ecotourism sector as a sub sector of the tourism industry which in turn needs to assist for the sustainable development in the country. In addition, areas need more studies in supporting and enhancing ecotourism sector are identified.

4.1 Conclusion

4.1.1 Objective 1 : To study the ecotourism resource bases in Sri Lanka for future ecotourism development including Wildlife, Forest, Coastal, and Irrigation reserves and Archaeological sites.

The resources that can be utilised for ecotourism are abundant. Any nature and culture related places and activities that tourist get interested to engaged, enjoy and admire with ecotourism principles would become a resource for ecotourism. In the literature review, it was shown how ecotourism is closely linked and overlaps with many other form of tourism in the present context. Although ecotourism was introduced as a sub sector in to tourism, presently it has become a management concept applied in most of the tourism disciplines. Therefore, clear separation of ecotourism resources has become much more complicated than it was in the past. The complication starts with its present wider spectrum of preview in the main tourism scenario.

On the other hand ecotourism has become wider subject applied in many other forms of tourism as a tool of sustainable approach than being mealy a tourism activity. e.g. when adventure tourism is incorporated into ecotourism; in addition to its main

adventure elements, care for nature & its conservation, protection and means of extending community benefits are incorporated. Moving beyond to the adventure it will become ecotourism activity with wider meaning linked with nature, socio-cultural responsibilities.

Similarly all other forms of tourism which use natural and cultural resources could be taken into ecotourism light by incorporating its main seven principles with any other form of tourism activity. In other words it is being and could be used as a method of incorporating sustainability mechanism in many other tourism disciplines. The UNEP has mentioned it:

“Genuine analysis of ecotourism should probably be based on projects formulated to follow ecotourism principles” (UNEP, 2001, p. 10)

Seven principles in ecotourism:

1. Conservation of biological diversity and cultural diversity, through ecosystems protection
2. Sustain the well-being of local people
3. Includes an interpretation/Learning experience – environmental & cultural knowledge
4. Involves responsible action on the part of tourists and the tourism industry
5. Is served primarily by small-scale businesses
6. Minimises to lowest possible level the consumption of non-renewable resources
7. Stresses local participation, ownership and business opportunities, particularly to rural people (Wood, 2002, p. 14)

Thus, as a start the Sri Lanka ecotourism resource base inside can be illustrated with its literature:

“Sri Lanka is an island with ample natural resources, including 1,500 km of sandy beaches rich with corals and marine life; over 3,000 species of plants of which 830 are endemic; 84 species of mammals of which 10 are endemic; a fresh water ecosystem with rich bio-diversity; many rivers and mountains; 450 sanctuaries, 10 national parks and three nature reserves; and seven world heritage sites.” (UN-ESCAP, 1999, p. 31)

“Sri Lanka is a large island which, as well as offering a beach environment, also a rich and exotic variety of wild life, verdant vegetation and ancient mountains.” (Hall, 2000, p. 233)

“Sri Lanka is one of the smallest countries in the world biologically most divers country in Asia. It has recognised as bio-diversity hotspots of global importance, being 250 sites of prime importance for the conservation of the world’s floristic diversity. Its divers topography and varied climatic zones, higher number of river basin per unit area have given extreme high level of species diversity, higher than most other Asian countries when measure in terms of unit area. Much of this diversity is endemic and 26% of the flowering plants and from 45% - 76% of certain taxonomic group of animals are considered as endemic to the country. The rich and diver flora and fauna are considered as the country’s important assets.”

(DWLC, 2001, p. 2)

“Tourist visited places where resources are available them to engage in different recreational activities. These natural and anthropogenic resources base provide for development of tourism in any region or area. The rich and diverse resource base places Sri Lanka among the foremost tropical islands of the world. Heterogeneous land forms, mountain and valleys, sandy and fragile beaches, blue sea with coral reefs and marine sanctuaries, picturesque water falls, lagoons and larger reservoirs of a 2500 years old hydraulic civilisation are the most valuable resources for tourism. Sri Lanka blessed with a comfortable and moderate climate, rich biodiversity of fauna and flora, tropical rain forest and botanical gardens. The ruins in the ancient cities of Anuradhpura (5BC-10AD) Sigiriya (5AD), Polonnaruwa (12AD - 14 AD), and Kandy (16 AD - 19 AD) - the last base before felt under British in 1815, are now all declared as world heritage sites. They together with many other ruined cities possess the remains of a 25 century old civilisation. Hundreds of large dagaba (pagoda), temples, monasteries, places, recreational parks, magnificent work of art, sculpture, carvings, architecture and town planning by succeeding monarchs represent a glorious past. Religious and cultural festivals, many monuments of the colonial past including world heritage

site of Galle Fortress and the administrative, religious, cultural, educational and other centres, of modern development including sports, music and art represent a valuable part of the resources of tourism.” (Anonymous, 1997, p. 137)

“Sri Lanka is a global biodiversity hot spot. About half of its species are endemic, including all fresh water crabs, 90 percent of amphibians, 25-75 percent of reptiles and invertebrates, around 50 percent of fresh water fishes, 26 percent of flowering plants, 14 percent of mammals and at least as many non migrant birds. Species richness is extreme and, although little studied, there are known to be over 3,368 species of flowering plants, 314 ferns, 575 mosses, 190 liverworts, 896 algae, 1920 fungi, 400 arachnids, 242 butterflies, 117 dragonflies, and damselflies, 139 mosquitoes, 525 carabid beetles, 266 land snails, 78 fresh water fishes, 250 amphibians, 92 snakes, 35 freshwater crabs, 21 geckos, 21 skinks, 322 non migrant birds. The island also provides critical habitat for internationally mobile species, including 5 species of endangered marine turtle, about 100 species of waterfowl, and many other migratory birds.” (Gurusinghe, 2001, p. 2)

The major tourism resources can be classified as list below:

Table 4.1 Some Ecotourism Assets, Places of Interest and Activities in Sri Lanka

Tourist attractions, Nature and Nature related	
Agriculture	Paddy and other tropical crops
Beaches	Over 1500 km of wide sandy beaches
Lagoons and Basin Estuaries	45 around the country
Coral reefs	Off shore and deep sea
Fishing	Inland & sea with traditional and modern
Large reservoirs	12 large reservoirs and many medium & small
Marine sanctuaries	Hikkaduwa
Mountaineering	Hill country scenery, landscape
National Parks & Nature reserves	15 national parks and three nature reserves (over 13 % of total country land area)
Plantations	Tea, Rubber, Coconuts and minor crops
Recreational parks	Peradenya, Henarathgoda, and Haggala
Rivers	103 rivers
Spices	Spices plantation , processes
Water falls	403 water falls

Table 4.1 Some Ecotourism Assets, Places of Interest and Activities in Sri Lanka (Contd.)

Fauna	
Butterflies	212 and 20 % are endemic
Mammals	84 species
Snakes	35 species
Fresh water fish	250 species 50 % endemic
Turtle	5 endangered species out of 8 in the world
Flora	
Plant species	240,000 species 26 % are endemic
Flowering plants	3368 species
Fungi	1920 species
Algae	896 species
Mangrove	40 species recorded, 14 are native and one endemic
Ecosystems	
Wetland ecosystem, Highland and forest, Grass lands, Forest and waterholes Rain forest Protected Forest reserves in central hills Coastal/ marine sanctuaries Wetland habitat in dry zones	
Activities	
Mountaineering	Hill country scenery, landscape
Trekking	In many areas
Bird watching	512 species, 230 native, 26 endemic , Bundala, Kumana, Weerawila, Kalamatiya and other lagoons, forest reserves & East Coast
Camping	Remote areas and with adventure
Water sports	Sea, river and inland water body based
Cycling	In remote areas, rural areas & southern cycling path
Village walk	In rural and remote areas
Fishing	Still fishing, sea and river base
Festivals	
Festivals	National, seasonal and traditional festivals, Cultural & food festivals
Events	Annual, seasonal and special events
Heritage and culture related	
World heritage sites	Seven world heritage sites including Sinharaja ever green rein forest
Lesser known attractions	Over 1000 heritage, cultural and nature places of tourist interest in different areas
Hydro civilisation	2500 year old
Temples	Buddhist, Hindu temples, Ancient Churches and Mosques
Way of life	Traditions, culture, indigenous etc
Source : compiled by the author based on information from WLCD, 2001; Anon, 1997; Premaratna, --; SLTB, 2003a, b & website; Gurusinghe, 2001; UN-Escap 1999; Weaver 2001a & Fennel, 1999	

In addition to secondary sources of evidence on rich nature & culture ecotourism resources in the country, the stakeholders employed to collect data in this research have also given opinions and views of the country resource base.

Among responses received from tourists, there were five questions directly distinguishing the ecotourism potentials of Sri Lanka. The results are summarised in table 4.2.

