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**BREAKING THE BARRIERS: MAKING ECOTOURISM  
CULTURALLY SENSITIVE IN A GLOBAL COMMUNITY**

BY

HOLLY MARIE DONOHOE, B.A. (Hons), M.A.

A Thesis submitted to the  
Faculty of Graduate and Postdoctoral Studies  
in partial fulfillment of the requirements for the degree  
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Department of Geography, University of Ottawa

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## **ABSTRACT**

This study examines the evolution of ecotourism and the emergent ‘cultural turn’ in the ecotourism discourse. Key ecotourism tenets are identified through content analysis of ecotourism definitions. Their salience beyond the ‘Western’ context (where they were developed) is identified as a significant concern in the literature and amongst professionals in the ecotourism field. Therefore, the Delphi technique is applied to capture and interpret international expertise related to cultural sensitivity and its relevancy for ecotourism goal achievement. In doing so, this research offers several contributions towards ‘breaking the barriers’. First, a definition for culturally sensitive ecotourism is established on the basis of the Delphi consultations. Second, a framework for contemporary ecotourism, one that is sensitive to the now global ecotourism landscape, is introduced. Third, barriers and opportunities for establishing and implementing cultural sensitivity are identified. Fourth, the utility of these outcomes for assisting the ecotourism community to ‘break the barriers’ and operate with understanding and integrity, to be sensitive to local and Indigenous communities, to protect cultural heritage and living cultures, and by extension, operationalize sustainable development, is explored. This research contributes to an evolving understanding of the contemporary ecotourism paradigm and its emergent cultural sensitivity imperative in the cultural mosaic of our global community.

## RÉSUMÉ

Cette étude examine l'évolution de l'écotourisme et l'avènement d'un virage culturel dans les discours académique et professionnel. Les principes de l'écotourisme sont identifiés par l'analyse de contenu de définitions de l'écotourisme et leur pertinence au-delà du contexte 'Occidental' (où ils ont été développés) est identifiée comme une inquiétude significative. La technique Delphi est appliquée pour saisir et interpréter l'expertise internationale au sujet de la sensibilité culturelle et la réalisation des buts de l'écotourisme. Ainsi, cette recherche contribue-t-elle de façons multiples à un 'mouvement au-delà des obstacles'. D'abord, une définition pour un écotourisme culturellement sensible est développée sur la base des consultations Delphi. Deuxièmement, un cadre de référence pour l'écotourisme contemporain, celui qui est sensible au paysage global, est élaboré et présenté. Troisièmement, les obstacles et les opportunités pour l'établissement d'un écotourisme culturellement sensible sont identifiés. Quatrièmement, la thèse évalue l'utilité de ces résultats pour aider la communauté écotouristique de : a) dépasser les obstacles, b) opérer avec intégrité, c) être sensible aux communautés locales et Indigènes, d) préserver l'héritage culturel, et, e) contribuer au développement durable.

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## PREFACE

This thesis is comprised of a collection of research papers that are published or under review for publication in peer-reviewed academic journals. The study problem, objectives, geographical context, and the relationship amongst the papers are described in the introductory chapter. The research papers are as follows:

**Chapter Two:**

Donohoe, H.M. and Needham, R.D. (2006) Ecotourism: The Evolving Contemporary Definition. *Journal of Ecotourism*, 5(3): 192-210.

**Chapter Three:**

Donohoe, H.M. and Lu, X. (in press) Universal Tenets or Diametrical Differences? An Analysis of Ecotourism Definitions from China and Abroad. *The International Journal of Tourism Research*.

**Chapter Four:**

Donohoe, H.M. and Needham, R.D. (in press) Moving Best Practice Forward: Delphi Characteristics, Advantages, Potential Problems, and Solutions. *The International Journal of Tourism Research*.

**Chapter Five:**

Donohoe, H.M. (under review) Culturally Sensitive Ecotourism: A Delphi Study. *Annals of Tourism Research*.

For those papers that are co-authored, the first author and PhD candidate conducted the actual research and prepared the manuscripts for publication. Dr. Roger D. Needham, provided guidance on the conceptualization of the research, on the review of early manuscripts, and editorial advice on the final drafts of Chapters Two and Four. Dr. Lu Xiaoli provided access to published resources in China, she translated select Chinese texts, and she provided coding support for Chapter Three. Different formatting styles are used in the aforementioned chapters in order to satisfy the stylistic criteria of each journal.

## **CHAPTER ONE**

### **Introduction**

The definition of ecotourism makes a high claim for its positive impact on society and the environment. It is important that these principles are properly implemented and continue to show the way for others. Various issues need to be addressed, reflecting current trends and external circumstances, including new opportunities to strengthen the benefits of ecotourism and new challenges to meet (The International Ecotourism Society, 2007: 5).

#### **1.1 Background**

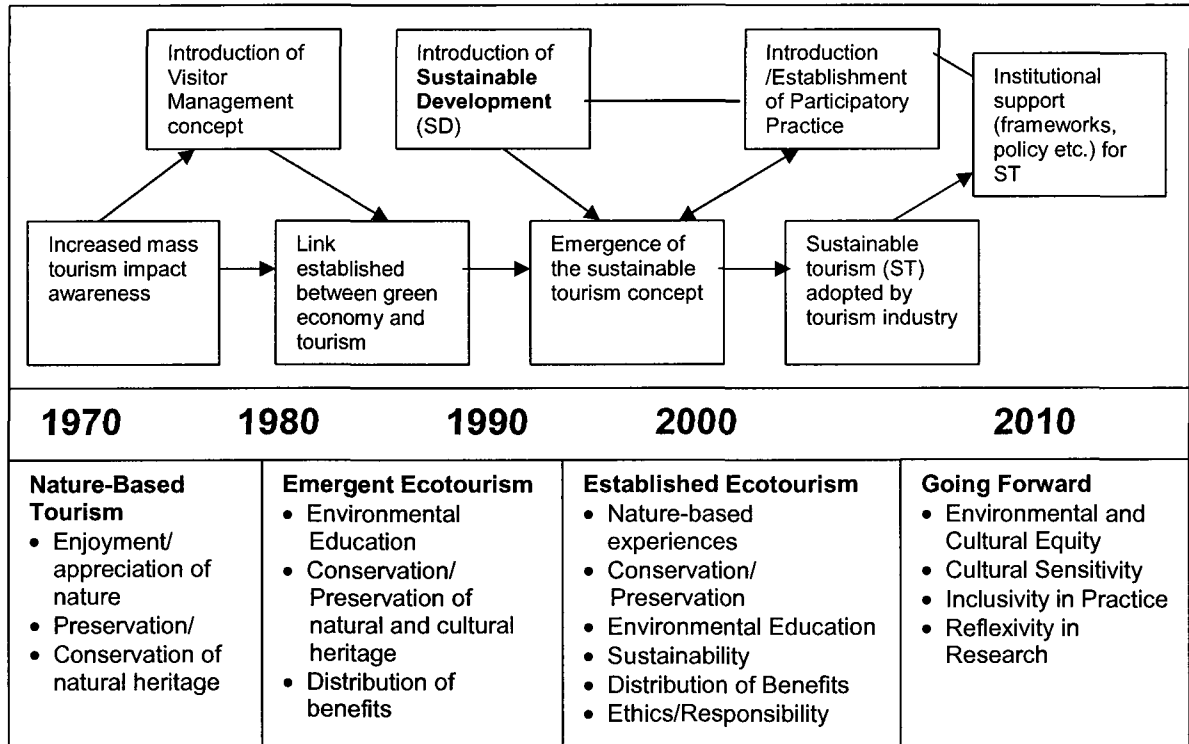
In the last thirty years, ecotourism has become a significant component of the international tourism economy. Recent estimates suggest that it is growing faster than all other tourism segments, with annual growth rates between ten and thirty percent (Fennell, 2003; McKercher, 2001; Sharpley, 2006; Vincent and Thompson, 2002). As a consequence of ecotourism's popularity and its growing spatial reach, it has generated considerable interest from tourism geographers and other stakeholders. Of particular interest is the fact that ecotourism purports to satisfy seemingly disparate conservation and tourism development ends; thereby offering an archetype for sustainable development (Weaver, 2005; Wight, 1993).

A review of the ecotourism literature reveals a diverse range of interests and conflicting values that present both concern and constraint for the realization of these ends. For example, the meaning of the term varies among different people, places, and contexts (Edwards et al., 1999; Fennell, 2001). The environmental, socio-cultural, and socio-economic conditions that influence the development and management of ecotourism vary from one region to another (Braden and Prudnikova, 2008; de la Barre,

2005; Hall and Page, 2002). The perceived benefits and consequences of ecotourism vary (Fennell, 2003; Stark, 2002). To illustrate, an ecotourism proponent might state that ecotourism operators are contributing to regional economies and ecological sustainability by providing opportunities and benefits (Gezici, 2006; Williams, 2006). On the other hand, an ecotourism critic might state that the sustainable development rhetoric has yet to be successfully integrated into ecotourism management paradigms and benefits are being lost as consequence (Honey, 2002; Jamal et al., 2006; Sharpley, 2000). Also, institutional arrangements – standards, policies, codes of conduct, etc. - for ecotourism vary according to context and implementation stage (Edwards et al., 1999; Jamal et al., 2006, Stark, 2002). This puts at risk the human and natural ecology upon which the ecotourism experience directly depends, the environmental ethics and sustainable development principles upon which the activity is conceptualized, and the legitimacy of the ecotourism industry (Fennell, 2001; Issaverdis, 2001; Honey, 2002; Sirakaya, 1997; Stark, 2002; Wight, 1993). In recent years, the literature has revealed an emergent concern related to the ‘universalizability’ of ecotourism (Nyiri, 2006). It is suggested that a set of values – embedded in ‘Western’ understandings of human/environment relationships, market demand, and environmental management – are being superimposed on ‘other’ or ‘non-Western’ ecotourism destinations and their value systems (Carrier and Macleod, 2001; Cater, 2006; de la Barre, 2005; Jamal et al., 2006; Sofield, 2007; Stark, 2002). A lack of sensitivity to the cultural context for ecotourism presents perils related to goal achievement. Concomitantly, there exists potential for benefits to be replaced with insecurity, resentment, conflict, ecological and cultural degradation, and economic loss (Vivanco, 2002). This condition presents a considerable

barrier to the achievement of sustainable ecotourism. The broader sustainable development literature confirms the inextricable relationship between human processes and attributes (such as economic and socio-cultural systems) and the natural environment. However, both the sustainable development and ecotourism literature indicate a systematic, historical disregard for the cultural pillar of sustainability and a disproportionate emphasis on the economic and environmental pillars. Doel (2003: 502) puts this in perspective: “Little wonder, then, that culture is often assumed to pale in significance when compared with more pressing concerns like economic crises, regional conflicts and global warming.” This neglect and/or disregard implies a ‘cultural sensitivity’ research void. In light of these recent themes and developments in the ecotourism literature, it is possible to trace the evolution of ecotourism (Figure 1) and to infer that:

1. Ecotourism is complex and evolving;
2. Ecotourism is spreading rapidly into increasingly fragile natural environments and increasingly diverse cultural environments;
3. Ecotourism values and perceptions vary;
4. Ecotourism goal achievement – the provision of genuine ecotourism experiences and the delivery of equitable socio-cultural and natural environment benefits - is contentious;
5. Ecotourism management frameworks and institutional arrangements that are sensitive to the global ecotourism context are required to ensure sustainable outcomes; and
6. Our understanding of ecotourism is incomplete.



Adapted from Donohoe and Needham (2007)

**Figure 1:** The Evolution of the Ecotourism Concept

On the basis of the aforementioned, this study is motivated by the task of ensuring that ecotourism is sustainable. This state is recognized to be contingent upon adaptation to complex cultural systems. In essence, the research is a response to the contemporary research call delivered by Carrier and Macleod (2001), Cater (2006), de la Barre (2005), Jamal et al., (2006), and Stark (2002) who suggest that the ecotourism experiment will fail in the absence of a greater sensitivity to the fourth pillar of sustainability – culture, and by extension, the cultural context of ecotourism. Cultural sensitivity is considered, therefore, as important as the other pillars of sustainability – social, economical, and environmental.

## **1.2 Purpose and Objectives**

Using a combination of methods and approaches (detailed in each chapter), this study examines cultural sensitivity and the contemporary ecotourism context. The primary objectives of the study are:

1. to examine the evolution of ecotourism and the discourses that shape ecotourism in both theory and practice;
2. to analyze ecotourism definitions and identify key ecotourism tenets;
3. to interpret international expertise to define cultural sensitivity;
4. to identify opportunities and barriers for establishing culturally sensitivity as an ecotourism imperative (in theory and practice);
5. to present an ecotourism framework; one that is equally sensitive to culture and the other pillars of sustainability – social, economic, and environmental.

## **1.3 Geographic Context and Theoretical Perspective**

Geography has a long-standing interest in the study of the human/environment relationship. It is contributing to our evolving understanding of this relationship by offering a unique lens through which to examine the interdependence of culture, nations, social change and the environment. Noted geographers such as Marsh (1882), Barrows (1923), Pattison (1964), May (1970), and Mitchell (1989, 1997) concede that the strength and contribution that geography brings to the study of the human-environment relationship is the collective breadth of theory and method, and the integration of natural and social sciences from all of geography's 'Traditions' in synthesis. Stoddart (1987: 333) argues that our understanding of the human-environment relationship would be "simply meaningless nonsense" in the absence of the geographical approach.

Tourism geography now represents an “applied area of study that is at the periphery of its own discipline but with strong connections to academic research and scholarship outside the area” (Hall and Page, 2002: 27). Tourism has become a matter of geographical interest because it represents a unique case study where geographical concepts such as spatiality, place, landscape, and region for example, are critical for furthering our understanding of the human/environment relationship (Hall and Page, 2002). Tourism presents a unique case for examining a human-use system (tourism products and processes) and its relationship with the environment (processes, resources, and impacts) (Crouch, 2000). There is also a growing capacity within the sub-discipline for identifying, measuring and modeling these complex human/environment relations and new models and methodologies are emerging (Butler, 1999; Mitchell and Murphy, 1991; Phillimore and Goodson, 2004; Smith, 1995). We understand that an alternative to ‘business as usual’ is required in order to mitigate negative environmental, economic, and socio-cultural impacts resulting from tourism activities. This has given rise to the contemporary interest in tourism policy development, implementation, and evaluation – particularly that related to tourism alternatives such as sustainable tourism and ecotourism (Butler, 2000, 2004; Nelson et al., 1999; Newsome et al., 2002).

The tourism geography literature, like the geography and environment literature establishes the study of the human-environment interface - particularly that related to tourism activities - as a legitimate geographical domain. Moreover, tourism geography is of considerable value to the proposed research because the unique geographical ‘synthesizing skill set’ and its distinct set of themes and tools have the capacity to contribute understanding and new perspectives to ecotourism planning, development, and

management (Hall and Page, 2002; Mitchell and Murphy, 1991). Today, “questions of the human-environment relationship have been elevated throughout the academy and public at large, and geography is recognized as possessing unusual strength in integrated, human-environment science” (Turner, 2002: 63). Geography offers established and legitimate theoretical frameworks for approaching an ecotourism research problem rooted in the human-environment condition. To this end, geography is contributing to understandings of the cultural construction of the environment, development, and of the relationships, values, and processes that shape the ways in which we approach managing the human-environment interface and achieving sustainable development (Demeritt, 1998; Eden, 2005; Harvey, 1996; Mitchell, 1997; Walker, 2007; Wallach, 2005; Wood, 1993). Antecedents make clear that research concerned with real-world problems, particularly those that manifest out of conflict between human use systems and natural processes, benefit from a look through the ‘geographical lens’.

The objectives of this study place this research firmly within the realm of tourism geography. In the geographical tradition, the study employs a combination of methods and approaches (as described in Chapter two through six), in order to address the links between cultural sensitivity, ecotourism and sustainable development. Past research has disproportionately focused on the environmental and economic benefits and constraints associated with ecotourism. While this work has contributed greatly to our evolving ecotourism knowledge, it fails to address the importance of culture in the achievement of ecotourism goals and its role in the human-environment relationship. This study is informed by the tourism geography perspective, which advocates a holistic research

approach and it is motivated by the research call for culturally sensitive ecotourism methods, tools and definitions.

#### **1.4 Organization of Thesis**

This thesis is organized into six chapters including this introductory chapter. Chapters Two through Five are papers that have been published or have been submitted for publication in academic journals. Together, these chapters address the primary objectives of the research.

Chapter Two, published in the *Journal of Ecotourism*, examines contemporary ecotourism discourse with a purpose to understand the origins and evolution of ecotourism and how it is defined in contemporary society (objectives 1 and 2). It also sets the stage for Chapter Three which explores variations (or lack thereof) in ecotourism theory across cultural boundaries. This chapter has been accepted for publication in the *International Journal of Tourism Research*. Chapter Four introduces the methodological context and approach assumed for addressing objectives 4 and 5 in Chapter Five. This chapter has been accepted for publication in the *International Journal of Tourism Research*. Chapter Five presents the results of a Delphi study to define cultural sensitivity and identify its opportunities and barriers for ecotourism. This paper has been submitted to the *Annals of Tourism Research*. As a companion piece to Chapters Four and Five, Appendix A provides a detailed account of the specific methodological approach used to address objectives 4 and 5. While Chapter Four provides a critical review of the Delphi and Chapter Five provides an overview of the methodological approach employed, the papers-based thesis format does not allow sufficient space to provide a very detailed account of the research design. In providing a methodological

preamble of sorts, Appendix A is meant to compliment Chapters Four and Five by providing additional information about the methodological design of the Delphi exercise. Appendix B includes the summary reports prepared and disseminated to Delphi panelists as methodologically necessary between iterative survey rounds. Chapter Six summarizes the major findings and conclusions drawn from this body of work. An ecotourism framework, one that is equally sensitive to culture as it is to other pillars of sustainability is presented (objective 5). In addition to this substantive contribution, this chapter also discusses the methodological and theoretical contributions of the study. The chapter concludes with a discussion and a set of suggestions for future research directions.

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## CHAPTER TWO

### **Ecotourism: The Evolving Contemporary Definition**

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## **Summary**

A rise in the popularity of ecotourism has coincided with voluminous definitional discourse. Amongst stakeholders, confusion has resulted from the disparate nature of these definitions. In the absence of a common definition or set of key tenets the challenge has been to ensure operational ecotourism that adheres to the theoretical underpinnings of the concept. Without some semblance of definitional consensus, ecotourism may be on a precarious course whereby the ethics upon which the activity is conceptualized, the natural environment upon which the activity depends, and the legitimacy of the industry are at risk. The ambition of this research is to disentangle a set of themes from the evolving definitional debate in order to provide a framework for the development of ecotourism policy and applications. Recurring themes are identified through the application of content analysis methodology to select contemporary definitions. Those themes that appear most frequently are then introduced as a key tenets based conceptual framework for ecotourism. The tenets are meant to represent a set of established fundamental beliefs central to ecotourism: (1) ‘nature-based’, (2) ‘preservation/conservation’, (3) ‘education’, (4) ‘sustainability’, (5) ‘distribution of benefits’, and (6) ‘ethics/responsibility/awareness’.

## **2.1 Background**

Since its inception, ecotourism has consistently grown and is now widely considered the fastest growing sub-component of the world's largest industry – tourism! (Dowling and Fennell, 2003; Fennel, 2003; Hawkins and Lamoureux, 2001; WTTC, 2004). The proliferation of ecotourism has generated interest from a multitude of stakeholders because it attempts to satisfy seemingly disparate conservation and tourism development ends (Weaver, 2005; Wight, 1993b). As a result, even scholarly interest has become fashionable with researchers actively engaged in the mounting complexities and confusions associated with this tourism type from a myriad of perspectives (Weaver, 2005). Despite such engagement, nearly 25 years after the first definition of ecotourism was published and since the subsequent appearance of a plethora of others, there remains little consensus among experts and a great deal of confusion about its meaning (Björk, 2000; Blamey, 2001; Honey, 1999; Hvenegaard, 1994; Mowforth, 1992). While it may be argued that the abundance of descriptive themes and the lack of definitional consensus is characteristic of the broader tourism discourse, these diverse interpretations of ecotourism are causing a myriad of difficulties for managers and planners who are in need of operational guidance (Dowling and Fennell, 2003; Fennell, 2001b; Donohoe and Needham, 2005b). Scace et al. (1992) argue that the ongoing definitional debate is not redundant as difficulties in ensuring quality ecotourism can be attributed to the absence of a common or universal definition and set of ecotourism tenets or criteria. Key concerns related to this void are management controls and standards which are slow to appear (Björk, 2000; Wight, 1993b). The implications of a burgeoning industry operating in the absence of standards and definitional consensus are such that the

ecotourism industry is evolving into many different forms. Some forms claim to be ‘genuine ecotourism’, while others do not (Fennell, 2001). As a result, the concept is being operationalized in such a way that what is occurring in the field may not accurately reflect the theoretical underpinnings of the concept. Without some semblance of definitional order, the proliferation of ecotourism will continue both inside and outside of definitional boundaries; thereby manifesting as one thing in theory – another in practice. As a consequence, Sirakaya (1997: 920) argues that “ecotourism may be taking a dangerous course” whereby the real benefits and costs of ecotourism are being perverted, lost, or unknown. Concomitantly, this puts at risk the natural environment upon which such experience directly depends, the environmental ethics upon which the activity is conceptualized, and the legitimacy of the ecotourism industry (Wight, 1993b).

### *Understanding Ecotourism*

Historically, the term ‘ecotourism’ was adopted in order to describe the nature tourism phenomenon (Wallace and Pierce, 1996). To illustrate with an early example, the first formal and one of the most widely accepted definitions of ecotourism was introduced by Ceballos-Lascurain in the 1980’s (Blamey, 2001; Boo, 1990). It stated:

Traveling to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring, and enjoying the scenery and its wild plants and animals, as well as any existing cultural manifestations (both past and present) found in these areas (Ceballos-Lascuráin, 1987: 14).

Although this definition has been applauded, critics suggest that it lacks foresight and overlooks experiential opportunities (Fennell, 2001). It disproportionately focuses on what tourists do, rather than what they should do [implying missed opportunities] (Stewart and Sekartjakrarini, 1994). Since the 1980’s, the definitional discussion has broadened to

include other dimensions or ethical considerations (Blamey, 2001). For example, some argue that ecotourism is an expression of sustainable development (Björk, 2000; Fennell, 2003; Wight, 1993). Others argue that it is strongly rooted in educational experiences (Blamey, 2001; Buckley, 1994), and some make the link to the natural environment, which distinguishes this tourism type from other tourism experiences such as mass tourism (Hvenegaard, 1994). In fact, ecotourism is not a homogeneous phenomenon but instead, it has become accepted as a complex and synergistic collection of social, ecological, and economic dimensions that reflect a common core idea (Björk, 2000; Weaver, 2005). This common core is an ethics-based approach to tourism; where the satisfaction of both conservation and tourism development ends is critical (Weaver, 2005; Wight, 1993b).

Other attempts to understand the ecotourism concept have been related to exploring individual ecotourism components. These components have been expressed in the literature as ‘principles’, ‘characteristics’, ‘criteria’, ‘themes’, and ‘dimensions’. For example, Buckley (1994) introduces a dimension-based model that includes conservation, sustainability, environmental education, and nature-based activities. Wallace and Pierce (1996) provide six fundamental principles related to minimized negative impacts of both infrastructure and participant numbers, increased awareness and educational opportunities, support for conservation, democratization (the participation of all stakeholders in decision-making processes), provision of community benefits, and educational and experiential opportunities for locals. This last principle overlaps considerably with increased awareness and community benefits. The authors argue that these conceptual principles reflect the “evolution of an ethical overlay” for ecotourism

(Wallace and Pierce, 1996: 846). In a volume on nature-based tourism, Newsome *et al.* (2002) argue that five interrelated components/characteristics must be present to make ecotourism distinct from other tourism types. The experience must be nature based, ecologically sustainable, environmentally educative, locally beneficial, and [participant] satisfactory. While the first three components are considered ecotourism specific, the authors acknowledge that the last two are desirable for all tourism forms. However, in combination they argue that these components collectively constitute ecotourism. And Eagles (2001), like Newsome *et al.* (2002), addresses both tourism (tourist and provider satisfaction) and the environment with a set of practical ‘principles of ecotourism’ that address a range of issues related to management, experience, and ethics.

Other attempts to understand and describe ecotourism have also relied on a ‘component’ identification approach. Björk (2000) for example, examines a series of definitions and identifies a set of central sustainable development principles common to ecotourism. The list includes loosely defined principles such as educational opportunities, planning considerations, ethical responsibility, and provision of community benefits. Others have taken a more empirical or quantitative approach with the application of content analysis methodology to the analysis of ecotourism definitions. Sirakaya *et al.* (1999) examine industry definitions presented by ecotourism operators in the USA, yielding a set of fourteen themes that include among others: sustainability, responsibility/ethics, community involvement, conservation, and education. Edwards *et al.* (1998) compile twenty-five definitions from a myriad of North American sources (government, academic literature, etc.), comparing definitional rhetoric against a set of predetermined components: purpose, setting, activities, guiding principles, management

and operations, nature conservation, planning and design, economic benefits, experience and awareness, nature conservation, community benefits, and social-cultural conservation. In this case, the sample size and composition did not support a comprehensive analysis. The most recent and comprehensive review to date is presented by Fennell (2001). This analysis reviews eighty-five ecotourism definitions from which the author declares ‘variability’ as a distinguishing feature of the ecotourism definitional literature. In addition, those variables that appear most often are identified as: (1) location or natural setting, (2) conservation, (3) culture, (4) benefits to locals, and (5) education. Fennell (2001) also examines definitional changes through time, noting that conceptual variables most common in contemporary definitions are slightly different than those from a broader, longitudinal sample. Fennell (2001) concludes that there is growing sensitivity to ‘sustainability’ and ‘benefits to locals’ - a new trend in the definitional discourse. Consequently, the author purports that this temporal phenomenon warrants further exploration.

The work of Fennell (2001) and others establishes that there are recurring definitional themes or ethics common to the definitional literature. These studies also suggest that these thematic trends can be identified through analysis, that definitions are still evolving, and that definitional consensus has yet to be reached. It has been over five years since the publication of these findings and as researchers we are very sensitive to research replication and validity testing. For these reasons the remainder of this paper takes the discussion to a new stage in order to determine if the patterns suggested by antecedent research are recurring in the more contemporary literature. Buckley (2000: 437) argues that trends identification is “akin to postulating historical hypothesis” and in

the case of ecotourism, such trends are testable retrospectively. He also argues that the identification of such trends is fundamental to business planning and public policy, as both business and government are increasingly being held accountable for environmental transgressions and fraudulent claims. Ecotourism policy development has only recently been initiated in response to the lack of consensus as to what constitutes ecotourism (Fennell, 2003). Given that definition is the essential basis for policy development (Honey, 2002), that a lack of definitional consensus is contributing to operational confusion (Dowling and Fennell, 2003), and that this confusion is contributing to an industry-wide legitimacy crisis (Wight, 1993b); a re-examination of the definitional debate is required in order to facilitate contemporary ecotourism policy developments.

## **2.2 Purpose and Objectives**

In the context of the unresolved ecotourism definitional debate, the central purpose of this study is to conduct a content analysis of contemporary ecotourism definitions, thereby offering an empirically derived understanding of the key tenets of contemporary ecotourism definitional discourse. While many definitions for ecotourism have emerged over the last few decades, there has been limited detailed analysis of these definitions with the explicit purpose of identifying key components central to the concept (Björk, 2000). Therefore, this paper simultaneously accepts Fennell's (2001) call for further research whilst addressing the void identified by Björk (2000).

The research motivation is based on a broader agenda that seeks to examine the links between definition and quality standards for ecotourism (policy development). With definitional maturity established, the researchers can then explore the processes and

procedures for standards and quality assurance programs finely tuned to the needs of ecotourism (Table 1). This paper represents the first step.

**Table 1:** Generic Process Model for Ecotourism Standards Development and Implementation

<b><i>Stage 1</i></b>	Establish a strong working definition for ecotourism and its fundamental tenets;
<b><i>Stage 2</i></b>	Establish an ecotourism policy statement that links these fundamental tenets to other normative, strategic and operational policies and practices;
<b><i>Stage 3</i></b>	Identify and interpret the relevant legislative and regulatory requirements for operation and procedures in the regional case;
<b><i>Stage 4</i></b>	Identify priorities and set appropriate objectives and targets for ecotourism practice using the fundamental tenets as guides;
<b><i>Stage 5</i></b>	Identify evaluation criteria to measure compliance with the fundamental tenets;
<b><i>Stage 6</i></b>	Establish an organizational structure and programs and projects to implement policy objectives surrounding these fundamental tenets;
<b><i>Stage 7</i></b>	Invest in planning, monitoring, corrective action and other maintenance and review activities to ensure that ecotourism policy and practice are in harmony;
<b><i>Stage 8</i></b>	Invest in adaptation instruments so that changing environmental, economic, and social circumstances are considered opportunities and not barriers to achieving ecotourism goals and objectives.

Definitions and standards provide the framework for the development of appropriate policy and practice for preserving the ecosystems that host ecotourism (Honey, 2002). In addition, it has been established that such standards provide the foundation for the legitimacy of ecotourism practices and opportunities (Donohoe and

Needham, 2005b; Sirakaya, 1997). In essence, an investment in standards demands companion investments in monitoring, evaluating, and ensuring that ecotourism conservation and development ends - that is the values, principles, and or ethics - are satisfied in application (Wight, 1993b). Study findings should provide much needed guidance for government, industry, and/or researchers who may be developing tourism management plans, research projects, codes of ethics, definitions, standards, or other ecotourism related advancements.

### **2.3 Methodology**

A thematic content analysis model is applied to an ecotourism definition sample in order to extract a set of common themes. Content analysis is a research technique for making replicable and valid inferences based on the systematic and objective analysis (comparing, contrasting, and categorizing) of communications (Babbie, 1992; Holsti, 1968; Krippendorff, 1980; Schwandt, 2001).

Content analysis relies on a count of the manifest content or visible surface content of select ecotourism definitions (units of observation). Without committing to a complicated statistical procedure, the method facilitates the identification of popular themes in the ecotourism literature. The advantage of this method is that content can be easily discerned and recorded, and the results can be easily replicated (Babbie, 1992; Krippendorff, 1980). The general analytical steps of this method are modified to better reflect the research objectives (Ryan and Bernard, 2000; Schwandt, 2001). The subsequent steps are followed:

1. Collection of definition samples
2. Identification of analysis criteria (nominal codes);
3. Creation of analysis framework (template/matrix);
4. Test coding on a sample of definitions;
5. Refine coding rules and analysis framework;
6. Coding of definitions;
7. Record results in the analysis framework;
8. Assess reliability and accuracy (intercoder agreement); and
9. Tabulating results.

In order to initiate analysis, a set of tentative themes was determined in a pilot study (Donohoe and Needham, 2005b). The pilot focused on a preliminary analysis of the definition sample and is informed by a critical review of relevant antecedent research (Björk, 2000; Blamey, 2001; Bottrill and Pearce, 1995; Epler Wood, 2002; Fennel, 2001; Fennel and Dowling, 2003; Honey, 2002; Newsome, et. al, 2002; Scace *et al.*, 1992; Wallace, nd.; Wallace and Pierce, 1996; Wearing and Neil, 1999). This list of themes was refined to sixteen criteria that serve as a content analysis template (Table 2).

**Table 2: Content Analysis Template**

<b>CRITERIA FOR ANALYSIS</b> (Working hypothesis derived from pilot study)	<b>SELECT DEFINITIONS</b>
	Observation (✓)
Distribution of Benefits (to community and others)	
Democratization	
Sustainability	
Preservation/ Conservation	
Monitoring and assessment of environmental impacts	
Education	
Minimizing Impacts	
Small scale (groups and enterprises)	
Ethics/ Responsibility/ Awareness	
Reliance on parks and protected areas	
Management	
Enjoyment/ Experience	
Culture	
Adventure	
Nature-based	
Volunteerism	

Subsequently each definition is coded and where reference is made to one of the sixteen criteria, the ‘hit’ or observation is recorded. Totals are calculated for all criteria and the top ranked criteria are then identified. This frequency tabulation provides the evidence for the discussion of key ecotourism tenets in subsequent sections.

The study sample includes thirty academic definitions of ecotourism, all of which were published after 1990. Those definitions most commonly referenced in the contemporary literature were identified and included in the sample. The definitions were selected from a range of prominent tourism research and policy publications (industry, academia, government, etc.) available in both English and French. Based on the assumption that these most recent and common definitions reflect earlier academic work and that they continue to influence ongoing research and policy developments (evidenced by common references in the literature), a successful maturity test is likely to be achieved.

In addition to the sample of academic definitions, a second sample is separately analyzed. These 12 definitions are associated with ‘supply-side’ ecotourism participants from governmental and private sectors in Canada (Table 3).

**Table 3:** Select Canadian Organizations Participating in Ecotourism

<p><b>Governmental Agencies</b></p>	<p>Canadian Environmental Advisory Council                  Alberta Tourism                  Manitoba Ministry of Culture Heritage and Tourism                  Environment Canada                  British Columbia Ministry of Small Business, Tourism, and Culture                  Tourisme Quebec                  Canadian Tourism Commission</p>
<p><b>Non-Governmental Organizations</b></p>	<p>The Ecotourism Society of Saskatchewan                  Tourism Industry Association Canada                  L’Association D’Aventure Ecotourisme Quebec                  The Sustainable Tourism Association of Canada</p>

The Canadian sample has been selected for four important reasons. First, the researchers are Canadian and have an interest in the Canadian ecotourism experience. Second, Canada is currently lacking national ecotourism standards (Donohoe and Needham, 2005b; Scace et al., 1992). Companion research has established that these factors are contributing to operational confusion and perversion (Donohoe and Needham, 2005b). Third, limited comprehensive study of the Canadian definitional discourse has been completed to date. The few exceptions are a report prepared by the now defunct Sustainable Tourism Association of Canada (2002), the inclusion of Canadian definitions in the Fennell analysis (2001), and a report prepared by Edwards *et al.* (1998) that includes some Canadian definitions in a broader study of the Americas. And fourth, the Canadian focus provides a platform for the exploration of definitional similarities and differences at the theoretical and applied levels.

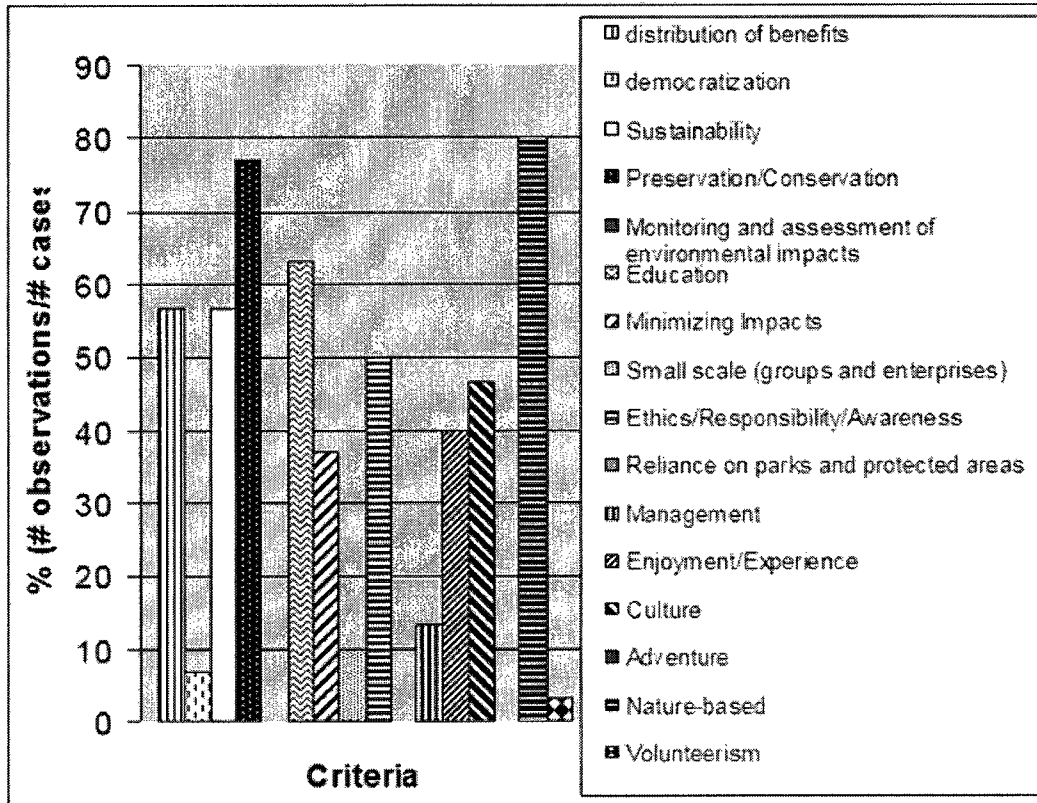
In order to test for content analysis reliability, a second researcher coded a random sample (60 percent) of definitions from both the academic and Canadian samples. The intercoder reliability was calculated as a percentage agreement (Lombard *et al.*, 2004). These calculations produced a reliability rate of 93.7 percent. While there is some disagreement in the literature about intercoder reliability standards, a rate of 80 percent or higher is considered acceptable (Krippendorff, 1980; Ryan and Bernard, 2000).

## **2.4 Results**

### ***The Academic Sample***

Two important observations can be made from the application of the content analysis template (Table 4). First, the criteria frequencies suggest that there is great

variation in contemporary definitional focus (Figure 2). This observation confirms that thematic variability is and remains a distinguishing feature of ecotourism definitional discourse (Björk, 2000; Bottrill and Pearce, 1995; Fennell, 2001).



**Figure 2:** Frequency of Criterion Observations in Sample I (Academic)

Second, a pattern of thematic repetition can also be identified (Table 4, Figure 2). Consequently, it is possible to identify a set of distinct and robust ecotourism criteria. These criteria reflect the six themes that appear most frequently. These criteria include,

**Table 4:** Discourse Commonalities: A Comparison of Ecotourism Definitions (Academic – Sample 1)

CRITERIA FOR ANALYSIS (themes)	SELECT REFERENCES AND THEIR DEFINITIONS																														Total Observations	Ranked Order*		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				
Distribution of Benefits (to community and others)											✓																					✓	17 (56.7%)	4
Democratization																			✓														2 (6.7%)	12
Sustainability		✓	✓							✓																						✓	17 (56.7%)	4
Preservation/Conservation		✓	✓	✓	✓	✓																										✓	23 (77%)	2
Monitoring and assessment of environmental impacts																																0	14	
Education	✓	✓	✓																													✓	19 (63.3%)	3
Minimizing Impacts																																✓	11 (37%)	8
Small scale (groups and enterprises)																																✓	3 (10%)	11
Ethics/Responsibility/Awareness		✓	✓																													✓	15 (50%)	5
Reliance on parks and protected areas																																✓	1 (3.3%)	13

CRITERIA FOR ANALYSIS (themes)	SELECT REFERENCES AND THEIR DEFINITIONS																														Total Observations	Ranked Order*
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
Management				✓									✓								✓										4 (13.3%)	10
Enjoyment/ Experience	✓	✓			✓						✓				✓									✓				✓			12 (40%)	7
Culture	✓	✓	✓	✓	✓	✓	✓							✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	14 (46.7%)	6	
Adventure																															0	14
Nature-based	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	24 (80%)	1	
Volunteerism																	✓													1 (3.3%)	13	

✓ Criteria observed in definition

\*\*Rank based on the number of observed appearances of the identified criteria – ranked most observations to least

Sources: (1) Ceballos-Lascurain, 1987: 14; (2) Richardson, J., 1991: 244; (3) Young, 1992; (4) Lindberg and Hawkins, 1993: 8; (5) Valentine 1993; (6) Western, D., 1993; (7) Wight, 1993b; (8) Hall and Kinnaird, 1994; (9) Hvenegaard, 1994; (10) Allcock *et al.*, 1995: 15; (11) IUCN (Now World Conservation Union), 1996; (12) Steele, 1995; (13) Goodwin, H., 1996; (14) MacGregor, James, 1996; (15) Wearing and Neil, 1999: 140; (16) Wallace and Pierce, 1996; (17) Lawrence *et al.*, 1997: 308; (18) Ross and Wall, 1999: 124; (19) Bjork, 2000: 196-197; (20) Weaver, 2001b: 105; (21) Lequin, Marie, 2001; (22) World Ecotourism Summit, 2002; (23) Honey, 2002: p. 381; (24) Newsome *et al.*, 2002: 15; (25) Weaver, 2002: 15; (26) Epler Wood, 2002: 9; (27) Fennell, David, 2003; (28) Fennell and Dowling, 2003: 41; (29) International Ecotourism Society, 2004; (30) Ecotourism Australia, 2005.

in ranked order from most frequently observed: (1) 'nature-based', (2) 'preservation/conservation', (3) 'education', (4) 'sustainability', (5) 'distribution of benefits', and (6) 'ethics/responsibility/awareness'.