Table 4.2 Tourist Level of Acceptance Sri Lana Resource Base

No.	Question	Agreed and strongly agreed % as sample (113)
1	Sri Lanka has many nature sites/places to see	(58+38) = 85%
2	Sri Lanka has a rich culture& heritage	(53+44) = 86%
3	Sri Lanka has unique flora & fauna	(50+28) = 69%
4	Ecotourism is a good option to Sri Lanka	(51+21) = 64%
5	I would like to visit again Sri Lanka as an ecotourist	(42+19) = 45%
Experienced 32 ecotourist's interview during the survey answered to question No.5 above (results against 36 and 113->)		13+10 = 23/36 = 64% (13+10)- 23/113 = 20.5% (% of the sample)
Other tourist willing to return as ecotourist Answer to Q No.5 (agreed + strongly aged)		29+9 = 38 38/76= 50% (29+9) - 38/113 = 33.6%

Tourists assessment on nature places and Culture-heritage is high as over 85% (table 4.2). On flora and fauna 69% and selecting ecotourism as a option 64%. Moreover 45% of visitor prefers to come back as ecotourists. As a against experienced eco travellers it is 72 % and it is in the sample 20.5%. These combinations prove the high potential for ecotourism from consumer preference. Particularly, visitor who have already been to a popular ecotourism destination agreed to come back as ectourists confirm that they are happy with ecotourism resource base in Sri Lanka.

The service providers view one resource base investigated in two ways. They were getting the reason for investment (for being in this business) and directly their assessment on country ecotourism resource base. Since there were no accepted criteria to identify ecotourism products and services, researcher has used his knowledge experiences

and other service provider recommendations to identify places to gather data. As a stakeholder already took a risk in investing on ecotourism business, the reason for being in this business was 'high potential'. Also comments collected on both 'resource base potential' and 'market demand' focus on their comments. As shown in table 3. C.4, 53% of them mentioned 'Very good' and on tourist demand accepted as 'Very good' by 22% and 41 % as 'Good'. Both these results (53% % 63%) indicate the confidence placed by service provider and visitors respectively on country ecotourism resources base.

Ecotourism resource managing organisations are key stakeholder who manages and open new avenues for future ecotourism development. As far as these organisations have in good understanding and positive attitude will be a good foundation for ecotourism. From organisations responded 30% already receives a significant contribution from present tourism activities.

Table 4.3 Resource Managing Organisation Opinion on Present Tourist and Ecotourism

No.	Question	Yes - 'Agree to some degree' & 'agreed significantly' as percentage of the sample (32)
1	Do you think present tourism helps to meet your organisation objectives?	(14+12) = 87%
2	Are there ecotourists currently visiting your ecotourism resource ¹ base?	(17+5) = 77%
3	Do you think ecotourism has the capability to help in achieving your organisation's objectives?	(10+17) = 90%

The majority of resource managing organisations agreed that presently they receive some benefit by tourism to reach their organisation objectives (objectives are mainly based on resource base conservation and management). When tourists are differentiated from conventional tourists to ecotourists, there are lesser number they accept. Important message is they receive ecotourism at a time the country has no formal promotion or other initiative to attract them. Almost all organisations (90%) admit that ecotourism will be a better option to cater to their resource base. The underlining message here is, they are willing to attract more ecotourist to their resource base in future. More they open avenues more ecotourism opportunities available in future.

The scholars' perspective on ecotourism resource base in Sri Lanka is very high. In responding to what their assessment of 'resource base in Sri Lanka' is the answers were:

Table 4.4 Scholars Perspective on Ecotourism Resource Base in Sri Lanka

Answer	No.	% by total
Average	2	5.9
Good	10	29.4
Excellent	16	47.1
Total	28/34	82%

From the replies nearly 50% mentioned the ecotourism resource base is excellent and over 29% 'good' in total about 76% are happy with. It confirms available ecotourism resource base in Sri Lanka is rich.

Summarising all the facts, it can be concluded based on this research and previous studies (e.g. Vidanage, 1995; UN-ESCAP,1999; Gurusinghe, 2001; Boes, 2000; Dearden, 2000; SLTB, 2003b; Hathurusinghe, 2004; De Silva 2004; Premaratna, 2003) that Sri Lanka has a rich resource base to explore its potential to attract ecotourist in future. It is mainly base on nature sites such as areas managed by Forest Department, Department of Wildlife Conservation and Coast Conservation Department. In addition irrigation reservoir catchments, river basins and agricultural land areas are the other possibilities.

Lack of activities with sustainability measures in natural environments prevents ecotourism benefit flows to the country and rural communities. It can be easily utilised to gain opportunities for local community to have extra benefits, in addition to conservation objectives of its dependent resource base in line with long term sustainability.

4.1.1.1 Comparison of Popular Ecotourism Activities with Available Resources and Product

Tourist attractions become tourism resources when it is made available with necessary infrastructure, information and other required components. Tourist motivations (interest & willingness to visit as well as enjoy places and events) generate demand when their time, money and desire are combined. With demand whole tourism system start functioning. For tourist satisfaction the service providers need to make sure their products and services are with the standards of visitor expectations. The standards are the main criteria for customer/visitor satisfaction. If the product or service could satisfy visitor better than their expectation, it helps for market sustainability. Stability of the market ensures sustainable flow of both financial and non financial benefits to its stakeholders. Additionally, as an essential part of ecotourism, environment and socio-cultural conservation and its sustainability would be ensured.

To assess present performance of ecotourism with available resources in Sri Lanka, lists of popular ecotourism activities are listed in table 4.4. Against each activity, how Sri Lanka performance as per present situation listed in each column. It help to get an idea on specific areas Sri Lanka can expand ecotourism activities and what areas need further improvement in comparison to present market demand for ecotourism activities in the international ecotourism markets.

The rich ecotourism resource base could be transferred to country benefits particularly local community benefits, if ecotourism is developed and managed proper manner. It helps the country not only with economic gains but also none economic benefits with their sustainability.

Table 4.5 Comparison of Popular Eotourism Activities with Available Resources in Sri Lanka

Category / type	Ecotourism and related activities	Availability of resources and products		
		Yes	To some degree	No
Ecotourism	Bird watching	✓		
	Observation & admiring nature	✓		
	Nature photography	✓		
	Out door education (nature, culture & related)		✓	
	Out door research		✓	
	Wild life Safaris	✓		
	Study on village life		✓	
	Handicraft and souvenir products		✓	
Adventure Ecotourism	Canoeing		✓	
	Whale watching			✓
	Hiking	✓		
	River Rafting & water sports		✓	
	Paddle boating		✓	
Captivity Ecotourism	Aquariums		✓	
	Botanical Gardens		✓	
	Visit Wildlife parks	✓		
Agro-ecotourism	Agro parks		✓	
	Plantation & associated environments		✓	
	Fruit, herbal, special plant nurseries		✓	
Community ecotourism	Home stay experience social life		✓	
	Handicrafts, souvenir products		✓	
	Village work and walk		✓	
	Food culture & traditions		✓	
Forestry ecotourism	Study & experiment forest & biodiversity		✓	
	Community forest plantations and associate environments		✓	
	Trekking	✓		
Coastal ecotourism	Marine safari		✓	
	Fishing & fisherman life		✓	
	Catamaran, peddle boating		✓	
Wetland ecotourism	Mangrove, lagoon and associate tours	✓		
	Water base recreations	✓		
Culture ecotourism	Culture exploratons tours		✓	
	Explore heritage	✓		

Source: The author based on activities suggested by Fennel, 1999, Weaver, 2001, WLEDC, 2001

Note: Activities in bold were pointed as most popular ones among foreign tourist surveyed for this research.

4.1.2 Objective 2 : To identify main challenges to ecotourism development and the reasons behind them

4.1.2.1 Challenges cited by previous researches

There are a few specific studies on ecotourism challenges in Sri Lanka. Among them some there are some similar findings to this study (shown in table 4.5). Since those objectives of studies were different from this study majority of them have not focus on recommendation as per specific challenges. But identification help to confirm some of findings of this research.

Table 4.6 Ecotourism Challenges Identified by Previous Researchers

Author	Challenges and Issues	
(Vidanage, 1995)	Lack of infrastructure Lack of interpreter services near potential areas/sites Not sufficient studies such on carrying capacity	
UN-ESCAP, 1999)	Difficult to implement rules and regulations e.g. combat with coral mining Exceed carrying capacity due to poor management Lack of train specialised guides	
(Grursinghe, 2001)	Absence of National Policies and Guidelines for ecotourism in Sri Lanka Low recognition and value given to ecotourism Need an organisation or system to provide proper information educating ecotourist Need small scale ecotour operators and accommodation providers to offer personalised services to genuine ecotourists Need of genuine Community base organisations (CBO)	
(Dearden, 2000)	No inter agency coordination for ecotourism development There is no forum for tourism dialogue between DWLC and tourism industry No ecotourism strategy for Sri Lanka	
(SLTB, 2003 b)	Lack of infrastructure Lack of training and awareness Lack of coordination among stakeholders	Low environmental responsibility Limited amenities Political influence & wasted interest
(Premartna, 2003)	Limited financial benefits Unequal distribution of benefits Natural resource damages Job rather than route out of poverty	Limited Participation Risk of overdependence and sustainability Intrusion and cultural disruption