More specifically, 80 percent of definitions reference 'nature-based' settings for ecotourism (Figure 2). Reference to 'conservation/preservation' was made by 77 percent of the definitional sample. In combination these two criteria are the highest ranked criteria and are the most common themes present in ecotourism definitions. These criteria are followed by 'environmental education' at 63.3 percent. 'Sustainability' and 'distribution of benefits' follow, both with 56.7 percent. 'Ethics/responsibility' completes the list with 50 percent.

The six top ranking criteria were referenced by more than 50 percent of the academic sample. The remaining ten criteria are then representative of fewer than 50 percent of the sample. With the exception of 'culture' (46.7 percent), 'enjoyment/experience' (40 percent), and 'minimizing impacts' (37 percent), the remaining seven criteria are referenced by fewer than 10 percent of the sample. In the case of 'monitoring' and 'adventure', no reference to these criteria is observed in the academic sample. As noted earlier, these criteria are included in the analysis as they appear in antecedent evaluations of ecotourism definitions. The lack of attention afforded these criteria in the contemporary sample raises the question of their needed inclusion in a mature definition. Consequently, only the top six criteria are included in the discussion of key ecotourism tenets.

### *The Canadian Sample*

Two important observations are made from the application of the content analysis template to the Canadian sample (Table 5). First, the criteria frequencies further emphasize the earlier finding that thematic variation is common to contemporary ecotourism definitions.

Second, a pattern of thematic repetition can also be identified. Consequently, it is possible to surmise a set of key criteria common to the Canadian ecotourism definition sample (Table 5). These criteria include - in ranked order from most frequently observed: (1) 'nature-based' (91.7 percent), (2) 'preservation/conservation' (75 percent), (3) 'ethics/responsibility/awareness' (75 percent), (4) 'education' (75 percent), (5) 'distribution of benefits' (58.3 percent), (6) 'minimizing impacts' (50 percent), and (7) 'enjoyment/experience' (50 percent). With the exception of 'culture' (42 percent), 'management' (25 percent), and 'sustainability' (16.7 percent), reference to the remaining criteria is limited to less than 10 percent of the sample. Therefore the top ranking criteria may be considered reflective of the evolutionary themes common to Canadian supply-side definitions of ecotourism.

**Table 5:** Discourse Commonalities: A Comparison of Canadian Ecotourism Definitions (Sample II)

CRITERIA FOR ANALYSIS (themes)	SELECT REFERENCES AND THEIR DEFINITIONS											Total Observations	Ranked Order*		
	31	32	33	34	35	36	37	38	39	40	41			42	
Distribution of Benefits (to community and others)	√		√			√			√	√	√	√	√	7 (58.3%)	3
Democratization		√												1 (8.3%)	8
Sustainability								√	√					2 (16.7%)	7
Preservation/ Conservation		√	√	√	√			√	√	√	√	√	√	9 (75%)	2
Monitoring and assessment of environmental impacts		√												1 (8.3%)	7
Education	√	√	√	√		√		√	√			√	√	9 (75%)	2
Minimizing Impacts	√	√		√		√						√	√	6 (50%)	4
Small scale (groups and enterprises)												√	√	1 (8.3%)	8
Ethics/ Responsibility/ Awareness	√	√	√	√	√				√			√	√	9 (75%)	2
Reliance on parks and protected areas														0	9
Management	√	√										√	√	3 (25%)	6
Enjoyment/Experience	√		√	√	√			√	√					6 (50%)	4
Culture		√				√			√			√	√	5 (42%)	5
Adventure														0	9
Nature-based	√	√	√	√	√	√	√	√	√	√	√	√	√	11 (91.7%)	1
Volunteering														0	9

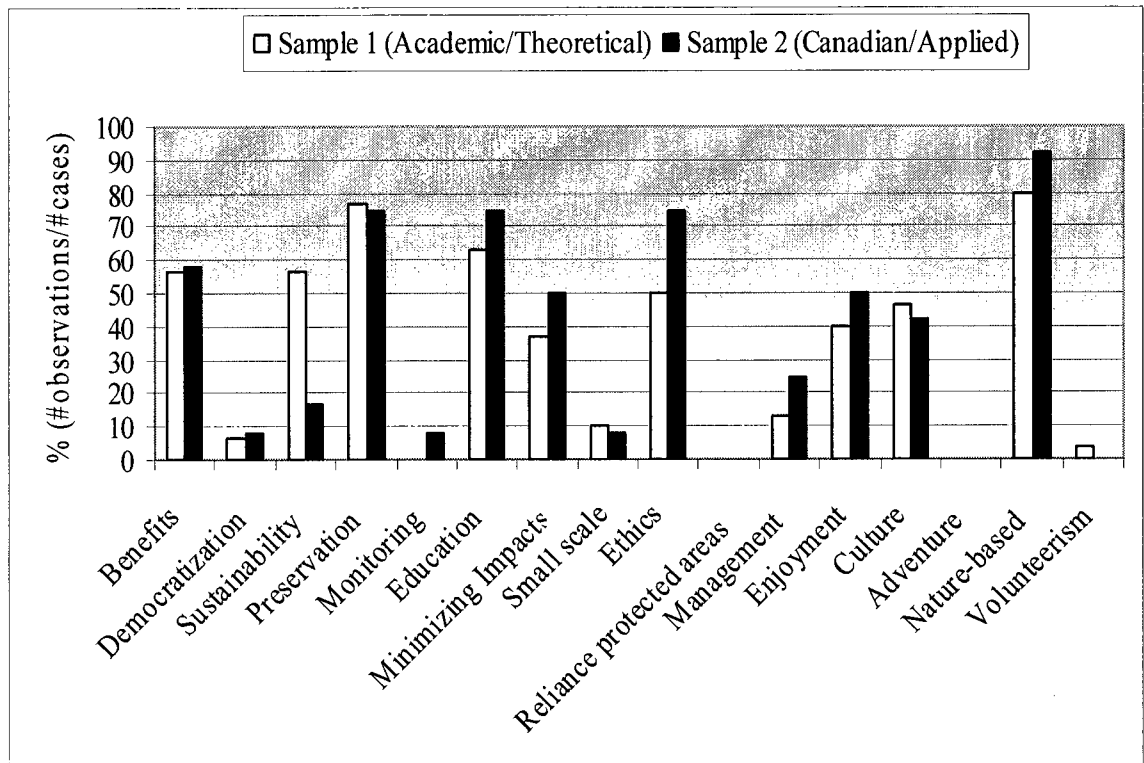
√ Criteria observed in definition

\*\*Rank based on the number of observed appearances of the identified criteria – ranked most observations to least

Sources: (31) Canadian Environmental Advisory Council, 1991: 5; (32) Alberta Tourism, 1992; (33) Seace, et al., 1992; (34) Environment Canada, 1993; (35) The Ecotourism Society of Saskatchewan, 1998; (36) Manitoba Ministry of Culture Heritage and Tourism, 2001; (37) British Columbia Ministry of Small Business Tourism and Culture, 2001; (38) Tourism Industry Association Canada, September 2003; (39) L' Association D' Adventure Ecotourisme Québec, 2002; (40) Kingmill, 2002: 3; (41) The Sustainable Tourism Association of Canada, 2002: p.5; (42) Tourisme Québec, 2002: 8-9

### Comparative Analysis

Two critical observations can be made when comparing the results of the academic to the Canadian sample (Figure 3).



**Figure 3:** Frequency of Criterion Observations for Sample I and Sample II

First, similarities can be noted between both lists of key criteria (Table 6). The three top-ranked criteria from both lists are the same. They also have the same rank order: (1) 'nature-based', (2) 'preservation conservation', and (3) 'education'. As such, these criteria may be considered priority themes at both the applied and theoretical levels. In addition, 'distribution of benefits' and 'ethics/responsibility/awareness' appear in both lists and appear with similar frequency. While these themes are ranked differently in each sample list, for both samples these criteria are observed in over 50 percent of the sample definitions and as such, may also be considered priority themes. The differences

in ranking may reflect differing contextual priorities (theoretical vs. applied). This notion is explored in subsequent discussion.

**Table 6:** Comparative Analysis of Key Themes

<p style="text-align: center;"><b>Key Themes (Academic – Sample I)*</b></p> <p style="text-align: center;">Nature-based Preservation/Conservation Environmental Education <u>Sustainability</u> Distribution of Benefits Ethics/Responsibility/Awareness</p>	<p style="text-align: center;"><b>Key Themes (Canadian – Sample II)*</b></p> <p style="text-align: center;">Nature-based Preservation/Conservation Environmental Education Distribution of Benefits Ethics/Responsibility/Awareness <u>Minimizing impacts</u> <u>Enjoyment/Experience</u></p>
--	---

\*Criteria appear in ranked order  
Those criteria appearing in underline/italics are different.

Second, differences can be noted. Difference is most evident when ‘sustainability’ is discussed. While this criterion appears fourth in the ranked academic sample, it does not appear as a top ranked criterion in the Canadian sample. In fact, ‘sustainability’ ranked eighth behind ‘minimizing impacts’ and ‘enjoyment/experience’. This difference may be reflective of the applied priorities of supply-side definitions, whereby ‘minimizing impacts’ (meeting legislative requirements, etc.) and ‘product delivery’ (customer satisfaction, product quality, etc.) may have a greater and more immediate impact or function. It may also be representative of the philosophical discussion of ecotourism present in the academic literature where sustainability is increasingly a key element. This trend has been chronicled by Fennell (2001) and Björk (2000), and is further evidenced by a growing corpus of publications where ecotourism and sustainability are central themes (Cater and Lowman, 1994; Epler Wood, 2002; Manning and Dougherty, 1995; Place, 1995; Tisdell, 1998; Weaver, 2001; Wight, 1993).

This trend parallels the rise in popularity and application of the sustainable development concept since its popular introduction in the Brundtland Report (WCED, 1987).

## **2.5 Discussion**

In general, the findings of this study highlight the variability in thematic focus that continues in contemporary ecotourism definitional discourse. While the discussion has grown to include a myriad of dimensions and issues, through analysis it becomes clear that a set of evolving themes may be considered central to the ecotourism concept, regardless of perspective. In fact, these six themes may be considered the essence of ecotourism definition and as such, they are introduced here as key ecotourism tenets. Table 7 provides a description of each tenet. The descriptions and associated elements have been extracted directly from the ecotourism literature and are reflective of the meanings and ethics commonly associated with these tenets.

It is interesting to note that other studies of ecotourism components have reported similar results. For example, Wallace and Pierce (1996) identify the same 6 principles in their description of ecotourism. In a review of the concept completed by Scace *et al.* (1992), representatives of the Canadian Environmental Advisory Council, they also identify the same 6 'elements'. Where 'distribution of benefits' is absent from their list of elements, it is emphasized later in their composite definition of ecotourism (Scace *et al.*, 1992).

**Table 7: Key Tenets and Associated Elements of Ecotourism**

KEY NORMATIVE TENETS Of ECOTOURISM	ASSOCIATED ELEMENTS Of ECOTOURISM
<i>Nature-based</i>	A. Activity occurs primarily in nature B. Healthy ecosystems C. Undeveloped/pristine areas (minimal human interference) D. Provides opportunity for visits to natural areas
<i>Preservation/Conservation</i>	E. Maintenance and enhancement of ecosystems F. Awareness of ecosystem requirements G. Collaborative efforts between providers and community (protected area managers, locals, etc.) H. Incorporation and implementation of preservation/conservation into management plan
<i>Environmental Education</i>	I. Provision of bio-cultural education for all stakeholders (Staff, guests, community, etc.) J. Encourage interaction with nature (to provide an experiential/educational benefit) K. Increases awareness and understanding of an areas natural heritage L. Empowers visitors and other stakeholders to become involved in issues affecting heritage (both natural and cultural).
<i>Sustainability</i>	M. Achievement of Equity and Social Justice N. Maintenance of Ecological Integrity O. Satisfaction of Human Needs P. Social Self-Determination and Cultural Diversity Q. Integration of Conservation and Development
<i>Distribution of Benefits</i>	R. Equitable local access to resources, costs, and benefits S. Benefits compliment rather than replace traditional local practices and activities (fishing, crafts, etc) T. Maximizes short and long term benefits for visitors, providers, locals, etc. U. Improves the quality of life for local people V. Compliments existing tourism infrastructure
<i>Ethics/Responsibility</i>	W. Ethics based environmentally, socially, and culturally responsible approach X. Ecological principles to guide decision making Y. Consideration of the impacts and consequences of travel in natural areas Z. Lead by example – increase awareness of the value of ethics based business and action.

Also, the Quebec Declaration on Ecotourism, produced as part of the World Ecotourism Summit Final Report (World Ecotourism Summit, 2002) during the International Year of Ecotourism, suggests that five distinct criteria be used to define ecotourism. These criteria include: ‘nature-based product’, ‘minimal impact

management’, ‘environmental education’, ‘contribution to conservation’, and ‘contribution to community’. Where ‘minimal impact management’ appears in the World Ecotourism Summit (2002) description, it is replaced with ‘ethics/responsibility’ and ‘sustainability’ in this study. With a few exceptions, these lists identify the same content.

The results of this study are also congruent with those presented by Fennell (2001). Fennell’s (2001) study reports that the variables most often observed in the literature include: (1) ‘reference to where ecotourism occurs’ (natural areas), (2) ‘conservation’, (3) ‘culture’, (4) ‘benefits to locals’, and (5) ‘education’. Where ‘culture’ appears in Fennell’s list, it is replaced again with ‘ethics/responsibility’ and ‘sustainability’ in this study. The differences in reported results are likely due to the breadth and volume of definitions included in the Fennell study and the relative maturity of definitions included in this study. In fact, the findings of this study confirm Fennell’s (2001: p. 403) observations that there is increased sensitivity to ‘sustainability’ and ‘ethics’ in contemporary discourse:

“Conservation, education, ethics, sustainability, impacts and local benefits were variables which were better represented in the more recent definitions, showing a changing emphasis in how the term has been conceptualized over time”.

Concomitantly, a recent analysis by Weaver (2005) argues that there is an emerging consensus on the core ecotourism criteria. In fact, Weaver’s list of criteria parallels those tenets presented in this study. While ethics does not appear explicitly in Weaver’s description, an ethics based approach to operationalizing the concept is implied (2005: 440, 443). In no way does the presentation of key tenets for ecotourism negate the fact that this concept continues to evolve in the literature and in application. However, **we appear to be moving towards definitional consensus.**

While this study does not seek to examine cultural/institutional relativism where ecotourism is concerned, the comparative analysis of Canadian supply-side definitions identifies subtle but important differences at the normative scale. The Canadian sample emphasized ‘enjoyment/experience’ and ‘minimizing impacts’ over ‘sustainability’. If ‘supply-side’ can be considered a type of ‘culture’, this manifestation may be considered a form of cultural relativism, whereby supply-side definitions tend to reflect different priorities (operational) than the general theoretical definitions. As such, further reflection is needed in the supply-side context so that definitional priority differences may be understood. Certainly, this insight is needed before standards and policy development can progress.

## **2.6 Conclusions**

The ambition of this research was to clarify the ongoing confusion about the ‘nature’ of ecotourism by extracting a set of recurring themes from the definitional discourse and introducing a tenets-based conceptual framework for ecotourism. As such, this paper does not seek to contribute to the existing confusion by introducing a new or composite definition of ecotourism. Instead, this analysis serves to highlight a set of key ecotourism tenets that may be considered the essence of the evolving contemporary definition.

The fundamental concern requiring reflection is whether or not supply-side definitions are reflective of the theoretical principles of ecotourism. In the case of Canada, the main principles, ‘nature-based’, ‘preservation/conservation’, ‘education’, ‘distribution of benefits’, and ‘ethics/responsibility/awareness’ are well represented in contemporary definitions. Again, the emphasis on ‘enjoyment/experience’ and

'minimizing impacts' over 'sustainability' is likely due to differing contextual priorities. In this case, differences may be a result of evolving theoretical themes in the literature and a distinct operational approach in applied definitions.

Also requiring reflection and future study is the operationalization of the key tenets of ecotourism. Fennell (2001) and Wallace and Pierce (1996) agree that principles and definitions are the articulated foundations of policy and they must act as such when constructing operational systems sensitive to standards, regulations, and guidelines. Therefore, the key tenets should (ideally) become the fundamental roots of ecotourism applications (Honey and Stewart, 2002). To date, ecotourism case studies have shown otherwise. These tenets are disregarded, perverted, or manipulated in application, thereby threatening the legitimacy of the industry (Donohoe and Needham, 2005b; Honey, 2002; Sirakaya, 1997; Wallace and Pierce, 1996). There have been cases of 'greenwashing', 'environmental opportunism', an/or 'eco-exploitation', whereby providers are marketing and offering 'ecotourism' without any or with limited ethical or practical considerations of the conceptual principles (Buckley, 2000; Honey, 2002; Sirakaya, 1997; Wight, 1993b). It is also the case that many operational constraints are contributing to the common 'minimalist', 'lite', or 'pseudo' approach, whereby some tenets are applied while others are applied superficially or not at all (Donohoe and Needham, 2005; Honey, 2002; Weaver, 2005). The concern is that with diluted adherence to the principles of ecotourism, "it will evolve into a less benign form of nature-based activity that is no longer recognizable as legitimate ecotourism" and no longer distinguishable from mass tourism (Weaver, 2005: 446). As such, the evaluation of ecotourism should remain a priority for researchers interested in documenting and

understanding the operationalization of this tourism concept. In addition, the tourism industry should also be careful not to allow the ecotourism sector to be corrupted by 'pseudo' ecotourism providers who do not apply the fundamental principles. In recognition of this "dangerous course" (Sirakaya, 1997: 920), there has been growing ecotourism stakeholder interest in the development of standards for ecotourism such as certification/accreditation programs and codes of ethics. If an international standards protocol for ecotourism was developed it would become increasingly difficult to invest in manipulation, the environmental and economic benefits associated with ecotourism could be realized, and the current legitimacy crisis could be averted (Wight, 1993b). For ecotourism to be successful and for the benefits of this theoretical concept to manifest, guidelines and standards must be made available to all stakeholders (Honey, 2002; Issaverdis, 2001). The key tenets introduced in this paper provide a framework for definition and the evolution of such controls and standards. The challenge then becomes implementing and monitoring these tenets in practice.

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## CHAPTER THREE

### Universal Tenets or Diametrical Differences? An Analysis of Ecotourism Definitions from China and Abroad

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**Summary**

In recent years, there has been increasing attention afforded ecotourism development in China. However, a national ecotourism framework has yet to emerge. This has forced planners, managers, policy-makers and researchers to look abroad for guidance. And, this raises sensitivity concerns related to Chinese cultural values, perspectives, and expectations regarding nature-based tourism experiences. This study analyzes contemporary Chinese ecotourism definitions with the objective to identify a set of common definitional themes. These themes are then compared to a set of ecotourism tenets established through antecedent analysis of definitions from abroad. A discussion of universal tenets, cultural values, diametrical differences, and the achievement of sustainable ecotourism ensues.

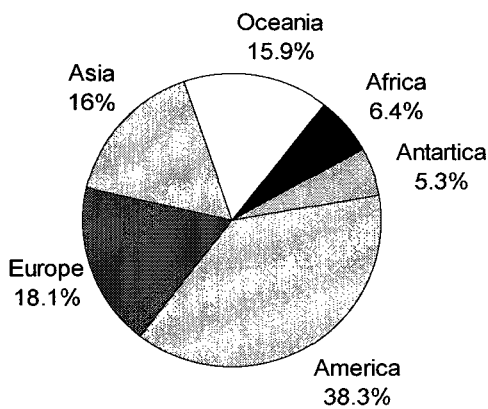
### 3.1 Background

Since its popular inception, ecotourism has become a global phenomenon (Hawkins and Lamoureux, 2001; Fennell, 2003). This tourism activity has been envisaged as an exemplar of sustainable development; a means for facilitating and enabling environmental, socio-cultural, and economic integrity (Blamey, 2001; Vivanco, 2002). Ecotourism popularity is, therefore, due in part to its operational goal to bridge the conservation – development nexus and deliver a range of benefits (Lindberg, et. al., 1997, Weaver, 2005; Wight, 1993). Benefits commonly associated with ecotourism are summarized by Stone and Wall (2004; 2005) and include such outcomes as high quality tourism experiences, generation of funds for natural area conservation, improved quality of life, promotion of cultural preservation, enhanced environmental awareness, infrastructure improvements, and economic development. As a result of these laudable benefits, international support for ecotourism is growing. It manifests in tangible ways such as policy developments, formal endorsements, research agendas, and consumer interest. The legitimization of ecotourism by the United Nations (UN) through the designation of the International Year of Ecotourism (2002), the creation of an International Ecotourism Society (TIES), the development of an International ecotourism certification standard (Green Globe 21), the publication of the *Journal of Ecotourism*, and the explicit establishment of ecotourism on the agendas of international organizations such as the World Tourism Organization (UNWTO) and the World Travel and Tourism Council are testament to the internationalization of ecotourism.

With growing global interest in ecotourism, a plethora of ecotourism definitions and operational ideologies have emerged. Recent examinations of the definitional discourse reveal a set of ecotourism tenets that capture the ethics and principles for which ecotourism is commonly understood (Björk, 2005; Blamey, 2001; Donohoe and Needham, 2006; Fennell, 2001, Weaver, 2005). This research implies that we have achieved near consensus; that is, a universal understanding of ecotourism and its core tenets (Weaver and Lawton, 2007).

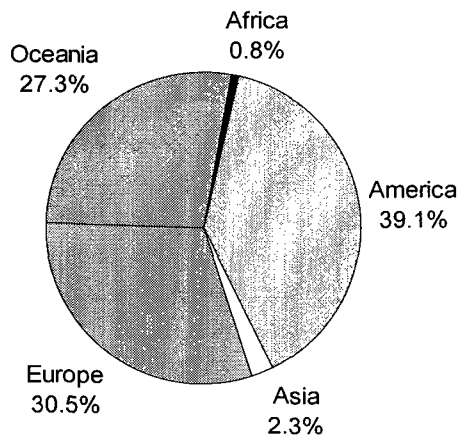
Conversely, researchers contend that the dissemination of tourism knowledge is influenced by social and political forces; that it is generally one-way – from developed countries of dominant language to others (Hall and Page, 2002; Humberstone, 2004; Kobasic, 1996; Nyiri and Briendenbach, 2005; Tribe, 2004). They suggest that prevailing tourism discourses show evidence of ‘seeing’ only through the ‘lenses’ shaped by the characteristics of neo-colonialism and imperialistic knowledge production systems. In the case of ecotourism, the literature contends that ecotourism is rooted in and greatly influenced by western ideology and values (Cater, 2006; Fennell, 2003). Lending credence to this contention is Backman and Morais’s (2001) study of the geographical distribution of ecotourism research foci and researcher location. Their study finds that much of the current ecotourism research is focused on and originates in ‘western’ locations such as the United States, Canada, Australia, and the United Kingdom (Figure 4 and 5). Despite the now global reach of ecotourism, Backman and Morais concede that much of the knowledge regarding ecotourism originates in more developed countries (MDC). And, less developed countries (LDC) such as Brazil, China, Indonesia, and Kenya where ecotourism activities are accelerating, a noteworthy knowledge void is

evident. Weaver and Lawton (2007: 1175) describe a “deep North-South divide” as a contemporary ecotourism research “macro-theme”. To proactively address this state of imbalance, it is recommended that an interdisciplinary approach be assumed, that the integration and continuity of research in neglected thematic and geographic areas be supported, and that the involvement of both academic and non-academic communities in the mobilization and translation of ecotourism knowledge be encouraged.



Source: Backman and Morais (2001)

**Figure 4:** Ecotourism Research Sites: Percentage by Continent



Source: Backman and Morais (2001)

**Figure 5:** Ecotourism Research Origin: Percentage of Authors Publishing

The work of Backman and Morais (2001) as well as the work of Carrier and Macleod (2005), Cater (2006), de la Barre (2005), Edwards et al. (1999), Fennel (2003), Sofield (2007), and others suggests that ecotourism may be understood in a socio-cultural ‘bubble’ that represents predominantly English-speaking ‘western’ influences. This bubble may also be understood in the broader contemporary context of globalization and the internationalization of human development (Hall and Page, 2002; Holt-Jensen, 1999; Nyiri and Briedenbach, 2005). This phenomenon is taken to refer to the social, political and economic processes that transcend borders, thereby connecting nations, peoples and processes in new and complex ways (Beeson, 2007). Although a contested concept, it has been characterized by the introduction and acceptance of global norms and standards representative of dominant social and political structures [removal of variation and distinctive features - assimilation] (Hveem, 2006). Therefore, it follows that tenets such as those listed in Table 1 and those applied by global institutions such as the World Tourism Organization (UNWTO) and the World Travel and Tourism Council represent a hegemonic structure that endorses western-centric definitions of sustainable development, sustainable tourism, and hence, ecotourism. Cater (2006: 36) contends that “if we uncritically accept Western-constructed ecotourism as the be-all-to-end-all, we do so at our, and others’ peril”. Concomitantly, Vivanco (2002) argues that insecurity, resentment, conflict, and ecological degradation are potential outcomes resulting from the widespread application of one ‘ecotourism mould’. Given that there is no universal understanding of development or the environment, Cater (2006), Humberstone (2004), and Vivanco (2002) argue that for ecotourism to truly exemplify sustainable development and other core ecotourism tenets it must be sensitive to cultural values and structural

inequalities. Therefore, there is a need for recognition of multiple ecotourism realities, the identification of realities that may be ignored or overlooked by hegemonic ecotourism frameworks, and the understanding of influences, potential conflicts and outcomes of such phenomena.

In recent years, the growing international interest in and geographic reach of ecotourism has directed a significant amount of interest to China's ecotourism resources and experiences (Li, 2004; Zhang et. al., 1995, Shen, 2004). Since ecotourism or '*shengtai luyou*' (生态旅) was officially recognized in China in the late 1980s, the opportunities and potential benefits of this activity have earned it a place on China's sustainable development agenda (Stone and Wall, 2004; 2005). As a result, ecotourism is increasingly available for international and domestic visitors interested in the natural and cultural heritage of China. Opportunities include such activities as wildlife and landscape viewing, trekking, cycling, and eco-lodge experiences (Doole, 2005). Although ecotourism is an emergent concept in China, research suggests that activities and ideologies that closely match those of so-called 'universal ecotourism' have been operational in China for much of the country's long history. A conservation ethic and a mature understanding of nature and environmental processes are observed in the earliest of Chinese culture (Holt-Jensen, 1999). These values are reinforced through spiritual ideologies common to Daoism, Confucianism and Buddhism and are deeply embedded in the Chinese culture (Qu and Li, 1994). They are however, starkly different from the ideal western view. For example, the Chinese concept of nature or "*da-ziran*" is understood on the basis of five elements – fire, water, metal, earth, wood – and the intimate involvement of humans in elemental processes (Sofield, 2007). Chinese definitions of 'man' are

based on the earth element. Earth is based on heaven. Heaven is based on the “way” (spiritual path). And, the way is based on da-ziran (nature). Philosophically, the Chinese world view exemplifies an anthropocentric perspective where humans are involved in nature at all times. This is distinct from a western perspective, which in its ideal view is biocentric; that is, it views nature as separate from humans (Sofield, 2007). The western concept of nature is understood on the basis of pristine [untouched by human activities] landscapes and ecological features. Therefore, Chinese ontologies regarding nature, ecological processes, and the relationships between nature and humans have evolved in a different cultural landscape than those associated with the ‘west’.

### ***Ecotourism in China: A Contextual Background***

Since the establishment of modern tourism in China in the 1950’s, tourism has grown to become a strategic industry for the development of China’s economy (Zhang *et al.*, 1995). In the course of an economic development policy shift (known as ‘reform and opening’), that saw the relaxation of China’s borders to tourists in 1978, China has sustained exponential growth in inbound tourism (Guangrui, 1995; Lew and Yu, 1995; Song, 2005). In 2004, international arrivals reached 100 million and international tourism receipts totaled US \$25 billion, an increase of 47.8 percent over 1978 (China National Tourist Office, 2005). Domestic tourism has also been experiencing exponential growth, with domestic tourist trips reaching over 1 billion (China National Tourist Office, 2005). Despite the many constraints associated with domestic leisure experiences, some of which include family obligations, time (work/life balance), income, traditional lifestyle/culture, and policy (immature markets), leisure and tourism opportunities - such as domestic travel - in China, have become a mass phenomenon

(Ling, 2005; Nyiri, 2006). This emerging '*leisure culture*' or '*xiuxian wenhua*' was formalized in government doctrine when the National Tourism Administration declared 1996 the 'Year of Leisure and Vacation', and in 1997 and 1998 the Central Government of the Chinese Communist Party made policy development and tourism promotion a priority for the first time (Wang, 2001; Xiao, 2003). Leisure and tourism has since become a known catalyst for economic development, income increases, and quality of life improvements in China (Ma, 2005; Zhang *et al.*, 1995). Rapid expansion is expected to continue in both the domestic and international tourism markets and as a consequence, China has shown the fastest growth amongst the world's leading tourism destinations in recent years (UNWTO, 2008). There is little doubt that China is a significant entity in the global travel and tourism exchange (Kenyon, 2005; Lew and Yu, 1995). And, rapid growth has forced increasing tourist demands and tremendous pressure for the rapid development of tourism resources in China (Zhang *et al.*, 1995).

The development of ecotourism in China has resulted from the convergence of four important factors. First, changing domestic tourism policies opened previously restricted rural areas to tourism, therefore facilitating greater access to natural areas (Cheng and Wang, 1996). Second, specialized tourism - such as ecotourism - has been growing steadily in China in response to growing demands for diversified tourist experiences (Zhang *et al.*, 1995). Although landscapes and the natural environment have long comprised a main attraction for domestic tourism, interest in nature-based tourism has evolved beyond scenic experiences in order to attract and satisfy changing domestic and international tourist demands (Nyiri, 2006; Petersen, 1995). Third, the ecological diversity and cultural richness contained within China's borders has been recognized as

one of the world's most highly valuable ecotourism resources (Lindberg *et al.*, 1997; Smil, 1984; Zhang, 1995). Such recognition has attracted increased attention from international tourists and eco-tour companies. And fourth, the development of Zhangjiajie National Forest Park (1982) and other nature reserves established, for the first time in China, the importance of integrating tourism development and the protection of the natural environment (Li, C. 2004; Li, W., 2004). These goals have long been identified as central to successful ecotourism development. The convergence of these four factors has stimulated the evolution and ongoing growth of ecotourism in China. As a result ecotourism and nature-based tourism are developing more rapidly than other tourism types (Li, W. 2004; Stone and Wall, 2005; Weaver, 1998).

Concrete evidence of the growing domestic interest in ecotourism manifested when the first forum on Chinese ecotourism was held in Xishuang Banna in Yunnan Province (1999). The event attracted over one-hundred Chinese scholars and resulted in the establishment of the Chinese Ecotourism Association and the *Declaration on Chinese Ecotourism*. Further evidence of the importance of ecotourism in China was made clear with the official announcement that 1999 was the Year of Chinese Ecotourism. Given the opportunities associated with ecotourism, the abundance of ecotourism resources, and the growing number of protected areas, ecotourism has become and remains an established priority on tourism and sustainable development agendas in China (Lindberg *et al.*, 1997; Li, W. 2004; Stone and Wall, 2005; Xu, 1994; Xu, 2005). Despite such engagement, a national definition and quality standards for ecotourism operations in China have not yet been established. While various Chinese ecotourism definitions have emerged over the last few decades, there has been limited analysis of the definitions and

their value for ecotourism planning and management. With the exception of a volume entitled: *Ecotourism: Theoretical Analysis & Case Studies* (Zhang, 2004), another prepared by Zhang (2003) that includes some Chinese ecotourism definitions in a broader study of tourism in China, and an analysis of ecotourism interpretations by site-managers in Hainan (Stone and Wall, 2004, 2005), the literature in this regard is lean (Lindberg *et al.*, 1997). Fennell (2001), Honey (2002), Wallace and Pierce (1996) agree that principles and definitions are the articulated foundations of policy and they must act as such when constructing operational systems sensitive to standards, regulations, and guidelines. Therefore, definition should act as the fundamental framework for ecotourism development and operation. Given the absence of a common ecotourism definition in China it becomes imperative that ecotourism planners and policy makers proceed with caution, seeking guidance from the evolving expertise in this domain. The relative embryonic state of ecotourism research and policy in China complicates the process as Chinese policy makers are forced to look abroad for guidance (Fennell *et al.*, 2001). Further complicating matters is that Chinese values are “diametrically different from those associated with the western paradigm of ecotourism” (Sofield and Li, 2003: 145). The planning and management of ecotourism in China, therefore, should be sensitive to these cultural differences (and not shaped solely on the basis of guidance from abroad). In the ideal case, sensitivity should begin at the normative level (definitions) and it should continue at strategic (policy, standards, and regulations) and operational levels (planning and management) as well.

### 3.2 Purpose and Objectives

These diametrical differences collided when the researchers met at the *Canadian Association of Geographers Annual Meeting* in London, Ontario (2005). Following a special session on tourism geography, the researchers discussed mutual interests related to ecotourism, environmental ethics, and tourism management. Curiosity was sparked related to the tourism ‘realities’ and environmental ‘values’ associated with the researchers’ different cultural backgrounds. Of particular interest, were differences related to the ways in which nature is valued and the ways in which the relationship between humans and the natural environment are understood in China and abroad. On the basis of this informal discussion and a follow-up discussion at the 9<sup>th</sup> World Leisure Congress in Hangzhou, China (2006), as well as a flurry of ensuing email communications, a decision was made to embark on a collaborative research journey to discover and interpret ontological differences and similarities and their influence on the ways in which ecotourism is defined in China.

Given the current state of ecotourism, the absence of common definition and policy directives, and the mounting challenges associated with managing ecotourism activities in China (Li, W. 2004), the remainder of this paper seeks to test the validity of Sofield and Li’s (2003) claim. We know that leisure, tourism, and recreation definitions change according to their purpose and context (Hall and Page, 2002). We know that China has a world view that is distinct from the dominant western world view and as a result, China has become one of the primary loci for exploring globalization and the universality [versus reality] of so-called universal values (Nyiri and Briedenbach, 2005). Thus in embarking on this research journey our guiding hypothesis was that *diametrical*

*differences between Chinese and Western ecotourism definitions are to be expected.*

Based on this hypothesis, a research purpose was defined with a goal to test this hypothesis and identify the differences. Two research tasks and associated objectives were defined to guide the analysis. First, the Chinese ecotourism literature must be analyzed with the objective to identify thematic trends in the discourse. Second, a comparative analysis must be completed with the objective to assess the congruency between the Chinese thematic trends and those from abroad (Table 7). In meeting these objectives, the ambition of this paper is to contribute to the evolving understanding of ecotourism definitions, values, and perspectives in China and the ontological gaps between ecotourism discourse in China and abroad. This contribution is meant to facilitate understandings of hegemonic ecotourism structures and their potential influence in developing countries. These concerns are worthy of further consideration because they provide insight into the cultural foundations and institutional context of ecotourism (Carrier and Macleod, 2005). Furthermore, such considerations shed light on the potential for populations to clash over meanings – particularly where differences in ontological understanding may exist. As ecotourism develops rapidly in China, these ontological differences must be identified, and ecotourism policy and planning must be sensitive to these differences so as not to risk compromising the socio-cultural and sustainable ideals and outcomes of ecotourism (Humberstone, 2004). It is the ambition of this study to stimulate tourism researchers to explore the complexity of cultural processes and values, particularly those related to ecotourism in developing countries where cross-cultural discourse has been limited.

### 3.3 Methodology

A thematic content analysis model is applied to select Chinese ecotourism definitions. Content analysis is a method for making replicable inferences based in the systematic analysis of communications (Krippendorff, 1980, Schwandt, 2001, Babbie, 1992). It relies on a count of the manifest content or visible surface content of communications. In this case, the units of observation are select ecotourism definitions from the Chinese academic literature. Content analysis has been judged to be a best-fit for the research purpose and objectives on the basis of the following rationale. First, it facilitates the quantitative analysis - identification and frequency analysis of thematic trends - in the definition sample. Second, the results can be easily replicated as content can be easily discerned, recorded and analyzed by another researcher (Babbie, 1992; Krippendorff, 1980). This ensures that the analysis is transparent and reliable. Third, the method corresponds to the methodological approach applied in antecedent analysis of 'abroad' definitions (Donohoe and Needham, 2006). This methodological approach was used to identify the key ecotourism tenets (Table 7) and it has been selected over other similar research efforts because it is congruent with antecedent and established content analysis approaches (consistency across studies) and its procedural steps are easily replicated and/or adapted. It is applied here for the analysis of Chinese definitions as it facilitates comparability between studies. Accordingly, the analytical steps from Donohoe and Needham's (2006) study are replicated here. It is important to note that like the Donohoe and Needham study, the analysis is limited to definitions accrued from the academic literature. Therefore, this study does not presume to address how managers and tourists define, practice and experience ecotourism in China.

***Step 1: Collection of definition sample***

The study sample includes sixteen contemporary Chinese ecotourism definitions, all of which were published after 1993. Definitions were identified through an appraisal of Chinese research published since 1990. While the definitions included in this study are representative of a broad range of Chinese definitions, by no means may the sample be considered an exhaustive list. Instead, these definitions represent a sample of recent scholarly attempts to define ecotourism in China.

***Step 2: Development of a content analysis template***

To initiate the analysis, a set of tentative themes were determined through a preliminary analysis of the definition sample and a critical review of relevant literature in China (Xu, 2005, Cheng and Wang, 1996, Chen and Pen, 2001, Guo, 1997, Yang and Lu, 2004). From this scan, a set of sixteen common and reoccurring themes were identified. These themes comprise the content analysis template (Table 8).

**Table 8:** Content Analysis Template

CRITERIA FOR ANALYSIS	SELECT REFERENCES AND THEIR DEFINITIONS (N=16)
	Observation (✓)
Adventure / Exploration	
Culture	
Democratization	
Distribution of Benefits (to community and others)	
Education / Awareness	
Enjoyment / Experience	
Ethics/ Responsibility	
Health benefits/Quality of life	
Management	
Minimizing Impacts	
Nature-based	
Preservation / Conservation	
Professionalism / Service Quality	
Reliance on parks and protected areas	
Small scale (groups and enterprises)	
Sustainability	

Donohoe and Needham apply the same approach for developing the content analysis template used in their study. Instead of simply taking their template and applying it to the analysis of Chinese definitions (which would produce a set of predetermined themes based on western research), the preliminary analysis allows themes to emerge from the Chinese sample. As the study seeks to observe the presence of differences and similarities between the samples, this was judged as the best-fit approach.