4.1.2.2 Challenges/Issues Cited by Tourists & Proposed Solutions

Challenges/Issue/ Problems	Solutions by international tourist
<ul style="list-style-type: none"> ➤ Ask yourself how many ecotourist know Sri Lanka? ➤ Unplanned development in near some nature areas ➤ Combat with adverse publicity overseas ➤ Get away from double pricing ➤ Sound and over crowd controlling ➤ Damp garbage in public & nature places ➤ Charges are high for foreigners ➤ No train (public transport) for tourist 	<ul style="list-style-type: none"> ➤ Develop good informative travel magazine & produce DVD and VCDs ➤ Specific education to target communities ➤ Develop at least a few trains for tourist ➤ Develop more green park instead abundant lands ➤ Train guide in other languages (other than English) ➤ Please do not built in nature areas ➤ Educate community all others to do well for tourist ➤ Promoting by SLTB people trust it ➤ Develop youth hostels ➤ Educate employees ➤ Stop double pricing <p>Develop facilities for different ecotourism activities</p>

4.1.2.3 Challenges Cited by Ecotourism Service Providers & Proposed Solutions

Challenges/Issue/ Problems	Solutions by Tourism Service Providers
<ul style="list-style-type: none"> ➤ Longstanding unstable security situation ➤ Lack of government initiative to support ➤ Absence of government recognition and standards ➤ Authorities believe is a very small market ➤ No interagency agency and stakeholder communication Local authorities have no idea ➤ Informal sector grow faster 	<ul style="list-style-type: none"> ➤ Seek all possible ways for peace ➤ Have dedicated body establish to lead, assist, advice and monitor the sector ➤ Conduct awareness to all stakeholders ➤ Develop a corporate plan with all stakeholders <p>Legalise Ecotourism national guidelines and policies and work for criteria & standards</p>

4.1.2.4 Challengers Cited by Tourism Resource Managing Organisations (TRMO) & Proposed Solutions

Challenges/Issue/Problems	Proposed Solutions by TRMO
<ul style="list-style-type: none"> ➤ How to maintaining the balance between ecotourism and environment protection (all kinds of pollution control) ➤ How and when to agree on carrying capacity and its implementation ➤ Change of inherent method of plan after development into development with plan implementation ➤ How to develop ethic for self control in the sector than rule and regulations ➤ Lower participation of local community 	<ul style="list-style-type: none"> ➤ Streamline decision making with environment concern ➤ Obtain stakeholder action participation instead stakeholders what is correct and what is wrong conceptual and idea participation ➤ Awareness to community and other ➤ under central government body (SLTB) ➤ Clear cut policies ➤ Larger scale target promotion ➤ Develop basic infrastructure ➤ Develop site specific ecotourism strategies under proper ecotourism development plan implementation ➤ Develop proper monitoring programme

4.1.2.5 Challenges Shown by the Scholars and Researches

Challenges/Issue/ Problems	Proposed Solutions by Scholars
<ul style="list-style-type: none"> ➤ Identification of write market segment and strategy for them ➤ Ways of maintaining the balance in opening and keep unchanged or minimum change) in sensitive resource bases ➤ What and what areas need legal provisions to control ➤ Let all understand ecotourism in a similar manner for easy collaboration 	<ul style="list-style-type: none"> ➤ Bring up all stakeholder and interest groups understand the ecotourism concept in the same way ➤ To agree and work for one goal by all stakeholders in the ecotourism sector ➤ To have honest leadership with no corruption Introduce right marketing strategy to right time to write ecotourist ➤ Maintain the product and service quality at international standards while ensuring resource base sustainability standards with carrying capacity

4.1.3 Ecotourism Sector Challenges in Global Perspective

Ecotourism is a global opportunity to reap benefits locally not only financially but also as nature culture conservation means. Its development has a global perspective even if we apply in local environment. Putting in a few sentences the executive Director of UNEP had expressed the main challenge in ecotourism today:

Ecotourism challenges;

“Putting ecotourism on truly sustainable path is a major challenge, requiring partnership and cooperation between the tourism industry, governments, local people and the tourist themselves. With your help, we can achieve the ambitious goals set for the international year of ecotourism”. (UNEP, 2002 p. 6)

Specific global challenges for ecotourism are:

- Use of ecotourism as tool for sustainable tourism development in tourism
- Conservation of natural resources with tourism assistance while preserving and enhancing the same for future generations (Host communities & other stakeholders)
- Use ecotourism as a essential means of community wellbeing in the area of resources in use for tourism
- Give priority to assist the communities below extern poverty level with extensive assistance and education to bring them in to main economic system considering and approaching the millennium goals
- Achieve sustainable tourism development objectives though ecotourism converting the real meaning of ecotourism to be fair for both present and future generations

4.1.4 Major Challenges to the Sri Lanka Ecotourism Sector

While admitting Sri Lanka faces those of world challengers, the study identified some country specific challenges in the ecotourism sector and they are:

- Maintaining the balance between ecotourism explorations and environment conservation and protection with carrying capacity consideration
- Change the inherited method of plan after development into development with plan implementation
- Improve low level of law enforcement and pollution controls and maintain cleanliness in nature & cultural resource bases
- Active involvement provincial and local government organisations with rural/village representation to think on a collective concept
- Lower awareness of community on ecotourism and way of convincing them on benefits that could be received with active participation
- How to develop ethical self regulated discipline to minimise unplanned development & disturbances
- Means of filling the gap of specific information that ecotourist demand and kind of services develop satisfying them
- Where, how and when to do effective ecotourism promotion
- Position Sri Lanka as a ecotourism destination and gain a name in the international market
- Implementation of accreditation and standards for ecotourism products and services
- Initiation of higher (policy making level) steering committee with Establishment centre body responsible for plan, implement, advice, evaluate ecotourism development assistance and monitoring the ecotourism sector
- Continuous improvement of awareness among stakeholders particularly local community & get the cooperation of all for effective ecotourism implementation initiatives.

Recommendations to meet these challenges are discussed in section 4.3 based on SWOT analysis and findings of this research and previous researches. Before recommendations, the next section proceeds with SWOT analysis of ecotourism in Sri Lanka, followed by discussion of the findings on different stakeholders.

4.2 Discussion

4.2.1 SWOT Analysis of Sri Lanka Ecotourism

Strengths

- I. Ecotourism resource base with high diversity, natural resources rich culture & heritage, climatic and socio-cultural diversity among areas and even climate year round and availability of all of them within a short distance.
- II. Identified high endemism which is over 25 % of total (in general) with native flora and fauna is a strong strength for Sri Lanka ecotourism.
- III. Ecotourism can exploit the association of Sri Lanka image with Buddhism, Ayurveda (herbal medicine), Sri Lankan food and way of life.
- IV. Having a specialised good set of government departments such as SLTB, CCD, CEA, WLCD, Irrigation Dept. and inventors who like this sector with care on nature and changing community perception towards positive to nature base tourism is a strength if all work together one day.
- V. Available rich Natural resources, educated human resource whom could be trained, and physical resources for ecotourism to start

Weaknesses/Problems

- I. Lack of understanding on real ecotourism concepts and poor coordination between govt organisations and other stakeholders
- II. No yet formalised policies, criteria, standards and government recognition for the sector
- III. Static community attitude and thinking draw back their own opportunity available within ecotourism
- IV. Other than corner discussions, no proper information and initiative by government sector to put every one on the correct tract
- V. Not available small, specialised and personalised service providers and their network which is the most preferred by ecotourist in the country (for accommodation, touring and interpretation).
- VI. Poor awareness among international communities about Sri Lanka tourism or ecotourism (many of them know only Ceylon Tea, Cricket and LTTE) lack of initiative to change the image from cheap beach destination to ecotourism destination.
- VII. Important authorities ignore important business initiative with no innovative thinking (some authorities do not know and do not want to know ecotourism value).
- VIII. Lack of qualified and specialised interpreters

Opportunities

- I. Existing and growing high demand for high quality products by the international markets
- II. Socio-cultural diversity and climatic diversity create interesting year round opportunity.

- III. By incorporating other forms of tourism such as agro, village, culture, community and adventure tourism with ecotourism in could be broaden horizons in this sector
- IV. Systematic education and awareness on regular intervals on all aspects of ecotourism will inspire its inside opportunity to local community to involve more and more in ecotourism
- V. Development of organic food and link with ecotourism sector will expand and enrich market opportunity locally and internationally.
- VI. Make ecotourism as conservation tool to protect sensitive habitats and ecosystems and help for the wellbeing of the local community.

Threats

- I. Poor planning & implementation for ecotourism development allowing informal exploitation thus, endangering fragile resource bases
- II. Unplanned ac-hoc development may destroy the core resource base
- III. With no standards ecotourist may get frustrated with some of available products
- IV. Continued war in the country weaken visitor motivation to visit Sri Lanka
- V. Neighbouring countries are far ahead of in accommodating ecotourist (Malaysia, Nepal, India, Thailand, Laos, Indonesia & Vietnam)
- VI. Some service providers and other stakeholders try to make money out of conservation and community benefit opportunity.

The research findings can be used to optimise opportunities with strengths for better benefits while having focus on weakness and combating with the threats.

4.2.2 The International Tourists

Sri Lanka reputation among international tourist as a beach destination still remains. But the survey revealed that nature and culture are also becoming increasingly popular. According to this study nature and sceneries (57%) are more popular than beaches (56%) as tourism products. Tourists preference to individual products such as wildlife, culture & heritage and nature, has become important. These attractions can be considered as ecotourism resources as assets. It sounds the market preference is moving towards these products beyond the beaches.