### ***Step 3: Coding of definitions***

The definitions were translated from Chinese to English in order to facilitate coding of the sample by both researchers. As expected, translation challenges presented, particularly where a ‘literal’ translation was not possible. There are many concepts and words in Chinese and English that simply do not translate well. To mitigate these challenges, the content analysis template was developed on the basis of a thematic analysis completed in Chinese. It was thought that this approach would allow the Chinese themes to emerge free of English language impositions and translation interference (English constructs, words, etc.) The template was then translated into English and used as the basis for evaluation. While efforts were made to mitigate translation and interpretation difficulties (and the potential outcomes it can influence), this methodological challenge is common to cross-cultural research and it is acknowledged by the researchers here.

An initial set of definitions (five) was coded in order to test the content analysis template. Initial testing is commonly used to refine the coding rules and analysis template where necessary. In this case, no interpretation or functional difficulties were encountered (though expected due to translation), thus the remainder of the sample was

coded. Where reference to each of the sixteen criteria was observed in the definitional sample, the observation was recorded.

***Step 4: Assessing reliability and accuracy***

In order to test the method and its reliability, the researchers coded the definition sample independently. Intercoder reliability was calculated by hand as a percentage agreement (Lombard *et. al.*, 2004). These calculations produced a reliability rate of 93.7 percent. Where agreement was not achieved (6.3 percent), translation and interpretation were likely the source of these observational differences. While there is some disagreement in the literature about intercoder reliability standards, a rate of eighty percent or higher is considered acceptable for the percentage method (Ryan and Bernard, 2000, Krippendorf, 1980).

***Step 5: Tabulating results***

On the basis of the analysis, a frequency tabulation was completed. That is, total observations for each criterion were calculated and the top ranked criteria were then identified. The comparative analysis is based on a simple comparison of the top-ranked themes from the Chinese (Table 9) and abroad analysis (Table 7). Although a simplistic approach, it facilitates a measure of ‘diametrical differences’ and an understanding of thematic trends and similarities between the samples.

**Table 9:** Content Analysis of Chinese Ecotourism Definitions

CRITERIA FOR ANALYSIS (themes)	SELECT REFERENCES AND THEIR DEFINITIONS																Total Observations	Ranked Order**	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16			
Preservation/Conservation	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	14 (88 %)	1
Nature-based	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	11 (69 %)	2
Distribution of Benefits	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	9 (56 %)	3
Education / Awareness	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	7 (44 %)	4
Enjoyment/Experience	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	7 (44 %)	4
Ethics/Responsibility/Awareness	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	7 (44 %)	4
Sustainability	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	7 (44 %)	4
Professionalism/Quality	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	6 (38 %)	5
Culture	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	5 (31 %)	6
Adventure/exploration	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	3 (19 %)	7
Health benefits/Quality of life	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	2 (13 %)	8
Reliance on parks and protected areas	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	2 (13 %)	8
Democratization	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	1 (6 %)	9
Management	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	1 (6 %)	9
Minimizing Impacts	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	0	10
Small scale (groups and enterprises)	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	0	10

•Criteria observed in definition

\*\*Rank based on the number of observed appearances of the identified criteria – ranked most observations to least

**TOP RANKED** themes appear in bold.

Sources: (1) Wang Xianpu, 1993; (2) Xu, 1994; (3) Cheng et al., 1996; (4) Lu, 1997; (5) Guo, 1997; (6) Zhang and Dong, 1997; (7) Wang, 1998; (8) Liu, 1998; (9) Wang, 1999; (10) Li and Zhang, 1999; (11) Chen and Pen, 2001; (12) Guo, 2002; (13) Luo, 2003; (14) Liu et al., 2004; (15) Yang and Lu, 2004; (16) Zhao and Zhou, 2004.

### 3.4 Results

#### *Chinese Definitional Themes*

Three important observations can be made (Table 9). First, the variability in criterion observations suggests that there is great variation in contemporary Chinese ecotourism definitions. This variability is consistent with antecedent observations of thematic variability in ecotourism definitions (Donohoe and Needham, 2006; Fennell, 2001).

Second, a thematic pattern can also be identified. Consequently, it is possible to surmise a set of priority themes common to the Chinese ecotourism discourse. These themes are reflective of the seven thematic criteria that appear most often in the study sample. These criteria include in ranked order from most frequently observed: (1) nature-based, (2) preservation / conservation, (3) distribution of benefits, (4) education / awareness, (5) sustainability, (6), ethics / responsibility, and (7) enjoyment / experience.

Direct reference to the top ranked themes is observed in more than forty percent of the definitions (Table 9). In particular, eighty-eight percent of definitions refer to ‘preservation/conservation’ and sixty-nine percent to the ‘nature-based’ criterion for ecotourism. These two criteria are the highest ranking criteria and are the most common themes present in Chinese ecotourism definitions. These criteria are followed by ‘distribution of benefits’ for which reference was made by fifty-six percent of the study sample. ‘Sustainability’, ‘education’, ‘ethics / responsibility, and ‘enjoyment / experience’ follow, completing the list with forty-four percent respectively. The remaining nine criteria were referenced by fewer than forty percent of the definitional sample and as such were not considered priority themes. With the exception of ‘culture’

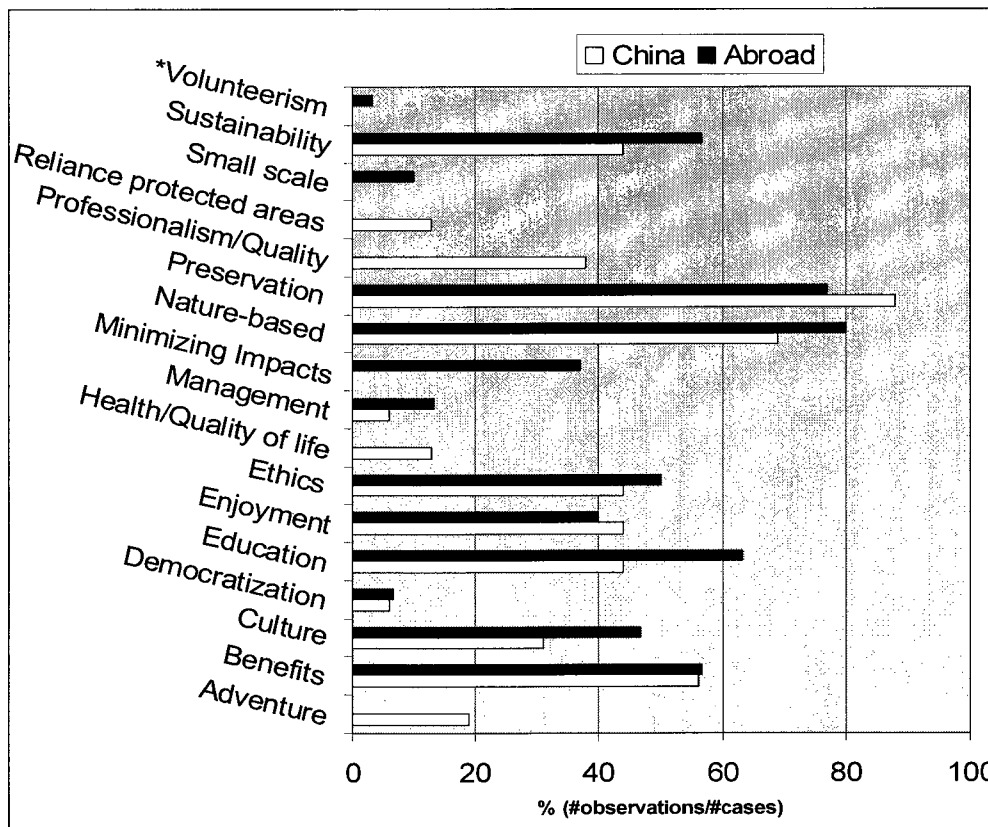
(forty percent), the remaining seven criteria were referenced by fewer than twenty percent of the sample. In the case of ‘minimizing impacts’ and ‘small scale’, these criteria were observed in less than five percent of the sample definitions.

The third important observation is the proportion of definitions that make reference to the final two criteria: ‘health benefits/quality of life’ and ‘professionalism/quality’. A perfunctory review of ecotourism definitions beyond China’s cultural and physical borders finds limited reference to these themes. These themes were included in the analysis framework because reference to their importance appeared frequently in the Chinese literature. The emphasis on ‘professionalism/quality’ (thirty-eight percent) and ‘health benefits/quality of life’ (thirteen percent) in the Chinese literature suggests a differing set of priority values. While they are important components of the ecotourism experience, they are not identified as priority definitional themes abroad.

### *Comparative Analysis*

Four important observations can be made when comparing the results of the Chinese definitional analysis with the key tenets of ecotourism (Figure 6). First, congruency is apparent between the content analysis criteria. As reminder, these criteria were identified through a preliminary review of the definitional samples (independent samples). This may be partly due to the methodological similarity with which the lists were deduced. Primarily, it is thought to be a reflection of the thematic trends present in the ecotourism definitional literature in both China and abroad. There are however, some important differences between the analysis criteria lists and this implies a set of different priorities and values. Where ‘monitoring’ and ‘volunteerism’ appear in the Donohoe and

Needham (2006) analysis they are replaced with ‘health / quality of life’ and ‘professionalism / quality’ in this study. There were no references to ‘monitoring’ and ‘volunteerism’ in the Chinese sample. Consequently they were not included in the analysis of Chinese definitions. ‘Health/quality of life’ and ‘professionalism/quality’ were included as they were observed in the preliminary assessment of Chinese definitions. These criteria were not observed with great frequency in the Donohoe and Needham (2006) sample as they were not identified in their pilot study, their content analysis template, or their discussion of key tenets. Therefore, thematic frequency for these criteria in the Chinese sample is an important observational difference.



\*Criterion appears in Donohoe and Needham (2006) analysis but not in Chinese analysis.

**Figure 6:** Comparative Analysis of Ecotourism Definitions from China and Abroad

Second, congruity can also be observed when the criterion frequencies for the samples are compared (with the exception of the aforementioned criteria). Variability in thematic frequency common to both samples is represented in Figure 6. It is interesting to note that ‘preservation/conservation’, ‘adventure’, and ‘reliance on protected spaces’ were better represented in the Chinese sample and ‘education’, ‘sustainability’ and ‘culture’ were referenced with less frequency. ‘Nature-based’ was also emphasized with greater frequency in the ‘abroad’ sample.

The third and arguably most important measure of congruency is evidenced when the top ranking criteria for each study sample are compared (Table 7 and 9). With the exception of ‘enjoyment/experience’ in the Chinese sample list, the top ranking criteria from both lists are identical. While these criteria appear in differing orders and were observed in the samples in slightly different frequencies, it remains that there is congruency between the key tenets of ecotourism and those criteria most frequently observed in Chinese definitions. As such, these criteria may be considered priority ecotourism themes in China and abroad. Differences in the rank order of the thematic criteria may be due to differences in sample size but it may also be reflective of different contextual priorities.

Fourth, where differences are clear is the manifestation of the ‘enjoyment/experience’ criteria in the list of top ranking themes in the Chinese sample. This theme was not identified as a priority theme/key ecotourism tenet by Donohoe and Needham (2006). In fact, this theme ranked eighth behind ‘culture’ in the ‘abroad’ sample.

### 3.5 Discussion

The comparative analysis identified four noteworthy findings. First, congruency exists between ecotourism definitions from China and abroad. In the case of China, definitions capture thematic priorities that are common to the broader ecotourism discourse. Therefore, it is possible to infer that ecotourism in China is defined in much the same way as it is in other nations and contexts. Consequently, the findings of this study support Donohoe and Needham's (2006), Fennell's (2001), and Weaver's (2005) claim that we are moving towards definitional consensus or a universal understanding of ecotourism.

Second, although congruity between samples is clear, subtle differences in the ways in which ecotourism is conceptualized in China and abroad can also be observed. For example, the abroad sample had a greater emphasis on nature-based activities. In China, it is argued that ecotourism is conceptualized as both a cultural and environmental experience (Niu, 1999, Zhang, 2003). China has a rich cultural history and cultural representation continues to be an important component of the Chinese leisure experience (Lew and Yu, 1995, Ma, 2005, Lindberg *et al.*, 1997, Petersen, 1995). In fact, early examples of ecotourism development focused upon cultural heritage sites while the promotion of natural sites has been more incremental (Nyiri, 2006; Weaver, 1998). Although culture is not well represented in the definitional sample (we expected it would be), it is nonetheless an important component of the experiential ecotourism environment in China. And, it may help us to understand why Chinese definitions do not place as much emphasis on the natural environment as definitions from abroad. Another possible explanation is related to the ways in which nature experiences are perceived in China. In

a keynote address at the Cultural Diversity and Leisure Development Forum in Hangzhou, China, Lan (2005) argued that Chinese people perceive nature and nature-based tourism differently than visitors. Although all share an appreciation for the natural environment, she argued that domestic expressions of nature-based tourism reflect the ‘Chinese way’ and a different set of experiential priorities. To illustrate, she highlighted the popularity of scenic attractions in the domestic tourism market. Conversely, direct interactions with nature are much more popular amongst inbound tourists. This phenomenon is also identified by Petersen (1995), Sofield and Li (2003) and Lindberg *et. al.* (1997) and it is handled at length in Nyiri’s (2006) volume on scenic spots. It is further evidenced in the leisure and tourism literature through case study analysis. For example, in a study of visitors to Dinghushan Biosphere Reserve in the province of Guangdong (Lindberg *et al.*, 1997), and a study of ecotourism in China’s national parks (Nianyong and Zhuge, 2001), the authors conclude that Chinese visitors are motivated by the opportunity to view scenery and that this experience is paramount to the nature-based activity. Nyiri (2006) supports this finding, arguing that scenic spots are synonymous with Chinese cultural heritage and not natural heritage as is common in the ‘West’. He explains that the cultural value of the natural sites, historically, has been promoted by the Central government as a means for creating a common sense of Chinese culture. For example, the naturally beautiful ‘Xi Hu’ or ‘West Lake’ in Hangzhou, China is widely promoted on the basis of its cultural heritage. Visitors are attracted by the opportunities to connect with the famous Chinese poets Bai Juyi and Su Dongpo, and the Italian explorer Marco Polo, who were inspired by the lake centuries ago. By extension, Chinese tourists are afforded the opportunity to benefit from the collective sense of common Chinese heritage

when visiting the site. The ‘viewing’ opportunity associated with the natural environment is also identified as priority for Chinese visitors in a study of national park use attitudes (Deng *et al.*, 2005). These researchers conclude that significant differences exist between the ways in which national parks and nature-based tourism activities are perceived between the Chinese and Anglo-Canadian study groups, whereby the latter perceives national parks as places to stay and engage in nature rather than view its splendor and connect with its history and cultural significance. This experiential priority reflects a diametrical difference in cultural values, perceptions, and expectations associated with nature-based tourism and ecotourism activities.

Third, differences can also be observed with the ‘distribution of benefits’ criterion. This theme ranked third in the Chinese sample where it is ranked behind ‘environmental education’ and ‘sustainability’ in the abroad sample. This may reflect differing priorities whereby tourism has been conceptualized as part of a broader economic development program to reconstruct and modernize China (Nyiri, 2006; Zhang *et al.*, 1995). This program was formally adopted by the Chinese Communist Party in 1978. Within this political construct, ecotourism has been conceptualized as a means for satisfying both environmental conservation and economic development priorities (Stone and Wall, 2005, Hall, 1996). Lindberg *et al.* (1997: 129) argue that due to pressing economic needs in developing countries such as China, economic benefit for communities and natural areas tend to be a higher priority ecotourism issue than in developed (OECD) countries. The perception that ecotourism is a developmental tool, is not unique to the Chinese government. In fact, it transcends political boundaries. In a survey of ecotourism participants in China, the authors conclude that ecotourism is perceived as means for

generating revenue and positive benefits for local communities (Lindberg *et al.*, 1997). The same conclusion is reached in an evaluation of ecotourism and community development in Hainan (Stone and Wall, 2005). Although the operational manifestation of these perceptions requires assessment, it may be that differing developmental and social priorities offer explanation for the greater representation of ‘distribution of benefits’ in the Chinese sample.

Fourth, other differential examples include ‘health / quality of life’ and ‘professionalism / quality’. While these criteria did not rank as priority themes, their presence in the Chinese sample and their absence in the abroad definitions implies yet another difference. The frequency with which ‘professionalism/quality’ appears may reflect the Chinese work ethic where professionalism is absolute. The frequency with which ‘health/quality of life’ appears in Chinese definitions may be a reflection of perceived ecotourism opportunities and the benefits of the human-nature relationship. In China, ecotourism is perceived as an activity with many community benefits; a means to improve quality of life through employment, educational, environmental (health), and experiential benefits (Stone and Wall, 2005, Lindberg *et al.*, 1997). It is also understood as a means to spiritual health and well-being. As reminder, nature or “*da-ziran*” is perceived as the ‘way’ or spiritual path from earth to heaven (Sofield, 2007). Therefore, culturally determined values about the human-nature relationship may provide insight into the frequency with which ‘health/quality of life’ is referenced in Chinese descriptions of ecotourism.

This discussion illustrates subtle nuances between Chinese definitions and those from abroad. The analysis also suggests that these differences may be expressions of culturally determined values. Conversely, while subtle thematic nuances do exist, it remains that ecotourism priorities in both China and abroad correspond. In fact, the frequency by which the top ranking criteria appear confirms that the thematic patterns identified in antecedent research are in fact occurring in contemporary Chinese definitions. This implies that a set of universal principles or tenets are emerging from the discourse. The results of this study, therefore, support the validity of Sofield and Li's (2003: 145) claim that Chinese values are "diametrically different from those associated with the western paradigm of ecotourism" but finds these cultural differences of little influence on the manifest content of Chinese ecotourism definitions. While differences exist between the ways in which ecotourism is conceptualized in China, these differences are subtle and do not constitute a diametrical difference. In fact, the analysis confirms that Chinese definitions are synonymous with 'abroad' definitional priorities. It is however, important to note that this study has focused solely on definitional values (as they appear in academic definitions) and not operational values or outcomes. Additional investigation in this regard, would allow us to gauge whether diametrical differences are present when planning and managing tourism. Perhaps it is here that Sofield and Li's diametrical differences manifest?

The findings suggest that Chinese definitions are greatly influenced by the Western ecotourism paradigm. Although it is known that Chinese scholars and policy-makers are looking abroad for guidance, it was thought that Chinese values would also find a place of influence in the ecotourism definition and scholarly discourse.

Concomitantly, this suggests that Chinese values are being submersed by Western values. If this is in fact the case, this raises concerns about the universality versus the reality of ecotourism values and definitions. Can Western-derived tenets serve as a strong explicit framework for ecotourism in China? Should they? Contemporary researchers are asking similar questions and their work suggests that the ecotourism model should be sensitive to the cultural context (Cater, 2006; Jamal et al., 2006; Nyiri, 2006). Braden and Prudnikova (2008) and de la Barre (2005) suggest that a context specific and culturally sensitive ethic needs to be developed to best address the ‘diametrical differences’ that are present between Western approaches and ‘other’ approaches to ecotourism. In the case of China, such an ethic should be sensitive to Chinese values (particularly those related to nature and wilderness), local stakeholders, Chinese tourism policies and expectations, and the local political climate on matters related to conservation and development. It is clear from the literature review completed in preparation for this study that such an ethic has yet to emerge in the academic discourse.

### **3.6 Conclusion**

The results of this study challenge the ecotourism community to consider the import of cultural values and their influence on ecotourism theory and practice. While diametrical differences between definition samples were not observed, there were subtle differences that suggest that culturally determined values should be influencing ecotourism theory and practice in China. In fact, the literature suggests that ecotourism should be sensitive to culture and that definition, guidelines, and policy should be flexible so as to adapt to variations in cultural, social, economic, and environmental contexts. In

the case of China, it is clear that a rigid western model for ecotourism may not be best-suited for domestic ecotourists. And, its application could potentially put at risk the many benefits ecotourism promises for stakeholders. In this regard, universal tenets serve as a strong reference standard for the operationalization of ecotourism and the delivery of sustainable outcomes (Table 1). But, for ecotourism to function successfully in a variety of contexts, and particularly those contexts beyond the boundaries of Western knowledge and praxis, the standard must be sensitive to cultural differences. In China, where ecotourism opportunities are multiplying, the contemporary imperative is a clear ecotourism definition and policy set that is sensitive to the Chinese context. In the absence of these critical foundations, ecotourism is itself unlikely to manifest as a model for sustainable development. Finally, we challenge researchers to engage in the ongoing discussion about universal ecotourism tenets, the influence and import of culturally determined ecotourism values, and the achievement of sustainable ecotourism.

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## **CHAPTER FOUR**

### **Moving Best Practice Forward: Delphi Characteristics, Advantages, Potential Problems, and Solutions**

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## **Summary**

In the last 30 years, there has been increasing application of the Delphi technique to tourism research. However, mystification regarding Delphi characteristics and procedures is evident in the literature. Through critical examination, this paper seeks to demystify the Delphi and advance understanding of the technique, contribute to the evolution of methodological guidelines, and provide further guidance to tourism researchers. A generic Delphi procedure is introduced, a critical review of its advantages and potential problems is presented, and critical design decisions are identified. Expert panel design and management are emphasised through example and critical review.

#### **4.1 Background**

Since its first application over fifty years ago, the Delphi technique has become an established and legitimate methodological approach, one worthy of continued investigation and application (Day and Bobeva, 2005; Kaynak and Macauley, 1984; Linstone and Turoff, 1975; Needham and de Loë, 1990). The Delphi has been widely utilized in a diversity of research domains and with widespread application has come a plethora of methodological interpretations and assessments (Brown, 2007). Furthermore, there appears to be ‘mystification’ regarding generic Delphi characteristics and ‘appropriate’, ‘best’, ‘proper’ and/or ‘useful’ methodological adaptation procedures (Linstone and Turoff, 1975; Mullen, 2003; Powell, 2003). It is unfortunate that a disproportionate amount of research emphasis where “sloppy execution” and/or “ad hoc” Delphi results reporting is common, and reflexive and evaluative methodological discourse is limited (Brown, 2007; Day and Bobeva, 2005; Rowe and Wright, 1999; Weber and Ladkin, 2003: 127). Day and Bobeva (2005: 104) and Linstone and Turoff (2002) contend that confusion is contributing to difficulties in drafting an explicit all-encompassing Delphi definition, in adapting the method to research context, and in ensuring rigour and validity in practice. Linstone and Simmonds (1997) and Rowe and Wright (1999) attribute difficulty to the lack of guidance regarding the problems for which this technique is best-suited. The debate over methodological value and utility has left the Delphi open to criticism (Landeta, 2005; Mullen, 2003; Powell, 2003; Rowe and Wright, 1999; Wheeler *et al.*, 1990).

## 4.2 Purpose and Objectives

In light of such intense scrutiny, it is suggested that Delphi's basic assumptions, procedures and products need illumination (Day and Bobeva, 2005; Rowe and Wright, 1999; Taylor and Judd, 1994). To benefit from Delphi's purported advantages, clear understanding is required to enable methodological application and adaptation (Ayton *et al.*, 1999). Mullen (2003: 37) agrees that understanding and not prescription is required to facilitate and not inhibit the "many valuable applications of this versatile technique". Drawing on antecedent research - recent reviews, select studies, and seminal Delphi texts - this paper offers several contributions towards 'demystifying' the Delphi. First, a generic Delphi description is introduced. Second, the suitability of technique adaptation to tourism research is explored and a discussion of its advantages and disadvantages specific to the tourism context follows. Third, an overview of the critical design decisions required in the adaptation process is provided. Fourth, the most critical design decision when conducting a rigorous Delphi-based study - expert panel design - is afforded particular attention (Day and Bobeva, 2005; Green *et al.*, 1990a, 1990b; Needham and de Loë, 1990; Okoli and Pawlowski, 2004; Powell, 2003; Sunstein, 2006). Guidance is provided on how to construct a Delphi panel, including experts' role, expert selection criteria, panel size, and panel stability. The paper does not seek to contribute a prescriptive or narrow definition of Delphi. Instead, the purpose of this paper is to advance understanding of the Delphi technique and to contribute to the evolution of methodological best practices. By extension, this paper provides guidance for adapting the Delphi technique to a variety of tourism research purposes.

### 4.3 Method

#### 4.3.1 *The Delphi Technique*

The Delphi technique, named for the ancient Greek oracle, is a qualitative method used to systematically combine expert knowledge and opinion to arrive at an informed group consensus on a complex problem (Duboff, 2007; Linstone and Turoff, 1975; Moeller and Shafer, 1994; Ritchie and Goeldner, 1994; Veal, 1992; Weber and Ladkin, 2003). In their seminal work on the Delphi technique, Linstone and Turoff (1975) define consensus as ‘opinion stability’ or the collective agreement amongst members of a group. This is achieved using iterative rounds, that is, sequential questionnaires interspersed with controlled feedback and the interpretation of experts’ opinion. It provides an enabling mechanism for organizing conflicting values and experiences, and it facilitates the incorporation of multiple opinions into consensus (Briedenhann and Butts, 2006; Day and Bobeva, 2005; Powell, 2003).

The technique was originally developed as a tool for soliciting opinion from a group of experts in order to inform a forecasting process (Gordon, 1994; Kaynak and Macauley, 1984; Rosenthal, 1976). The Delphi has since evolved and this evolution may be described on the basis of five eras: Secrecy, Novelty, Popularity, Scrutiny, and Continuity and Refinement (Rieger, 1986). The Secrecy era occurred from the late 1950s to the early 1960s and is represented by military intelligence activities (Duboff, 2007; Garrod and Fyall, 2005; Needham and de Loë, 1990). Under the auspices of “Project Delphi”, an American Air-Force-sponsored RAND Corporation study, Dalkey and Helmer (1951, 1963) developed the technique in order to obtain reliable consensus judgement regarding Post-World War II weapons’ requirements. The Novelty era (1960s)

is characterized by Delphi application for forecasting activities, such as social trends and technological directions (Linstone and Turoff, 1975). The Popularity era (late 1960s–1970s) may be characterized by a flurry of Delphi applications, for forecasting, but also for evaluating complex social problems related to environment, transportation, and health. During this time, Linstone and Turoff (1975) report a three-fold increase over previous era activity. Scrutiny (1970-1980) began with the publication of Sackman's (1975) criticism of the Delphi technique. Heated discourse immediately followed, and according to Bardecki (1984), Martino (1984), and Needham and de Loë (1990) the majority of Sackman's criticisms were effectively refuted by Goldschmidt (1975).

The current era of Continuity and Refinement (1980 to present) is characterized by the acceptance of the Delphi as a legitimate methodology and a valuable contributor to progress on complex social problems or issues (Landeta, 2006; Rieger, 1986). Discourse has shifted from questions regarding precision and accuracy (Linstone and Turoff, 1975) to questions regarding methodological application and refinement (Wheeller *et al.*, 1990). Accordingly, progress has been made in areas such as the accuracy of predictions, group stability, response behaviour, and the role of the expert (Mullen, 2003; Needham and de Loë, 1990). In the current era, the Delphi technique continues to be applied in a breadth of fields that include government planning (Linstone and Turoff, 2002), environmental management (Bardecki, 1984; Gokhale, 2001; Needham and de Loë, 1990), leisure planning and education (Bramante, 1989; Briedenhann and Butts, 2006; Briedenhann and Wickens, 2007; Moeller and Shafer, 1994; Riley, 1990; Vaugeois *et al.*, 2005), health (de Meyrick, 2003; de Villers *et al.*, 2005; Mullen, 2003), marketing (Bonnemaizon *et al.*, 2007; Chevron, 1998; Hayes, 2007; Larréché and Moinpour, 1983; Yeong *et al.* 1989),

information systems research (Okoli and Pawlowski, 2004) and corporate management (Hurd and McLean, 2004; Duboff, 2007; Linstone and Turroff, 2002). In a cursory review, Gordon (1994) reports that thousands of Delphi studies have been performed since Dalkey and Helmer (1951, 1963) first published their research.

#### ***4.3.2 Delphi Characteristics***

Typically, the Delphi is used to address complexity and uncertainty in an area where knowledge is imperfect, where there are no correct answers or hard facts, and consensus of expert opinion is considered an acceptable second choice (Kaynak and Macauley, 1984; Miller, 2001a, 2001b). It is in this context that Kaynak and Macauley (1984: 90) describe the Delphi technique as “a unique method of eliciting and refining group judgment based on the rationale that a group of experts is better than one expert when exact knowledge is not available.” Linstone and Turoff (1975: 3) define the Delphi as a “method for structuring a group communication process, so that the process is effective in allowing a group of individuals, as a whole, to deal with a complex problem.”

Day and Bobeva (2005: 103) concur:

The Delphi is founded upon the use of techniques that aim to develop from a group of informants an agreed view or shared interpretation of an emerging topic area or subject for which there is contradiction or indeed controversy.

Hanafin *et al.* (2007) and Linstone (1978) argue that the method is particularly well-suited to highly complex problems where:

1. Ethical, political, legal, or social dilemmas dominate economic or technical ones;
2. Face-to-face contact is not possible or desirable, due to prohibitive financial, geographical or temporal constraints and/or concern regarding democratic participation;
3. Precise analytical techniques and exact knowledge are absent and the gathering of subjective opinion, moderated through group consensus, is the only approach available; and where
4. Relevant experts are in different fields and/or occupations and not in direct communication.

The Delphi technique has been applied in a wide variety of contexts and on a wide variety of complex issues because it is structured to be an inclusive, flexible, and reflexive process that facilitates (but does not force) consensus (Linstone and Turoff, 1975; Vaugeois *et al.*, 2005). It offers an alternative to traditional face-to-face consensus-seeking research approaches, such as focus groups, group interviews, and think-tank committees (Day and Bobeva, 2005; Gordon, 1994; Needham and de Loë, 1990; Powell, 2003). It is distinct because it reduces the influence of psychological factors, the power of persuasion, the unwillingness to abandon ‘norms’, the bandwagon effect of major opinion, and the risk of ‘other’ voice submersion by a dominant voice (Linstone and Turoff, 1975; Moeller and Shafer, 1994; Veal, 1992). Rowe *et al.* (1991) and Powell (2003) describe the potential for a “follow the leader” or a biased state of affairs as *process and product loss* while the structured, narrow scope, democratic, and anonymous approach of the Delphi leads to a *process and product gain*. By design, Delphi

participants are afforded “the freedom to present and challenge alternative viewpoints, and to think reflectively and independently between rounds or iterations” (Needham and de Loë, 1990: 136). Such freedom can produce high quality and highly relevant ideas for informing consensus (Powell, 2003). Process and product gain are achievable because experts are purposefully selected and are thoroughly briefed on the objectives, procedures, and anticipated end-products in advance. Concomitantly, true debate is encouraged and equal weight afforded each participant’s response (Gordon, 1994; Needham and de Loë, 1990).

Gordon (1994), Rowe and Wright (1999), and Jung-Erceg *et al.* (2007) identify a set of Delphi attributes. They are:

- It is an anonymous process. The anonymity of experts is maintained throughout the process.
- It is a structured process. The information flow is coordinated by researchers. There is no direct information flow among experts.
- It is a repetitive process. The same experts are asked to respond a minimum of two times (though three to four is most common). Feedback on the previous round is synthesized and provided to participants so that they are afforded the opportunity to review, change, or comment on their responses.
- It is an iterative and reflexive process. The experts contribute estimations, judgements or opinions.
- It is a data and information rich process. The approach is designed to enable the statistical and precise presentation of interim and final results.

While these attributes provide a practical summary of the Delphi’s constitution, Table 10 expands on the methodological objectives, underlying assumptions, structure, and procedures that characterize the Delphi technique.

**Table 10:** Delphi Technique Characteristics

Objective	To derive a consensus on a complex issue.	
Purpose	Theory generation, exploration, testing, evaluation	
Procedures	<i>Format</i>	<ul style="list-style-type: none"> <li>- Structured series of questionnaires and feedback reports</li> <li>- Iteration variable; some control.</li> </ul>
	<i>Final Response Interval</i>	<ul style="list-style-type: none"> <li>- Iteration varies; some control.</li> </ul>
	<i>Participant Commitment</i>	<ul style="list-style-type: none"> <li>- Participant decides based on task at hand, interest level, and knowledge of the subject to be studied</li> <li>- Participant centered and anonymous by design.</li> </ul>
	<i>Administrator Commitment</i>	<ul style="list-style-type: none"> <li>- Preparatory phase is rigorous; operational and assessment phase is demanding.</li> </ul>
	<i>Underlying Assumptions</i>	<ul style="list-style-type: none"> <li>- Participants are stakeholders and/or subject matter ‘experts’; selection criteria pre-determined</li> <li>- An information package forms the basis of the consensus process.</li> <li>- Conscious action towards consensus; through repeated measurement, the range of responses will successfully move towards a mid range or consensus answer.</li> <li>- Participant anonymity.</li> <li>- Findings represent synthesis opinion and not a statistically significant result.</li> </ul>
	<i>Questions Posed</i>	<ul style="list-style-type: none"> <li>- Questions have well-defined parameters and are specific in scope (controlled feedback)</li> <li>- Interactive – two or more rounds are common, but one to ten have been observed.</li> <li>- Controlled debate</li> </ul>
	<i>Product</i>	<ul style="list-style-type: none"> <li>- Group response - an option or associated range of options, with associated probabilities.</li> </ul>
	<i>Quantity of Ideas</i>	<ul style="list-style-type: none"> <li>- High; due to independent, reflexive thinking and iteration process.</li> </ul>
	<i>Quality of Ideas; Relevancy of Information</i>	<ul style="list-style-type: none"> <li>- High; due to independent, reflexive thinking and iteration process.</li> </ul>
	<i>Closure level</i>	<ul style="list-style-type: none"> <li>- High for the individual participant; independent reflexive thinking and iteration; participant centered.</li> <li>- Variable for the Delphi administrator(s) as the process is participant centered and dependent on carefully planned and executed procedure.</li> </ul>

Adapted from Day and Bobeva (2006), Gordon (1994), Kaynak *et al.* (1994) and Needham and de Loë (1990).

### **4.3.3 *Delphi and Tourism Research***

The use of the Delphi technique for solving complex tourism problems is now recognized (Green *et al.*, 1990a, 1990b). Delphi is especially relevant to tourism research because of the method's utility for consensus building, its flexibility and application to issues that are difficult to address with conventional survey research methods, its ability to access expertise that would otherwise be unavailable to the researcher, and its strength in informing the policy development/enhancement process (Archer, 1994; Briedenhann and Butts, 2006; Miller, 2001b; Needham and de Loë, 1990; Spenceley, 2005; Wright, 2006). While it is possible to argue its relevancy to other industries or economic sectors on this basis, Kaynak and Marandu (2006) and Weber and Ladkin (2003) concede that the technique has a number of advantages that are congruent with the characteristics of the tourism industry and the needs of tourism researchers (Table 11). First, the Delphi is suitable for forecasting uncertain factors that affect or may affect the tourism industry. Factors such as border security, climate change, extreme weather events, terrorism, and political instability come to mind. Second, the technique provides the freedom of anonymity so that participants may express their opinions. This ensures that contributions reflect rational and reflexive individual opinions and not the influence of other participants or dominant voices. This is often the case when other group methods (workshops, focus groups, public meetings, etc.) are employed. Third, the technique is dependent on expert judgement. This is particularly useful in tourism research as expert participants are often in an influential position. Thus, they may be in a position to operationalize the recommendations identified through Delphi consensus building. It has been suggested that these individuals are more likely to participate in a Delphi because

**Table 11:** Delphi Advantages and its Benefits for Tourism Researchers

Advantages	Benefits for Tourism Researchers
It is well-suited for forecasting uncertain factors	It is well-suited for forecasting uncertain factors that may affect tourism
It is anonymous	It provides opportunity for participants to express their opinions without being influenced by others and without fear of 'losing face' amongst their peers
It is dependant on expert judgement	It is particularly well-suited to tourism experts as they are often in a position to be affected by or in a position to operationalize the research product. Thus, they may be more willing to participate
It is not limited by narrow expert definitions	It facilitates capacity building for expert interaction in an industry that is characterized by fragmentation and limited opportunities for interaction and knowledge exchange
It is effective and efficient	5. It is a low-cost technique that is easily administered by tourism researchers
It is reliable and outcomes can be generalized	6. It is a legitimate technique for tourism research. The generalizability of research outcomes is particularly well-suited for tourism forecasting.
It is non-linear by design	7. It offers an alternative research approach for addressing emergent and/or complex tourism problems that do not benefit from the traditional linear approach
It is insightful	8. It facilitates progress. Through iterative feedback, participants are part of the process, and the sum is much more than its parts. This is particularly well-suited to tourism research where participants (communities, tourism operators, etc.) are increasingly key/mandatory contributors to the research process and outcomes. Community-based tourism research and sustainable tourism research are examples that come to mind.

they may be directly affected by the research product (Day and Bobeva, 2005). Fourth, the Delphi offers the freedom to select tourism experts based on their closeness to or experience with the problem at hand without being limited by geography or narrow

expert definitions (Miller, 2001b, Needham and de Loë, 1990; Weber and Ladkin, 2003). Furthermore, fragmentation of the tourism industry and the research domain typically present individuals with little opportunity to interact and exchange ideas. The Delphi has been found particularly useful in such circumstances as it provides a unique forum for idea generation and exchange (Brown, 2007). Fifth, it offers an effective and efficient way to stimulate new ideas, and to widen or combine experts' knowledge. "In light of the potential advantages of low cost, rapid response, and ease of administration which Delphi offers," Green et al. (1990: 272) advocate the Delphi for tourism research. Sixth, it offers reliability and generalizability of outcomes. This has proven particularly useful for tourism forecasting (Garrod and Fyall, 2005). Seventh, Brown (2007: 136) argues that the technique "contributes an exciting tool for researchers engaged in the paradigm shift away from reductionist, linear analysis that has limited application for the complex, interrelated issues emerging in the 21<sup>st</sup> century". This is particularly true of the tourism industry where non-linear approaches and alternatives to 'business as usual' are increasingly required to address emergent issues and complex tourism problems (Wall and Mathieson, 2006). Sustainable development, climate change, and cultural sensitivity provide examples (Donohoe and Needham, 2007; Miller, 2001b). Finally, "Its iterative feedback develops an insight, which in its totality, is more than the sum of its parts" (Day and Bobeva, 2005: 104). Mitroff and Turoff (1975: 30) state best the utility and appropriateness of the Delphi technique for tourism research:

It is hoped that as a result of witnessing the dialectical confrontation between experts..., the decisionmaker will be in a better position to form his own view (i.e., build his own model or become his own expert) on the problem...

Although the technique's advantages are evident, a number of potential problems and disadvantages have also been identified (Table 12). For example, Kaynak and Macauley (1984) and Taylor and Judd (1994) suggest that the following must be carefully considered by tourism researchers engaged in Delphi research:

- The opinions of experts are generally less satisfactory than hard facts;
- The good and bad judgements may not be known and may be given equal weight; and
- The method usually is more reliable for aggregate tourism trends' forecasting, than for developing reliable and specific breakdowns by territory, customer groups, or product type.

The Delphi is highly sensitive to design characteristics such as panel design, question clarity, and outlier management and reporting (Day and Bobeva, 2005; Phillimore and Goodson, 2004; Miller, 2001). The panel must be carefully constructed so as to achieve the breadth of expertise, size, and composition desired and this requires significant investments on the part of the researcher. A survey may fail to produce the desired data or convergence of opinion on the basis that the questions are not pertinent, well-designed, or well-interpreted by the panellists (Seely et al., 1980). Like other survey methods, pilot testing the questionnaire is recommended to identify and mitigate interpretation difficulties (Miller, 2001). As the goal of the Delphi is to achieve consensus, the question arises about how best to handle outliers or minority opinion. In their early work on the Delphi, Dalkley and Helmer (1951) express the need to address 'dissension.' However, Linstone and Turoff (1975) report that this is often neglected as it requires more work for the Delphi administrator. Neglect, however, may lead to a

**Table 12:** Delphi Disadvantages and Mitigation Measures

<b>Disadvantages</b>	<b>Mitigation Measures for Tourism Researchers</b>
1. Highly sensitive to design characteristics: <ul style="list-style-type: none"> <li>(a) Panel expertise</li> <li>(b) Panel composition</li> <li>(c) Question clarity</li> <li>(d) Outlier management and reporting</li> <li>(e) Questionnaire administration</li> </ul>	1. Comprehensively assessment before making critical design decisions (CDDs): <ul style="list-style-type: none"> <li>(a) Panel expertise is established with internal and/or external measures</li> <li>(b) Panel is purposefully well-balanced at the outset and throughout the process</li> <li>(c) Scoping round to pilot test questions</li> <li>(d) See #6</li> <li>(e) See #5</li> </ul>
2. Assumes experts will allow their judgements to be re-formed by the opinions of others.	2. Individual freedom to express and defend judgement facilitates but does not force an informed consensus.
3. Vulnerable to high attrition rates due to the long temporal commitment required, distractions between rounds, or disillusionment with the process.	3. Monetary or moral persuasion (also considered a limitation - #4); selecting panellists with high interest; panel and iteration management and quality control checks (based on predetermined criteria or plan); termination of the study (if rates exceed acceptable range); panellists informed of the process and goals at outset (introductory package, model, etc.).
4. The use of monetary payment or moral persuasion to retain participants may introduce bias into the study results.	4. Panel and iteration management approach (funnel model)
5. Risk of “specious consensus” where participants conform to the median judgement (lack of engagement or knowledge of topic, temporal constraints, etc.).	5. Critical design decisions (CDDs) required: <ul style="list-style-type: none"> <li>(a) Critical assessment of “expertise”</li> <li>(b) Inclusion of a scoping round (pilot test)</li> <li>(c) Critical questionnaire return deadlines set (to allow time to reflect and respond while limiting time for disengagement)</li> </ul>
6. Difficulty determining what constitutes sufficient consensus (or lack thereof), when iterations stop, and when a final report should be prepared.	6. Subjective measures commonly used: <ul style="list-style-type: none"> <li>(f) 60% agreement amongst panellists</li> <li>(g) Inter-quartile range no more than 10% above or below median</li> <li>(h) Time or budgetary limitations</li> <li>(i) Different ‘rules of thumb’ considered equally valid (determined by study)</li> <li>(j) Measures must be predetermined.</li> <li>(k) Lack of consensus must be considered (lack of change between rounds, minority opinion persists, outliers, etc.)</li> </ul>

specious consensus as dissenters abandon. Caution is advised in this regard and it is recommended that researchers mitigate this risk by addressing and monitoring outliers and minority opinion. Furthermore, Linstone and Turoff remind us that there is no way to ensure a consensus outcome and it should not be forced if the Delphi is to be a legitimate exercise. Instead, researchers are encouraged to explore the possibility that a lack of consensus may result from the exercise. Diversity of opinion is a natural state amongst groups. Proponents of the Delphi cite the sharing of subjective opinion (and ensuing debate) between members of the group for increasing the quality and objectivity of the data collected and the credibility of the study's findings (Bijl, 1992; Lang, 1995; Miller, 2001). Paradoxically, there is a "strong natural tendency in the Delphi for opinion to centralize" and this is the desired Delphi outcome (Linstone and Turoff, 1975: 277). However, this paradox presents the Delphi architect with an alternative and potentially valuable outcome. The inability to achieve consensus should also be viewed as a valuable research outcome (Linstone and Turoff, 1975).

The Delphi is vulnerable to attrition rates and this must be carefully considered and managed by the researcher. High attrition rates are often attributed to the long temporal commitment required, the distractions between rounds, or disillusionment with the process. Timing the Delphi so as to avoid known distractions (e.g. tourist season, holidays), and creating a comprehensive panel management plan are recommended for mitigating these potential disadvantages (Andronovich, 1995; Briedenhann and Butts, 2006; Moëller and Shafer, 1994). Informing participants of the Delphi process and goals at the outset, providing support, and maintaining communication throughout the exercise is important to secure informed consent and to mitigate disillusionment (Needham and de

Loë, 1990). In his work on community participation, Andronovich (1995) notes that panellist selection is also an important attrition prevention strategy. He suggests that the selection of panellists who are interested in the research topic may pre-empt frustration with the process and loss of interest over the course of the exercise.

There is also the potential for difficulty when determining whether consensus has been or can be achieved. Several methods are recommended in the literature. Sixty percent agreement amongst panellists is considered a sufficient measure while others rely on a measure of inter-quartile range (no more than 10 percent above or below the median). This data analysis approach is substantiated throughout the Delphi literature and in particular, the Delphi research in the tourism domain (Green et. al., 1990; Moeller and Shafer, 1983). In order to assess convergence and the achievement of a group consensus (or lack thereof), the literature recommends that measures be predetermined and guided by antecedent research (Garrod and Fyall, 2005; Miller 2001).

Sunstein (2006) reminds us that the Delphi is also subject to what he considers to be the “Four Big Problems” of group techniques: *error amplification* (bias, framing effects, individual errors, information cocooning/ivory tower outcomes), *the cascade effect* (blind leading the blind), *inability to elicit relevant group knowledge*, and *group polarization* (extreme judgement). These problems can be summarized as social influences, processes, and pressures and their potential to affect the research outcome. A description of each of these problems is provided in Sunstein’s (2006) *Infotopia: How Many Minds Produce Knowledge*. In the broader research context where they are also relevant, these methodological constraints are handled at length in the *Sage Handbook of Qualitative Research* (Denzin and Lincoln, 2005). What is important to note is that group

deliberation “increases both confidence and uniformity” and this “may leave the strong and potentially misleading impression that deliberation has produced sense” (Sunstein, 2006: 102). In fact, ‘nonsense’ may be the product if the “Four Big Problems” are not adequately addressed by the Delphi architect. By extension the validity, reliability and legitimacy of the group exercise may be challenged. To mitigate, Sunstein recommends an inclusive Delphi that relies on consultations with a heterogeneous expert panel (to ensure a diversity of opinions is present). He also recommends anonymity as a means to facilitate the sharing of opinion free from judgement, bias, and coercion. Anonymity distinguishes the Delphi from other group techniques and on this basis, Wolfers and Zitzwitz (2004, 2006) have found the Delphi to be a more accurate method (more accurate results) than open deliberation. While recent literature has challenged the necessity of anonymity, particularly in the context of the ‘conference panel’ where participants openly deliberate, the danger of adapting such an approach lies with Sunstein’s “Four Big Problems”.

It is important to note that while rapid administration has been identified as a methodological advantage, the literature suggests that the time required to complete a Delphi study has been inaccurately portrayed. Although the literature indicates both rapid (Tsaour *et al.*, 2006) and drawn out Delphi studies (Briedenhann and Butts, 2006; Miller, 2001a), a substantial time commitment – on the part of the researcher(s) and the participants - may be considered a methodological disadvantage. Research delay is forced by slow communication mediums (e.g. ground mail), late response submissions, inaccurate calculations of the time required for response synthesis and analysis, and the study scope and complexity. Taylor and Judd (1994: 538) suggest that “The time

required to complete the process can be decreased through refinements in the method, in making use of data processing procedures, and in selecting suitable panel members who are really willing to participate”. It may also be reduced with the use of Internet-based technology. For example, Internet-based surveys may provide Delphi administrators with an alternative for maximizing participation and minimizing time delays. Internet-based technology offers a unique and rapid medium for communicating with participants. During the participant recruitment phase, Internet usage can facilitate communications with a global network of potential experts. A large sample may be accessed, recruitment costs (postage, travel, etc.) may be reduced, and time, as a result, can be optimized. During the data collection and analysis phase, Internet-based technology facilitates communications such as the delivery of surveys and survey deadline reminders. This technology also has the capacity to assist in the collection and analysis of data. Responses can be tracked, response rates can be calculated, and consensus can be monitored. But, having said this, Internet-based technology is a relatively new phenomenon. Challenges common to Internet-based communications are present. For example, inactive email addresses and the absence of Internet infrastructure, particularly in developing nations, are common obstacles.

Potential problems and disadvantages can present barriers to the robustness and the validity of Delphi application. Therefore, it is imperative that Delphi administrators assess the technique’s advantages and disadvantages and take appropriate mitigation measures. A synthesis of the technique’s disadvantages is provided and mitigation measures for tourism researchers are suggested in Table 12 (Goldschmidt, 1975; Mullen, 2003; Needham and de Loë, 1990; Rieger, 1986; Sackman, 1975; Taylor and Judd, 1994).

In light of the Delphi's advantages and the measures available to mitigate disadvantages, Taylor and Judd (1994) claim that the benefits outweigh the technique's costs. As with any research method, however, this is always going to be a subjective matter and, as Briedenhann and Butts (2006) argue, no study is free of flaws, bias, or inconsistency. Delphi architects should judge the weight of the advantages and disadvantages in light of their specific research agenda and they should make critical design decisions accordingly.

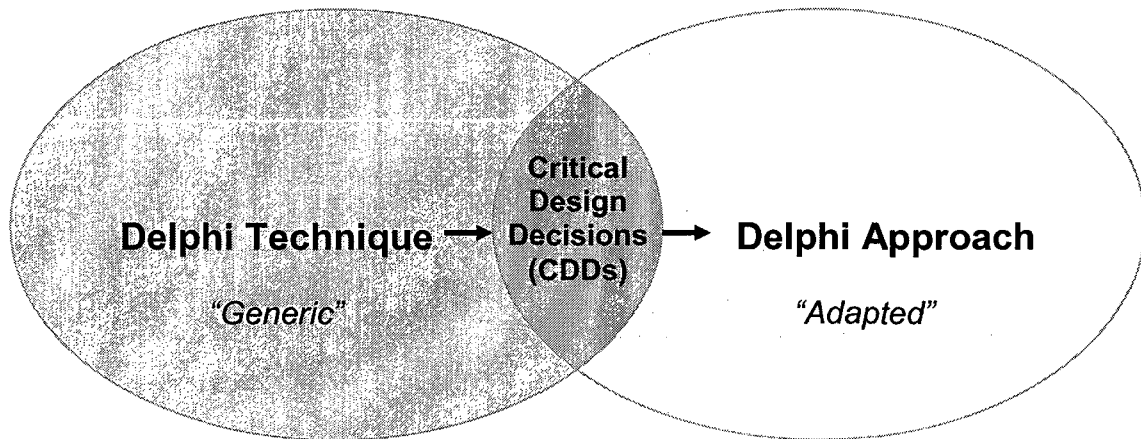
Based on statements like Taylor and Judd's and the many advantages associated with the technique, it comes as no surprise that the Delphi has been applied to a variety of tourism research problems (Bramante, 1989; Briedenhann and Wickens, 2007; Moeller, 1975; Moeller and Shafer, 1994; Riley, 1990). Table 13 identifies select examples. They are organized according to the two most common application types. The first is related to forecasting and issue identification and/or prioritization. Such studies employ the Delphi to assess the tourism market, generate theory and/or achieve a consensus forecast for future events and/or a set of alternative future scenarios. The second is related to concept or framework development. Studies of this kind typically involve the development and refinement of a theory or conceptual model and its components. In essence, the Delphi has been used primarily to generate theory, to forecast, to identify and to prioritize issues, and to develop frameworks, strategies, or plans (Day and Bobeva, 2005, Mullen, 2003; Needham and de Loë, 1990; Weber and Ladkin, 2003). Thus, the typology mirrors the evolution of Delphi activities in other research or subject matter domains.

**Table 13: Delphi Typology for Tourism Research**

<b>Delphi Application</b>	<b>Select Tourism Research Examples</b>
<b>Forecasting or issue identification / prioritization</b>	<ul style="list-style-type: none"> <li>• English and Kernan (1976) – <i>Purpose</i>: Predict air travel and aircraft technology.</li> <li>• Garrod and Fyall (2000) – <i>Purpose</i>: Identify constraints and imperatives in the long-term management of built heritage attractions and assess the significance of these issues for potential sustainability strategies.</li> <li>• Kaynak <i>et al.</i> (1994) – <i>Purpose</i>: Project future expansion of the tourism industry in Botswana.</li> <li>• Kaynak and Macauley (1984) – <i>Purpose</i>: Determine tourism industry future scenarios in Nova Scotia, Canada.</li> <li>• Kaynak and Marandu (2006) – <i>Purpose</i>: Forecast tourism industry scenarios in Botswana.</li> <li>• Liu (1988) – <i>Purpose</i>: Forecast tourism to Hawaii.</li> <li>• Lloyd <i>et al.</i> (2000) – <i>Purpose</i>: Predict change in Hong Kong Hotel Industry.</li> <li>• Moeller and Shafer (1994) – <i>Purpose</i>: Probe for social, managerial and technological events that are likely to shape the future of park and recreation management.</li> <li>• Tideswell <i>et al.</i> (2001) – <i>Purpose</i>: Retrospective assessment of tourism forecast accuracy.</li> <li>• Vaugeois <i>et al.</i> (2005) – <i>Purpose</i>: To identify a set of research priorities and develop an agenda for knowledge exchange improvements in the leisure and tourism field.</li> <li>• Yeong <i>et al.</i> (1989) – <i>Purpose</i>: Forecast future scenarios and marketing implications for the Singapore Tourism Industry.</li> </ul>
<b>Concept or framework development</b>	<ul style="list-style-type: none"> <li>• Briedenhann and Butts (2006) – <i>Purpose</i>: Formulate an evaluation framework for application in the development and management of rural tourism projects.</li> <li>• Choi and Sirakaya (2006) – <i>Purpose</i>: Develop sustainability indicators to measure community tourism development.</li> <li>• Garrod (2003) – <i>Purpose</i>: To develop a definitional framework for marine ecotourism.</li> <li>• Green <i>et al.</i> (1990a, 1990b) – <i>Purpose</i>: Develop a framework for the assessment of environment impacts stemming from tourism projects.</li> <li>• Kearsley <i>et al.</i> (1999) – <i>Purpose</i>: Assess tourism industry understanding and attitudes regarding the sustainable tourism concept</li> <li>• Kuo and Chiu (2006) – <i>Purpose</i>: Develop an assessment framework for identifying potential impacts of agritourism policy on health and the environment.</li> <li>• Miller (2001b) – <i>Purpose</i>: Develop indicators that consumers use in the selection of holidays and that promote sustainable tourism.</li> <li>• Spenceley (2005) – <i>Purpose</i>: Develop a toolkit (component factor based) for the evaluation of sustainable tourism.</li> <li>• Tsaour <i>et al.</i> (2006) – <i>Purpose</i>: Identify ecotourism sustainability indicators.</li> </ul>

Antecedent research establishes tourism as an especially complex phenomenon that is well-suited to the potential benefits of the Delphi technique. However, the research also establishes a clear disconnect between understanding of the generic Delphi technique and the process for adapting the technique to the tourism context. When preparing for a Delphi study, it is recommended that researchers adapt the Delphi technique to best-suit the research problem at hand and the resources available. Garrod and Fyall (2005: 89) provide a reminder that the Delphi “can be extremely sensitive to design characteristics, including the level of panellists’ expertise, the panel composition, the degree of clarity with which the questions are posed, how outliers are reported on, and how the survey is administered”. Critical design decisions (CDDs) are required, therefore, in the preparatory (design) phase to mitigate methodological disadvantages or problems, and by extension, the potential for misinterpretation, bias, and other potentially damaging outcomes.

A process model for developing a Delphi study specific to the tourism context is adapted from Day and Bobeva’s (2005) “*Generic Toolkit for the Successful Management of Delphi Studies*” (Figure 7). On the basis of this generic Delphi technique, tourism researchers can make critical design decisions (CDDs) and adapt the Delphi to their specific research problem. The Delphi must be flexible, but firmly anchored to generic procedures and Mead and Mosely (2001), Mullen (2003), and Powell (2003) propose the term “Delphi approach” to describe the range of contemporary Delphi applications and the required adaptations or adjustments.

**Figure 7:** The Delphi Approach

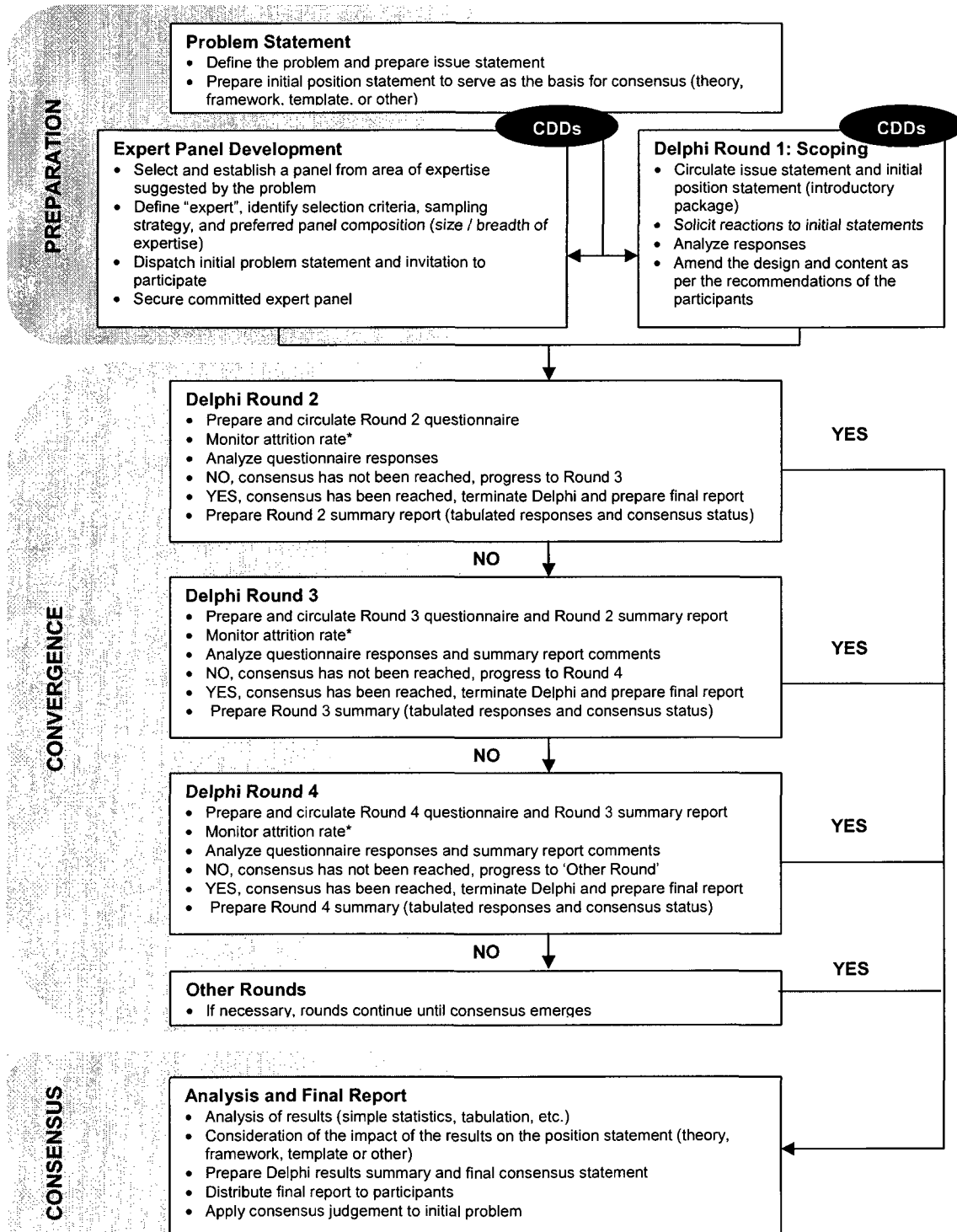
## 4.4 Results

### 4.4.1 *Delphi Procedures*

The literature establishes that Delphi success is intrinsically linked to a carefully planned and executed procedure (Bonnemaizon *et al.*, 2007; Day and Bobeva, 2005; Duboff, 2007; Phillimore and Goodson, 2004; Miller, 2001b; Needham and de Loë, 1990). Despite interpretive freedom and flexibility, a Delphi approach should follow a set of general procedures or rules that instil confidence in the research results (Briedenhann and Butts, 2006, Day and Bobeva, 2005, Gordon, 1994, Kaynak and Marandu, 2006, Moeller and Shafer, 1994, and Taylor and Judd, 1994). The general procedures and critical design decisions (CDDs) are critical in this regard (Figure 8).

Typically, the process involves several rounds of questionnaires that are circulated to carefully selected expert panel. However, the literature indicates that a “scoping round” (Round 1), that is a preliminary or general survey round, is commonly used as a means to circulate and solicit reactions to an introductory information package (initial problem and position statement) and/or pilot test questionnaires (Day and Bobeva,

**Figure 8: Conducting a Delphi Study: General Procedures**



\* Rate of participant withdrawal (failure to respond)  
 CDD – Critical Design Decision (see also Figure 7)

2005; Green *et al.*, 1990; Hurd and McLean, 2004; Miller, 2001b; Weber and Ladkin, 2003). This scoping round is often recommended as it may help to identify ambiguities or interpretation difficulties confronting participants. It also allows some early validity testing, administration improvements, and enhanced study focus (Garrod and Fyall, 2005; Powell, 2003). Alternatively, select literature indicates that many of the issues and the preliminary information sought through the scoping round can be acquired or resolved with a comprehensive literature review conducted by the researcher and summarized for the experts' panel (Wheeler *et al.*, 1990). The inclusion of a scoping round, therefore, requires that a critical design decision (CDD) be made.

Following the scoping round, the first questionnaire is developed on the basis of the feedback collected. It is circulated to the expert panel members (Round 2). Subsequent rounds are essentially the same as Round 2, but with new and refined questionnaires and summary reports - aggregate group judgement on the questions from the previous round - provided to participants. This may include a simple statistical analysis, but it may also include commentary from select participants (anonymous) and a consensus status update. On the basis of the summary reports, the experts have an opportunity to reflect on the issues at hand, to draw upon their expertise, and to make changes to their initial opinions without compromising their expertise in the eyes of others in their field (Rowe and Wright, 1999). For experts whose responses represent the range extremes, they are asked to reassess their responses in light of the group's range and provide justification for their responses (Gordon, 1994). Green *et al.* (1990) emphasize that these convergence rounds and particularly the feedback element, are designed to move the experts towards consensus. In the fourth or final round (additional

rounds if necessary to achieve consensus), a synthesis and/or evolving consensus statement is distributed and a final assessment is requested from participants (Gordon, 1994). When sufficient consensus has been achieved, the Delphi rounds cease and the resulting group judgement may be applied to the initial problem. Statistical measures of central tendency and distribution are often employed to assess the degree of consensus achieved and the quality of the group judgement. In the case of the alternative, a lack of consensus or the inability to achieve opinion stability can be assessed using the same statistical measures. Where the distribution of opinion between rounds shows little evidence of centralization, a lack of consensus must be considered. Additional survey rounds may be judged as appropriate; however, a lack of change between rounds (where opinion is not centralized) is evidence of the later. As previously indicated (Table 12), when a strong minority view is not explored, additional rounds may be harmful; leading to dissenter drop out and a specious consensus in the final report (Linstone and Turoff, 1975). During this phase, consideration must also be given to the impacts of the group judgement (or lack thereof) on the initial problem and position statement; that is, the judgement may be applied to the problem (model refinement, forecast, etc.). Finally, a Delphi report is prepared and distributed to panellists.

#### ***4.4.2 Expert Panel***

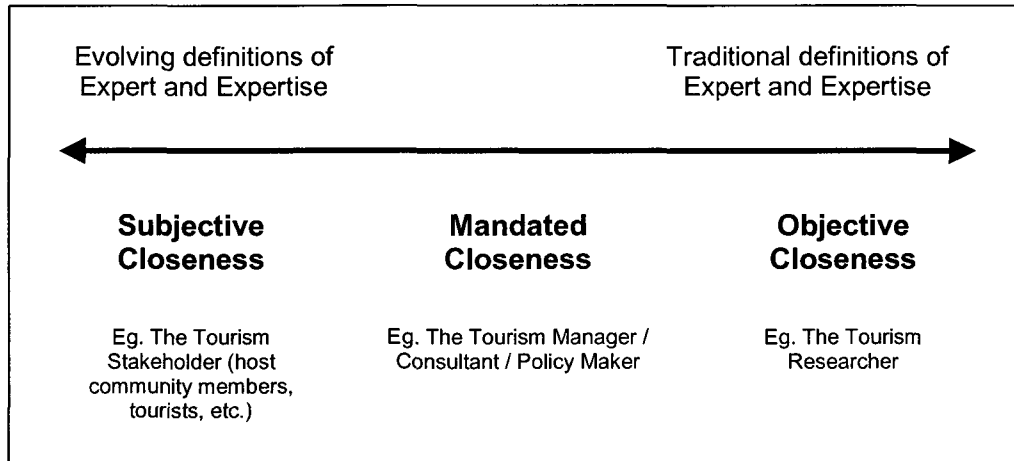
Powell (2003: 378) makes clear the importance of the expert panel when she states that “The success of a Delphi study clearly rests on the combined expertise of the participants who make up the expert panel.” Green *et al.* (1990) and Taylor and Judd (1994) concur with Powell. Therefore, when making critical design decisions related to

expert panel composition, it is widely recommended that the qualifications of the experts, the balance of expertise, and the size of the panel be comprehensively assessed (Mullen, 2003; Murray, 1979; Needham and de Loë, 1990; Powell, 2003).

#### **4.4.3 *Defining the Expert***

Most definitions of ‘expert’ begin with a broad statement. For example, Simon (1965) describes expertise as being synonymous with authority and a level of experience and/or knowledge that distinguishes the expert from the novice. Traditional definitions restrict the expert to those with specialized training, such as academics, scientists or medical doctors (Needham and de Loë, 1990). The latter statement excludes those who derive their expertise from first-hand experience. Cantrill *et al.* (1996: 69) oppose such restrictions, arguing that “the definition should include any individual with relevant knowledge and experience of a particular topic.”

Needham and de Loë (1990) contend that experts can be identified in terms of their closeness to a problem or issue and that closeness exists along a continuum (Figure 9). The continuum captures an inclusive expert population comprised of individuals with subjective, mandated, and objective closeness. Subjective closeness refers to those individuals that possess deep experiential knowledge or hands-on experience. Mandated closeness refers to those individuals that possess professional and/or legal responsibility. Objective closeness refers to those individuals that explore and inquire without preconceived bias. Closeness, therefore, ensures that “Participants bring a wide range of direct knowledge and experience to the decision-making process” (Powell, 2003: 377).

**Figure 9: The Expert Continuum**

Adapted from Needham and de Loë, 1990

The expert continuum is congruent with the group deliberation approach presented in Sunstein's (2006) *Infotopia: How Many Minds Produce Knowledge*. Sunstein states that when experts are brought together to deliberate on a particular issue, individuals with closeness to the issue are more likely to produce valid and relevant consensus. Furthermore, he contends that dispersed expertise, that is the inclusion and aggregation of multiple expert group contributions (objective, mandated, and subjective) ensures that a better understanding of the problem and alternative solutions results. The strength and promise of an inclusive approach, including the Delphi, is that the whole (consensus) is more than the sum of its parts.

Accordingly, Andranovoch (1995), Delbecq *et al.* (1975), Gordon (1994) and Linstone (2002) state that to achieve meaningful, legitimate and quality Delphi results, the research problem and survey questions must be congruent with the interests, knowledge, and skills of participant experts. Kaynak *et al.* (1994) add that in addition to closeness to the subject under investigation, experts should represent different

perspectives on the issue. While the Delphi technique has traditionally been identified as best-suited for objective experts, it is clear that evolving definitions of expert, expertise, and ‘research’ are leaning towards the application of the Delphi for more inclusive study (Duboff, 2007; Mullen, 2003; Wheller *et al.*, 1990). Dalbecq *et al.* (1975) contends that heterogeneous groups, characterized by experts with varied “closeness” and different perspectives on the problem at hand, produce higher quality results than homogeneous groups. Garrod and Fyall (2005) concur, stating that the panel needs to be balanced on the basis of expert ‘closeness’ (background and capabilities), and that balance must be maintained throughout the Delphi in order to produce a valid group judgement.

In the case of published Delphi studies, including tourism research, experts exist along the closeness continuum and various expert group combinations have been consulted. For example, in Miller’s (2001a, 2001b) work on sustainable tourism indicators, the panel consists of objective researchers who published papers in peer-reviewed tourism journals (external validation of their expertise through publication review process). In their assessment of agri-tourism policy, Kuo and Chiu (2006) establish a heterogeneous panel comprised of objective (researchers and professors) and mandated (officials, non-governmental organizations) tourism experts. Kaynak and Macauley (1984) also establish a heterogeneous panel for the assessment of tourism market potential. But, in addition to objective and mandated experts as represented by tourism operators, public policy makers, and tourism association leaders, they also include subjective experts as represented by the general public. The measure of expert ‘closeness’ and the balance of expertise that is required for a Delphi, therefore, is dictated by the research purpose and objectives. For example, if one were interested in evaluating

the relation between ecotourism and cultural sensitivity, one would expect the panel to include experts from all geographic regions supporting tourism research and ecotourism activities, and a heterogeneous group of experts from across the closeness continuum. To this end, one would expect that heterogeneity would contribute rich and varied insight, and this information could enhance the research product (better understanding of the relation between ecotourism and cultural sensitivity). A homogenous panel of experts (e.g. Western academics) would not be well suited to the research purpose or objectives.

On the basis of the expert continuum and the participant requirements for a successful Delphi, a description of the selection criteria for each expert group must be clearly defined (Briedenhann and Butts, 2006; Wright, 2006). For example, the participant profile may be defined by age, nationality, knowledge, expertise, occupation or position, qualifications, education, or other attributes. In this way, the criteria provide a basis for establishing the “closeness”, “perspective”, “coverage”, “balance” and “expertise” that participants are required to provide (Garrod and Fyall, 2005; Gordon, 1994). In addition to this internal or “administrator-based” measure of expertise, external or “self-rating” is another measure that is commonly used to establish expertise. The validity of this approach is highly contested in the literature because there exists potential to construct a self-proclaimed and uncontrolled panel comprised of individuals who may not in fact be the most knowledgeable or experienced (Larréché and Moinpour, 1983; Sackman, 1975; Taylor and Judd, 1994). Expertise can also be a measure of external judgement from an individual in a position of authority who has knowledge of the participant and problem area. For example, this may include the president of an organization such as the World Tourism Organization, the director of a governmental

agency such as the Canadian Tourism Commission, and the director of an academic unit such as the School of Hospitality and Tourism Management at the University of Guelph. In the case of objective experts, validity may be established through a measure of peer-reviewed publication. In this way, the expert's work has been externally verified by other experts in the field (Miller, 2001b). In many cases, a combination of these approaches could be used to identify experts and establish expertise (Larréché and Moinpour, 1983). A critical design decision (CDD) is therefore, required to validate the panel's expertise.

The importance of defining the desired expert group is not contestable. However, there remains ambiguity in the ways in which definition is operationalized and reported. Crisp *et al.*, (1997) identify a lack of sufficient design description, including expert panel decisions, as common practice. A cursory review of the Delphi literature confirms this phenomenon. In many cases, little information is provided regarding the qualifications of experts, inclusion or exclusion criteria, the selection process, or the reasons for selecting particular expert groups. In this regard, concern is related to difficulties assessing methodological rigour and the potential for the study's validity to be compromised. Accordingly, the literature advises Delphi administrators to proceed with caution; warning against making critical design decisions (CDDs) without first completing a panel composition requirement review and providing comprehensive design decision description. A few noteworthy studies follow these rules. For example, Bonnemaizon, Cova and Louyot (2007) provide a detailed account of the expert selection criteria and process. Experts were identified on the basis of textbook authorship and the sample was narrowed on the basis of a balanced geographical distribution of participants. Weber and

Ladkin (2003) also provide a very detailed tourism expert selection narrative in their Delphi assessment of key issues and competitive forces affecting the Convention Industry.

Alberts (2007) and McKercher and de Cros (2002) argue that when too many stakeholder groups are consulted, the decision-making process can be clouded rather than complimented by competing expectations and values. Furthermore, dispute continues regarding the value of subjective expert inclusion (e.g. homogeneous groups comprised of the general public, tourism participants, or host communities) (Alberts, 2007; Larréché and Moinpour, 1983; Linstone, 2002). Debate is related to whether individuals possess sufficient expertise of the problem or topic, and by extension, whether the Delphi will achieve valid results. As a consequence, this critical design decision must be justified in the study. When the expert and expert selection criteria are not clearly defined, the performance and the outcomes of the Delphi process may be compromised. In addition, doubt (validity, bias, other) rather than confidence can result.

For tourism researchers who are struggling to make a critical design decision regarding panel composition, care must be afforded the achievement of balance between differing approaches to and perspectives on knowledge, the closeness of the expert to the problem at hand, and the requisites for achieving a robust and relevant Delphi consensus (Alberts, 2007; Briedenhann and Butts, 2006; Vaugeois *et al.*, 2005). The validity of the Delphi, therefore, is a measure of the panel composition and expertise (Larréché and Moinpour, 1983). Powell (2003: 378) provides a reminder that “The Delphi does not call for expert panels to be representative samples for statistical purposes”. Instead, representativeness is assessed on the qualifications (closeness, selection criteria satisfaction, etc.) of the expert panel. Gordon (1994: 4) simplifies: “They [the results]

represent the synthesis of opinion of a particular group, no more, no less”; hence, panel design underlies the success of a Delphi study.

#### **4.4.4 Panel Size: Requisites and Challenges**

The literature establishes that Delphi validity, efficacy, and reliability are dependent on expert group size. However, little evidence on the strength of the relationship is available (Bonnemaizon *et al.*, 2007; Powell, 2003; Rowe and Wright, 1999). As a consequence, there is varied opinion on the prerequisite panel size. At a minimum, 7 to 15 respondents are considered necessary (Archer, 1980; Cavalli-Sforza and Ortolano, 1984; Delbecq *et al.*, 1975; Linstone, 1978; Turoff, 1970; Yeong *et al.*, 1989). Linstone (1978) asserts that accuracy deteriorates with smaller panel sizes and improves with larger numbers. Furthermore, Briedenhann and Butts (2006) suggest that a smaller panel size is better suited to a homogeneous sample while a larger group may be required for a Delphi that is comprised of a mixed group of experts (heterogeneous sample). In the latter case, Turoff (1970: 153) suggests “anywhere from ten to fifty people”, while most studies use panels of fifteen to thirty-five individuals (Gordon, 1994; Miller, 2001b; Rowe and Wright, 1999). The literature contains examples and suggestions for panels comprised of hundreds (Mullen, 2003) to thousands of participants (Cantrill *et al.*, 1996; Jung-Erceg *et al.*, 2007; Linstone, 1978). A scan of the tourism literature reveals published studies with Delphi panel sizes in the following ranges: twenty or less (Kuo and Chiu, 2006; Lloyd *et al.*, 2000; Tsaur *et al.*, 2006; Weber and Ladkin, 2003), twenty to fifty (Choi and Sirakaya, 2006; Green *et al.*, 1990a, 1990b; Liu, 1988; O’Connor and Frew, 2004; Yeong *et al.*, 1989), fifty to seventy (Briedenhann and

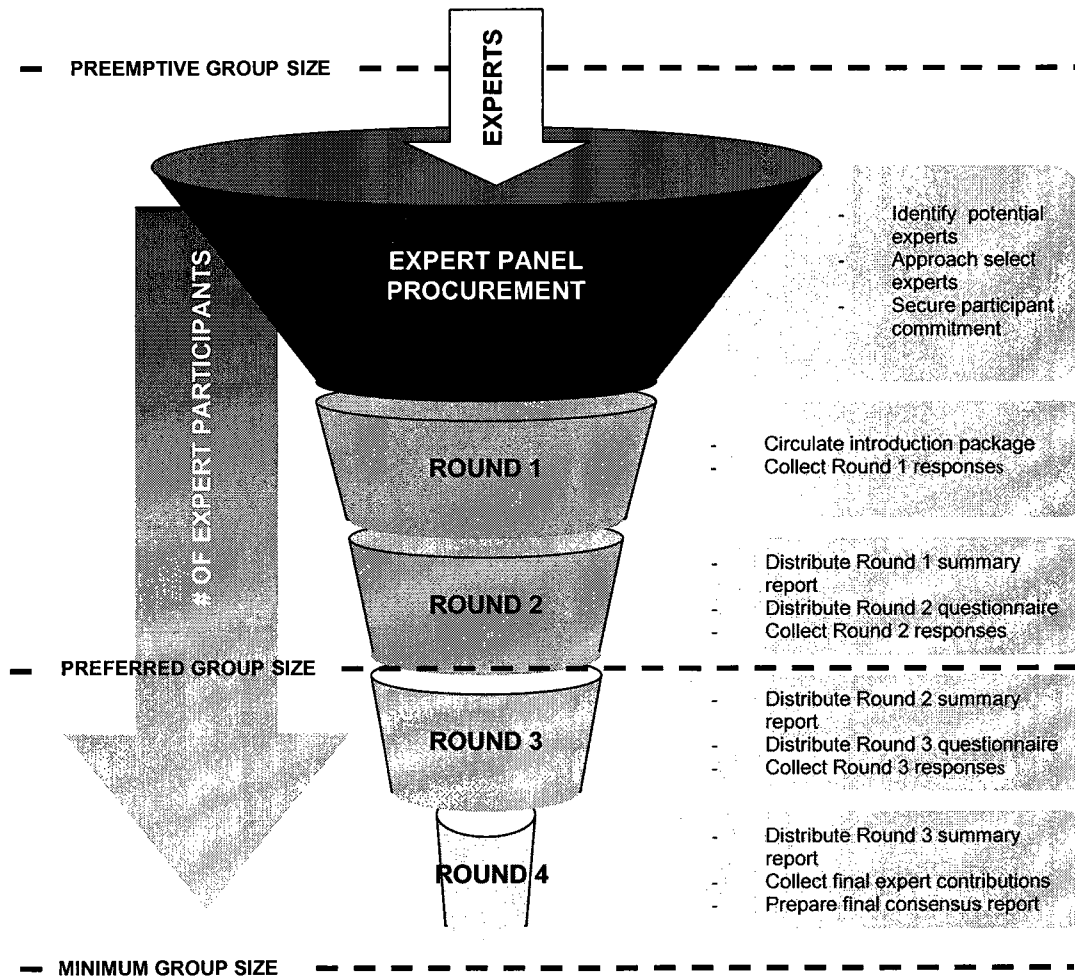
Butts, 2006; Kaynak and Marandu, 2006; Miller, 2001b), seventy to one hundred (Kaynak and Macauley, 1985; Spenceley, 2003); and one hundred or more (Kaynak *et al.*, 1994). Guidance suggests that critical panel size decisions (CDD) “should be governed by the purpose of the investigation” (Cantrill *et al.*, 1996: 69), the scope of the problem, the resources available, and the desired balance of expertise (Delbecq *et al.*, 1975; Powell, 2003; Spenceley, 2003).

Another challenge in constructing and maintaining an effective panel size is related to attrition rates (Brown, 2007; Day and Bobeva, 2005; Mullen, 2003). A high attrition rate, that is, withdrawals between rounds, is a common problem (Briedenhann and Butts, 2006; Day and Bobeva, 2005; Gordon, 1994; Kaynak and Macauley, 1984; Weber and Ladkin, 2003). In the preparatory phase, when the expert panel is being developed, the literature establishes that an acceptance rate (commitment to participate) between 12 and 75 percent should be anticipated (Day and Bobeva, 2005; Gordon, 1994; Hurd and McLean, 2004; Lloyd *et al.*, 2000). With each subsequent iteration, the literature notes response rates in the range of “an unacceptable 8 percent to an excellent 100 percent” (Mullen 2003: 41). In tourism research, attrition rates between 20 to 25 percent (Briedenhann and Butts, 2006; Miller, 2001b) to 45 to 50 percent (considered high) (Choi and Sirakaya, 2006; Green and Hunter, 1992; Kaynak and Macauley, 1984; Liu, 1988), for example, are reported. Panel stability is understood to represent minimal attrition rates or preferred panel composition (size and balance) management (Day and Bobeva, 2005; Kuo and Chiu, 2006). A lack of panel stability presents a serious problem for Delphi administrators who require stability in order to achieve desired outcomes. The literature concedes that the addition of new members, in order to replace withdrawals, is

not a recommended mitigation measure. Murray (1979: 155) suggests that it damages the “very core of the Delphi procedure” and “the results that emerge must be suspect”.