High preferences for Kandy, Pinnawala, Dambulla and Hill Country shows tourist interest in inland products. In addition, around 50% tourists engaging in activities such as wildlife safari, herbal medicine (Ayurveda), lagoon boat tips and bird watching, indicate growing trend towards nature and activities in local environment. Particularly tourists' comment on 'what kind of resources are available in Sri Lanka?' as per their responded 65% nature, 46% culture and 22% adventure related which again indicates that they are now aware about these resources.

In the assessment on ecotourism tourism resources by tourist, nature, culture, flora & fauna, received high attention. Tourist willingness to visit again as a holiday visitor (70%) and about 61% as ecotourist brings a strong message on future potential. Irrespective of all other requirements, tourist demand matters for future development. The question is when they are ready to come back, is destination ready to receive them?

In spite of potential and attractiveness of ecotourism, destination Sri Lanka will not be able to position itself as a leader in the South Asia without addressing existing problems:

- Garbage in public places
- Facilities and standards some are of in poor quality
- Infrastructure
- Damages to sensitive resources particularly by domestic mass tourist

These issues need quick attention by authorities to minimise their impact in the short term and long term. Findings of the survey with experienced ecotourists are of vital importance for the ecotourism development in the country. They are quite happy on the resource base but not with facilities and their standards. Their willingness to return to the island again as ecotourists, shows the growing interest on the resource base. Whether the destination is taking adequate measures to place ecotourism products and services as per the principles accepted by the industry with sustainability measures to meet the visitor expectation still remains unanswered.

4.2.3 Local Community

The study findings show that unemployment level in rural areas is high. It is evident that rural community is not adequately supported by any of the industries including tourism in the area. Unemployment and underemployment is a problem in the rural sector in Sri Lanka (SBSL, 2002). Although the exact numbers are unknown as there is no studies on unemployment and underemployment in these areas.

It was revealed that about 38 percent do not get any income support from the tourism industry and 23 percent get on a little support. 12 percent of households earn about 50% of their income from tourism. Only about 27 percent (38 households) earn their total income by tourism, and 73 percent mainly depend on economic activities other than tourism.

Income is important to maintain the living standards in a household. In the sample, there were about 75% households get less than Rs. 10,000 (\$100) per month. According to the respective Divisional Secretariat information, a family has at an average of 4-5 members in these areas. It means there monthly income per person is about Rs. 2222/- (\$ 20) and daily income Rs.74/- (\$ 0.67) As per the World Bank millennium goals those earn less than one dollar per day are below the extreme poverty line. Accordingly, about 73% of the sample was under poverty line. Particularly in Bentota, tourism has been over 40 years. Finding shows that the majority do not get income by tourism and most are poor. It is also proves with a comment made by community member in Bentota "tourism to our area is like a good water tank, there are two lines for water to come and go like income. But for us it does not mean a big thing".

Even with little knowledge on ecotourism, community has a trust on it and think positive ecotourism as a good concept to maintain sustainability in their area. This is shown by comments made by community. "Tourism is good and we want to see it is developed but we do not want to loose our children and environment".

Tourism has already created direct and indirect employments opening doors for people to be benefited. In addition induced benefits are generally supported to community and businessmen. In Bentota the formal sector is managing over 600 rooms. Many other services and informal sector too have created employments. The employment per hotel room ratio in Sri Lanka is (1.4 x No. of room's) ratio in the accommodation sector. In Maduganga are still formal sector in a slow move but the informal sector is faster. Thus, informal sector impacts would be significant in Maduganga. Services such as passenger boats are already developed to the level where environment problems emerge. The community are very concerned with the environment but most of the time they have a low voice as they are not organised. Due to unfavourable security situation the investment is sluggish. Since market is not growing fast and existing service establishments try to survive particularly during off season (April-September). This adverse development apparently affects employment creation and income by tourism.

In ecotourism; economic, social, cultural and environment sustainability are of primary importance factors. For the local community participation in ecotourism education on ecotourism would be the start.

4.2.4 Tourism Service Providers

The ecotourism service providers have given some clear and important insight in the present situation of ecotourism in Sri Lanka. High business potential, earning good income and capitalisation on available resources need attention in future work. Rich resource base and sound demand provide good foundation for its development as a strong foundation. But lack of initiative and support by government organisation can bring them into critical situation. To face challenges in new initiative service providers need a support particularly from government setup. Sri Lanka Tourist Board (SLTB) and Ministry of Tourism (MOT) are the key supporting organisations. What is needed is not side support

but committed involvement for service providers to take over international market opportunity for local benefits.

Performance improvement by the stakeholders on four main elements of ecotourism such as visitor education, community benefits, nature- culture sustainability and financial viability, needs to be attended. It is the back bone of the ecotourism sector to become an industry in future. Education is a basic ingredient in ecotourism. In addition to visitors, all others involved need higher level of knowledge with regular updates. Nature and culture conservation contribution is also a desire of ecotourists. On the other hand, it is an essential requirement for long-term sustainability of its own resource base. Community who is a part of the same environment, need to be integrated in the whole process with due consideration to their socio-cultural sustainability. Tourism should not make local community slaves of tourism at any cost. Also, other stakeholders need clear understanding on community involvement limits by ecotourism. (This issue was already discussed in section 1.2.3.5).

Stakeholder cooperation and long term sustainability of inter-dependent ecotourism resource base and financial viability with local community wellbeing are the responsibilities of ecotourism stakeholders.

4.2.5 Tourism Resources Managing Organisations (TRMO)

The ecotourism resource managing organisations are mainly working for ecotourism in isolation. Clear evidence of this is the fact that the Dept. of Wildlife Conservation (DWLC) has developed web site which uses a definition of ecotourism different from that of Sri Lanka Tourist Board (SLTB) & Ministry of Tourism (MOT). Even government sector organisation tries to develop and market ecotourism individually. It leads to many limitations such as inefficiency, waste of resources, underutilised specialised skills & knowledge etc. e.g. international marketing capacity of the Sri Lanka tourist Board can be a strength to WLCD if they work together. When taken all the stakeholders the collective strength has not yet been properly identified with an integrated plan and allocation of responsibilities as per specialisation which has not yet been considered.

Some organisations do get any benefit even as their resources been exploited by tourism. This can lead to lack of cooperation and misunderstanding for future. All TRMOs believe working together is a better option for them reached the organisational objective and willing to cooperate. Since all work in isolation with no close communication for ecotourism development, a performance is below its potential. Work in isolation often can lead to confusions and create barriers to tourism service providers in practice.

Six major benefits of collaboration were identified by this research. These are: (1) increased efficiency, (2) fewer conflicts & reduced overlaps, (3) sharing knowledge & experiences, (4) conservation, (5) improved wellbeing of the community and (6) private sector involvement.

One issue unattended was who is going to lead the whole process in a systematic way. With 90% preference it was clearly indicated that SLTB and MOT need to take the lead. Other important organisations are: Central Environment Authority, Eco concern NGO, Coast Conservation Dept. and DWLC, were also highlighted by service providers. Therefore, it is critically important to work for an integrated common plan with divers responsibilities under high-powered, both legally and financially, lead by the government sector to monitor the whole process on continuous basis.

4.2.6 Researchers and Scholars

Researches and scholars provided numerous suggestions on what on what needed to be done urgently to enhance ecotourism development these are summarised below:

- Integrated plan with demand, resources and capacities with sustainable approach is a first requirement
- Develop and implement a policy, criteria and standards help service providers to get government recognition which is a tool for marketing their products.
- Establishment of separate section in the SLTB for ecotourism was also suggested to give priority to the ecotourism sector which would also be saving of natural resources while enhancing sustainable benefits.

- Identify high potential ecotourism resource bases and assist local community and smaller investors to initiate facilities following the guidelines in the study done by the Sri Lanka Tourist Board (SLTB, 2003a).
- Development of basic infrastructure such as access road to remote locations with Local Authorities and Provincial councils.
- Information is vitally important to ecotourists, therefore, it is suggested to have some quality information publication dedicated to ecotourists.
- Training of interpreters is also recommended as Sri Lanka has no sufficient quality interpreters not guides.

4.2.7 Limitations of the Study

- To collect information from international tourist a questionnaire distributed at the departure lounge of the Colombo International Airport in March 2007. The questionnaires were in English language and enumerators were also could communicate only with English as a foreign language. As a result, the data gathered can be bias towards English speaking tourists. Also this research focused only on international tourist due to time limitation whereas domestic tourists also important in Sri Lanka tourism to consider when doing a survey.
- The time of data collection for the research was within the period of Sri Lanka government efforts to liberate the Eastern Region of Sri Lanka from terrorists. Apparently visitors consider that as a war. Thus, the tourist arrivals were lower than usual (- 36 % in March 2007; source: table 2.1).
- Ministry of small industries, even though it is important, and its sister organisations were not been able to included due to time constraints in the survey.
- Representation of tourism service providers and tourism resource managing organisations that are far away from capital was limited in the survey.

4.3 Recommendations and Suggestions

Objective 3: Make recommendations to (a) ecotourism sector (as a whole) and (b) stakeholders for future development.