In order to achieve stability, it is suggested that administrators: develop an initial expert sample list (from which to approach potential participants) that reflects the predetermined expert selection criteria; establish a minimum requisite group size and/or a preferred group size; and, develop a panel stability management plan accordingly (Choi and Sirakaya, 2006; Day and Bobeva, 2005; Gordon, 1994). It is recommended that panel stability be assessed periodically throughout the process with a quality control measure based on predetermined panel composition preferences and criteria (Garrod and Fyall, 2005). Based on their experiences, Pan *et al.* (1995: 32) advocate that the “sample size should be as large as possible to allow for subsequent drop-outs, yet small enough to ensure the respondents are all experts in their fields”. While it may seem counterintuitive to ‘allow for drop-outs’, their recommendation is based on sound evidence that attrition is a Delphi reality that needs to be well-managed. In combination with other methods that are designed to reduce attrition (e.g. panellist selection based on closeness to the problem, interest, and dedication), this approach is thought to provide a complimentary mitigation measure for attrition management. To do so, a funnel model is introduced as a tool for making this critical design decision (CDD), for managing and assessing panel stability, and for moving best practice forward (Figure 10).

## 10: The Delphi Funnel: A Panel Management Model



### 4.5 Discussion and Conclusion

#### 4.5.1 *Moving Best Practice Forward: Attrition Management*

Where comparatively low attrition rates were reported in the tourism research, variations of the funnel approach were applied (Figure 10). In an evaluative study of rural tourism projects, Briedenhann and Butts (2006) took the decision to create a Delphi panel comprised of a diversity of expertise from academia, the public sector, consultative and rural tourism fields. A preferred panel size of sixty individuals was identified on the

basis that the panel size is congruent with established methodological norms and it will “allow for potential drop-out” (Briedenhann and Butts, 2006: 175). A combined approach, that is, the funnel model and purposeful selection (on the basis of closeness to the topic) was applied. Prospective participants (115) were invited to participate in the Delphi exercise and from this initial list, sixty panellists were selected. The first survey round produced a 100 percent response rate, the second 87 percent, and the third 75 percent. In the third round, fewer participants were able to participate because of unforeseen distractions (World Summit on Sustainable Development). Throughout the study, the authors monitored attrition as well as the desired panel size and balance. The result was a comparatively lower attrition rate than other Delphi studies in the tourism domain.

O’Connor and Frew (2004) employ a three round Delphi approach to the study of hotel electronic commerce. Over 600 individuals were invited to participate and from this group, forty-two experts were invited to join the Delphi panel. Selection was guided by the participant’s closeness, interest, and experience with the research topic as well as a preferred panel size. An overall response rate of 65 percent was achieved. In Miller’s (2001) Delphi survey, tourism researchers were consulted in order to develop a set of indicators for sustainable tourism. Participants (74) were purposefully selected on the basis of their publication record related to tourism sustainability. The Delphi panel size was determined on the basis that 74 panellists is widely accepted in the literature and that it allows for attrition management. In round one, a 73 percent response rate was achieved and in round two this increased to 80 percent. Yeong *et al*, (1989) achieve similar results in their Delphi study of the Singapore Tourism Industry and Garrod and Fyall (2000)

achieve response rates in the range of 100 percent (round one), 89 percent (round two), and 93 percent (round three). In the latter case, the Delphi was used to compliment an initial survey exercise that resulted in a low response rate (23 percent). Differences between methods are attributed to the purposeful selection of Delphi panellists, communications with participants, and attrition monitoring.

Using a combination of strategies, as recommended in the literature by antecedents such as Andronovich (1995), Briedenhann and Butts (2006), Garrod and Fyall (2005), Pan *et. al* (1995) and as proposed here (funnel model), an attrition management plan has been developed for a Delphi study in the ecotourism domain. Over the course of a six-month period, the plan was executed. It is discussed here as the results of this approach provide further support for the efficacy of purposeful attrition management for reducing participant withdrawal between Delphi survey rounds.

On the basis of Andronovich's (1995) suggestion that attrition due to loss of interest or frustration can be reduced by purposeful panellist selection, a detailed expert selection criteria list was developed. It was used to guide the purposeful selection of ecotourism experts drawn from academia, and the public and private sectors (operational ecotourism). An initial list of potential participants (pre-emptive group size ~ 670) was developed on the basis of a literature review (academics publishing on ecotourism) and consultations with international organizations in the ecotourism field. A letter of invitation was dispatched by e-mail to potential participants. It provided a description of the research agenda, participation requirements, and a detailed description of the expert selection criteria. It also requested that prospective panellists complete an initial survey designed to assess selection criteria satisfaction. On hundred and fifty-nine responses

were received, and from this list, one hundred and fifty-seven individuals were identified as qualified experts. The panelists (157) were then invited to complete the round one survey on the basis that the preferred panel size would be achieved through attrition and that a desired balance between expertise had been achieved (academic/professional). Specifically, we expected that as the Delphi progressed into the summer months and the busy ecotourism and field research season, participation would decline. We anticipated this potential distraction, as recommended by Briedenhann and Butts (2006), and we planned accordingly. In this regard, a Delphi panel consisting of between 50 and 75 panellists was judged to be the ideal size to balance the breadth of expertise required and the management of the Delphi procedure (data analysis, reporting, communications, etc.). To achieve this ideal panel size, a larger initial group was judged to be necessary. In round one, 94 panellists completed the survey and a response rate of 60 percent was achieved. While we found this initial rate to be lower than expected, it served to winnow out those panellists with the most interest in the topic, the research process, and the research results. These individuals remained committed through round two and round three where better response rates were achieved; 84 percent and 77 percent respectively (Table 14). In approaching panel management in this way, the funnel model served as a tool for attrition planning and management. As we moved through the Delphi, we expected attrition, we planned accordingly, and we achieved our desired panel size and Delphi outcomes. The panel remained balanced throughout (monitoring between rounds), panellists remained engaged and committed, and the minimal panel size was not breached. Most importantly, the overall attrition rate (26 percent) was above the average rate and amongst the best rates reported elsewhere in the tourism literature.

**Table 14:** Delphi Panel Composition: An Example

<b>Panel Member</b>	<b>Round 1</b>	<b>Round 2</b>	<b>Round 3</b>
<u>Survey delivered to:</u>	<i>157</i>	<i>94</i>	<i>79</i>
<b>Total (completed surveys)</b>	<b>94</b>	<b>79</b>	<b>61</b>
Professional	47	41	33
Academic	22	17	15
Both Professional and Academic	25	21	13
<b>Response rate</b>	<b>60%</b>	<b>84%</b>	<b>77.2%</b>

In all of these examples, a strategic management plan based on the recommendations of antecedents is shown to be an effective best-practice for managing attrition during a Delphi study. When trying to locate examples for discussion here, it was found that a majority of Delphi studies provide little detail of the panel development and management strategies employed. In order to move best-practice forward, it is recommended that Delphi researchers move away from “sloppy execution” and “ad hoc” reporting so that the many valuable lessons learned can be shared with others (Brown, 2007; Day and Bobeva, 2005; Rowe and Wright, 1999; Weber and Ladkin, 2003: 127). In the case of attrition, caution is advised. A critical design decision (CDD) is therefore required to select the strategy or combination thereof that are best suited to the research and that are proven to be effective practices. In this regard, antecedent research and the recommendations found here can provide a foundation from which progress towards a set of best-practices for Delphi administration can evolve.

#### **4.5.2 Conclusion**

The preceding discussion has comprehensively summarized the characteristics and procedures that constitute a generic Delphi technique. It has also provided guidance for adapting the generic technique to better suit a specific research agenda. Critical design decisions (CDDs) required for adaptation are emphasized, with particular attention afforded the design and management of the Delphi panel.

A Delphi is shown to be a particularly useful and well-suited research method for tourism problems and for tourism problem-solvers. Whether conducting tourism research in institutions such as universities and research centres, or when conducting research in organizations or agencies such as industry associations or federal departments, the Delphi offers a legitimate, advantageous method for tourism forecasting, tourism issue identification and prioritization, and tourism concept or framework development and testing. However, the researcher must carefully consider the scope of the study, the suitability of the approach, the critical design decisions (CDDs) to be made, and the desired research product, when adapting the technique to the tourism context. In doing so, the validity, reliability, and legitimacy of the study and the potential contribution to tourism knowledge are enhanced. Those engaged in research outside the boundaries of research institutions, government agencies, or industry organizations - such as tourism planners, developers, or promoters - would benefit from the application of the Delphi technique. It offers an inclusive technique that has the capacity to aggregate dispersed expertise from a range of stakeholders in order to inform policy decisions, program improvements, service delivery, marketing directions, and future events' planning. It is also an effective tool for research capacity development in all domains. Assuming that

the researcher earns the experts' trust (faith in the researcher and the science) and that they nurture the experts' participation, the Delphi participants may be willing to reconvene for consensus building, idea generation, or other research purposes in future. It is clear, that the Delphi is in fact more than the sum of its parts. In essence, the potential benefits for tourism "knowledge making" are noteworthy and the Delphi technique is deserving of continued debate and application in the tourism domain.

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## **CHAPTER FIVE**

### **Culturally Sensitive Ecotourism: A Delphi Study**

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**Preface:** A Note about Methodology

Given the purpose and structure of a papers-based thesis, little room is afforded a detailed research design description. While a critical methodological review is provided in Chapter Four and a brief methodological overview is provided in Chapter Five, the ‘nuts and bolts’ of the research design process are not addressed in detail. Therefore, a detailed account of the research design was judged to be a necessary supplement.

Appendix A provides a description of the three-phase Delphi approach and a justification for its utility and application is provided. The procurement and management of the expert panel is described while particular attention is afforded expert selection criteria design and application.

Appendix B presents the Delphi Summary Reports. The reports, three in total, capture the findings and key residuals for the Delphi survey rounds. By design, the Delphi requires that a summary report be prepared and distributed to panellists after each survey round (with an invitation to provide feedback on the report contents). They are presented here just as they were delivered to the Delphi panellists.

Appendix A and B are meant to compliment Chapters Four and Five so as to provide additional insight into the methodological design and process for the Delphi research.

**Summary**

This paper presents the results of a three round Delphi survey exercise. The Delphi involves the collection of ecotourism expert judgement on the importance of cultural sensitivity for ecotourism. The research is informed by antecedents - from both the professional and academic domains - who call for a greater emphasis on culture and the importance of cultural sensitivity for the achievement of sustainable development through ecotourism. This study is a response to a call for definitions and measures that will assist ecotourism professionals, researchers, policy-makers, and participants ensure that culture is not compromised during the ecotourism experience and that ecotourism delivers sustainable outcomes. The Delphi results confirm that cultural sensitivity is of utmost importance for ecotourism. However, the study also finds that uncertainty exists about what cultural sensitivity is, is not, and should be in the context of ecotourism. In working through the Delphi surveys, a select group of ecotourism experts address this uncertainty. A consensus definition of cultural sensitivity is developed and the potential barriers and opportunities associated with its implementation in the ecotourism industry are identified.

## 5.1 Background

Growing interest in sustainable tourism experiences (demand) in combination with increasing access to ecological and cultural landscapes (supply) is facilitating ecotourism development in a growing variety of cultural and ecological contexts. Despite the now global ecotourism landscape, relevant literature has come to suggest that a set of values – embedded in ‘Western’ understandings of human/environment relationships, market demand, and environmental management – are being superimposed on ‘other’ or ‘non-Western’ ecotourism destinations and their value systems (Backman and Morais, 2001; Carrier and Macleod, 2001; Cooper and Vargas, 2004; de la Barre, 2005; Jamal *et al.*, 2006; Stark, 2002). A lack of sensitivity to the cultural context of ecotourism presents perils related to goal achievement. The literature suggests that real danger exists for model transference failure when a single ‘ecotourism mould’ is used. There exists potential for benefits to be replaced with insecurity, resentment, conflict, ecological degradation, and economic loss (Vivanco, 2002). Cater (2006:36) asserts that “if we uncritically accept Western-constructed ecotourism as the be-all-to-end-all, we do so at our, and others’ peril.”

Ecotourism researchers and professionals are calling for cultural sensitivity and a re-thinking of so-called ‘universal’ ecotourism knowledge. Sofield (2007: 158) presents an alternative, arguing that “where different world views and different aesthetics are involved, a greater degree of acceptance and understanding for difference is imperative.” Furthermore, for ecotourism to truly exemplify sustainable development, the ecotourism mould must be sensitive to cultural differences (Cater, 2006; de la Barre, 2005; Honey, 2002; McCool and Moisey, 2001; Stark, 2002). In the *Oslo Statement on Ecotourism*

(The International Ecotourism Society, 2007), this is identified as a critical issue for strengthening the sustainability and potential benefits of ecotourism. A call to action is made by the international ecotourism community:

Encourage the ecotourism industry to operate with integrity to protect and promote tangible and intangible cultural heritage and living cultures, and to preserve and celebrate the multitude of unique cultural, social, religious and spiritual elements of local and Indigenous communities around the world (The International Ecotourism Society, 2007: 6).

Calling on Habermas's (1990) discourse ethics and moral theory, Stark (2002: 109) defines 'universalizability' as a "rational consensus on a proposed norm." She argues that the norm is valid, if and only if the interests of those actually affected by decisions are represented. Thus, 'universalizability' is a measure of 'real' stakeholder consensus. In the sustainable tourism case, Hughes (1995) raises questions about the universality of scientific understanding and definition. He claims that the dominant approach to sustainable tourism is technical, rational and scientific and that it has eclipsed the emergence of an ethical response that addresses the value of culture. In the ecotourism case, Stark raises questions about whether we have truly reached a 'universal' consensus on ecotourism and its key tenets, and whether this so-called consensus accounts for the interests, values, histories, and traditions of people who do not share the same culture. Stark and Hughes raise serious concerns about the universalizability of 'what we know', and by extension, 'what we do' in the ecotourism case. Their work implies that our understanding is not complete, that it does not account for multiple interests and values, and that it is not culturally sensitive. Not only are international and 'universal' definitions derived from and deeply embedded in Western paradigms, it is the

case that ecotourism research has historically focused on and has originated in Western locations (Backman and Morais, 2001; Cater, 2006).

Despite the global ecotourism reach, it may be possible to understand ecotourism as a ‘socio-cultural bubble’ whereby predominantly English-speaking, scientific, and Western influences are represented and very little is known about non-Western values, perceptions and behaviours (Crouch and McCabe, 2003; de la Barre, 2005; Carrier and Macleod, 2001; Tribe, 2004). Cater (2006) and Jamal et al. (2006) go so far as to equate this ‘bubble’ with a hegemonic sphere, whereby the ‘West’ assumes the role of dominant knowledge population. With this role comes some degree of influence, power, or control over ‘other’ populations’ and the ecotourism paradigm. de la Barre (2005) contends that the current ecotourism epistemology is exclusive. It disenfranchises certain ways of being in, or knowing nature and wilderness in destination cultures, and that this has an impact on the sustainability of ecotourism destinations.

To make ecotourism sensitive to various values, beliefs, attitudes, experiences, and opportunities, there is a need for recognition of multiple ecotourism realities, the identification of realities that may be ignored or overlooked by hegemonic structures, and the understanding of influences, potential conflicts and outcomes of such phenomena (Jamal *et al.*, 2006; Sofield, 2007). The latter requires an epistemology and methodology that highlights and prioritizes cultural sensitivity and that is counter-hegemonic by design (Denzin and Lincoln, 2005; Saukko, 2005). This includes definitions, standards, research models, visions and strategies that are sensitive to the diversity of cultural values and identities that exist in the ecotourism landscape (Cooper and Vargas, 2004; de la Barre, 2005). Recent articles in the *Journal of Ecotourism* (Cater, 2006; de la Barre, 2005;

Jamal et al. 2006), *Philosophy and Geography* (Stark, 2002), and the *Journal of the Royal Anthropological Institute* (Carrier and Macleod, 2005), stress that a priority shift towards a more-balanced notion of sustainable ecotourism and the recognition of ‘cultural sensitivity’ as a precursor to sustainable ecotourism goal achievement is required. In essence, antecedents emphasize a need to introduce the cultural sensitivity concept into ecotourism discourse and praxis and to develop models, templates, and tools for assisting researchers and professionals in this process. To date, a definition of cultural sensitivity has not been brought forward in the ecotourism context.

## **5.2 Purpose and Objectives**

The purpose of this study is to define culturally sensitivity for ecotourism. A process model, for making progress towards culturally sensitive ecotourism, is adopted after the Fyall and Garrod (1997) process model for making tourism sustainable. The model requires that the concept [cultural sensitivity] be defined, its import established, and tools and measures be developed for evaluating its application. This study is therefore congruent with the first two stages of the Fyall and Garrod model as its central objectives are to: assess the awareness and importance of cultural sensitivity for ecotourism; to develop a cultural sensitivity definition for ecotourism; and to identify barriers and opportunities for establishing cultural sensitivity as an ecotourism imperative.

The Delphi technique is employed in order to capture and interpret international ecotourism expert judgement on cultural sensitivity. In doing so, this paper offers several contributions towards making ecotourism culturally sensitive. First, a group judgement is to be rendered about the importance of cultural sensitivity, thereby establishing the need

for future investments related to cultural sensitivity and ecotourism. Second, a consensus definition for cultural sensitivity is to be developed through consultation with the expert group. The Delphi is purposefully selected as it is an inclusive method whereby different perspectives, values, and experiences are afforded equal weight. Third, potential barriers and opportunities for establishing and implementing cultural sensitivity in the ecotourism industry are to be identified. Finally, it is the ambition of this paper to contribute to the evolving understanding of the links between culture, sustainable development and ecotourism, to contribute a theoretical basis (definition) for the development of cultural sensitivity planning, management, and research tools, and to engage the ecotourism community in the cultural complexities of the contemporary ecotourism paradigm.

### **5.3 Methodology**

For the purposes of this study, the Delphi technique is selected over traditional survey methods (surveys, group interviews and focus groups) as a strong methodology for eliciting knowledge and opinion from a group of international ecotourism experts. The Delphi is a qualitative method used to systematically combine expert knowledge and opinion to arrive at an informed group consensus on a complex problem (Linstone and Turoff, 1975; Moeller and Shafer, 1994). Using iterative rounds, that is, sequential questionnaires interspersed with controlled feedback; the technique relies on the interpretation of expert opinion. It provides an enabling mechanism for organizing conflicting values and experiences, and it facilitates the incorporation of multiple opinions into an informed group consensus (Briedenhann and Butts, 2006; Linstone and Turoff, 1975).

The method is judged to be a best-fit on the basis of its suitability for tourism research (Garrod and Fyall, 2005; Green *et al.*, 1990) and a set of key attributes and advantages that are congruent with the study's objectives (Table 15). Additionally, the structure, utility and purpose of the Delphi technique are congruent with the work of de la Barre (2005) and Stark (2002) who suggest a need for 'constructed space' for consensus building. Given that ecotourism has historically been advanced by 'Western' and/or non-inclusive knowledge systems and that this process finds us now in a potentially calamitous predicament, it makes the most sense to apply a 'counter-hegemonic' methodology that supports Habermas's principle of universalizability and the achievement of inclusive consensus. In this way, the product of the Delphi, the consensus definition, is to be inclusive of multiple interests, values, and expertise while mitigating the risk of furthering Cater's 'hegemonic sphere'.

A three-stage Delphi exercise, with three survey iterations, comprises the methodological framework for this study (Figure 11). As the foundational step in the research design, an expert panel was developed. Guidance suggests that panel size, characteristics, and composition should "be governed by the purpose of the investigation", the scope of the problem, and the resources available (Cantrill *et al.*, 1996: 69; Linstone, 2002). For this study, international ecotourism experts were desired to create an inclusive panel that reflects a diversity of experience, knowledge, skills, and cultural perspectives. Two relevant expert groups are identified: ecotourism professionals from government, private industry and non-governmental organisations; and academics engaged in ecotourism research and education. The inclusion of both professional and academic experts is substantiated by Briedenhann and Butts (2006), Sunstein (2006), and Vaugeois

*et al.* (2005) as a means for achieving a balance between differing approaches to and perspectives on ‘knowledge’, for mitigating the existent divide between research and professional communities (knowledge sharing, communications, priorities, epistemology, etc.), whilst ensuring a more inclusive and relevant Delphi consensus.

**Table 15:** Delphi Attributes and Advantages

*Legitimacy:* The Delphi is considered an established research technique.

*Suitability:* The Delphi is well-suited to complex problems where exact knowledge is not available and the contributions of experts would contribute to advancing understanding and knowledge about the problem.

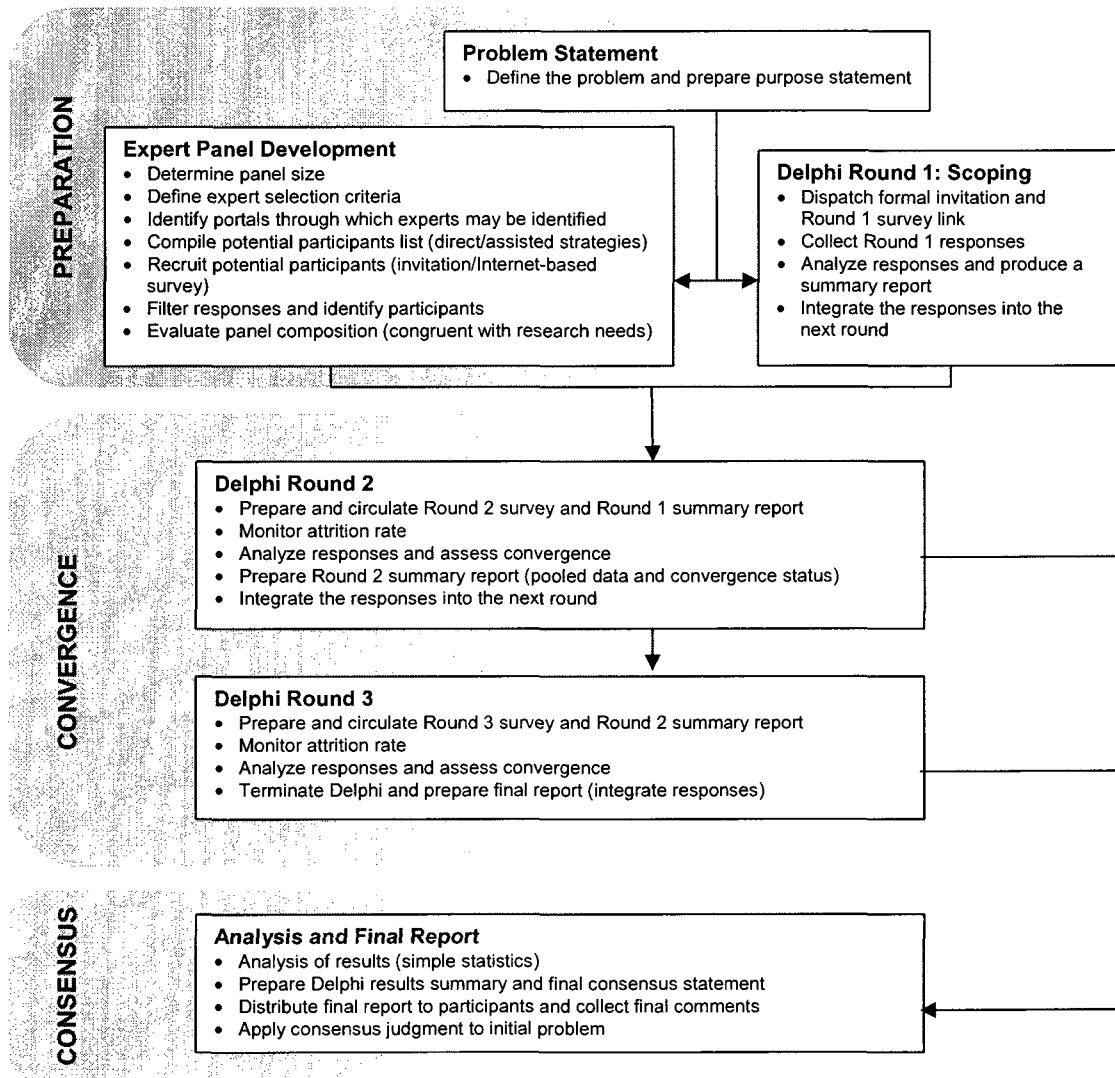
*Proximity:* Given the potential difficulties involved with bringing participants together for face-to-face meetings, the Delphi offers a ‘virtual laboratory’ where physical meetings are not required.

*Reflexivity:* By design (iterations), the Delphi allows for participants to really think through the concepts and questions – so that the resulting data is very rich, and by extension, valid research findings result (and statistical presentation of results is possible).

*Flexibility:* The Delphi is flexible, allowing for a variety of design decisions to be made. Flexibility permits methodological adaptation in order to achieve a more comprehensive understanding of the research problem.

*Repetition:* The Delphi is designed to move a group towards a convergence of opinion. The process requires multiple iterations where surveys are distributed and feedback (summary reports) is provided to participants. The product is an informed judgement about a complex problem.

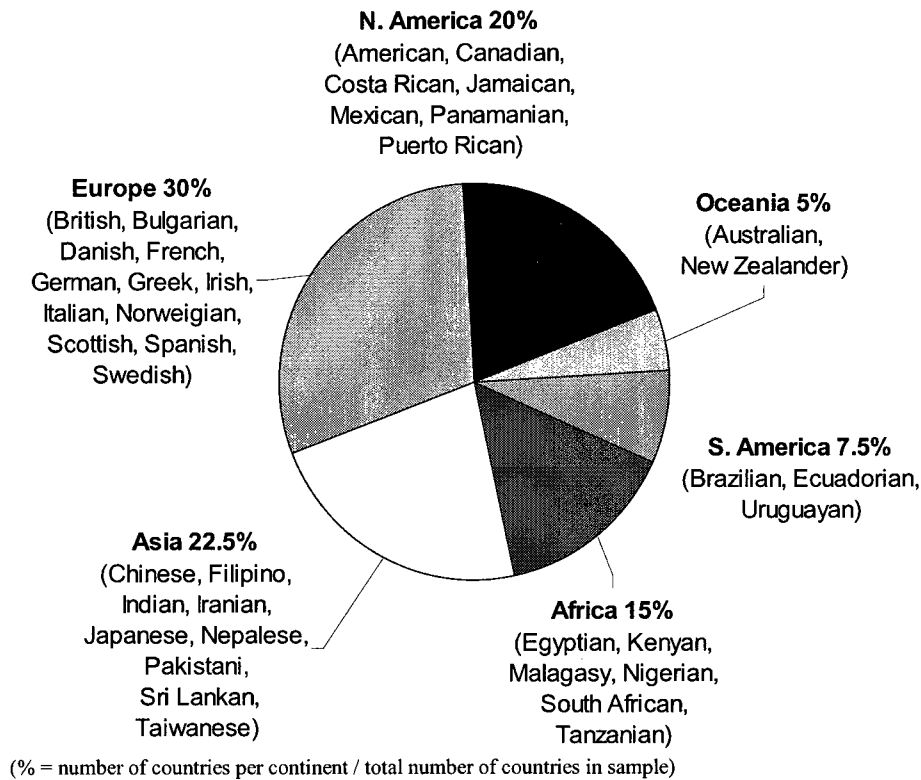
*Anonymity:* By design, the Delphi reduces the risk(s) for group dynamics to influence outcomes. Experts are free to express their opinions without fear of losing face amongst their peers.



**Figure 10:** Three-Stage Delphi Approach

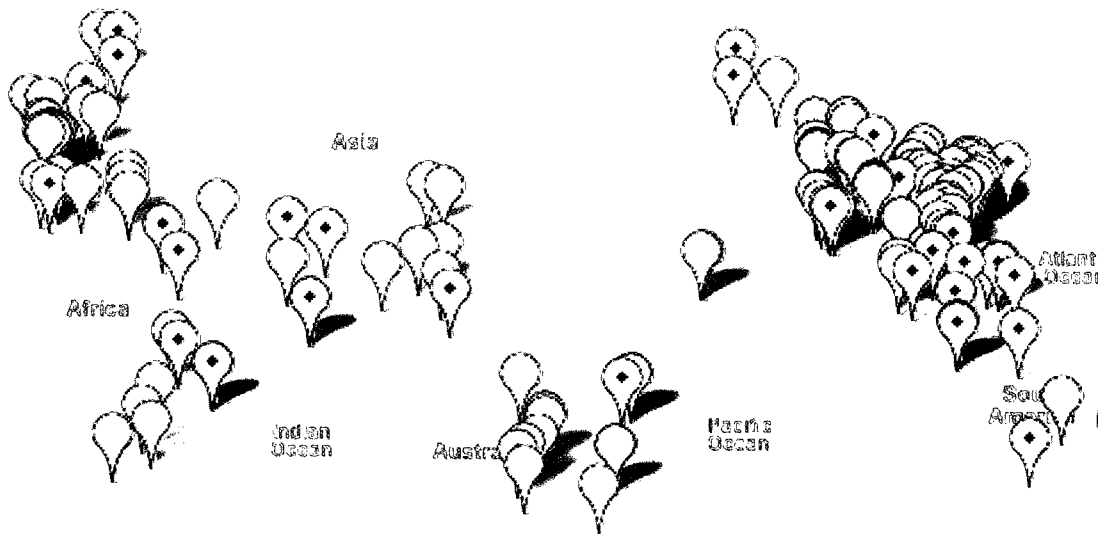
Through a review of published work in five peer-reviewed publications (*Annals of Tourism Research*, *International Journal of Tourism Research*, *Journal of Ecotourism*, *Journal of Sustainable Tourism*, and *Tourism Management*) and with the assistance of the International Ecotourism Society an initial set of 684 potential participants were identified. The desired panel size is between 50 and 100 individuals from a range of cultural backgrounds and geographical locations. Experts, that is, 86 professionals, 32

academics, and 39 professional and academic experts were selected on the basis that they satisfied several predetermined ‘ecotourism expert’ selection criteria (determined through a potential participant survey). This included English language proficiency and one of the following: current or previous experience in the public, governmental, or private sectors related to ecotourism and/or nature-based tourism activities (minimum five years); evidence of professional productivity in terms of peer-reviewed or professional publications and research and/or participation in academic or industry symposia; and a teaching portfolio that includes courses dedicated to tourism and/or ecotourism (minimum five years). A cultural richness evaluation was also completed to ensure the diversity of the panel. The participants’ nationalities were compiled and the breadth of nationalities was assessed as a simple measure of cultural richness. Forty nationalities are represented on the panel (Figure 11).



**Figure 11:** Research Participant Nationalities

The participant's locations provide a secondary indicator of richness. The participant's location is used to create an Internet-based map of the "research laboratory" (Figure 13). Different coloured markers are used to identify the locations of professional experts (blue), academic experts (red), and those who self-identify as both academic and professional experts (green). All identifying information is excluded from the map so that it can be shared with participants without compromising anonymity. The researcher's location is identified with a yellow marker. A map with participants located across the globe, while a very basic indication, is meant to compliment the aforementioned measure of cultural richness. A map with multiple coloured markers is also further indication that a balance of expertise is represented on the panel (Figure 13).



Source: (Google Maps)

<http://maps.google.ca/maps/ms?hl=en&ie=UTF8&msa=0&msid=111796785121555186954.000445e4b7c291375dfbb&z=2>

\*Markers indicate a participant's location and expertise:

Blue (ecotourism professional) / Green (ecotourism academic) / Red (both professional and academic)

**Figure 12:** The Research Laboratory: Delphi Participant and Researcher Location Map

Once the expert panel was established, the Delphi surveys were administered. This was completed sequentially over the course of six months. The first round was a scoping exercise designed to get participants reflecting about the relationship between cultural sensitivity and ecotourism. Round 1 asked: (1) What are the three most important issues surrounding contemporary ecotourism?; (2) How important is it for ecotourism to be explicitly sensitive to culture and cultural differences around the globe?; (3) How appropriate is the working definition of cultural sensitivity for ecotourism (definition provided)?; and (4) What cultural variables or attributes need to find expression in the definition? Participants were provided with a one-month period in which to respond. A response rate of sixty percent was achieved (Table 16).

**Table 16:** Delphi Panel Composition

<b>Panel Member</b>	<b>Round 1</b>	<b>Round 2</b>	<b>Round 3</b>
<u>Survey delivered to:</u>	<i>157</i>	<i>94</i>	<i>79</i>
<b>Total (completed surveys)</b>	<b>94</b>	<b>79</b>	<b>61</b>
Professional	47	41	33
Academic	22	17	15
Both Professional and Academic	25	21	13
<b>Response rate*</b>	<b>60%</b>	<b>84%</b>	<b>77.2%</b>

\*The research was completed between January 2008 and July 2008. As the research moved into the summer months and the busy ecotourism season, it was expected that participation would decline. Therefore a larger initial group was sought in order to mitigate a potentially high attrition rate. This proved to be a useful strategy.

Rounds two and three presented a series of questions designed to move the group towards a consensus definition for cultural sensitivity. Through the iterative process, the definition was enhanced by hundreds of participant comments and suggestions. In each round, an enhanced definition was introduced and feedback was collected regarding its appropriateness. In order to assess the level of convergence between rounds, simple mean scores and standard deviation were calculated. This data analysis approach is substantiated throughout the Delphi literature and in particular, the Delphi research within the tourism domain (Green et. al., 1990; Moeller and Shafer, 1994). As the definition was enhanced, the research revealed a convergence of group opinion and an increase in convergence between rounds. Between Rounds two and three, the definitional enhancements were minimal, no significant change in the mean scores was observed, but the increase in convergence (reduction in standard deviation value) was noteworthy.

Thus, it was decided that consensus had been reached and that further rounds would not produce additional convergence of opinion.

## **5.4 Results**

### ***Cultural Sensitivity: An Important Contemporary Ecotourism Issue***

The Delphi exercise evaluated expert opinion on the importance of cultural sensitivity for ecotourism. In Round one, participants were asked to rate the importance of cultural sensitivity for ecotourism and a majority agreed that it is very important (80.9%). Participants were also asked to identify (key words and descriptions) the most important contemporary issues for ecotourism. Content analysis was used to assess the responses and this produced a list of twenty issues. The summary list of issues was introduced to participants in a summary report that was circulated following the completion of Round one. Participants were then provided the opportunity to reflect on the validity and importance of the twenty issues. In Round two, they were asked to rank the issues based on a scale of importance (most important to least important) and to comment on the salience of each issue. On the basis of the responses, as well as a calculated response average measure, the issues were described, and the top ranked issues were identified (Table 17).

It is noteworthy that the top seven issues are congruent with the key tenets and principles of ecotourism as described by international ecotourism organisations and contemporary researchers (Donohoe and Needham, 2006; The International Ecotourism Society, 1990, 2007; World Tourism Organization, 2002). Collectively, these seven issues represent a cluster of ‘most important’ issues for contemporary ecotourism and

they are strongly embedded in our knowledge and management systems (to various degrees and at various scales).

**Table 17:** Contemporary Ecotourism Issues (in rank order)

<ol style="list-style-type: none"> <li><b>1. Community Participation and Benefits:</b> Ensuring that host communities are actively participating in, contributing to, and benefiting from ecotourism.</li> <li><b>2. Environmental Conservation:</b> Minimizing negative impacts and maximizing positive impacts on the natural environment.</li> <li><b>3. Sustainable Development:</b> Recognizing the valuable role that ecotourism plays in sustainable development. Ensuring a balanced approach where all SD components are given equal weight.</li> <li><b>4. Awareness / Education:</b> Ensuring that cultural and environmental awareness / education are fostered by the ecotourism experience (amongst all stakeholders).</li> <li><b>5. Cultural Sensitivity:</b> Ensuring this key ecotourism principle is also an ecotourism practice. It requires clarification of what cultural sensitivity is and is not in the context of ecotourism.</li> <li><b>6. Ethics / Responsibility:</b> Assuming an ethics-based environmentally, socially, culturally, and economically responsible approach and fostering responsibility amongst ecotourism stakeholders.</li> <li><b>7. Cultural Conservation:</b> Minimizing negative impacts / maximizing positive impacts on communities and cultural heritage.</li> </ol>
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It is also important to note that the issues can not be considered mutually exclusive. In fact, Delphi participants make explicitly clear that the issues are interconnected and that understanding the connections is critical for progress (Table 17). It is important to note that cultural sensitivity was identified as an issue of importance as it was highly ranked by the group (a secondary measure of the issue's import). In a much broader sense, the list represents a set of issues that are important to the global ecotourism community. It follows that investments in research, management, and

planning that address these issues is required to ensure the long-term sustainability of the ecotourism industry.

### *A Cultural Sensitivity Definition for Ecotourism*

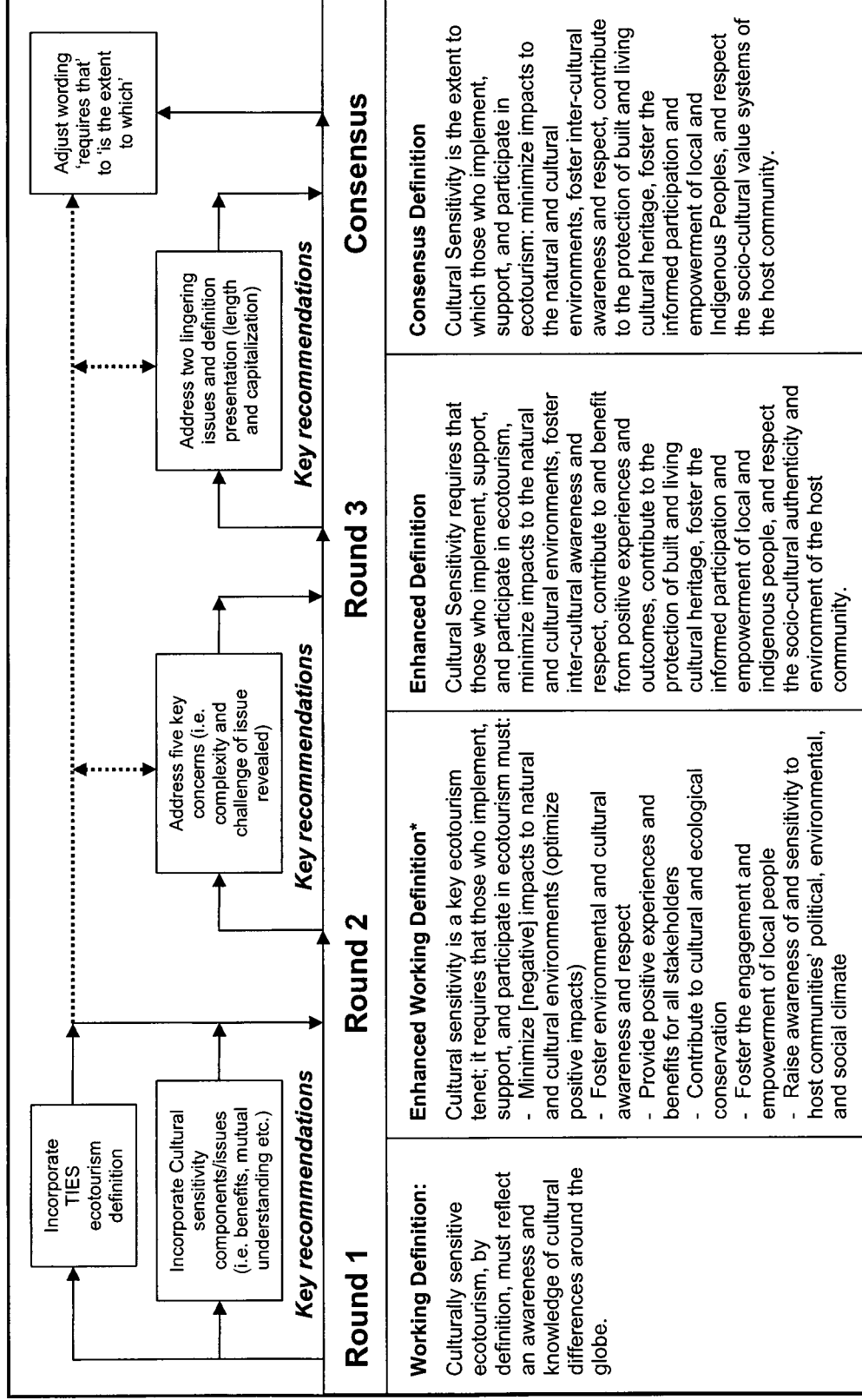
In Round one, a working definition was introduced for group judgement (see Figure 14). This definition was purposefully broad and loosely structured so as to allow the group to inform the shape and content of the definition over the course of the Delphi exercise. As expected, the first definition resulted in a flurry of valuable comments, suggestions, and critiques that were used to enhance the definition for the subsequent Delphi round. While a majority agreed that the Round one definition was appropriate (25.5%) or very appropriate (51.1%), the remainder of the group was divided. Some felt that the definition was somewhat appropriate (16.0%), while others stated that the definition was not very appropriate (6.4%) or not appropriate at all (1.1%) (Table 18).

**Table 18:** Definitional Appropriateness Measured on a Five-Point Likert Scale

Round	% Very Appr. (5)	% Appr. (4)	% Somewhat Appr. (3)	% Not Very Appr. (2)	% Not Appr. (1)	Mean score	Std. dev.
1	51.1	25.5	16.0	6.4	1.1	4.2	0.97
2	50.0	29.5	16.7	2.6	1.3	4.26	0.87
3	42.6	49.2	8.2	0	0	4.34	0.62

The comments revealed the breadth of participant opinion and perspective. It also revealed that the definition needs to be enhanced so as to make explicitly clear what cultural sensitivity means for ecotourism (a majority agreed). Furthermore, participants

Figure 13: Definitional Enhancement Process



\* This definition was enhanced, partly, by incorporating the TIES (1990) definition.

suggested that the definition reflect a number of critical issues and cultural sensitivity variables including: scale, mutual understanding, cultural similarities, cultural preservation, and positive benefits for stakeholders. Of note, several participants suggested incorporating the International Ecotourism Society's ecotourism definition as the basis for definitional enhancement and group judgement. The suggestion was made on the basis that the TIES definition captures many of the critical components (aforementioned) of cultural sensitivity revealed by participants in Round 1. Thus Round 1 confirmed the importance of cultural sensitivity and the need to better define cultural sensitivity for ecotourism.

In Round 2, an enhanced definition, informed by the results and recommendations from Round 1, was introduced for group judgement (Figure 14). This definition was also judged to be 'very appropriate' or 'appropriate' by a majority of the group (79.5 percent). There was also evidence of further movement towards a convergence of group opinion (reduction in standard deviation). However, the analysis also reveals that cultural sensitivity is a complex issue and that our understanding of what is required and by whom is yet unresolved. A set of concerns emerged from this round and their consideration throughout the definitional enhancement process was judged to be necessary by both the researcher and the research participants.

The first concern is related to the nature-culture dynamic. A noteworthy divide manifested amongst participants about the role and value of culture in the ecotourism experience. For example, some argued that the natural environment is an agent of cultural change (and vice versa); thus, the relationship between them is symbiotic. One participant describes this relationship as a necessary "nexus". Conversely, others argued

that nature and culture are separate and there is no place for nature in a definition of cultural sensitivity. One participant makes this position clear: “I would question the inclusion of natural environments in a human-centred area of ecotourism as it muddies the water.” Other participants argued that there is no place for culture in a definition of ecotourism. Representative comments include: “Ecotourism’s key tenets are about nature, not people”; and “Cultural sensitivity stands separate from ecotourism”. The confrontation between these seemingly polarized views reveals that ecotourism and cultural sensitivity remain cloaked in confusion and that a spectrum of understanding is present amongst even the world’s experts. Going forward, the challenge is to facilitate movement towards an enhanced understanding of the nature-culture nexus whilst maintaining sensitivity to the possibility that a divergence of opinion and not a convergence of opinion is a Delphi result.

The second concern is related to cultural preservation. This issue also presented a noteworthy divide amongst participants (though not nearly as polarized as the previous). The group agreed that ecotourism should foster cultural preservation, particularly because ecotourism presents opportunities for enhancing and preserving the cultural identity of local and Indigenous communities that may otherwise be lost or put at risk. However, in other communities where traditional practices are not compatible with the United Nations *Declaration of Human Rights*, preservation is contested. As one participant remarks it “is a dilemma” that is not easily resolved:

Can we tolerate certain 'traditions' (e.g. female circumcision, the position of women in much of the Arab world or in Thai villages - prostitution to earn karma points) as the right to be culturally different - or do we, as Ecotourism agents of progress, try to subvert it?

Given additional resources, both temporal and financial, it would be interesting to explore along which line this divide manifests (if at all). For example, it is possible that it can be understood on the basis of a North-South, East-West, or Professional-Academic line. Although beyond the scope of this study, further investigation is required to make this determination and to better understand the external forces that are shaping the discourse related to cultural preservation.

Other participants remind the group that culture is not a commodity nor is it static or tangible. The danger of approaching culture as a ‘thing’ to be preserved is that it risks a “condensed and substantialised vision of cultures and natures.” It also raises concerns about authenticity: “The most salient and problematic question associated with this definition of cultural sensitivity is what is meant by “authenticity”; according to whom?” In general, there was discomfort with the inclusion of the words ‘cultural conservation’ or ‘cultural preservation’ in the definition. Going forward, the challenge is to find a means to best express the opportunity to foster ‘culture’ without compromising United Nations ideals.

The third concern is related to the stakeholders involved in the ecotourism experience and how they are to operationalise ‘cultural sensitivity’. Some participants argued that it was the role and responsibility of the ecotourism providers and the ecotourists to be sensitive (or to foster cultural sensitivity) while others argued that all stakeholders should be responsible. This includes the host community and those in support of ecotourism (policy-makers, local businesses, participants, etc.). Going forward, the challenge is to enhance the definition so that the importance and role of a multi-stakeholder approach is addressed. As participants have indicated, this is imperative for

moving beyond contemporary notions of cultural tolerance to cultural sensitivity, and for ecotourism to contribute to the structural change process (local, regional, national, international laws and policies, etc.) associated with the sustainable development imperative.

The fourth concern is related to impacts and benefits. While a majority agree that minimizing negative impacts and maximizing positive impacts is an important element of ecotourism, there is concern about who defines ‘negative’ and ‘positive’, how these definitions are to be adapted to the ecotourism and community context, and how they are to be measured in practice. A majority of the participants agreed that ecotourism must contribute benefits for the communities and environments in which the activities occur. However, there are concerns about the distribution of benefits across stakeholder groups. Key concerns relate to the power dynamics that exist between the host community, the ecotourism operator, and the tourist, and the kinds of conflicts, challenges, and outcomes that these dynamics produce. How do we ensure that all stakeholders engage (or have opportunity/choice to engage or not engage) in a beneficial democratic and participatory process? The challenge in addressing this concern is to ensure that the definition emphasizes positive outcomes without being prescriptive about what, when, where, and how they are to manifest.

Progress has been made towards understanding the relationship between cultural sensitivity and ecotourism and how this should be defined. The results from Round two served to move the group towards a consensus definition. However, a set of unresolved definitional issues regarding cultural sensitivity and ecotourism were also identified. The complexity, challenges, conflicts, and concerns related to cultural sensitivity and its

definition, were then brought forward to inform the definitional enhancement process. On this basis, a third definition was developed. It was introduced in the Round three survey and over 90% of participants judged the definition to be appropriate or very appropriate (Table 18). It must also be noted that the number of participants who judged the definition to be 'not appropriate' or 'not very appropriate' was reduced to none. This produced a reduced standard deviation measure and an increase in group convergence. It is important to note, however, that this result is also influenced by attrition between rounds. A reduction in the number of participants influences the standard deviation measure. It is also possible that dissenters have withdrawn from the process. If this is in fact the case (there is no way of assessing this possibility), it could result in a reduction in judgements deeming the definition to be 'not appropriate' or 'not very appropriate'. This possibility is referenced elsewhere in the literature as a methodological reality and constraint and it must be acknowledged here (Dalkley and Helmer, 1951; Linstone and Turoff, 1975).

In Round three, the definition was accepted by a majority of the group but a minority (8.2%) argued that the definition needed [minor] enhancement on the basis of three key issues: definition length, cultural authenticity, and outcomes. The length of the definition was an issue for several participants who felt that the definition should be shortened for practical purposes (ease of use, readability, etc.). Authenticity was also an issue amongst a select few. For them, the issues that emerged in Round two that were associated with cultural preservation had not been adequately resolved in the enhanced definition. Participants expressed concern about the authenticity of the host community, how and by whom authenticity is to be defined, how to preserve authenticity, and how to

share authentic experiences. “Authenticity is difficult”. It is paradoxical. It is complex. Participants acknowledged the challenge and suggested a shift in focus to respecting values, behaviours, and environments as a better way of addressing contested definitions of ‘authenticity’ and ‘cultural preservation’. Residual concern was also present about the inclusion of ‘positive experiences and outcomes’ in the definition. Several participants, in this round and previous rounds, contested the inclusion of the statement. In Round three, several participants recommended its removal on the basis that the statement is vague and intangible, that it is context specific, and that it is difficult to implement and measure.

On the basis of the Round three results, that is participant feedback, comments, and suggestions, minor definitional enhancements were completed and a consensus definition was reached (Figure 14). As is customary in Delphi research, participants were provided the opportunity to review the consensus statement and to provide comments and suggestions. The majority of those who responded (though a minority of the group), did so very positively about both the consensus definition specifically and the research generally. One participant, however, challenged the definition:

I am not certain that as phrased, the ‘definition’ is actually a definition. As written, it tells us what cultural sensitivity requires, (that is a set of action conditions) not what it is. A slight rephrasing (I have no disagreement with the content) would probably solve this.

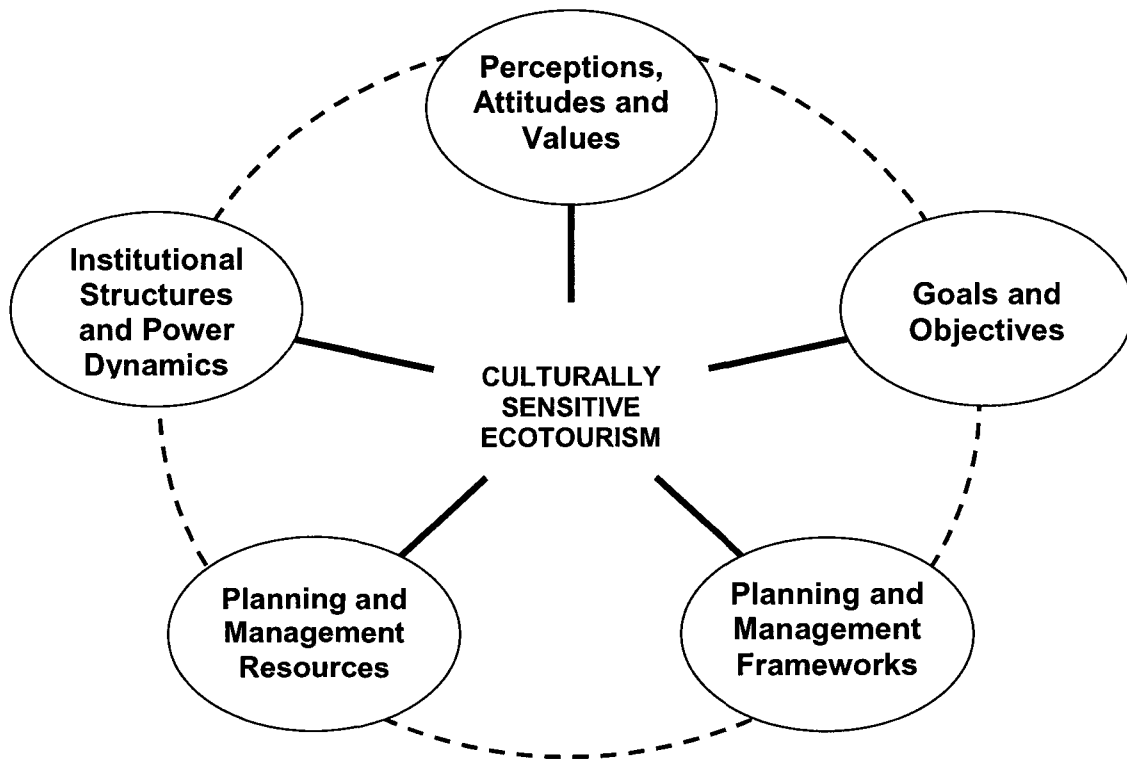
In light of this comment, a slight change in wording was judged to be necessary by the researcher for several reasons. First, it moves the definition away from a prescriptive definition (based on action imperatives). Second, it establishes a definitional framework for implementing and measuring the achievement of (or lack thereof) cultural sensitivity.

It also establishes a basis for future efforts to operationalize the definition; that is, to develop of a set of techniques, tools, and methods for making ecotourism culturally sensitive. Based on this iterative process, this definition is brought forward for ecotourism.

**Cultural Sensitivity** is the extent to which those who implement, support, and participate in ecotourism: minimize impacts to the natural and cultural environments, foster inter-cultural awareness and respect, contribute to the protection of built and living cultural heritage, foster the informed participation and empowerment of local and Indigenous Peoples, and respect the socio-cultural value systems of the host community.

### *Implementing Cultural Sensitivity for Ecotourism: Opportunities and Barriers*

Throughout the Delhi exercise, participants made reference to barriers and opportunities that could affect the establishment of cultural sensitivity as an ecotourism imperative. These barriers and opportunities manifested explicitly and implicitly in the participant survey comments. In order to better understand the complexity of cultural sensitivity and ecotourism, the Round three survey was purposefully designed to elucidate opportunities and barriers to cultural sensitivity from the expert panel. A thematic content analysis of the response data was completed and a set of five themes emerged (Figure 15). In turn, they are introduced and the barriers and opportunities associated with each are described.



**Figure 14:** Opportunities and Barriers for Establishing Culturally Sensitive Ecotourism

*Perceptions, Attitudes, and Value* refers to a range of human (individual and/or collective) understandings based on observational and experiential learning about the surrounding environment (natural, social, or other) or situation. Linked with human behaviour and decision-making, perceptions, attitudes and values can vary and change across time and space (natural and social landscapes), and are not universal constructs. Perceptions, attitudes, and values may affect the extent to which ecotourism is culturally sensitive. Barriers associated with this theme include: misunderstanding, insensitivity, lack of awareness, false expectations, and conflicting values. Key concerns were related to the level of staff training (tour guide), understanding amongst supporting agencies in the public and private sectors, and the ability to begin sensitivity training before tourists arrive in the host community (and vice versa). Thus, an understanding of perceptions,

attitudes, and values amongst stakeholders is critical for the achievement of cultural sensitivity.

The majority of participants who made reference to (mis)understanding linked this potential barrier to education and awareness training as a means for addressing this problem. Opportunities associated with this theme include: education, inter-cultural understanding, and awareness. Education and awareness was identified by a majority of the group as a noteworthy opportunity related to cultural sensitivity. Opportunities to shape, enhance, and contribute to evolving perceptions, attitudes, and values related to cultural similarities and differences exist in the ecotourism environment. For example, education could be in the form of organized and purposeful cultural education training and learning programs or informal inter-cultural exchange opportunities. Education is thought to lead to improved understanding and sensitivity and a reduction in conflict related to differing perceptions, attitudes and values. It is also thought to lead to opportunities for promoting diversity and heritage protection. According to select Delphi panellists, education and awareness investments can facilitate a “richer overall experience and a better understanding of the tourism destination”, “The furthering of a global community based on the acceptance of our differences and an appreciation of our similarities,” as well as “genuine concern and good will among hosts and guests,” Furthermore, the Delphi panel has identified education, above all others, as the most important and critical opportunity for operationalizing cultural sensitivity and for increasing awareness about the social, cultural, environmental and economic impacts of ecotourism.

*Ecotourism Objectives* refers to a set of philosophical parameters and pragmatic goals for ecotourism. Longstanding confusion about what ecotourism ‘is’ and ‘does’ is identified in the academic and professional literature as a significant challenge and barrier to objective achievement (Burton, 1998). Delphi participants cite a lack of consensus and definitional confusion as a significant barrier to cultural sensitivity in particular, and sustainability in general. On the other hand, participants were optimistic, identifying movement towards “definitional consensus” as an opportunity for improved understanding. By way of discussing and operationalizing cultural sensitivity, there exists opportunities to address the apparent confusion about ecotourism’s objectives and definition. In addition, when a culturally sensitive approach is assumed, an inclusive space for consensus may be possible. This presents opportunities to address and resolve lingering confusion and unresolved concerns. Furthermore, it provides many opportunities for ecotourism to continue to contribute to the sustainable development imperative, particularly if a balanced approach – between economic, environmental and socio-cultural principles – is assumed.

*Planning and Management Frameworks* refers to a set of formal and informal tools for operationalizing cultural sensitivity (Fennell and Dowling, 2003). This includes but is not limited to: guidelines, regulatory and institutional policies, and evaluative tools. When considering operational actions such as creating programs, policies, training modules, measuring progress, and reporting outcomes, Delphi participants identified the absence of management and evaluation frameworks as a significant barrier to the delivery of culturally sensitive ecotourism experiences. Concern was also expressed about the industry’s ability to commit to providing culturally sensitive products, for facilitating

informed tourist purchases, and for sharing culturally sensitive values and outcomes with supporting organisations. Participants indicated that the creation of “guidelines of what is (and what is not) culturally sensitive ecotourism, methodological frameworks, best practices,” the development of policy and regulatory measures, and evaluation frameworks is the logical next step for making ecotourism culturally sensitive.

Concomitantly, participants identified the creation of planning and management frameworks as an important opportunity (not simply a barrier driven reaction) for making ecotourism culturally sensitive. If the current void is addressed, there exists possibility for ecotourism to assume a leadership role by providing relevant examples of best-practices, codes of conduct, and evaluation frameworks for other heritage-dependant industries, tourism businesses, and communities. A trickle down effect may be possible, whereby the ecotourism industry can continue to ‘lead by example’ (by expanding its leadership to also include socio-cultural sustainability).

*Planning and Management Resources* refers to a set of operational needs, assets, and processes. For example, this may include operational costs, human resources, and time. Participants expressed concern that progress towards cultural sensitivity may be affected by related constraints: “Operators have a lack of resources to address the issue; including time constraints, financial constraints, and knowledge base and educational constraints.” Participants expressed concern about the costs associated with cultural sensitivity; that is, the costs associated with staff training, policy development, community participation, and more, are perceived as a barrier to success. Furthermore, participants expressed concern about financial sustainability if ‘new’ investments are required. Participants, particularly those with expertise from the professional domain,

expressed concern about stretching financial resources to yet another ecotourism objective: “Financial sustainability may suffer while trying to accomplish such a wide range of goals.”

Second, the amount of time required to develop and implement cultural sensitivity plans, policies and programs is of concern. This concern is magnified when the amount of time diverted from other management areas is considered (e.g. marketing, product development). Third, communication is identified as a barrier to cultural sensitivity. For example, language, communication tools (e.g. internet) can present as a barrier when attempting to communicate across cultures and continents. Trust relationships between providers, communities, and tourists are also required to facilitate open and engaged dialogue: “It takes time and patience to work with communities, and to maintain ongoing favourable relations for culturally sensitive tourism.” Thus, investments are required (staff training, technological investments, translation, relationship building, time, etc.) to overcome communication barriers. Fourth, education and training was identified as a potential barrier because of the time and cost required to train staff and educate members of the host and visiting communities. This barrier is clearly linked to the barriers associated with perceptions, attitudes, and values.

Despite these concerns, the Delphi panel expressed optimism in regards to the current and future state of ecotourism resources. They identified potential opportunities related to resources and processes such as ecotourism supply and demand, natural/cultural heritage access and conservation, communications and marketing, education and training, and community development. Increasing supply and demand for ecotourism is identified as an opportunity to propel the industry towards cultural

sensitivity and it is an opportunity to share cultural sensitivity values with ecotourism stakeholders.

Participants also identified opportunities to contribute to natural and cultural heritage conservation and to increase these activities as values change. Cultural sensitivity could also work to improve communications between tourists, providers, communities, and policy makers. Given that cultural sensitivity, ideally, facilitates dialogue, then if implemented it could lead to improved communications. Though communication is also identified as a barrier, its identification as an opportunity implies that investments could lead to positive outcomes. Marketing was identified as an opportunity for those who offer culturally sensitive experiences. Sensitivity is a 'marketing asset' that can be mobilized in marketing material and ecotourism products to attract ecotourists. It can also be used as a means to begin cultural sensitivity education long before the tourist arrives on site: "Incorporate opportunities to understand the local culture within the tour; Put effort into developing "cultural experiences", and ensure marketing materials reflect the experience." Education and training is identified as a barrier to cultural sensitivity but it is also identified as a potential opportunity. Investments in staff education and training are thought to have the potential to accelerate cultural sensitivity implementation. It is also thought to have the potential to increase awareness amongst stakeholders (leadership/trickle down effect): "What ecotourism operations need for success (from all perspectives) is smart, engaged, progressive people running them, people that can make prudent decisions when considering barriers (including those listed above)."

Community development was considered to be the most important opportunity in this thematic area. Investments in infrastructure, financial infusions, community cohesion, and support for local initiatives (particularly those associated with natural and cultural heritage conservation) were identified as potential outcomes and opportunities of culturally sensitive ecotourism. All of these opportunities not only have the potential to benefit the community, but they may cycle back to provide resources and support mechanisms for ecotourism. And, as one participant remarks: “This plethora of opportunities is what makes ecotourism so inherently interesting and exciting.”

*Institutional Structures and Power Dynamics* refers to the stakeholders, agencies, actors, and processes involved (directly and indirectly) in the governance of ecotourism environments, experiences, and resources. It also refers to the power dynamics that result from both the structure and function of these arrangements. Associated issues and processes include democratization (extent), western-centrism, consumerism, commodification, and inequality. One participant provides perspective:

Cultural sensitivity must be set in a wider, dynamic, context where there are political (terrorism/conflict etc), economic, social, environmental (GEC etc), technological and institutional forces at work which mean that 'culture' is a far from static concept and that there are other, very powerful forces, at work militating against sensitivity: ecotourism will often be a drop in the ocean.

Related concerns emerged from the Delphi and they have potentially long-reaching implications. Democratic process was identified as a particularly lofty goal given the number of stakeholders involved in ecotourism, their various perspectives and

expectations, and the time and efforts required to ensure that everyone has a voice in the decision-making process. Also of concern was the potential for indifference or a lack of interest to manifest amongst members of host communities, local governments, or tourists. Political structures and trends are also identified as a potential barrier, particularly in countries where democratic process is the exception and not the norm. This feeds directly into concerns about the inequalities that exist between ecotourism stakeholders. Consumerism and commodification of ‘authentic’ cultural experiences are also of significant (and residual) concern to participants. Institutional barriers and contextual power dynamics have the capacity to shape ecotourism developments and the achievement of cultural sensitivity. However, understanding of these dynamics is limited both in theory and practice. Significant and long term investments are required to better understand and address institutional barriers.

Opportunities were also identified for addressing the institutional barriers and power dynamics. Culturally sensitive ecotourism may contribute to community engagement; that is individual contributions to the local tourism economy and social fabric. This may lead to improved democratic process for ecotourism planning and management while engagement and democratization has the potential to lead to community empowerment and improved social cohesion (social capital). It also has the potential to contribute to social justice for individuals and communities. It may contribute to the improved status of women, employment opportunities, minority inclusion, improved access to education and health care, human rights, quality of life, and improved distribution of financial benefits. In the ideal case, it should lead to improved understanding and acceptance amongst cultures.

*Cultural Sensitivity and the Sustainable Development Imperative*

Since the 1980's, there has been growing recognition that sustainable development represents both a considerable challenge and a vital imperative for human development and well-being. Popularly introduced in the 1987 World Commission on Environment and Development *Brundtland Report*, the concept demands that a balance be achieved between economic, social, and environmental needs and limitations for present and future generations. These three elements have become widely known as the *pillars of sustainability*.

In recent years, a noteworthy discourse has emerged regarding the need for a fourth pillar – culture (Hawkes, 2001). This 'fourth pillar' is proposed on the basis that sustainable development is achievable only when there is balance between the objectives of cultural diversity and those of environmental responsibility, economic viability, and social equity (Nurse, 2006). In terms of global development, the import of culture has been accelerated on the basis of the growing value of cultural assets (goods, services, experiences, etc.) in economic exchange systems, as well as the growing threats to cultural diversity associated with globalization (Carrier and Macleod, 2001; Jamal et al., 2006; Stark, 2002). The importance of culture, its protection and celebration, its import for human development and well-being, and its vital role in sustainable development processes, is formally recognized in keystone policies and statements such as the United Nations *Millennium Development Goals* (2005), the *Universal Declaration of Human Rights* (United Nations, reconfirmed in 1998), and the United Nations Educational, Scientific and Cultural Organization's *Universal Declaration on Cultural Diversity* (UNESCO, 2001).

Ecotourism champions environmental conservation and education and it is well-aligned with the principles of sustainable development (Sharpley, 2000; Weaver and Lawton, 2007). Because of its ethics-based approach to tourism management, ecotourism is perhaps more than any other tourism type, best positioned to achieve sustainability. Although the principles of sustainable development have been formally and informally adopted by the ecotourism community, in sharp contrast, there is considerable disagreement about whether sustainable development is actually being achieved (Honey, 2002). In the last decade or so, these concerns have been linked with the fourth pillar of sustainability – culture, and by extension the import of culture to ecotourism. Cooper and Vargas (2004: 56) identify a failure to truly acknowledge the import of culture for the ecotourism experience and the absence of “cultural sensitivity” in the ecotourism exchange as the “two-edged sword of ecotourism.” They argue that attracting tourists into environmental and cultural contexts, many of which are sensitive to a scale of activity and experiential expectations that they are not equipped to manage, can damage both the host environment and culture whilst compromising progress towards sustainable development. Individuals and organisations involved in ecotourism management and research argue that in adopting the principles of sustainable development, ecotourism has overlooked the importance of culture and has instead focused on the other pillars of sustainability. In fact, there appears a historic disregard for the cultural pillar of sustainability and disproportionate emphasis on the economic and environmental pillars. Doel (2003: 502) puts this in perspective: “Little wonder, then, that culture is often assumed to pale in significance when compared with more pressing concerns like economic crisis, regional conflicts and global warming.”

The achievement of ecotourism goals, and by extension sustainable development, is recognized to be contingent upon successful adaptation to and protection of complex cultural systems. While the current sustainable development paradigm recognizes this in principle, antecedents suggest that the ecotourism experiment will fail in the absence of a greater sensitivity to the fourth pillar of sustainability – culture, and by extension, the cultural context for ecotourism. Culture and cultural sensitivity are therefore, considered as important as the other pillars – social, economic, and environment. This imperative is supported by the judgement of the Delphi panellists specifically and the general findings of this study. The cultural sensitivity definition and the opportunities and barriers identified through the Delphi exercise represent but one of many necessary steps in the process required to break the barriers to sustainable development through ecotourism.

## **5.5 Discussion and Conclusion**

The Delphi proved to be a valuable forum for the generation of ideas and debate amongst the panellists. It produced a rich data set that contributed to an evolving understanding of cultural sensitivity and the development of a cultural sensitivity definition. The research sought to capture and interpret expert opinion related to the importance of cultural sensitivity, the development of a cultural sensitivity definition, and the barriers and opportunities associated with operationalizing the concept in the ecotourism domain. While there remains little doubt that cultural sensitivity is an issue of import, the study also reveals that investments are required to expand the breadth of its understanding amongst ecotourism stakeholders. The study accomplished its central objective to move the group through the development of a consensus cultural sensitivity definition for ecotourism. There is much hope (explicit in the participants' comments)

that this definition can serve as a first step towards making ecotourism culturally sensitive in the global community.

The ecotourism literature establishes that definitions are the foundation from which ecotourism policy and practice frameworks can be developed (Honey, 2002; Garrod, 2002). They are also thought to serve as a basis for the legitimacy of ecotourism practices and opportunities. Therefore, the next step, as the Fyall and Garrod's (1997) process model suggests, and as confirmed by the Delphi panel, is to develop a set of frameworks – techniques, tools, methods, policies for culturally sensitive ecotourism. This requires companion investments in monitoring and evaluation to measure the extent to which ecotourism is culturally sensitive in practice. The study also served to illuminate the potential barriers and opportunities to making progress towards these goals. A lack of understanding (on a variety of scales and issues), resources (both tangible and intangible), and the structural and power dynamics that shape processes and outcomes, are identified as potential barriers.

Although the Delphi served to facilitate a consensus outcome, the research process revealed a number of methodological shortcomings. First, although the Delphi did in fact provide an inclusive method for capturing and acknowledging the importance of multiple voices, the process moved the group towards a single consensus voice. In doing so, the differences between panellist judgements were subsumed by the process. While differences and dissident voices were afforded equal attention throughout the Delphi exercise (as reported in the Delphi Summary Reports in Appendix B), it is important to note that a convergence of opinion is the embedded expectation of a Delphi exercise. This surely influences the panellists' responses and the researchers' analysis,

and by extension, it must influence the resultant consensus statement. This issue is not easily resolved and it is not the ambition of the researcher to do so here. Instead, it is acknowledged as a potential methodological constraint that is deserving of future methodological review. Second, the scope of the research and the pragmatic research constraints such as time and budget limited the ability of the researcher to assume a variety of perspectives and approaches to the data analysis. For example, although the study examines cultural sensitivity and the data is purposefully drawn from a culturally and experientially diverse group of experts, it was not designed so as to be sensitive to culturally-based or experience-based differences and similarities amongst panellist judgements. Therefore, it is possible that the data contains additional insight into a variety of influences and factors that may affect expert opinion related to culture, cultural sensitivity, and ecotourism. This omission in the research design illuminates the possibility for future research opportunities.

In addition to the aforementioned research opportunities, future research should focus on enhancing our understanding of the barriers and the tools available for mitigating the obstacles they present. Opportunities were also identified by participants and these perhaps are the greatest measure of ‘hope’. While participants expressed concern about the process and resources required to make ecotourism culturally sensitive, there was agreement about its importance and its contribution to sustainable development. Participants cited a number of reasons, including community empowerment, educational opportunities, inter-cultural exchange and understanding, heritage conservation, and sustainable outcomes. Although somewhat paradoxical in its complexity and necessity, this study identifies cultural sensitivity as a contemporary ecotourism planning and

management imperative. While ecotourism continues its “coming of age” (Weaver and Lawton, 2007: 1168) and our understanding of the contemporary ecotourism paradigm evolves, it is hoped that the study’s findings will provide guidance for ecotourism stakeholders in both the academic and professional domains who are contributing to ecotourism management plans, research agendas, standards, codes of conduct, or other ecotourism related advancements related to culture, cultural sensitivity, and sustainable development.

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## CHAPTER SIX

### Summary and Conclusions

#### 6.1 Introduction

This research explores the evolution and contemporary context for ecotourism. Several issues defined the scope and need for the research. First, ecotourism is a popular tourism activity with a growing spatial reach. This means that ecotourism is now practiced in increasingly sensitive cultural and natural environments. As it continues to expand its reach, concern has arisen about its sensitivity to these environments. While much of the research has focused on the environmental context and impacts of ecotourism activities, a disproportionate attention has been afforded its cultural context and impacts. In recent years, a number of scholars have noted this research void and have made a call to the research community to address the complexity associated with the culture-ecotourism relationship. Given the well-established links between ecotourism goals and the objectives and processes associated with the widely popular sustainable development concept, as well as a growing understanding of the importance of culture in this process, a response to this call was judged to be imperative. For ecotourism to embody sustainability, to provide benefits to the communities in which its activities occur, to ensure its social and cultural relevancy, and to continue its contribution to environmental conservation efforts around the world, our understanding of these links must evolve. In light of this imperative, this study addressed five primary objectives:

1. to examine the evolution of ecotourism and the discourses that shape ecotourism in both theory and practice;
2. to analyze ecotourism definitions and identify key ecotourism tenets;
3. to interpret international expertise to define cultural sensitivity;
4. to identify opportunities and barriers for establishing cultural sensitivity as an ecotourism imperative (in theory and practice);
5. to present an ecotourism framework; one that is equally sensitive to culture and the other pillars of sustainability – social, economic, and environmental.

## **6.2 Summary of Findings**

### **6.2.1 Objective 1: Trace the Evolution of Ecotourism**

Through the extensive literature review conducted in preparation and in support of this research, the evolution of ecotourism is now well-understood (Figure 1). From its earliest roots as a nature-based recreational activity, to its strong links with sustainable development theory and practice, to its emergent concerns and issues, this research has revealed a ‘coming of age’ for ecotourism (Weaver and Lawton, 2007).

### **6.2.2 Objective 2: Identify Key Ecotourism Tenets**

Building on the discoveries associated with objective 1, Chapters Two and Three demonstrate that we have reached a near consensus about ecotourism’s key tenets. This fundamental tenet set is introduced and each key tenet is defined. Their importance is substantiated not only by the analysis, but also Weaver and Lawton’s (2007) recent work. However, the research also reveals a set of concerns and emergent issues related to the universalizability of the key tenets. These concerns have served to illuminate the need for cultural sensitivity adaptations and investments and it has validated the need to address the ensuing study objectives.

### **6.2.3 Objective 3: Define Cultural Sensitivity**

The Delphi study relied on the collection and interpretation of expert judgement from a select group of ecotourism experts. Their contributions, through several rounds of questionnaires, served to inform the development of a cultural sensitivity definition for ecotourism. In achieving this objective, the research reveals that cultural sensitivity is a complex issue and that it is not well-established within the international ecotourism community. The Delphi technique is designed to move a group towards a consensus of opinion and this process produced a convergence of opinion about the importance (very important) of cultural sensitivity for contemporary ecotourism. A consensus was also reached on a definition of cultural sensitivity for ecotourism. Overall, the results reveal, despite the complexity and challenge of the issue, that cultural sensitivity can be defined and its importance can be established amongst a select group of ecotourism experts from a diversity of geographical and cultural locations.

### **6.2.4 Objective 4: Identify Opportunities and Barriers to Cultural Sensitivity**

The Delphi analysis revealed a set of opportunities and barriers to establishing cultural sensitivity as an ecotourism imperative in theory and praxis. These are understood on the basis of five macro themes including: (1) Perceptions, Attitudes and Values; (2) Ecotourism Objectives; (3) Planning and Management Frameworks; (4) Planning and Management Resources; and, (5) Institutional Structures and Power Dynamics. The Delphi panel, above all others, identified education as the most important and critical opportunity for operationalizing cultural sensitivity and for increasing awareness about the social, cultural, environmental, and economic impacts of ecotourism. Other opportunities include the potential for ecotourism to lead by example, by

demonstrating initiative and leadership within the tourism industry. Cultural sensitivity, while discussed in the context of ecotourism in this study, is an issue that affects other tourism activities. Should the ecotourism industry act to operationalize this concept, a set of best-practices, models and frameworks, and experiences can be shared with others who may be seeking to make their operations culturally sensitive. Barriers associated with making ecotourism culturally sensitive are related to a lack of resources and residual confusion about what ecotourism is and is not amongst those who manage and practice ecotourism. Investments in training programs (for staff, communities, and visitors), management frameworks, codes of ethics, policies, and other are required to move best-practice forward. However, the Delphi panel expressed concern about the ability of ecotourism operations to do so when resources are already limited and established ecotourism perceptions, attitudes, and values do not necessarily include or prioritize cultural sensitivity. Where resources are available, it is likely that they will be allocated to seemingly more important ends such as conservation or product development.

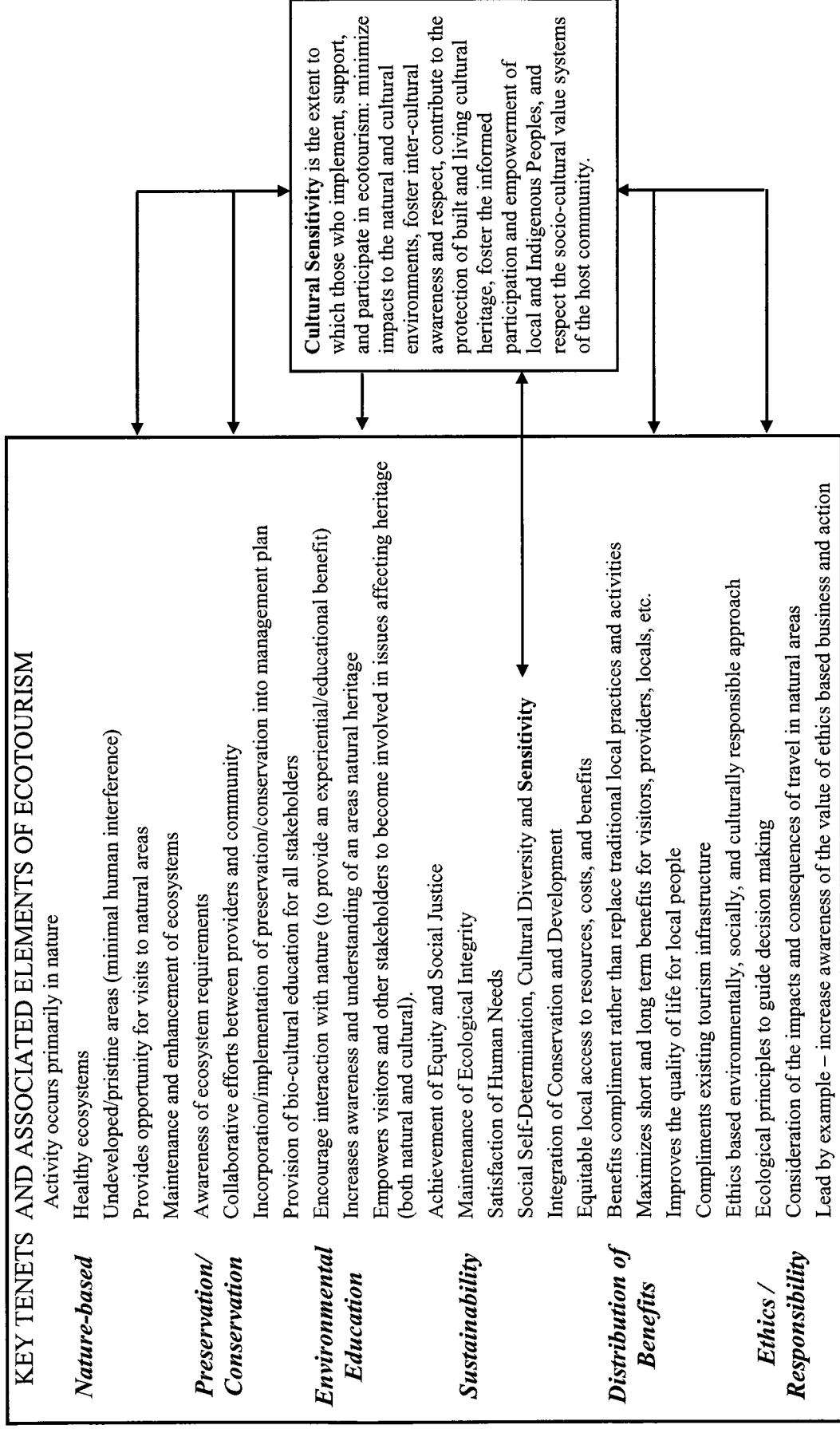
Despite these barriers, the Delphi panel is optimistic for progress towards culturally sensitive ecotourism. However, progress must be supported by definitions, frameworks, research, and advocacy efforts in both the scholarly and professional communities. Given the importance of culture, its influence on the policies that shape tourism development, the findings of the study are noteworthy. An evolving understanding of cultural sensitivity and a growing need for action is revealed. The substantial product of this study, the cultural sensitivity definition for ecotourism, is introduced as a foundation for progress.