Summary of challenges from section 4.1.4 for ecotourism sector:

- *Maintaining the balance between ecotourism explorations and environment conservation and protection with carrying capacity consideration*
- *Change the inherited method of plan after development into development with plan implementation*
- *Improve low level of law enforcement and pollution controls and maintain cleanliness in nature & cultural resource bases*
- *Active involvement provincial and local government organisations with rural/village representation to think on a collective concept*
- *Lower awareness of community on ecotourism and way of convincing them on benefits can be attended with awareness followed by active participation*
- *How to develop ethical self regulated discipline to minimise unplanned development & disturbances*
- *Means of filling the gap of specific information that ecotourist demand and kind of services develop satisfying them*
- *How and when to do effective ecotourism promotion*
- *Position Sri Lanka as a ecotourism destination in the international market*
- *Implementation of accreditation and standards for ecotourism products and services*
- *Initiation of higher (policy making level) steering committee with Establishment centre body responsible for plan, implement, advice, evaluate ecotourism development assistance and monitoring the ecotourism sector*

4.3.1 Recommendations for Ecotourism Sector

“Promoting the sound development of ecotourism requires giving careful attention to the role of government, the tourism industry, local communities, the media and relevant international organisations. There are number of points that might deserve special attention. These include the defenition of ecotourism, the current situation in the roles of various of stakeholders, including their perceptions and expectations about ecotourism, the potential of expiation of ecotourism in each country and any impediments and how to overcome them in order to sustain the sound development of ecotourism”

(UN-ESPAP, 1999, p. 1)

As highlighted by UN the fallowing recommendations focus on current situation of ecotourism in Sri Lanka and the role of various stakeholders which include their perceptions and expectations in the light of future expiation of ecotourism in the country.

1. Raise awareness on regular interval basis and provide education all to think ecotourism is not an other form of conventional tourism but it is a part of conservation and protection of environment and culture
2. All major stakeholders should work ‘with’ and ‘for’ one ecotourism goal and common objectives sharing responsibilities and developing mutual understanding and unity strength
3. As a start, have one ecotourism policy and guide line to all in Sri Lankan and initiate criteria and standards with armaments to existing old rule and regulations in a way that fits into present requirements and situations - have clear cut policies
4. Ministry of Tourism & Sri Lanka Tourist Board should take the lead role and direct and advice with intellectuals to the sector the private sector and community for ecotourism development
5. Authorities need to think capitalising on our strengths to get optimum use of oppotunities having trust on knowledge gathered locally and internationally

6. Need a dynamic and efficient coordination between private sector and community by government sector
7. Conduct seminars, workshops and discussions at national regional and local level for stakeholder coordination and awareness
8. Develop good national ecotourism marketing plan and promote it collectively and continuously as one ecotourism sector instead work isolation individual organisations and private sector
9. Position Sri Lanka as a ecotourism destination in the international market
10. Initiation of higher (policy making) level steering committee with Establishment centre body responsible for plan, implement, advice, evaluate ecotourism development and extend assistance.
11. Read & think, learn & understand, how whole nature system function and reap benefits from it with no changers to it.
12. Streamline decision making with environment concern
13. Obtain stakeholder action participation instead conceptual and idea participation
14. Awareness to community and other stakeholders what is correct and what is wrong
15. Develop proper monitoring programme under central government body (SLTB)
16. Develop basic infrastructure with central, provincial and local government initiatives
17. Develop site specific ecotourism strategies under proper ecotourism development plan implementation

The recommendations were based on previous researches and the findings of the five main stakeholders employed in this research. Obviously all stakeholders are responsible in taking into considerations of the recommendation in order to overcome future challenges. But international tourist and local community have their own limitations in this regards. But other three Tourism Resources Managing Organisations (TRMO), Tourism Service Providers (TSP) can do major work using supply side management. Therefore,

specific recommendations are focus on three groups of stakeholders. The scholars can constructively support for the supply side management exercise.

4.3.2 Selected Recommendations With Identified Responsibilities

Stakeholder Responsible ->		TRMO			TSP	Sch.
Creation of stakeholder cooperation		Govt. Marketing Organisations	Local Authorities	Other TRMOs	Service Providers	Eco concern NGO's & other
Ranking of responsibilities 1-high, 2-medium, 3 - low ->						
Challenge	Recommendation					
-Lack of Stakeholder cooperation	-Establish centre body responsible for ecotourism Dev't & monitoring	1	2	1	1	3
-Poor inter agency cooperation	-Initiate steering committee for ecotourism with resource agencies	1	1	1	3	2
	- Conduct awareness to strengthen mutual undstanding	1	1	2	2	1

Marketing		Govt. Mark'g Organisations	Local Authorities	Other TRMOs	. Service Providers	Scholars & Researchers
Ranking of responsibilities 1-high, 2-medium, 3 - low ->						
Challenge	Recommendation					
-Lack marketing in identified market segments	-Marketing should emphasise that security situation doest not present a risk to tourist	1		2	1	2
_ No fund allocation for ecotourism promotions	-Initiate ecotourism promotions	1	3	2	1	3

Stakeholder responsible ->		TRMO			TSP	Sch.
Legislation		Gov't Marketing Organisations	Local Authorities	Other TRMOs	Service Providers	Eco. Con. NGOs & Sch.
Ranking of responsibilities 1-high, 2-medium, 3 - low ->						
Challenge	Recommendation					
-Existing regulations does not recognise ecotourism and its features	-Update existing legislation suit to present	1	1	2	3	3
	- Initiate standards/labelling Ecotourism products	1	2	3	3	2
-Not available legalised policy guideline & strategies	-Legalised studied policy guidelines & communicate to others	1	2	2	3	3

Communities		Marketing Organisations	Local Authorities	Other TRMOs	Service Providers	Eco concern NGO's & others
Ranking of responsibilities 1-high, 2-medium, 3 - low ->						
Challenge	Recommendation					
-Lack awareness prevent coming forward	-Continues general and specific awareness programmes	1	2	1	1	1
Service providers						
-Low conservation contributions & community support	- Take up conservation and community support as a part of your annual budget	2	2	1	1	3
	-Conduct awareness on need of conservation contributions	1	1	1	1	1
-Lack of personalised & specialised services	- Encourage and assist private sector & network them by Gov't	1	3	1	2	2

4.3.3 Ecotourism Sector Initiatives to Meet Challenges Cited in Global Perspective

- Use of ecotourism as tool for sustainable tourism development in Sri Lanka
- Conservation of natural resources with tourism assistance while preserving the same for future generations (tourist & host communities)
- Use ecotourism as a essential means of community wellbeing in the area of resources in use for tourism
- Give priority to assist the communities below extern poverty level with extensive assistance and education to bring them in to main economic system considering millennium goals
- Achieve sustainable tourism development objectives though ecotourism converting the real meaning of ecotourism to be fair for both present and future generations

4.4 Recommendations for Further Research

1. At least every other year one survey need to be conducted by the NTO to ascertain information on socio cultural and environmental impacts by tourism in popular tourism regions in the country and take mitigating measures accordingly.
2. Research on ways and means as well as limits (carrying capacities) of using fragile ecosystems which has rich biodiversity resource bases such as forest, lagoon, marine etc., are future necessities
3. Limited research has been conducted on the attitudes, beliefs and perceptions of the professionals driving the ecotourism industry. Therefore, integration of land management and ecotourism planning in nature-based environments is of future importance.
4. Updated international knowledge on ecotourism resource bases to ecotourist and on ecotourism industry to other stakeholders is of necessity base on research as a part of development process to this knowledge base sub-sector in tourism.

4.5 Contributions of the Study

- I. Criticism to the tourism authorities with “.. .. the term eco-tourism coined in 90s and has been interpreted narrowly by Sri Lanka Hospitality Management” (Hathurusinghe, 2004, p. 1) showed the research vacuum on ecotourism in the country. This study aims to fill the gap to a greater extent and explore wider possibilities of ecotourism for sustainable tourism development.
- II. Similarities and differences between ecotourism and other overlapping forms of tourism were elaborated and indicated differences between ‘hard core ecotourists’ and ‘soft ecotourists’. (sometimes considered by researchers as one group thus leaving room for criticism.)
- III. This study cleared the confusion between “eco” and “sustainable” tourism and highlighted where these two concepts stand (in section 1.2.3.8) responding to issue surfaced by Hathurusinghe (2004, p. 14) that “what one person or company calls ‘eco’ other calls ‘sustainable’.”
- IV. It also focused to clear confutations among stakeholders on certain conceptual understanding on two concepts (i) ecotourism and community based tourism, (ii) community involvement and private sector involvement in ecotourism. (section 1.2.3.5)
- V. Stakeholders (especially ecotourism service providers and Scholars) felt that general knowledge on ecotourism sector in Sri Lanka is lacking. This research is expected to fill this gap to a certain extent by bringing existing external knowledge into the local environment with the study.
- VI. Identification of all ecotourism stakeholders in wider perspective for local environment was not available in the literature. This research has identified stakeholders (Table 3.D.6) for the ecotourism sub sector in border perspective which cab be facilitate future research.
- VII. The motivation of this research was not purely academic; it aims to provide broader range of practical measures for successful development of ecotourism in Sri Lanka.
- VIII. The recommendations could be used as a base for future action plan for ecotourism development

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APPENDICES

Appendix A:

Ecotourism Stakeholder Survey
Questionnaire for International Tourist

The purpose of this survey is to collect data and information for a thesis of the International Master of Business Administration (IMBA) programme at the Faculty of Service Industries of Prince of Songkla University, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

P.U. Ratnayake -

SLTB

Researcher

Part 1: Tourist preferences, activities and expenses (Please mark (✓) appropriate boxes)

1. What was your motivation for visiting Sri Lanka (SL)?

- | | | |
|---|---|-------------------------------------|
| <input type="checkbox"/> Beaches | <input type="checkbox"/> Nature & Scenarios | <input type="checkbox"/> Wildlife |
| <input type="checkbox"/> Culture & Heritage | <input type="checkbox"/> Water sports | <input type="checkbox"/> Ecotourism |
| <input type="checkbox"/> Visiting friends | <input type="checkbox"/> Other (pls. | |

specify).....