### **6.2.5 Objective 5: Present a Culturally Sensitive Framework for Ecotourism**

This research has clearly established cultural sensitivity as a contemporary research need and an important pragmatic ecotourism issue. However, Delphi panellists are adamant that cultural sensitivity, while important, is not a key ecotourism tenet. Instead, cultural sensitivity is best understood as an ecotourism imperative that has strong and explicit links with the key tenets. For this reason, cultural sensitivity is best understood as an associated element. On the basis of the issue's relative importance, the key tenets and associated elements, as defined in Chapter Two (Table 7), must be adapted to reflect these findings. A framework for culturally sensitive ecotourism is introduced (Figure 16).

The framework highlights the key tenets and cultural sensitivity. The consensus definition for cultural sensitivity, as defined by the Delphi panel in Chapter Five, comprises the cultural sensitivity 'element' of the framework.

**Figure 15:** A Framework for Contemporary Ecotourism



Adapted from Donohoe and Needham (2006)

### **6.3 Contributions of the Study**

#### **Theoretical Contributions**

The theoretical contributions of this thesis derive from the development of the contemporary ecotourism framework (Figure 16). The key tenets and associated elements of ecotourism have been identified and their salience has been substantiated in the literature (Weaver and Lawton, 2007). Cultural sensitivity, an emergent issue in the ecotourism discourse, is brought forward as the basis for a Delphi study. A definition of the concept is developed and tested amongst a select group of ecotourism experts and it is found to be very appropriate for the contemporary context. To date, no such definition is available to the ecotourism community. It is, therefore, the primary contribution of this study. While the definition marks an important movement forwards, it also reveals a need for further consideration of the theoretical context for definition. This may include an examination of the ethical imperatives for cultural sensitivity. This may include ethics and values related to organizational culture in the agencies that govern tourism and the communities that host tourism activities and the tourists who participate. A basis for cultural sensitivity as 'important' as been established here but the ethical foundation for operationalizing the concept warrants future theoretical considerations. This is required so that movement towards the next step – operationalizing the concept – can occur. It is hoped that this framework will provide a strong and explicit foundation for the development of ecotourism generally, and culturally sensitive ecotourism specifically. This may include regulations, policies, programs, codes of ethics, or education and training modules. It is also hoped that the framework can serve as an ecotourism research tool. It may provide a framework for the evaluation of ecotourism operations (case

studies) or the comparative analysis of ecotourism across cultural and geographical boundaries. Finally, it is hoped that it will serve to inform the contemporary ecotourism discourse related to ecotourism and cultural sensitivity. Given that this is an emergent issue and that knowledge in this regard is evolving, the framework offers a theoretical basis for debate and discussion.

### **Methodological Contributions**

The methodological contributions of this thesis stem from the application of the Delphi technique to the study of ecotourism and cultural sensitivity. In doing so, it represents an important shift away from methodological approaches that tend to foster one way of knowing and doing ecotourism. Instead, the Delphi method has proven to be an effective tool for inclusive study. In particular, the anonymity offered by the Delphi's structure allowed a diversity of voices to be represented on the Delphi panel free from the power of persuasion or dominant voices. While the study does not claim to be completely free from bias as the researcher's and the panelist's positions as well as the methodological structure and design do have some degree of influence on the outcomes, it is the 'sum of the parts' that makes the Delphi outcome so valuable. The cultural sensitivity definition therefore, represents the contributions of many ecotourism experts from around the world.

The Delphi technique, while recognized as a legitimate research tool in the tourism domain, has not been widely applied for the study of ecotourism. To my knowledge, one study has been published (Garrod, 2002) and there are several current studies being conducted. Therefore, this study is noteworthy because it represents for the first time, that a Delphi was used to capture and interpret the judgement of a group of

international experts on a contemporary issue of importance for ecotourism. Furthermore, the application of Day and Bobeva's (2005) Delphi toolkit represents the first attempt to test this proposed guide for Delphi administration. The toolkit has not been substantiated in the literature as a useful and relevant tool. This study reveals that the toolkit does in fact provide a practical reference guide for Delphi planning and design and, the in-depth planning that was completed contributed to a seamless Delphi administration process. While a number of issues and concerns emerged from its application, the researcher found that many of these could be mitigated by consulting the Delphi literature for additional guidance. There is however, a lingering concern that is not easily resolved by this study or by antecedent research. By design, Delphi participants and administrators work towards a convergence of opinion. An expectation for consensus is therefore embedded in the Delphi structure and process and this must be acknowledged as an influence on the research outcome. In a way, the Delphi is designed to iron out the wrinkles and to favor convergence over a divergence of opinion. While the co-presence of divergent opinions is an important Delphi finding in and of itself, it must be acknowledged that the Delphi presents a paradox for the researcher and the participants. That is, the importance of multiple voices is acknowledged whilst the creation of one consensus voice is the ultimate goal. The irony of this paradox was dually noted throughout the Delphi exercise (the researcher was sensitive to the possibility that divergence and not convergence could result), it is addressed in Chapters Four and Five, and it is once again acknowledged here as an important methodological finding.

The final methodological contribution is related to the use of the Internet for Delphi administration. In preparation for the study a comprehensive literature review

was completed. It did not reveal any examples of Internet-based Delphi study. Given that this study relied primarily on the Internet for Delphi Administration, there are many lessons to be learned from this unique application. It is the researcher's ambition to share this methodological advance with others through future publication in a peer-reviewed journal.

### **Substantive Contributions**

This thesis makes several substantive contributions relevant to the development and management of ecotourism. First, the framework for contemporary ecotourism captures the most salient issues and priorities for ecotourism. It therefore represents significant progress towards a consensus definition for ecotourism. As previously noted, Weaver and Lawton (2007) substantiate this finding when they claim that we have “achieved near consensus on the core criteria of ecotourism.” As this was identified as a significant barrier for ecotourism managers (Chapter Five), this contribution is noteworthy. Not only can it serve as a framework for guiding operations, it also has an embedded capacity as an evaluative tool for assessing the ‘genuineness’ of ecotourism operations. These potential applications have yet to be empirically assessed, but could serve as the basis for future research.

Second, the cultural sensitivity definition is a response to the call for research and practice that addresses the changing cultural landscape for ecotourism. The importance of cultural sensitivity for the contemporary ecotourism context has been established by the Delphi study, a definition has been introduced and a set of barriers and opportunities to its implementation have been identified. This study offers a normative foundation for the development of strategic (e.g. policies and regulations) and operational (e.g. codes of

practice) imperatives for making ecotourism culturally sensitive. Finally, the significance of the above findings extends to tourism industry where cultural sensitivity is an issue of importance that affects planning and management activities. The cultural sensitivity definition (and the method by which it was developed) could inform the development of definitions, policies, programs and best-practices for other tourism types or industries.

#### **6.4 Directions for Future Research**

This research has improved our understanding of the contemporary ecotourism paradigm. However, in conducting this research, new questions and research directions have emerged and the need for further research has become apparent.

First, research is needed to better understand the “North-South divide” (Weaver and Lawton (2007: 1175) within the ecotourism industry and the ‘West-East divide’ that exists in the ecotourism research community (Backman and Morais, 2001). This divide is reflected in the ecotourism literature and its presence is cause for concern. While this study has acknowledged the divide and has offered practical resources for bridging the existent ‘gap’, it remains that the ecotourism literature is imbalanced. Research that explicitly explores this divide and/or research that proactively addresses neglected areas (South/East) of study would contribute to ecotourism knowledge generally, and to an evolving understanding of the cultural context for ecotourism.

Second, this study draws from the expertise of a culturally diverse panel of ecotourism professionals and academics to inform the development of a definition for cultural sensitivity. However, data analysis activities were not designed to be sensitive to experiential, geographical or culturally-based differences and similarities between experts. This decision was made on the basis that time and resources were limited and

convergence was evident in the earliest of the Delphi stages (significant divergence of opinion was not evident). Therefore, the data has not yet been analyzed with an eye that is sensitive to these potentially revealing perspectives. This omission illuminates the possibility for future research to identify and analyze the differences and similarities along a variety of lines - implicit or explicit – that have or have not manifested between the panelists.

Third, it would be useful to ascertain how well the framework (Figure 16) would perform in a variety of settings. Research is needed to understand how the framework may (or may not) inform the planning and management of ecotourism. Relevant questions may include: Can it be used as a basis for policy development?; Can it serve as a framework for product development? Research is also needed to test the framework's utility as an evaluative tool. Relevant questions include: Can the framework be used to evaluate the 'genuineness' of ecotourism operations? Can it be used to assess the extent to which a provider is culturally sensitive? There are many opportunities here and research is needed to better understand the value and utility of the framework.

Fourth and directly related to the above, is the need for research that addresses quality control and indicators. Although it is widely acknowledged that these measures and tools are needed to assure that ecotourism products are genuine and that they meet their social, cultural, environmental, and economic obligations, their development and critical review has been lean (Donohoe and Needham, 2006; Honey, 2002; Jamal *et al.*, 2006; Weaver and Lawton, 2007). Research that explores the opportunities and constraints associated with quality control and evaluation would advance the current state of knowledge and it would facilitate the planning and management of ecotourism. As

previously noted, the framework (Figure 16) may provide a basis for the development of indicators and quality control measures. It may also serve to inform research concerned with these themes.

A fifth area for future research is related to the development and application of models, tools, and frameworks for culturally sensitive ecotourism. To continue to make progress towards culturally sensitive ecotourism, the reader is reminded of the Fyall and Garrod (1997) process model that is adapted and introduced in Chapter Five:

1. defining cultural sensitivity in the context of ecotourism;
2. establishing cultural sensitivity as an ecotourism imperative;
3. developing a framework for measuring the achievement of cultural sensitivity; and
4. developing a set of techniques, tools, and methods for making ecotourism culturally sensitive.

This research has satisfied the first stage, but investments are required for subsequent stages. Research that focuses on establishing cultural sensitivity, building on the opportunities and barriers identified in this study, would further our understanding of the investments and resources required to do so. Developing indicators and other measurement frameworks for assessing the cultural sensitivity of ecotourism providers, host communities, guests, and other stakeholders would serve to satisfy stage three. In order to make progress towards stage four, that is the development of a set of techniques, tools and methods for making ecotourism culturally sensitive, there must be significant progress towards the goals of the first three stages. Given that a definition is now available, it can serve as the basis for the development of these instruments. Research that encourages continuity is encouraged as are collaborative and interdisciplinary

research approaches. Collaborative research between (and across) the academy and the professional communities would ensure that the outcomes of such research are accessible, relevant and salient for both communities. As Weaver and Lawton note: This should help to create a symbiosis between the academic and non-academic ecotourism communities that cannot but facilitate the positive progression of both” (2007: 1176).

Finally, it is the hope of the researcher to be able to continue to contribute to ecotourism’s ‘coming of age.’ The development of a future research agenda is to be informed by the research needs identified by this study.

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## **APPENDIX A: Delphi Research Design**

The Generic Delphi Toolkit is a three-stage model for guiding Delphi design and management. Using the toolkit, the following sections use an ongoing research project to explore the utility of the model. Each of the generic stages and criteria is best understood through a detailed examination of the research purpose and the decisions involved in its design. To ensure clarity and flow through the next few sections, a detailed methodological design is presented in the style of a research proposal. The ambition is to bring the reader a greater depth of understanding regarding the research design and methodological approach. The Appendix is meant to compliment the methodological discussions provided in Chapters Four and Five.

### **The Delphi Approach Used in this Study**

The Delphi is employed to better understand cultural sensitivity, how it is to be defined in the ecotourism context, and how it is (is not) operationalized by the ecotourism industry. The purpose of the Delphi, therefore, is to develop a cultural sensitivity definition and to test it's validity amongst a group of international ecotourism experts (Table A1). This purpose statement is the foundation for all other design decisions that must be considered during the 'Preparation' stage of the Delphi.

**Table A1:** Delphi Design Decisions in the Study of Cultural Sensitivity and Ecotourism

<b>Generic Criteria</b>	<b>Design Decision</b>
1. Purpose of the Study	<i>Exploring:</i> cultural sensitivity for ecotourism <i>Developing:</i> a cultural sensitivity definition for ecotourism <i>Testing:</i> the definition in order to assess its relevance and salience
2. Participants	Heterogeneous group of international ecotourism experts (professionals and academics)
3. Anonymity of Panel	Full
4. Number of Rounds	Four – 1 scoping round and 3 survey rounds (flexible: to be guided by convergence measures)
5. Concurrency of Rounds	Sequential set of rounds
6. Mode of Operation	Remote access to international experts
7. Communication Media	Internet-based with provisions for paper-and-pen based communication (if necessary), email, phone

The Delphi technique was selected over traditional survey methods, such as the group interviews or the focus group, as a strong methodology for eliciting knowledge and opinion from a group of international ecotourism experts. The method was judged to be a best-fit on the basis of its suitability for tourism research (Archer, 1980; Garrod and Fyall, 2005; Green *et al.*, 1990; Kaynak and Marandu, 2006) and its demonstrated utility for informing a definition development process (Garrod, 2003). Delphi attributes may also be considered advantages that are congruent with the research agenda (Table A1). In addition to these advantages, the method is thought to be a particularly well-suited alternative to other survey methods that rely on precise analytical techniques (Austin *et al.*, 2008; Linstone, 1978; Okoli and Pawlowski, 2004). For this complex research problem – cultural sensitivity and ecotourism - exact knowledge is simply not possible and the gathering of subjective opinion, moderated through group consensus is a suitable alternative.

The structure, utility and purpose of the Delphi technique are congruent with the work of de la Barre (2005) and Stark (2002) who suggest a need for ‘constructed space’ for consensus building. Given that ecotourism has historically been advanced by ‘Western’ and/or non-inclusive knowledge systems and that this process finds us now in a potentially calamitous predicament, it makes the most sense to apply a ‘counter-hegemonic’ methodology that supports Habermas’s (1990) principle of ‘universalizability’ and the achievement of inclusive consensus. In this way, the product of the Delphi is to reflect multiple interests, values, and expertise while eliminating the risk of furthering Cater’s (2006) ‘hegemonic sphere’ (an exclusive or Western-derived model). Instead, the Delphi method offers a constructed space for consensus building. It facilitates reflexivity and it allows for alternative viewpoints and/or voices of the ‘other’ to be heard.

It is important to acknowledge that the Delphi exercise is to produce a truth that is positioned in both time and space. This is an important consideration because the conditions that are framing the exercise, including the global popularity of ecotourism and the recent discourse related to cultural sensitivity, are likely to affect the outcome. The experts who are to comprise the Delphi panel are also representative of a diversity of truths located in time and space and, their opinions and contributions are likely to reflect this fact. The same can be said about the position of the researcher. Therefore, it is recognized that the outcome of the research is contextual, subjective, and contemporary. It is not an absolute.

### Implementing the Delphi

A three-stage Delphi approach is assumed for this study and it is based on the Generic Delphi Toolkit (Figure A1).

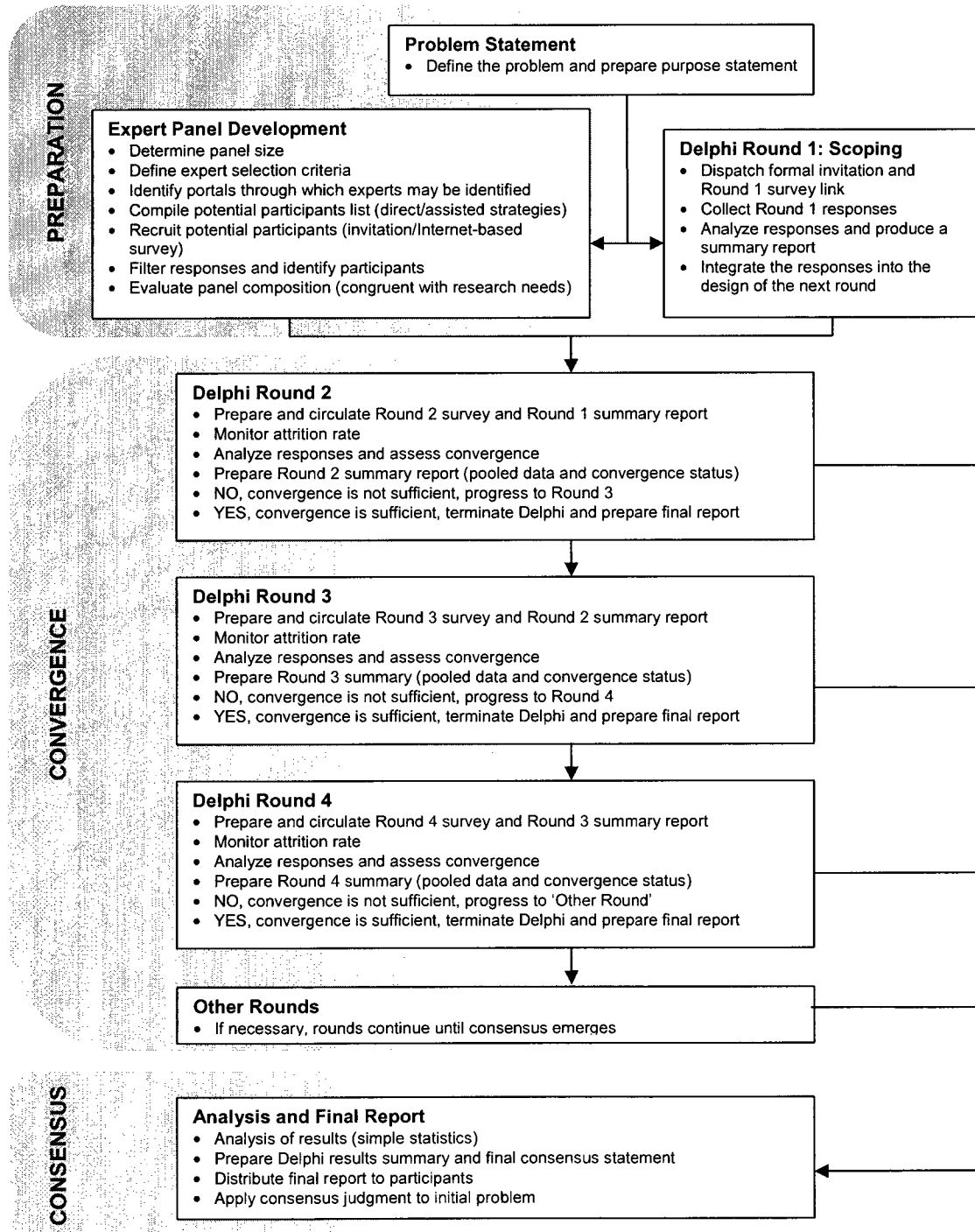


Figure A1: Delphi Implementation Process

### ***The Preparation Stage***

The literature establishes that Delphi study objective achievement is intrinsically linked to a carefully designed and executed Delphi plan (Day and Bobeva, 2005; Miller, 2001; Phillimore and Goodson, 2004). The first stage demands rigorous preparation where care is afforded the basis for consensus (purpose statement), the establishment of participant selection criteria and the creation of an expert panel; the design of a data collection and analysis instrument; the identification of an initial set of issues to be tested through Delphi implementation and/or pilot testing the toolkit.

In the preparation stage, the expert panel design is identified as the most important design decision(s) underlying the achievement of methodological rigour (Garrod and Fyall, 2005). Therefore, the success of a Delphi study is intrinsically linked to the declaration of selection criteria, the selection of experts, and the management of an expert panel (Green *et al.*, 1990; Linstone and Turoff, 2002; Powell, 2003; Taylor and Judd, 1994).

A Delphi study does not rely on a statistically representative sample of participants to achieve meaningful, legitimate and quality results (Okoli and Pawlowski, 2004; Powell, 2003). Guidance suggests that design decisions related to Delphi panel size, characteristics, and composition should “be governed by the purpose of the investigation,” the scope of the problem, and the resources available (Cantrill *et al.*, 1996: 69; Delbecq *et al.*, 1975; Powell, 2003). The expertise represented on the panel should therefore be congruent with the research topic and issues (Andranovoch, 1995; Delbecq *et al.*, 1975; Linstone, 2002).

For this study, international ecotourism experts are desired to create a panel that reflects a diversity of experience, knowledge, skills, and cultural perspectives. To do so, stakeholders from a range of international locations with a variety of ecotourism expertise are to be consulted. Two relevant expert groups are identified: (1) ecotourism professionals from government, private industry and non-governmental organizations, and (2) academics engaged in ecotourism research and education. It is assumed that these groups, together (heterogeneous panel), will contribute rich and varied data and information for the consensus process. The inclusion of both professional and academic experts is substantiated by Alberts (2007), Briedenhann and Butts (2006), Sunstein (2006), and Vaugeois *et al.* (2005) as a means for achieving a balance between differing approaches to and perspectives on ‘knowledge’, for mitigating the existent divide between research and practitioner communities (knowledge sharing, communications, priorities, epistemology, etc.), and for producing a valid Delphi consensus. An intriguing dichotomy is present, and it is expected that consultations with these groups will provide meaningful results.

An eight-phase strategy is proposed for identifying, recruiting and selecting participants. The strategy is informed by the Generic Delphi Toolkit and the guidelines presented by Delbecq *et al.* (1975) and Okoli and Pawlowski (2004).

*Phase 1:* The panel size requirements are to be defined. The researcher consulted the Delphi literature, and particularly the tourism literature, for guidance in this regard. Linstone (1978) asserts that accuracy deteriorates with smaller panel sizes and improves with larger numbers. For Delphi studies that are comprised of a mixed group of experts (heterogeneous group), Briedenhann and Butts (2006) recommend a larger group. The

tourism literature contains examples of panels in the range of 7 to 100 participants (Choi and Sirakaya, 2006; 2005; Green *et al.*, 1990; Kaynak and Marandu, 2006; Kuo and Chiu, 2006; Lloyd *et al.*, 2000; Miller, 2001; O'Connor and Frew, 2004; Tsaur *et al.*, 2006; Weber and Ladkin, 2003; Yeong *et al.*, 1989). The challenge in constructing a heterogeneous panel of international ecotourism experts is in ensuring that the panel includes a diversity of cultural backgrounds, perspectives, and experience. Given the global context of the research and its cultural theme, this balance is imperative for producing a relevant and inclusive consensus. Thus a goal of 75 to 125 participants is judged to be congruent both with Delphi research standards and with the objectives of the research agenda. Also, the goal is purposefully broad to facilitate inclusion and to mitigate attrition between rounds (see Phase 5). A minimum panel size of twenty participants has also been determined on the basis of recommendations found in the literature (Archer, 1980; Delbecq *et al.*, 1975; Linstone and Turoff, 2002). The minimum establishes a critical level under which the Delphi panel can no longer be considered stable and the Delphi can no longer be considered a rigorous exercise (Garrod, 2003). Thus a safeguard (minimum panel size and attrition rate/critical level monitoring) is in place in the case of high attrition rates during the convergence stage. A balance between academic and professional experts as well as their global distribution (Western and Eastern representation) is also desired. Care is to be afforded relatively equal representation throughout the Delphi exercise.

*Phase 2:* Ecotourism expertise criteria are to be defined. This is important because the criteria are to establish the parameters for participant recruitment and

selection. For this study, the ‘expert’ must be proficient in English and they must satisfy a minimum of one of the selection criteria:

1. Current or previous experience in the public or governmental sector related to ecotourism and/or nature-based tourism activities (minimum 5 years)
2. Current or previous experience in the private sector related to ecotourism and/or nature-based tourism activities (minimum 5 years)
3. Evidence of professional productivity in terms of peer-reviewed or professional publications and research and/or participation in academic or industry symposia
4. Teaching portfolio that includes courses dedicated to tourism and/or ecotourism (minimum 5 yrs)
5. Other – potential participants are to be afforded the opportunity to provide insight into ecotourism expert qualities and/or attributes that we may have missed and that should be considered for participant selection.

The researcher recognizes that the language requirement introduces a potential bias to the study of cultural sensitivity – particularly because a diversity of ‘voices’ are desired on the Delphi panel. However, English is the language in which the research is to be conducted, it is the language in which the global ecotourism community conducts their business, and it is the predominant language in which scholarly research is published. For these reasons, English serves as the unifying language for the panel.

*Phase 3:* Portals through which ecotourism experts may be accessed are to be identified. International peer-reviewed publications and organizations where ecotourism experts publish and/or seek membership are to be consulted (Table A2). Peer-reviewed journals provide publication portals where ecotourism experts publish their research findings. For example, the *Journal of Ecotourism*, the *Annals of Tourism Research*, the *Journal of Sustainable Tourism*, the *International Journal of Tourism Research*, and *Tourism Management* are established publications where ecotourism research is

frequently published. Expertise is established through a rigorous peer-review process. In addition to the selection criteria, peer-review serves as an additional measure of expertise. On this basis, these four publications have been selected as portals through which ecotourism experts are to be identified. International organizations where ecotourism experts seek membership provide complementary portals for identifying potential participants.

The International Ecotourism Society (TIES) and the International Ecotourism Club (ECOCLUB) are global organizations where ecotourism experts (both academics and professionals) seek membership. Unique to these organizations is a strong representation of ecotourism professionals from a diversity of locations and cultural backgrounds. While academic experts are also strongly represented in the membership ledgers, the [total] diversity of ecotourism expert members is the strength and utility of these portals. In total, six portals are included as they offer unparalleled access to ecotourism experts generally, and potential research participants specifically. In the absence of these select portals, the international pool of ecotourism experts would be difficult to access and the challenge of constructing the desired Delphi panel would be magnified.

*Phase 4:* Using the expert portals, *direct* and *assisted* strategies are to identify potential participants and create a potential research participant database. First, individuals with ecotourism research experience are to be identified through a strategic review of papers published in the aforementioned journals within the last five years (2002-2007). This direct approach is expected to produce one-hundred individuals. By way of the TIES portal, additional ecotourism experts are to be identified from the

membership and expert lists found on the organizations' public website. Individuals and their contact information are to be harvested and entered into the potential research participant database. In addition to these direct methods, TIES and ECOCLUB are to assist by circulating a 'call for participants' to their membership through electronic or print newsletters and/or posting the 'call' on their website. Interested individuals are invited to submit an 'expression of interest' to the researcher. Direct and assisted strategies are expected to produce a pool of approximately six-hundred potential participants for the Delphi exercise.

*Phase 5:* As the Delphi is known for high attrition rates, that is, low participation commitment and high withdrawals between survey rounds, a panel management plan is to be used to mitigate potential attrition. The potential participant pool is to be a significant size so that the selection criteria can be applied to capture the most qualified experts and so that attrition between rounds does not lead to a breach in the minimum panel size. A significant pool is also required so that the desired panel composition can be acquired and maintained throughout the Delphi. All potential participants are to be contacted by email with an invitation to participate. The invitation is to contain a description of the research and the participant selection criteria. A link to an Internet-based survey is also to be provided. The survey is to require potential participants to indicate which, if any, of the selection criteria they satisfy, to indicate their English language proficiency, to identify their nationality, to self-identify as an academic, professional, or combination thereof, and to provide their contact information. Respondents are to be provided with a fourteen-day period in which to respond. Completion and return of the survey is to imply consent to participate.

**Table A2: Select Ecotourism Expert Portals and Anticipated Results**

<b>Portal</b>	<b>Description</b>
1. Journal of Ecotourism (JOE)	<i>Aims and Scope:</i> JOE seeks to advance the field by examining the social, economic, and ecological aspects of ecotourism at various scales and perspectives. Content includes research that addresses and contributes to ecotourism planning, development, policy, good practice, marketing, and ethics. Quality is ensured through rigorous peer evaluation (at least two independent reviewers). <i>Readership:</i> Academics and students of tourism and related fields, practitioners, consultants and public sector officials involved in the evaluation, planning and policy-making areas of ecotourism.
2. Journal of Sustainable Tourism	<i>Aims and Scope:</i> The journal seeks to advance understanding of the relationships between tourism and sustainable development. Content includes research that explores economic, social, cultural, political, organizational or environmental aspects of the subject. Quality is ensured through rigorous peer evaluation. <i>Readership:</i> Academics and students of tourism and related fields, practitioners, consultants and public sector officials involved in the evaluation, planning and policy-making areas of tourism.
3. International Journal of Tourism Research	<i>Aims and Scope:</i> The journal seeks to promote and enhance tourism research. Content includes papers that explore tourism aspects, the development of new research approaches, and contemporary tourism issues. Quality is ensured through rigorous peer evaluation. <i>Readership:</i> Academics, students, practitioners, consultants and public sector officials involved in tourism.
4. Tourism Management	<i>Aims and Scope:</i> The journal assumes an interdisciplinary approach. Content includes research related to the planning, policy and management of tourism. Particular attention is afforded research that is relevant to both academics and professionals. Quality is ensured through rigorous peer evaluation. <i>Readership:</i> Academics and students of tourism and related fields, practitioners, consultants and public sector officials involved in the evaluation, planning and policy-making areas of tourism.
5. The International Ecotourism Society (TIES)	<i>Aims and Scope:</i> TIES is the world's longest established and largest ecotourism organization. It is committed to promoting the principles of ecotourism, to providing a global portal to ecotourism knowledge and resources, to creating a global ecotourism network, and to advocating ecotourism. <i>Membership:</i> Practitioners, consultants and public sector officials involved in ecotourism, and academics and students of ecotourism and related fields are members. Over ninety countries and forty national and regional ecotourism associations are represented.
6. The International Ecotourism Club (ECOCLUB)	<i>Aims and Scope:</i> ECOCLUB exists to bring ecotourism stakeholders together in order to promote sustainable and genuine ecotourism. To achieve these goals, the organization has an extensive Internet-based network where ecotourism stakeholders connect to share knowledge and resources. <i>Membership:</i> Practitioners, consultants and public sector officials involved in ecotourism, and academics and students of ecotourism and related fields are members. Over seventy countries are represented.
<b>Anticipated Results – 600 potential participants</b>	<b>Study Results – 680 potential participants</b>

*Phase 6:* Survey respondents that satisfy the selection criteria (determined through survey analysis) are to be entered into a participant ledger. Those that do not will be contacted with a request for additional information. Upon receipt of the requested information, their expertise and participation is to be re-evaluated. Those that do not satisfy the selection criteria as well as those that do not respond to the request for additional information are not to be included and are to be sent a notice in this regard. Should the recruitment strategy fail to identify the number, quality, and diversity of participants required, additional portals are to be added and additional potential participants are to be contacted. This may include seeking the assistance of select regional ecotourism organizations. Organizations are to be selected so as to ensure a global distribution of participants (targeted to regions where confirmed participation is lean (to achieve the cultural richness required for the panel). It may also include the addition of several new peer-reviewed journals portals (particularly if academic representation is lean). In this case, phases 2 to 4 will be repeated until the desired panel composition is achieved.

*Phase 7:* This phase is meant to ensure that the panel contains the cultural richness required for the study. The following strategy is to be applied: potential participants that satisfy the selection criteria are to be entered into a participant database and their nationalities are to be compiled and reviewed. A panel that is statistically representative of the World's population or cultures is likely to be laborious and time consuming to develop and it is not likely to add great(er) value to the study. Instead, the decision is taken to develop a panel that is comprised of a diversity of individuals from both western and non-western nations. To establish diversity, two measures are to be employed. First, the number of nationalities, organized by continent, is to facilitate a

simple measure of cultural richness. A diversity of nationalities is desired (i.e. at least 25) while a lack of diversity (i.e. few nationalities or a western predication) is to serve as indication that cultural richness has not been achieved. To ensure that western and non-western voices have an overall equal voice, care is also to be afforded this balance.

While this measure may be considered subjective by some, statistical sampling is widely acknowledged in the Delphi literature as unnecessary for establishing methodological validity (Day and Bobeva, 2005; Linstone and Turoff, 1975). Instead, representativeness and validity is established by other rules of thumb that are best described on the basis of their appropriateness to the research at hand (Miller, 2001; Spenceley, 2005; Linstone and Turoff, 2002). For this study, representativeness and validity is to be assessed on the basis of the qualities and cultural richness of the expert panel (Landeta, 2006).

The participants' locations provide a secondary indicator of richness. This information (from the contact information provided in the survey) is to be entered into a Google map and shared with participants (link on the researcher's webpage). Google maps are an interactive and public Internet-based tool for sharing information (Google Maps, 2008). For both the researcher and the participant group, the map provides a view of the 'laboratory.' Participants are to be located on the map with a marker. As the Delphi requires anonymity, identifying information is to be excluded from the map. The only additional information that is to be shared is the experts' realm of expertise. For example, the markers are to be colour-coded to identify academic participants (red), professional participants (blue), or those that identify as both academic and professional (green). The researcher's location is also to be identified on the map (yellow). A map with markers across the globe, while a very basic indication, is meant to complement the

aforementioned measure of cultural richness. A map with multiple coloured markers is also further indication that a balance of expertise is represented on the panel.

*Phase 8:* Once the participants have been selected and the desired balance has been achieved, participants are to be contacted by email. A letter of information is to be delivered to all participants. The letter is to serve as a formal invitation to participate and it is to contain information related to participation (requirements, risks, benefits, commitment, and time), the research purpose, confidentiality and anonymity, conservation of data, and the study results. A link to the Round 1 Internet-based survey is to be provided in the letter, as is a link to the researcher's webpage where the Google map and interim research results are to be posted.

It is expected that this eight-phase strategy will produce a strong panel of experts for the Delphi exercise. As the expert panel construction is considered the most important Delphi design feature, this very detailed and strategic approach is considered imperative for methodological rigour.

### ***Convergence Stage: Data Collection and Analysis***

The second stage, referred to as 'Convergence,' typically involves three rounds of surveys that are circulated to a predetermined expert panel. Internet-based communication (email and Internet-based surveys) is to comprise the primary communication media for the research (Table A1). The Delphi survey invitations are to be administered remotely using email and the researcher may be accessed throughout the study period in this way. The advantage of using the Internet is that it is a convenient, economical and quick method for transmitting communications (Benfield and Szlemko, 2006; Denzin, 2004; Donohoe, 2008; Duffy, 2002; Liamputtong, 2006; Mann and Stewart, 2000; Schmidt, W.C. 1997; Wright, 2005). This method is increasingly

attractive for Delphi administrators who struggle to mitigate the traditionally long waits between Delphi iterations when surface mail is the primary media (Day and Bobeva, 2005; Okoli and Pawlowski, 2004). Although equally long waits can be experienced when using email, the convenience of sending reminder emails (delivered immediately) can reduce participant withdrawals and wait times. Surface mail is to be offered as a secondary communication media to participants who do not have Internet access or who prefer the traditional paper-and-pen approach to surveys. Although not as efficient as email, it is recognized that ecotourism experts may not have Internet access for a variety of reasons. For example, they are in the field conducting research or managing ecotourism opportunities. They may also be in a location where Internet infrastructure has not yet been developed or existent infrastructure is poor. Thus, this alternative is to be offered to those who should so prefer it.

At this stage, four survey iterations are planned. The surveys are to be administered sequentially over the course of four to six months. The first round, to be completed during the preparation stage, is to be a scoping exercise designed to get participants reflecting about the relationship between cultural sensitivity and ecotourism. Round 1 is to ask three questions: ‘What are the most important issues surrounding contemporary ecotourism?’; ‘How important is it for ecotourism to be explicitly sensitive to culture and cultural differences around the globe?’; and ‘How appropriate is the working definition of cultural sensitivity for ecotourism?’ (definition to be provided). By collecting responses to these scoping questions, the salience and validity of the research purpose and issues can be assessed. It also allows for a preliminary assessment of the breadth of perspectives, opinions, and expertise of the panel members. The scoping round (Round 1) results are to be used to guide the development of the Round 2 survey.

The central purpose of Round 2 is to develop and enhance the cultural sensitivity definition. Using the data collected in Round 1, an enhanced definition is to be introduced to participants. Participants are to judge the appropriateness of the definition, recommend changes and/or contest the definition, and provide additional comments and insight. Using thematic analysis, the responses are to be consolidated to inform further definitional enhancements.

The objective of Round 3 and 4 is continue to organize the group's opinions in order to inform the definitional enhancement process and the identification of opportunities and barriers. In essence, the group will be moving toward consensus on a cultural sensitivity definition for ecotourism and a set of salient opportunities and barriers for its implementation. As suggested in the Toolkit, a summary report is to be prepared following each iteration and it is to contain an assessment of the convergence level achieved and a summary analysis of the panellists' comments. Thus, during the convergence stage of the Delphi, simple statistics are to be calculated and the summary reports are to be shared with participants.

At this stage, it is important to note that while four iterations are planned, a high level of consensus may be reached prior to this. Equally, additional iterations may be required to reach consensus. A lack of consensus may also result, and this should be considered a valuable finding (Linstone and Turoff, 1975). Representative examples of these possible outcomes are drawn from the literature and include Miller's work on sustainable tourism indicators. In this case, iterations were terminated when consensus was achieved during the second round. Larréché and Moinpour's (1983) Delphi study of marketing models required five iterations to work through a comparative assessment procedure and to achieve a group consensus. In Garrod's (2003) study of marine

ecotourism definitions, the Delphi was terminated after two iterations due to high attrition and a breach of the study's established minimum panel size and composition. The Generic Delphi Toolkit and the Delphi literature highly recommend that convergence and attrition rates be monitored throughout the Delphi exercise (Briedenhann and Butts, 2006; Gordon, 1994; Weber and Ladkin, 2003). In order to assess whether the desired panel is being maintained, if the minimum panel size has been breached, and if the group is moving towards consensus (or not), monitoring is to be completed throughout the convergence stage of this study.

### ***Consensus Stage***

The convergence stage is to produce a cultural sensitivity definition that is considered the most important, relevant, and useful to an international panel of ecotourism experts. The process assures that the definition has undergone testing and that a consensus judgement has been rendered regarding its value and appropriateness. Delphi results are to be integrated into the final research product – a definition – that contributes to discourse related to ecotourism definitions, cultural sensitivity, and management guidelines.

Before applying the results to the initial research problem, a draft final report is to be circulated to Delphi participants with a request for final comments. Contributions are to be integrated into the final Delphi report. The final report is to be disseminated to Delphi participants and supporting organizations. So as to share the results of the study with the international ecotourism community, related publications are also to be prepared and submitted to peer-reviewed journals and presentations are to be delivered at relevant conferences.

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## **APPENDIX B: Delphi Summary Reports**

### **Delphi Round #1 Summary Report**

## **ECOTOURISM AND CULTURAL SENSITIVITY**



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## INTRODUCTION

This report contains the Round #1 survey results summary. For each of the four survey questions, the results are described and the key residual messages are presented.

In total, ninety-four ecotourism experts from over thirty countries completed the survey (60% response rate). The expert panel is composed of academic experts (24 percent), professional experts (49 percent) and individuals with expertise in both academic and professional realms (27 percent).

**QUESTION #1:** *In your expert opinion, what are the three most important issues surrounding contemporary ecotourism?*

**Results:** Twenty contemporary ecotourism issues are identified through content analysis. Their importance is established by the frequency by which they appear in the survey response data. The frequency tabulation (number of references to each issue) was independently completed by two researchers. The inter-coder reliability, that is, the congruency between the two independent tabulations, is 93 percent (satisfying the most stringent measures of reliability). On the basis of this tabulation, the issues are ranked and the twenty top-ranked issues are identified (Table 1). Key concerns regarding each issue are also described.