2. What places did you visit in Sri Lanka (SL)?

- | | | |
|--|---|---|
| <input type="checkbox"/> Anuradhapura | <input type="checkbox"/> Polonnaruwa | <input type="checkbox"/> Kandy |
| <input type="checkbox"/> Dambulla/Sigiriya | <input type="checkbox"/> Hill't Orphanage | <input type="checkbox"/> National parks |
| <input type="checkbox"/> Beaches in south | <input type="checkbox"/> Pinnawala (Elep't Orphanage) | |
| <input type="checkbox"/> East Coast | <input type="checkbox"/> Botanical gardens | |
| <input type="checkbox"/> Others(pls specify) | | |

3. What other activities were you engaged in?

- | | |
|--|---|
| <input type="checkbox"/> Wild life safari | <input type="checkbox"/> Bird watching |
| <input type="checkbox"/> Visit Turtle conservation | <input type="checkbox"/> Ayurveda (herbal treatment) |
| <input type="checkbox"/> Water sports | <input type="checkbox"/> Boat trip in lagoons/sea |
| <input type="checkbox"/> Adventure | <input type="checkbox"/> Cycling |
| <input type="checkbox"/> Ecotourism | <input type="checkbox"/> Visit Culture & Heritage sites |
| <input type="checkbox"/> Tracking | <input type="checkbox"/> Other |

4. What activities & places you found interesting after your visit in Sri Lanka that were previously unaware of:

.....

5. No of nights spent in SL 1-4 5-9 10-14 over15

6. How much did you spent on this tour? (excluding airfare) (other currency-pls. mark- € / £)

- | | | |
|---|--|--|
| <input type="checkbox"/> Less than US\$500 | <input type="checkbox"/> US\$501-1000 | <input type="checkbox"/> US\$1001-1500 |
| <input type="checkbox"/> US\$1501-2000 | <input type="checkbox"/> US\$2001-2500 | <input type="checkbox"/> US\$2501-3000 |
| <input type="checkbox"/> More than US\$3000 | | |

Part 2: Ecotourism Resources and tourist perception (Please mark (✓) appropriate box)

	Strongly agree	Agree	Not sure	Disagree	Strongly disagree
7 Sri Lanka has many nature sites/places to see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Sri Lanka (SL) has a rich culture& heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 SL Community supports tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 Sri Lanka has unique flora & fauna	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 Wildlife is amazing in Sri Lanka	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 There is enough information to ecotourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 Guides/Interpreters have a good knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 Quality of other services is good	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 There are enough activities to experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16 I am happy with environmental conservation in SL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17 I was bothered by garbage in public areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 Too many people in the places I visited	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19 Culture and heritage are protected sufficiently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20 Local community gets benefits from tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21 Ecotourism is a good option in Sri Lanka	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22 Mass tourism disturbs the nature in SL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23 I would like to visit SL again for a holiday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24 I would like to visit again SL as an ecotourist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part 3: Suggestions and opinions

25. In your opinion, what kinds of resources are available in Sri Lanka for developing Tourism?

- Nature related Culture related Adventure Water sports
- Ayurveda (herbal treatment) Nice Beaches others

Please explain, how it can help to develop tourism in Sri Lanka your selection/s? :-

.....
.....
.....

26. What Sri Lanka should do to offer those resources to ecotourists in future?

.....
.....

27. What challenges/difficulties does Sri Lanka have to face in developing ecotourism?

.....
.....

28. Could you give your opinion on how to face those challenges?

.....
.....

Part 4: Tourist Profile

29. Gender Male Female
30. Age:- Less than 20 21-30 yrs 31-40 yrs
 41-50 years 51-60 yrs over 60 yrs
31. Education Primary Secondary Diploma
 Bachelor Post graduate Other
32. Occupation Self employed Employed - Govt. Employed - Private
 Professional (e.g. lawyer) Retired Other(specify).....

33. Country/Region of origin

- Europe → UK Germany France Netherlands
 Italy Switzerland Other European country
- Scandinavia → Norway Sweden Other Scandinavian
- South Asia → India Pakistan Maldives Other S. Asian
- East Asia → Japan Malaysia Singapore China
 S. Korea Thailand Other East Asian Country
- Australasia → Australia New Zealand Other Australasian Country
- America → USA Canada Other American country
- Other → Other than above (pls. specify).....

34. Have you travelled before to any other ecotourism destinations such as Cost Rica, Galapagos Islands, Brazil, Nepal? Yes No

Thank you for using your valuable time in completing the questionnaire

Appendix B:

Ecotourism Stakeholder Survey
Questionnaire for the Local Community

The purpose of this survey is to collect data and information for a thesis of the International Master of Business Administration (IMBA) programme at the Faculty of Service Industries of Prince of Songkla University, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

P.U. Ratnayake -SLTB
 Researcher

Part 1: Personal information (Please mark only one box for one question)

1. Name of the Village

House No.....

(Please mark () appropriate box)

2. Gender (Bread winner of the household) Male Female

3. Age ;

Less than 20 21-30 yrs 31-40 yrs

41-50 years 51-60 yrs over 60 yrs

4. Education

up to year 5 year 5 to 10 G.C.E. (O/L)

G.C.E. (A/L) Degree & similar Post graduate degree

5. My Primary occupation is Tourism related Not tourism related

and I am;

- Self employed Employed - Govt. Employed Private
 Professional (e.g. lawyer) Overseas Retired

 Housewife Unemployed

6. Secondary source of income (occupation)

- I don't have Have tourism related Have non-tourism related

7. How much your total income is tourism related(all primary, secondary and other)

- All of my income about half income small part of income None

8. Are there unemployed persons in your household (expecting employment age over 16 years)

- All are employed 1-2 persons
 3-5 persons All are unemployed - over 5 persons

9. Resident or Migrated to this area (answer one will be considered as resident)

- 0-2 years 2-5 years 5 -10 years
 over 10 years Living here since my birth

10. Household income per month (approximate)

- Less than Rs.5,000 Rs. 5,001-10,000 Rs. 10,001-15,00
 Rs. 15,001-25,000 Rs.25,001-50,000 over Rs. 50,000

Part 2: Community feeling on ecotourism

(Ecotourism is a form of tourism caring for the environment, socio-culture, community benefit and ecosystems)

11. Do you know what ecotourism is?

Do not know Know a little Yes I know

(Please mark only (✓) appropriate cage against question)	Strongly agree	Agree	Not sure	Disagree	Strongly disagree
12 I'd like to know/ learn more about ecotourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 I'd like to work for ecotourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 I think ecotourism is good for us	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part 3: Socio cultural aspects of ecotourism

16 Tourism helps to preserve our traditional dancing, arts, handicrafts etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17 With ecotourism our society & culture will be preserved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 Tourist like to see our way of life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19 Our children are motivated by tourism to learn foreign languages including English	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part 4: Environment aspect of ecotourism

20 Tourism helps to preserve our area's natural environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21 Tourism helps to conserve our forest, wildlife and ecosystems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22 With ecotourism our natural environment will be protected better.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23 There are organisations/ our community people, already working to protect the environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part 5 : Community opinion on economic impacts of ecotourism

(Please mark only appropriate box against question)		Strongly agree	Agree	No decision	Disagree	Strongly disagree
24	Tourism has already created many jobs in our community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25	Tourism can create more jobs to our area in the future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26	Tourism provides more business to our area's small businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27	We can sell handicraft and souvenirs to tourist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28	Tourism helps to improve infrastructure in our area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29	Our community can earn more providing tourist services (boat, guiding etc)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30	Tourists come to see our traditional economic activities (Cinnamon, Prawn farms etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31	Tourism related jobs are better paid than others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32	Because of tourism prices of goods and services are higher than other areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33	Because of tourism land price is higher than in other areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34	Big companies get most tourism benefits and leave less opportunities for us	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35	Tourism brings economic benefits but social costs are higher	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

36. Your comments and suggestions on ecotourism and its benefits to your community:

.....

Thank you for completing the questionnaire

Appendix C:

Ecotourism Stakeholder Survey
Questionnaire for Ecotourism Service Providers

The purpose of this survey is to collect data and information for a thesis of the International Master of Business Administration (IMBA) programme at the Faculty of Service Industries of Prince of Songkla University, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

P.U. Ratnayake -SLTB
 Researcher

Part 1: Ecotourism facility details

1. Name of your Ecotourism facility (name of the company/place)

.....

2. Types of services you provide to tourists on your own (Pls. Mark (✓) appropriate box)

- Tour Operator Travel Agency Accommodation
 Vehicle Rental Water sports facilities
 Equipment for activities(cycling, camp etc) Others (plsspecify).....

3. How many years have you been in this service: No of years (approx)

.....

4. What was the main motivation/reason for you to start ecotourism related services (in brief)?

.....

5. Approximately how many international tourists receive/get your services per month
 Number

6. What percentage of them (above) are ecotourists (approximate average)?

- Less than 25% 26%-50% 51%-75% 76%-100%

Part 2: Resource base and initiatives

7. How do you assess our (Sri Lanka) ecotourism resource base?

- Very good good Average Not good poor

8. How do you assess the demand for ecotourism by international tourist to our country?

- Very good good Average Not good poor

9. In your opinion, is the ecotourism initiative taken by the govt. authorities sufficient?

- Very good good Average Not good poor

10. In your opinion which authority need to involved most in developing ecotourism?

(If you wish to name many, please mark as 1,2,3 on priority basis taking 1 as highest)

- SLTB CCD CEA Ar.Dept
 DWLC Irri.'n Dept. Loc.Auth. Pro.Co.
 Ecotourism concern NGOs' AGA Min. Small Ind.
 Other (pls specify) .

11. What kind of functions do you recommend those authority/ies to do for the
development of eco tourism

.....

Part 3: Ecotourism Market & Potential

(Please mark (✓) appropriate box)		Strongly agree	Agree	No decision	No (disagree)	Strongly disagree
12	There is substantial international ecotourism market potential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	SL can attract enough ecotourists presently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	Ecotourism potential is there but it does not generate a demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	SL has a clear idea on our ecotourism market segment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	We have positioned our destination effectively in the ecotourism markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17	Collective effort of the Private Sector to attract ecotourists is sufficient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18	We (SL) do not offer yet what the ecotourism market expect from us	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	Marketing campaign by Sri Lanka is sufficient to attract ecotourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	I am planning to develop more ecotourism facilities in future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21	There are enough investors to develop ecotourism facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part 4: Education, Conservation and Community benefits by ecotourism

22. In ecotourism, education of ecotourist on the places visited and activities they are engaged in is important.

Strongly agree agree agree a little Disagree

23. How does your company/entity enrich the knowledge of ecotourists who receive your service?

None Little (pls. explain) A lot (pls. explain)

24. In ecotourism, conservation of nature, ecosystem and biodiversity is important.

Strongly agree agree agree a little Disagree

25. What does your company/entity do for conservation of nature, ecosystem and biodiversity with ecotourist who receive your service?

- None Little (pls. explain) A lot (pls. explain)

26. In ecotourism, preservation and enrichment of culture and heritage is important.

- Strongly agree agree agree a little Disagree

27. What does your company/entity do for preservation and enrichment of culture and heritage with ecotourist who receive your service?

- None Little (pls. explain) A lot (pls. explain)

28. In ecotourism, improvement of the well-being of the local community is important.

- Strongly agree agree agree a little Disagree

29. What does your company/entity do for improvement of the well-being of local community with ecotourist who receive your service?

- None Little (pls. explain) A lot (pls. explain)
-
-

Part 5: Cooperation and collaboration in ecotourism

30. In ecotourism there are many stakeholders, therefore, do you think joint plan
(working together with all stakeholders) is a better option?

- Definitely yes yes to some degree
 No Not sure

Please explain your answer to question 31 (Why joint plan is good/ not good ?)

31. In your opinion, working with other tourism related organisations will help to achieve
your objectives better ?

- Definitely yes yes to some degree No Not sure

(if your answer is no or not sure please go to No. 35)

32. What other organisations do you think need to work together with yours?

(Please mark ($\sqrt{\quad}$) all appropriate boxes)

- SLTB CCD CEA Ar.Dept
 WLCD Irri.'n Dept. Loc.Aut. Pro.Co.
 Ecotourism concern NGOs' AGA
 Other (pls specify).....

Part 6: Suggestions and opinions

33. In your opinion, what opportunities are available to develop ecotourism in Sri Lanka as a destination

.....
.....

34. In general, what strengths does SL have to develop ecotourism?

.....
.....

35. Do you see any barriers/ problems in developing ecotourism in SL?

.....
.....

36. Your suggestions on how to overcome them

.....
.....
.....
.....

Thank you for your time and completing the questionnaire

Appendix D:

Ecotourism Stakeholder Survey

Questionnaire for Tourism Resources Managing Organisations

The purpose of this survey is to collect data and information for a thesis of the International Master of Business Administration (IMBA) programme at the Faculty of Service Industries of Prince of Songkla University, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

P.U. Ratnayake -SLTB
Researcher

Section 1: Organisation objectives and revenue by tourism

1. Name of the Organisation

.....

2. Kindly mention the main objective/s of your organisation in brief.

i)

ii)

iii)

3. How much the annual budget use by your organisation (approximately)

i) Rs.Mn-2007 ii) Rs.Mn-2006 iii) Rs.Mn-2005

4. What are your funding (revenue) sources to your organisation?

Self Govt. allocation Donations By tourism

Loan Other (pls specify)

5. How much does tourism (international & domestic) contribute to your Organisation's total revenue (appropriate)?

- None (go to quiz 7) less than 10% 11%-25%
 26%-50% 51%-75% 76%-100%
 No idea

6. How much does international tourism contribute to the total revenue (approx.)

- None less than 10% 11%-25%
 26%-50% 51%-75% 76%-100% No idea

Note:-. Tourism Resource: - nature sites, habitats, flora, fauna, biodiversity, heritage and culture etc.

Part 2: Present tourism and ecotourism

7. To what degree do you think present tourism helps to meet your organisation objectives?

- Significantly to some degree No Not sure

8. Do you have any plan to provide more facilities for tourism?

- Strongly yes yes to some degree No Not sure

9. What kind of facilities that will be (if your answer was no or not sure to No.8 pls go to Question 11)

- Infrastructure Information Accommodation
 Sanitary and drinking water Other (pls. specify).....

10. Are there ecotourists currently visiting your ecotourism resource¹ base?

- Yes, many Yes, some No Not sure

11. In your opinion, do you think ecotourism has the capability to help in achieving your organisation's objectives? (such as conservation, restoration & enhancement etc.)

- Definitely yes yes to some degree No Not sure

12. Please explain the reason for your answer in question No.11

.....

13. We are planning to attract more ecotourist to our resource base in future

- Strongly yes yes to some degree
 No Not sure

Note:-Tourism Resource: - nature sites, habitats, flora, fauna, biodiversity, heritage and culture etc.

Part 3: Cooperation and collaboration for ecotourism

14. In ecotourism there are many stakeholders, therefore, do you think working together with all stakeholders (joint plan) is a better option?

- Definitely yes yes to some degree No Not sure

15. Please explain your answer to question 14 (Why joint plan is good/ not good ?)

.....

16. In your opinion, working with other tourism related organisations will help to achieve your objectives better?

- Strongly yes yes to some degree No
 Not sure (if your answer is no or not sure please go to No. 20)

17. What other organisations do you think need to work together with yours?

- SLTB CCD CEA AD
- DWLC Irri.'n Dept. LA PC
- NGO Ecotourism concern NGOs' AGA

- Pvt. Sector Other (pls specify)

18. What would be the role of your organisation in the collaboration? (Working together)

.....

19. Your suggestions for implementation of collaboration effort (joint effort)

.....

20. Pls. give your comment on 'future challenges on ecotourism development in Sri Lanka';

.....

21. In your opinion, what does Sri Lanka need to do in facing those challenges?

.....

Please mention/provide list of the sites/locations under your supervision/management that can be used as a ecotourism resource (on over leaf please)

Thank you for the information and your valuable time

Appendix E:

Ecotourism Stakeholder Survey
Questionnaire for Ecotourism Researchers & Scholars

The purpose of this survey is to collect data and information for a thesis of the International Master of Business Administration (IMBA) programme at the Faculty of Service Industries of Prince of Songkla University, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

P.U. Ratnayake –SLTB
 Researcher

Part 1: Significance of your involvement in Ecotourism

1. Kindly mention your capacity of involvement in ecotourism.

(e.g. researcher, scholar, educator, etc.)

.....

2. What aspects of your involvement in ecotourism do you find most important.

.....

Part 2: Resource base and our products initiatives

3. How do you assess SL's ecotourism resource base?

Excellent Good Average Poor

Not good No idea

Comments

.....

4. How do you assess SL's present ecotourism facilities, services & Infrastructure?

- Excellent Good Average Poor
 Very poor No idea

Comments.....

5. What improvements and additions you would like to suggest (facilities, services and infrastructure)?

.....

Part 3: International market trend and potential. (Comment in brief).

6. How do you assess current international ecotourism market potential?

- Excellent Good Average Poor Very poor No idea

Comments.....

7. Are the present offers in Sri Lanka good enough to attract this ecotourism potential?

- Adequate/sufficient Developing Not sufficient No idea

Comments.....

8. In general how do you assess Sri Lanka's ecotourism market segment?

- Excellent Good Average Poor Very poor No idea

Comments.....

9. How well has SL positioned itself as a destination in the ecotourism markets?

- Excellent Good Average Poor Very poor No idea

Comments.....

10. Has the private sector developed sufficient ecotourism products (capacity & quality)?

- Excellent Good Average Poor Very poor No idea

Comments.....

11. Comments on the current ecotourism marketing campaign by Sri Lanka (comments pls)?

- Excellent
- Good
- Average
- Poor
- Very poor
- No idea

Comments.....

12. What direction of move you would like to suggest for the future?

.....

.....

.....

Part 4: Stakeholder collaboration

(In ecotourism there are many stakeholders, therefore, pioneering destinations have initiated working together approach)

13. In your opinion, how should shareholders cooperation be carried out in SL?

.....

.....

.....

14. What role should government organisations such as MOT¹ & SLTB² play?

(Please mark first two prioritise of your answer)

.....

.....

.....

15. What role should government organisations such as DWLC³, CCD⁴, and Archaeological Department (Resource Managing Organisations) play? (Please mark first two prioritise of your answer)

.....

.....

16. What role should the local community and community leaders (CBO⁵) play?

.....
.....

17. What should we need to do?... to promote Sri Lanka as a ecotourism destination?

.....
.....

18. What should be the role of private & other organisations in the collaboration?

.....
.....

- (1-Minisry of Tourism, 2- Sri Lanka Tourist Board,
3-Dept. of Wild Life Conservation, 4- Coast Conservation Dept.
5-Community Base Organisations)

19. Are there stakeholders other than above, you may find as important and (if any) what should they do?

.....
.....

20. In your opinion, what organisation (stakeholder) should play the central role?

.....
.....

Part 5: Suggestions and opinions

21. What strengths do we have to develop ecotourism?

.....
.....

22. Do you see any barriers or problems in developing ecotourism?

.....
.....

23. A few words on future opportunities in ecotourism

.....
.....

24. In your opinion, what are the challenges SL has to face in developing ecotourism?

.....
.....

25. Your suggestions on how to overcome them

.....
.....

Thank you for valuable time completing the questionnaire

Appendix F:

GENERAL INFORMATION OF SRI LANKA

Sri Lanka in Brief

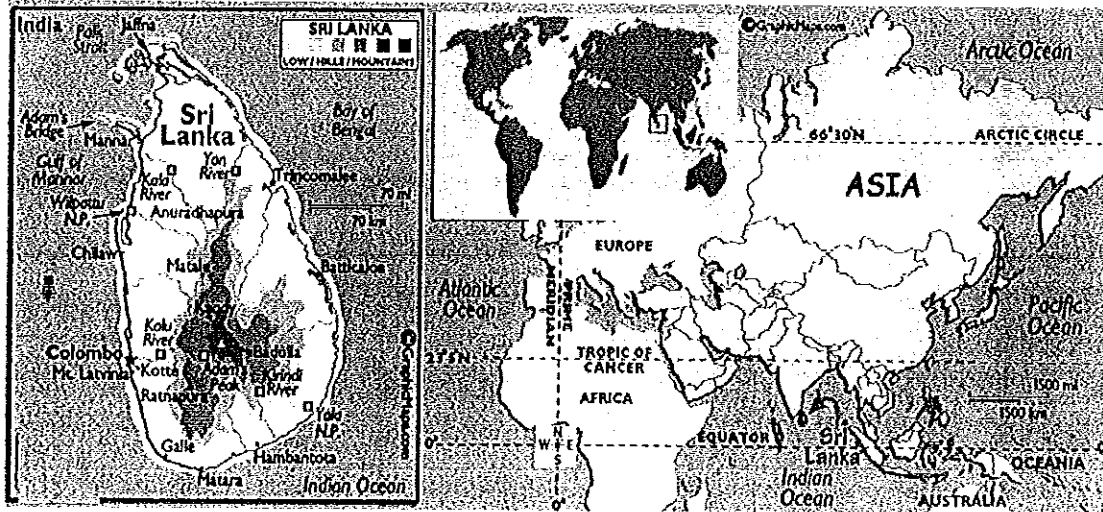
Sri Lanka is a paradise Island known as pearl of the Indian Ocean and its map shaped like a tear drop. Formerly was known as Ceylon and famous for its wonderful Tea and later with Cricket. Sri Lanka is a vibrant country with an incredible history with its long-standing Buddhist tradition and entrenched environmental ethic. Facts show, it has the world's first wildlife sanctuary, created by King Devanampiya Tissa in the 3rd Century BC and the world oldest recorded tree (from 249 BC) with 2256 year old by 2007, called "Sri Maha Bodhi". Add to this over 2500 years of recorded history, a mosaic of diverse and potent cultures and a rich archaeological heritage and one has the ideal ingredients for enlightening ecological travel (Gurusinghe, 2001).

As the European influences spread throughout southern Asia in the 16th century, the Portuguese invaded in Sri Lanka in 1505, later supplanted by the Dutch in the 17th century (1658). The British acquired Sri Lanka (as Ceylon) from the Dutch in 1796, assuming full control in 1802. The country gained its independence on 4th February 1948 continued to use the name Ceylon even after gaining independence as it was a British Crown Colony and became a Republic on 22nd May 1972, adopting a new constitution along with the Sinhala name, Sri Lanka. From 1948 it has made an attempt to achieve economic and social independence under different regimes. The executive presidential system was introduced with a new constitution in 1978. Since then the President is the head of the state (SLTB, website).

For decades that followed, internal strife seemed indigenous to Sri Lanka, as tensions between the Sinhalese majority and Tamil separatists finally erupted into a civil war in 1983. Tens of thousands died in that ethnic conflict, and although now on the proverbial back-burner, social and governmental conflicts continue to fester. Then tragically, Sri Lanka, frequently referred to as the "*Teardrop of India*," was itself devastated by the powerful earthquake-triggered tsunami (or tidal wave) on December 26, 2004.

Tourism is a strong industry in Sri Lanka in generating foreign exchange and employments in the country. Heavy dependency nature of country economy on import inputs for industries and consumption let country to pay more attention to industries and services such as tourism to set-off its annual balance of payment and stabilise exchange rate.

Map of Sri Lanka and Tourism Resources



The island has something to suit almost any preference, from the red earth and scrub forest of the dry zone, to the verdant splendour of the tropical rainforest; from the coastal mangroves alive with bird life to the stunning beauty of the hill country, replete with spectacular waterfalls and mist drenched mountain forest. Animal life is profuse and includes the ubiquitous elephant, as well as leopards, deer, monkeys, sloth bears, wild boar, cobras, crocodiles, dugong and turtles. The island is an important seasonal home to migrating birds.

There is good swimming, scuba diving, snorkelling at Hikkaduwa & Unawatuna., and sailing, windsurfing and water skiing on the Bentota River. and surfing found in Hikkaduwa and Arugabbay. For trekking, try climbing Adam's Peak or walking across the strange silent plateau of Horton Plains near Nuwara Eliya to see the 700m (2296ft) drop at World's End. Major points-of-interest include the ancient town of Anuradhapura, Polonnaruwa, Sigiriya, the cultural city of Kandy, rock temple at Dambulla; the exotic port city of Galle; Pinnawela Elephant Orphanage; the sacred mountain of Adam's Peak; Hikkaduwa, Bentota and Negambo wide sandy beaches on the west coast are a few of many to visit. National park such as Yala/Ruhuna, Yala East, Udawalawa,

Wasgamuwas, Vilpattu. Forest reserves such as Sinharaja, Central hills, Horton plains, Knuckles range, Ritigala, Mahaweli reservoir forest reserves, Koslanda basin, Piduruthalagala, Enginimitiya forest reserve etc (SLTB, website).

Marco Polo proclaimed that 'Sri Lanka was one of the best islands in the world'.

Country Profile

Title	Facts
Name	The Democratic Socialist Republic of Sri Lanka
Geographical Location	Sri Lanka is an island in the Indian Ocean, situated 50 kms. or 31 miles off the Southern tip of India, and is separated from India by the Palk Strait
Topography	The coastal areas and northern half are flat. The central and south-central are hilly and mountainous.
Area of the country	65,610 sq.kms. (25,332 sq.miles)
Time Zone	GMT: + 5.30 hrs
Population and ethnicity	Population 20.06 Mn. (2005 Estimates) Sinhalese - 74%, Tamils - 18%, Moors - 07%, Others - 01%
Gender composition	Male - 49.6, Female - 50.4%
Religion	Buddhist - 76.7, Muslims - 8.5, Hinduism - 7.6, Catholic - 6.9
Official Languages	The Official languages are Sinhala and Tamil. However, English is widely used as a medium of communication in commercial circles.
Climate	Tropical, with an average annual temperature of about 27°C. Rainy seasons May - June and September - October
Per capita income	Approximate. US\$ 960 (World Bank Annual Report 2005)
IDD country code	+ 94 or (00 94)
Internet domain name	.lk
Tourist information	http://www.srilankatourism.org
Geographical Demarcations	Provinces : nine Districts : twenty five

VITAE

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Educational Attainment

Degree	Name of Institution	Year of Graduation
Bachelor of Arts (Hons.) in Economics	University of Colombo, Colombo, Sri Lanka	1993
Post Graduate Diploma in Tourism Destination Management	WES Tourism Training and Research Centre, Bruges, Belgium	2001
Post Graduate Diploma in Marketing of Services	Maastricht School of Management, Maastricht, Netherlands	2002

Scholarship Awards during Enrolment

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List of Publication and Proceeding

Ratnayake, P. U. & Assenov, Ilian. (2007). *Challenges to Ecotourism Development in Sri Lanka: An Assessment*. The Sixth Asia Pacific Forum for Graduate Student Research in Tourism, September 21-23, 2007, Xiamen, China.