**Table 1** Question #1 Summary: Contemporary Ecotourism Issues (in rank order)

<ol style="list-style-type: none"> <li>1. <b>Sustainable Development:</b> Recognizing the valuable role that ecotourism plays in sustainable development (SD). Ensuring a balanced approach to ecotourism where all SD components – economics, environment, socio-cultural – are given equal weight.</li> <li>2. <b>Community Participation and Benefits:</b> Ensuring that host communities are actively participating in, contributing to, and benefiting from ecotourism.</li> <li>3. <b>Environmental Conservation:</b> Minimizing negative impacts and maximizing positive impacts on the natural environment.</li> <li>4. <b>Awareness / Education:</b> Ensuring that cultural and environmental awareness / education are fostered by the ecotourism experience (amongst all stakeholders).</li> <li>5. <b>Cultural Sensitivity:</b> Ensuring this key ecotourism principle is also an ecotourism practice. It requires clarification of what cultural sensitivity is and is not in the context of ecotourism.</li> <li>6. <b>Legitimacy / Greenwashing:</b> Ensuring that ecotourism practice is clearly anchored to its definition (see issue #7). This may require investments in guidelines, certification, education, and training to avoid misrepresentation.</li> <li>7. <b>Definition:</b> Achieving consensus [reducing confusion] about what ecotourism is and is not.</li> <li>8. <b>Operational Guidelines and Certification:</b> Creating/enhancing standards so as to facilitate ecotourism benefits achievement and industry legitimacy. Standards must be sensitive to the local context and must be firmly anchored to the ecotourism definition.</li> <li>9. <b>Institutional Arrangements:</b> Improving government involvement and support for ecotourism. May include the development/enhancement of ecotourism strategies, policies, and partnerships (supported by action).</li> <li>10. <b>Cultural Conservation:</b> Minimizing negative impacts and maximizing positive impacts on communities and cultural heritage.</li> </ol>
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- 11. Research and Development:** Undertaking work to increase knowledge, including knowledge of market trends (changes), market composition, visitor and host community needs and expectations, in order to inform the enhancement of and/or the development of ecotourism.
- 12. Globalization:** Recognizing the influence of globalization on ecotourism experiences and the communities and environments that host them. Concern exists about preserving cultures and celebrating diversity (heterogeneous) and avoiding the internationalization of culture (homogeneous). Economic justice, that is, benefits for communities and not just foreign investors and national government is also of concern.
- 13. Ethics / Responsibility:** Assuming an ethics-based environmentally, socially, culturally, and economically responsible approach to ecotourism and fostering (lead by example) responsibility amongst ecotourism stakeholders (visitors, host communities, etc.).
- 14. Carrying Capacity / Scale:** Planning and managing ecotourism so as not to exceed the carrying capacity. Scale is suggested as a critical element in the carrying capacity equation (local, national, global), thus the measure of capacity must include considerations beyond the immediate ecotourism location (e.g. impacts of air travel on global climate).
- 15. Infrastructure:** Developing and enhancing ecotourism infrastructure (landscapes, architecture) and supporting infrastructure (roads, water systems, energy systems, etc.) so as to support ecotourism product delivery and benefits achievement (environment impact reduction, economic and social benefits for communities, etc.).
- 16. Climate Change:** Considering climate change impacts on ecotourism and taking action to reduce ecotourism's contribution to climate change processes.
- 17. Benefits Achievement:** Ensuring that environmental, socio-cultural, and economic benefits are achieved through ecotourism activities. This requires investments in definition, certification, monitoring systems, and policies in support of ecotourism [and the landscapes upon which it depends]. Efforts are also required to improve the linkages between ecotourism stakeholders (governments, NGOs, operators, host communities)
- 18. Human Resources:** Undertaking work to increase the number of skilled employees in the ecotourism field. This may include investments in professional training and certification programs.
- 19. Technology:** Harnessing the potential benefits of technology – both soft (e.g. management systems, methodologies) and hard (e.g. machines, electronics, tools) so as to facilitate ecotourism experiences, management activities, benefits achievement, and risk mitigation.
- 20. Best-Practices:** Leading by example and sharing success stories. Efforts required to link to, and benefit from, best-practices in business generally, and 'sustainable' business specifically.

In reviewing these issues, a set of issue categories naturally emerge: Category A – issues related to ecotourism experience, Category B – issues related to ecotourism management, and Category C – issues related to external forces and pressures. Using these categories as a basis for further analysis, it is evident that management issues are paramount (Table 2). Though the categories are not mutually exclusive, they allow us to consider the issues from a different perspective.

**Table 2** Ecotourism Issues by Category (see Table 1 for issue definition)

Issue	Rank Order
<b>Category A – Issues related to ecotourism experience</b>	
Community participation and benefits	2
Awareness and education	4
Benefits achievement	17
<b>Category B – Issues related to ecotourism management</b>	
Sustainable development	1
Environmental conservation	3
Cultural sensitivity	5
Legitimacy / Greenwashing	6
Definition	7
Operational guidelines and certification	8
Institutional arrangements	9
Cultural conservation	10
Research and development	11
Ethics / Responsibility	13
Carrying capacity / Scale	14
Infrastructure	15
Human resources	18
Technology	19
Best-practices	20
<b>Category C – Issues related to external forces and pressures</b>	
Globalization	12
Climate change	16

**Key Residuals Messages – Question #1**

- There are twenty important issues surrounding contemporary ecotourism
- The issues can be understood on the basis of their relation to the ecotourism experience, ecotourism management, and external forces and pressures that may affect ecotourism.
- Management issues have emerged as the most important issue set, with sustainable development being the most important issue surrounding contemporary ecotourism.
- Cultural sensitivity, the focus of this research project, ranks fifth in importance (more will be said about this in the Question #2 analysis).

**Note:** The issues and their rank importance are to be revisited in Round #2.

**QUESTION #2:** *How important is it for ecotourism to be explicitly sensitive to culture and cultural differences around the globe?*

**Results:** A majority agrees that it is very important for ecotourism to be culturally sensitive (Table 3). However, the analysis also reveals that cultural sensitivity is still cloaked in conceptual vagueness. There appears a lack of clarity about what cultural sensitivity is, what it means for ecotourism to be culturally sensitive, who is required to be sensitive, and when sensitivity is necessary. On one end of the response spectrum, some contend that cultural sensitivity is required only when ecotourism activities occur in or near communities (context specific cultural sensitivity). Others argue that host culture sensitivity [only] is required (stakeholder specific cultural sensitivity). And at the other end of the spectrum, participants make clear that mutual sensitivity by and for all stakeholders is required throughout the ecotourism experience regardless of context (inclusive cultural sensitivity). This spectrum of understanding confirms the need to clarify what is meant by cultural sensitivity and how it is to be defined and measured in the ecotourism community. This requires investments in:

1. Ecotourism indicators that reveal cultural sensitivity; and
2. Ecotourism indicators that reveal cultural insensitivity.

**Table 3** Question #2 Summary and Representative Comments

<b>Very Important</b>	<b>80.9%</b>
<p>“It is of foremost importance for ecotourism to be explicitly sensitive to culture and especially to local cultures and their understanding of nature. The politics of ecotourism do not always put culture in context and this derives in enormous failures of ecotourism projects.”</p>	
<p>“If we understand that nature and culture have direct links, separating both makes no sense and therefore it seems obvious that ecotourism has to integrate a maximum respect and consideration to cultural differences.”</p>	
<p>“In many cases the activities of local cultures affect the efforts to preserve an environment. One cannot be addressed while ignoring the other. Ecotourism that is developed closely with local cultures will also provide a more unique travel experience, an urgent necessity in our rapidly homogenizing world.”</p>	
<p>“To not give the importance of the sensitivity of culture is to set the movement to failure”.</p>	
<p>“Ecotourism should be as directed to the conservation of culture, and thus be sensitive to it, as to the natural environment. Sustainability implies the protection of those factors which attract ecotourists, and to exploit, degrade or in other ways adversely impact upon communities' cultures is to threaten the long term viability of ecotourism itself.”</p>	
<p>“Ecotourism should, like "ecological integrity", imply that humans are an integral component of ecosystems. Therefore, people and their institutions whether they be cultural or otherwise are part of the solution, not the problem as it is often implied in preservationist or "wilderness" movements/advocates.”</p>	

<b>Important</b>	<b>17%</b>
<p>“People traveling to different parts of the world need to read and study about the country they are visiting and specifically about the local community that lives in the area to be able to interact in a respectful way learning and enjoying through their local knowledge.”</p> <p>“True ecotourism should benefit the community and local culture in addition to enhance conservation and the environment.”</p> <p>“I think this [cultural sensitivity] goes without saying. It is one of the guiding principles of ecotourism. Clientele must be sought that is culturally sensitive - especially at the onset of ecotour ventures to protect local traditions and make it more likely that local providers will be successful.”</p> <p>“Ecotourism may have a primarily wildlife/nature-based focus, with minimal interaction with local cultures, e.g. Antarctic tourism, so the requirement of explicit cultural sensitivity is not a blanket one and will be appropriate to site.”</p>	
<b>Somewhat Important</b>	<b>2.1%</b>
<p>“Since there are many more words illustrating the cultural aspect of tourism (community tourism, cultural tourism, responsible tourism, fair trade tourism, etc.), ecotourism should mean that activities in a natural environment do not have strong impacts on the communities surrounding them.”</p>	
<b>Not Very Important</b>	<b>0</b>
<b>Not Important</b>	<b>0</b>

### Key Residuals Messages – Question #2

- The importance of cultural sensitivity is well-established for ecotourism.
- There exists an important conceptual and definitional void related to what cultural sensitivity is and is not in the context of ecotourism.
- Investments are required to define cultural sensitivity and the parameters by which it is to be measured (indicators).

**Note:** These findings mirror antecedent ecotourism research that calls for investments in understanding and operationalizing cultural sensitivity (see below). This body of work suggests that a lack of consideration for the cultural context of ecotourism presents perils related to the achievement of sustainable development and the other ecotourism goals and benefits (top-ranked issues - Question #1).

1. Carrier, J.G. and Macleod, D.V.L. (2005) Bursting the Bubble: The Socio-Cultural Context of Ecotourism. *Journal of the Royal Anthropological Institute*, 11: 315-334.
2. Cater, E. (2006) Ecotourism as a Western Construct. *Journal of Ecotourism*, 5(1&2): 23-39.
3. de la Barre, S. (2005) Not ‘Ecotourism’? Wilderness Tourism in Canada’s Yukon Territory. *Journal of Ecotourism*, 4(2): 92-107.
4. Jamal, T., Borges, M., and Stronza, A. (2006) The Institutionalisation of Ecotourism: Certification, Cultural Equity and Praxis. *Journal of Ecotourism*, 5(3): 145-175.
5. Sofield, T. (2006) Leisure and Sustainable Environments. Presentation delivered to the 9<sup>th</sup> World Leisure Congress, Hangzhou, China.
6. Stark, J.C. (2002) Ethics and Ecotourism: Connections and Conflicts. *Philosophy and Geography*, 5(1): 101-113.

**QUESTION #3:** *Culturally sensitive ecotourism, by definition, must reflect an awareness and knowledge of cultural differences around the globe. Please comment on the appropriateness of this working definition.*

**Table 4** Question #3 Summary

Very appropriate	51.1%
Appropriate	25.5%
Somewhat appropriate	16.0%
Not very appropriate	6.4%
Not appropriate	1.1%

**Results:** A majority agree that the working definition is appropriate or very appropriate (Table 4). However, the responses suggest that the definition needs to be enhanced so as to make explicitly clear what cultural sensitivity means for ecotourism. Respondents suggest that the definition reflect a consideration for a number of issues. Scale, mutual understanding, cultural similarities, cultural preservation, and positive benefits for all stakeholders are representative issues. Several participants suggest bringing forward The International Ecotourism Society’s (TIES) ecotourism definition as the basis for discussion (and definitional enhancement). The suggestion is made on the basis that the TIES definition captures many of the critical components (aforementioned) of cultural sensitivity:

“To ensure that those who implement and participate in responsible tourism activities should follow the following principles:

- Minimizing impact
- Foster environmental and cultural awareness and respect
- Provide positive experiences for both visitors and hosts
- Provide direct financial benefits for conservation
- Provide financial benefits and empowerment for local people
- Raise sensitivity to host countries’ political, environmental, and social climate.”

The International Ecotourism Society (1990) *Definitions and Principles*. Available on WWW at: [www.ecotourism.org](http://www.ecotourism.org).

While a concise definition is to provide a normative standard for ecotourism's cultural sensitivity, respondents have expressed explicit concerns about how cultural sensitivity is to be implemented and how success is to be measured. This is to say that definitional progress is needed, but we must move beyond normative definitions to begin establishing the parameters of strategic and operational standards for ecotourism's cultural sensitivity. We need to provide the mechanisms and tools to operationalize the cultural sensitivity concept in the ecotourism community.

### **Key Residuals Messages – Question #3**

- The cultural sensitivity working definition is appropriate. But, definitional ambiguity remains.
- The definition requires enhancement to make explicitly clear the key cultural sensitivity components.
- The TIES ecotourism definition is suggested as a framework for facilitating definitional enhancement and more in-depth discussion.
- But, the discussion remains at the normative level and does not address the task of implementing cultural sensitivity.
- Investments are required to define the parameters by which cultural sensitivity is to be measured (indicators).

*Note:* These findings are congruent with the findings from questions #1 and #2.

**QUESTION #4:** *To ensure that ecotourism is culturally sensitive, what cultural variables or attributes need to find expression in the ecotourism definition? As a starting point for discussion, please review the attributes listed below and comment on their appropriateness. We encourage you to suggest additional variables.*

**Results:** Overall, the cultural sensitivity attributes are judged to be appropriate by the group and no additional attributes are revealed (Table 5). Additional comments however, provide suggestions for adding shape, direction and substance to the challenge of defining cultural sensitivity measures. These emerging cultural sensitivity variables are grouped according to a corresponding attribute.

**Table 5** Question #4 Summary: Cultural Sensitivity Attributes, Emerging Variables, and Representative Comments

	Very appropriate	Appropriate	Somewhat appropriate	Not very appropriate	Not appropriate
<b>Human Ecological Landscape</b>	58.5%	30.9%	9.6%	0	1.1%
<i>This refers to noteworthy human activities, artifacts, and impacts, and the interaction of humans and with biophysical environments over time.</i>					
<p><b>Language:</b> “English seems to be the official language of ecotourism, but to some extent a culture is defined by its language... so it must be addressed.”</p> <p><b>History:</b> “Interrelation of human ecological impact over time and adaptation strategies and milestones”. “I believe it is noted above but historic culture is just as important as we have lost so much in the way of these cultures already. Example the ancient Egyptians, Mayans, Aztecs, Native American histories, etc.”</p> <p><b>Scale:</b> “We have often assumed that one community is much like another community; we study community response or involvement in ecotourism in the hopes of generalizing results to wider populations. But each community is unique, having its own history, current capacities, and cultural features. What is culturally appropriate ecotourism in one community may be completely inappropriate in another. This can be based on the history of colonization in the region, nation or continent. That is, scale at both the temporal and spatial levels may be significant here.”</p>					
<b>Perceptions, Attitudes and Values</b>	61.7%	28.7%	7.4%	1.1%	1.1%
<i>This refers to societal and individual understanding of cultural relations and norms. Understanding is determined by experiential knowledge.</i>					
<p><b>Ethics:</b> “These might be considered part of "perceptions, attitudes, and values", but they represent a philosophical stance that transcends all aspects of ecotourism -- nature, culture, education, and so on. The question becomes, however, whether ethical beliefs can change if they are inconsistent with the basic tenets of protecting and preserving natural and cultural environments.”</p> <p><b>Awareness:</b> “It [cultural sensitivity] should involve education among all parties - local communities, government, non-government organisations, industry and ecotourists - (before, during and after the trip)”.</p> <p><b>Participants/Stakeholders:</b> “The challenge will be to clarify which are central to both the community and tourist value systems - and therefore which need to be recognized and sustained given different ecotourism or other tourism development paths”. “A most important consideration would be the values, attitudes and perceived course of development for stakeholders, especially where these stakeholders may be threatened indigenous populations.”</p> <p><b>Expectations:</b> “Expectations vary widely among individuals and communities. Depressed rural economies filled with impoverished, under-educated people will agree to many different agendas if they see opportunities for employment or other advantages. In reality, ecotourism operations (given their small footprint) do not generate as many benefits as local communities may expect, and this leads to disappointment.”</p> <p><b>Behaviour:</b> “An understanding of: art (material and performing), living conditions, gender attitudes, dress, "hidden dimensions" i.e. loudness of voice, touching other persons, appropriate behaviour, food etc. Notably Americans, Russians and world wide low-, mid- and mid-up market tourists often believe that their home behaviour is the "correct" international behaviour.”</p>					

	Very appropriate	Appropriate	Somewhat appropriate	Not very appropriate	Not appropriate
<b>Strategies and Institutional Arrangements</b>	42.6%	42.6%	10.6%	3.2%	1.1%
<i>This refers to decision-making infrastructure composed of customs, laws, policies, and the agencies and stakeholders needed to plan and manage for ecotourism.</i>					
<p><b>Politics:</b> “I note the absence of any political connotations of cultural sensitivity. For example, tourists to Kenya could benefit from understanding the ethno-regional context of the recent violence. Indeed more awareness of this issue would go a long way to dismiss some of the misconceptions of the country, its people and its history”. “Democracy - empowerment of local communities to determine the local tourism in their locality, in a democratic fashion.”</p> <p><b>Engagement and Collaboration:</b> “A collaborative planning process must be used. By approaching these issues before they are reality, and in collaboration with the stakeholders, the enterprise has more chance of viability.”</p>					
<b>Technology</b>	35.1%	36.2%	18.1%	5.3%	5.3%
<i>This refers to the ways, means, and tools used by individuals/societies to adapt to changing conditions in the state of the natural and human environments. This includes hard (machines, tools, etc.) and soft (adaptive technologies, management frameworks, etc.) technologies.</i>					
<b>Change:</b> “Cultures are not homogenous or static - they are made up of individuals and in a constant state of flux. Each situation varies. The more base democracy is practiced to develop tourism infrastructure, the better, but there will always be inner group dynamics that cannot be regulated by policies or technologies.”					

It is interesting to note that while the attributes are common to all cultures, the responses suggest that a set of cultural sensitivity variables are required for understanding how the attributes manifest in a variety of cultural contexts. These variables allow us to begin understanding what cultural sensitivity is and is not. The attributes and a working set of cultural sensitivity variables (as informed by the Round #1 survey responses) are to be brought forward for discussion in Round #2.

<p><b>Key Residual Messages – Question #4</b></p> <ul style="list-style-type: none"> <li>• The cultural sensitivity attributes are appropriate</li> <li>• Initial investments to add shape, substance, and direction to the cultural sensitivity attributes reveal an emerging set of variables</li> <li>• Additional investments are required to continue to add shape, substance and direction</li> <li>• The findings set the stage for Round #2.</li> </ul>
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**Delphi Round #2 Summary Report**

**ECOTOURISM AND CULTURAL SENSITIVITY**



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## INTRODUCTION

This report contains a summary of the Round #2 survey results. For each of the survey sections and questions, the results are described and the key residual messages are presented.

In total, seventy-nine ecotourism experts from twenty-eight countries completed the survey (84% response rate). The expert panel in Round #2 is composed of academic experts (21.5 percent), professional experts (52 percent) and individuals with expertise in both academic and professional realms (26.5 percent).

## SECTION 1: CONTEMPORARY ECOTOURISM ISSUES

In Round #1, twenty issues and their rank importance were identified surrounding contemporary ecotourism. The main concerns for each issue are described in the Round #1 Summary Report. In Round #2, participants passed judgement on the issues and their ranking (Questions #1 and #2). They were asked to complete the following tasks:

- 1. In order to provide us with additional information and to move the group towards a consensus set of contemporary ecotourism issues, please rank the issues from most important to least important.*
- 2. Please provide us with additional insight into the issues, their rank importance, or other.*

Results: The issues were ranked from most important (1) to least important (20). The rank scores are tabulated, a response average is calculated for each issue, and on this basis, a rank order is identified (Table 1).

It is noteworthy that the top seven issues are congruent with the key tenets and principles of ecotourism as described by international ecotourism organizations and contemporary researchers (Fennell, 2001; The International Ecotourism Society, 2004, 2007; Weaver, 2005; World Tourism Organization, 2002), and revealed in the preparatory stages of this research (Donohoe and Needham, 2006). Collectively, these issues represent a cluster of ‘most important’ issues for contemporary ecotourism and they are strongly embedded in our knowledge and management systems. The next eight issues are considered ‘important’. They can be understood as a ‘management cluster’ related to ecotourism planning, policy, and operations. Central to this cluster are definitions, frameworks and policies for guiding practice, for delivering ecotourism benefits, and for producing best-practice successes. The final six issues may also be understood as issues of importance; however, their importance may vary across time and space. For example, globalization, climate change, and technology may or may not have an impact on ecotourism in one community, but it may have significant impacts in another. These issues may be understood as a cluster of ‘external forces and pressures’ that may affect ecotourism.

**Table 1.** Contemporary Ecotourism Issues

Issue	Response average	Rank order
Community Participation and Benefits	3.71	1
Environmental Conservation	4.19	2
Sustainable Development	4.86	3
Awareness / Education	6.71	4
Cultural Sensitivity	6.99	5
Ethics / Responsibility	8.14	6
Cultural Conservation	8.77	7
Operational Guidelines and Certification	10.33	8
Carrying Capacity / Scale	11.08	9
Legitimacy / Greenwashing	11.70	10
Best-Practices	11.94	11
Benefits Achievement	12.01	12
Research and Development	12.06	13
Institutional Arrangements	12.10	14
Definition	12.24	15
Climate Change	12.62	16
Human Resources	13.37	17
Infrastructure	13.49	18
Globalization	15.20	19
Technology	16.03	20

**Table 2.** Contemporary Ecotourism Issues – Representative Comments

<p><b>Interconnectivity of Issues</b></p> <p>“An ecotourism project MUST provide both environmental conservation and local community benefits, and MUST be done in a sustainable manner. If we are to rank and order these concepts, we lose out. It just can't be ranked; it has to all be integrated.”</p> <p>“Some of these issues require a lengthy discussion rather than a simple grading since they are interrelated, partially redundant or otherwise hard to define.”</p> <p>“Some variables are so intertwined; it is difficult to rank one above the other. For example: cultural sensitivity and cultural conservation. In that case, I considered cultural sensitivity to be above cultural conservation in the sense that we cannot refrain a community from benefiting or being influenced by visitors' own cultural differences. Furthermore, by ensuring "community participation and benefits" we are empowering a community to assert and integrate their own cultural outlook and personality into the ecotourism offer. That is what the "development" part in "sustainable development" means.”</p> <p><b>Importance Scale / Issue Clusters</b></p> <p>“It seems that most of the items listed above some how have the same priority and some of the items have the less importance in comparison to the others like the climate change and impacts of ecotourism on such an issue.”</p> <p><b>Differences Across Time and Space</b></p> <p>“Each situation and context is different and standards are often difficult or impossible to implement equally across the globe because certain basic conditions are not equally provided. Different localities and specific situations give rise to unique solutions and opportunities.”</p> <p>“The relative importance of these issues will certainly vary, depending on their geographical context and the degree to which they apply to any given company's operations. It was difficult to separate out many of these "issues.”</p>
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A range of issues have emerged and their importance for ecotourism can be understood on the basis of an importance scale and a set of issue ‘clusters’. It is also important to note that the issues can not be considered mutually exclusive. In fact, respondents make explicitly clear that the issues are interconnected and that understanding the connections is critical for progress (Table 2). For the purposes of this research, these findings confirm the importance of this study and future research concerned with cultural sensitivity and ecotourism (ranked fifth). In a much broader sense, this list represents a set of issues that are important to the global ecotourism community. And it follows that investments in research, management, and planning that address these issues is required to ensure the long-term sustainability of the ecotourism industry.

### Key Residual Messages – Section 1

- Twenty important contemporary ecotourism issues are identified.
- The issues are deeply interconnected.
- Their importance and rank importance is established by a group of international ecotourism experts.
- Their importance can be understood on the basis of an importance scale and a set of issue clusters: ‘most important’ (issues embedded in knowledge and management systems), ‘important’ (management issues), and ‘important’ but with variations across time and space (issues relating to external forces and pressures).
- Cultural sensitivity, the focus of this research project, is once again confirmed as an issue of importance.
- Investments in research, management, and planning that address these important issues are required to ensure the sustainability of the ecotourism industry.

Donohoe, Holly M. and Needham, Roger D. (2006) Ecotourism: The Evolving Contemporary Definition. *Journal of Ecotourism*, 5(3): 192-210.

Fennell, D. (2001) A Content Analysis of Ecotourism Definitions. *Current Issues in Tourism*, 4(5), 403-421.

The International Ecotourism Society (2004) *What is Ecotourism?* Available at URL: [http:// www.ecotourism.org](http://www.ecotourism.org) (accessed 2005).

The International Ecotourism Society (2007) *Oslo Statement on Ecotourism*. Available at: [http://www.ecotourismglobalconference.org/wp-content/uploads/2007/08/Oslo\\_Statement\\_on\\_Ecotourism\\_Aug\\_2007.pdf](http://www.ecotourismglobalconference.org/wp-content/uploads/2007/08/Oslo_Statement_on_Ecotourism_Aug_2007.pdf) (accessed 18 August, 2007).

Weaver, David B. (2005) Comprehensive and Minimalist Dimensions of Ecotourism. *Annals of Tourism Research*, 32(2): 439-455.

World Tourism Organization (WTO) (2002) *The World Ecotourism Summit Final Report*. Madrid: World Tourism Organization.

## SECTION 2: DEFINING CULTURAL SENSITIVITY FOR ECOTOURISM

Although consensus about the importance of cultural sensitivity emerged in Round #1, a call to better define cultural sensitivity and how it is to be diagnosed in a variety of ecotourism and cultural contexts has been made by antecedents. This call was confirmed by the Delphi participants in Round #1. Thus, participants were asked to assist the researchers in defining cultural sensitivity in Round #2. Delphi participants were asked to complete the following task (question #3):

*The working definition of cultural sensitivity has been enhanced by the results of Round #1. Please comment on the appropriateness of this enhanced definition:*

*Cultural sensitivity is a key ecotourism tenet; it requires that those who implement, support, and participate in ecotourism must:*

- *Minimize [negative] impacts to natural and cultural environments (optimize positive impacts)*
- *Foster environmental and cultural awareness and respect*
- *Provide positive experiences and benefits for all stakeholders*
- *Contribute to cultural and ecological conservation*
- *Foster the engagement and empowerment of local people*
- *Raise awareness of, and sensitivity to, host communities' political, environmental, and social climate*

**Results:** A majority agree that the working definition is appropriate or very appropriate (Table 3).

**Table 3.** Question #3 Response Summary

<b>Answer Options</b>	<b>Response</b>
Very appropriate	50.0%
Appropriate	29.5%
Somewhat appropriate	16.7%
Not very appropriate	2.6%
Not appropriate	1.3%

However, participants recommend further definitional enhancement on the basis of a number of concerns:

**1. The nature – culture dynamic:** Should nature be a critical component of the definition? Some argue that the natural environment is an agent of cultural change (and vice versa); thus, the relationship is symbiotic. Conversely, others argue that nature and culture are separate and there is no place for nature in a definition of cultural sensitivity and no place for culture in a definition of ecotourism. There is a noteworthy divide present on this issue. Representative comments include:

“Cultural sensitivity is a part of ecotourism, but is not a key tenet. Ecotourism's key tenets are about nature; not people.”

“Not sure about the inclusion of ecological issues: while the natural and cultural realms are certainly integrated (more so in many aboriginal groups' zeitgeist), isn't that issue of equal and partly separate attention?”

“Cultural sensitivity stands separate from ecotourism. It is a broader set of concerns than the "narrow" ecotourism.”

“I would question the inclusion of natural environments in a human-centered area of ecotourism as it muddies the water.”

“Not be western-centric- appreciate culture/nature nexus.”

**2. Cultural preservation:** How do we foster cultural preservation? This presents opportunities for enhancing and preserving the cultural identity of local and indigenous communities (language tradition, etc.) that may otherwise be lost or at risk. In other communities where traditional practices are not compatible with the *United Nations Declaration of Human Rights*, should we foster cultural preservation? As one participant remarks it “is a dilemma” that is not easily resolved. Representative comments include:

“There are cultural elements around the world, especially in remote destinations, that are not always compatible with the UN Declaration of Human Rights or some of the principles of Political Ecology. There is a dilemma - can we tolerate certain 'traditions' (e.g. female circumcision, the position of women in much of the Arab world or in Thai villages - prostitution to earn karma points) as the right to be culturally different - or do we, as Ecotourism agents of progress, try to subvert it?”

“Assuming that ecotourism brings with it economic benefits to a local community, it invariably leads to change. The local community will start to develop, and with development invariably comes cultural change. Cultural sensitivity is far more important than cultural conservation, which, if an ecotourism project is particularly successful, will invariably be unattainable.”

“Culture is not a "substance" so it can not be considered to be immobile. Somehow the concepts "cultural conservation" and "impacts" in the way they are formulated condense a substantialised vision of cultures and natures. I do not think this is correct.”

“Nature is rather easy to deal with, culture is far more difficult. I would say: Minimize cultural impacts, except where such may effect political change to non-democratic, repressive (i.e. China, North Korea, Belarus, Russia, Zimbabwe), colonized (i.e. Tibet etc) governments. Also cultural conservation is a very problematic term! (conserving material culture, food habits, gender inequality, slavery and infanticide... ?)”

“The definition must speak to the need for enhancing the true cultural identity of a community or ecotourism destination not the equivalent of greenwashing cultural aspects of the ecotourism experience.”

**3. Cultural sensitivity actors:** While a majority agree that sensitivity is required of all stakeholders involved in the ecotourism experience, there remains disagreement about how this is to be operationalized. Who assumes responsibility for sensitizing host communities, visitors, and institutions in support of ecotourism to each others values and practices? Representative comments include:

“Both hosts and guests (from different cultures) need to be sensitized to each others values and practices. For example, while Japanese visitors value nature in their practice of Shinto, they may not understand how to behave in a new environment to prevent damage. In this respect, guided ecotours would be one

way to introduce such visitors to relatively sensitive environments in a responsible manner. On the other hand, the hosts need to better understand the culture of visitors in order to better manage experiences.”

“Foster cultural awareness and respect for and by who? Being aware and respectful of other cultures doesn't necessarily lead to no impacts, and ignores many structural issues that defeat the good intentions of awareness and respect (local, regional, national, international laws, economic policies and systems, racism, etc.).”

“This definition implies that responsibility for cultural sensitivity lies solely with individuals in power and that local communities are only afforded "benefits" and "empowerment," if those individuals bestow them. The definition is well-intended, but does not involve the people most affected by ecotourism.”

“This strikes me as quite an effective definition, as it puts the onus on the ecotourism developer to be sensitive (as per your definition). This gives the developer a guideline to determine behaviour toward community participants, conservation, etc. It also provides a benchmark for ecotourism assessors and clients to better understand how an ecotourism organization implements cultural sensitivity.”

**4. Impacts:** While a majority agree that minimizing negative impacts and maximizing positive impacts is an important element of ecotourism, there exists concern about who defines ‘negative’ and ‘positive’, how these definitions are to be adapted to the ecotourism and community context, and how they are to be measured in practice. Representative comments include:

“This definition looks quite appropriate to me, especially the highlighted importance of the participants of ecotourism to seek to minimize the negative impacts on the cultural and natural environments and foster the positive impacts.”

“All of the judgmental language, i.e., positive and negative impacts, begs the question - who makes the judgment? I suggest that local people expressing local values need to be making those decisions.”

**5. Stakeholder benefits:** A majority agree that ecotourism must result in benefits for the communities and environments in which the activities occur. However, there are concerns about the distribution of benefits across stakeholder groups. Key concerns relate to the power dynamics that exist between the host community, the ecotourism operator, and the visitor, and the kinds of conflicts, challenges, and outcomes that these dynamics produce. How do we ensure that all stakeholders engage (or have opportunity) in a beneficial democratic and participatory process? Representative comments include:

“This is still very paternalistic. It doesn't mention local wisdom and land-use practices, prior informed consent, or land rights. It still focuses on "sensitivity" instead of acknowledging local peoples as the owners, managers, and decision-makers who actually have the right to say no to ecotourism development schemes.”

“I'm not so sure about including "Provide positive experiences and benefits for all stakeholders." It seems to be too idealistic. In reality, there are always interest groups that are interested in something other than environmental or cultural sensitivity.”

“Although the definition has touched on many aspects, it still does not suggest, as strongly as may be necessary, that sensitive cultures are defined by the host communities and the developers from outside the communities or visitors/ecotourists are observers rather than definers of what is cultural within any given community.”

“Being able to provide positive experiences and benefits for ALL stakeholders is a bit unlikely. Perhaps something more in line with the first statement is more reasonable. E.g., provide positive experiences and benefits for the majority of stakeholders, while respecting the minority's opinions and involvement.”

“It makes assumptions that local people wish to take part in the process e.g. 'Foster the engagement and empowerment of local people' is very much an outsiders point of view and raises the issue of imposing on local communities who may not wish this and perhaps also raises the issue of neo-colonialism. What if local communities wish to be involved in ecotourism development but are happy that this erodes rather than conserves local culture?”

### Key Residual Messages – Section 2

- The definition of cultural sensitivity for ecotourism is appropriate
- A set of key issues is emerging that defines what cultural sensitivity is and is not. These issues are captured in the working definition.
- It is very clear that cultural sensitivity is a complex issue and that our understanding of what is required and by whom is still unresolved. A set of definitional concerns must be addressed.
- The definition requires further enhancement.

## SECTION 3: CULTURAL SENSITIVITY VARIABLES FOR ECOTOURISM

The purpose of section #3 is to begin the process of establishing the parameters by which we can define and measure the achievement of cultural sensitivity in a variety of ecotourism and cultural contexts. Thus, the goal of this survey section was two-fold. First, it was to assess the relevance of a preliminary set of variables and second, it was to identify new variables. The survey section was organized on the basis of four attributes: (1) human ecological landscape, (2) perceptions, attitudes, and values, (3), strategies and institutional arrangements, and (4) technology. For each of these attributes, Delphi participants were asked to complete the following tasks:

- *Please rate the relevance of the cultural sensitivity variables related to each attribute.*
- *Please suggest additional variables.*
- *Please provide us with additional insight related to cultural sensitivity, ecotourism and the suggested attributes and variables.*

Results: Using a likert-type scale, participants rated the variables on the basis of their relevance for ecotourism. Overall, a majority agree that the variables suggested by the researchers are relevant to very relevant (Table 4). Participant suggestions and insight have been aggregated into a list of new variables by the researchers (Table 4). The results suggest two important factors that should be considered. First, it suggests that cultural sensitivity is very complex. This is demonstrated by the breadth of variables that have been suggested and evaluated. Second, it suggests that cultural sensitivity variables are dependant on the ecotourism context; that is the ecological and cultural context in which the ecotourism experience occurs. This is supported by participant comments that suggest the relevance, validity, and utility of the variables may vary across time and space. And these findings suggest that complexity may be a barrier to culturally sensitivity for ecotourism.

**Table 4.** Cultural Sensitivity Attributes and Variables: A Preliminary Appraisal

<b>Variables *suggested by researchers</b>	<b>Very Relevant (5)</b>	<b>Relevant (4)</b>	<b>Somewhat Relevant (3)</b>	<b>Not Very relevant (2)</b>	<b>Not relevant (1)</b>	<b>Rating Average</b>
<b>HUMAN ECOLOGICAL LANDSCAPE</b>						
Cultural assets and traditions (inventory and history)	51	22	3	1	0	4.6
Cultural heritage (preservation and protection)	59	15	2	1	0	4.7
Cultural risks (identification)	36	35	6	0	0	4.4
Cultural impacts (identification)	44	26	7	0	0	4.5
Community benefits	53	20	3	1	0	4.6
<b>Variables ** new variables suggested by participants</b>						
Arts (folk arts, crafts, fine arts, music)	Cultural heritage (practices/traditions)	Interaction with the environment	Special places			
Authenticity	Cultural openness and ability to engage in discussion	Intra-cultural exchange and collaboration	Spiritual practice (ceremony, artifact, inventory)			
Change over time	Cultural revitalization (identity and practice)	Land ownership and rights (patterns, inventory)	Sustainable development			
Context (cultural and ecological)	Cultural values, attitudes and perceptions	Language and dialects	Technology (history and inventory)			
Cultural diversity (identifying expressions within and across cultures)	Cultural similarities (identification and basis for exchange)	Local/traditional communications protocols	Traditional and historical knowledge			
Cultural expressions (art, music, language, etc.)	Cultural values, attitudes and perceptions (related to ecological conditions)	Nature-culture dynamics (understanding)	Visitor values			
Cultural heritage (assets and artifacts)	Environmental hazards	Power relations	Language and dialects			
Cultural heritage (built environments)	Environmental hazards preparedness (adaptation)	Presence of nature in the traditions (artifacts)	Local/traditional communications protocols			
Cultural heritage (history)	Gender aspects and culture	Resources and assets				

<b>Variables *suggested by researchers</b>	<b>Very Relevant (5)</b>	<b>Relevant (4)</b>	<b>Somewhat Relevant (3)</b>	<b>Not Very relevant (2)</b>	<b>Not relevant (1)</b>	<b>Rating Average</b>
<b>PERCEPTIONS, ATTITUDES AND VALUES</b>						
Mutual understanding and respect (between people and societies, visitors and hosts)	60	13	3	1	0	4.7
Awareness and respect (diversity of cultural traditions, values, beliefs, and behaviours)	63	10	4	0	0	4.8
Reevaluation of culture	19	36	18	3	1	3.9
<b>Variables ** new variables suggested by participants</b>						
Acceptance and celebration of cultural differences and similarities	Definition of which values are negotiable and which not	Interpretation of cultural values and characteristics	Interpretation of cultural values and characteristics	Shared sense of responsibility (for cultural heritage)		
Beliefs	Economic changes over time	Key value sets (identification)	Key value sets (identification)	Traveler's motives		
Change over time (cultures are dynamic and changing concepts)	Economic status (perceptions and attitudes)	Participatory process (community participation in tourism planning)	Participatory process (community participation in tourism planning)	Understanding of differences		
Cultural knowledge	Education (access, and change over time)	Perception of change in uses of cultural elements	Perception of change in uses of cultural elements	Use and explanation of local language/words		
Cultural understanding	Ethics	Positive cross-cultural interaction	Positive cross-cultural interaction			

<b>Variables *suggested by researchers</b>	<b>Very Relevant (5)</b>	<b>Relevant (4)</b>	<b>Somewhat Relevant (3)</b>	<b>Not Very relevant (2)</b>	<b>Not relevant (1)</b>	<b>Rating Average</b>
<b>STRATEGIES AND INSTITUTIONAL ARRANGEMENTS</b>						
Operational guidelines / codes of ethics (creation and operationalization)	41	32	4	0	0	4.5
Management plan (development, implementation, and monitoring)	45	30	2	0	0	4.6
Policy and legislation (development, implementation, and monitoring)	27	38	12	0	0	4.2
Regulatory measures and law enforcement	21	33	22	1	0	4.0
Political infrastructure and systems	14	40	19	4	0	3.8
Civic involvement (engagement and collaboration)	44	27	6	0	0	4.5
<b>Variables ** new variables suggested by participants</b>						
Applied research	Education and training		Integration of private and public sector responsibilities (coordinated effort)		Participatory process (society, public and private sectors)	
Communication channels	Ethics (embedded in management and regulatory process)		Integration of science of cultural and natural travel experiences		Power structures assessment (economic, political and social attributes, processes, and systems)	
Democratic attributes of the decision making infrastructure	Institutional inventory (agencies, actors, supporters, and actions)		Barriers to cultural sensitivity (identification / strategy development)		Private and Public Sector Partnerships	
Distribution of roles and mandates between local and national authorities	Institutional support (funding, policy, other)		Master Plans (development, implementation and monitoring)		Resource assessment (financial, human and physical)	

<b>Variables *suggested by researchers</b>	<b>Very Relevant (5)</b>	<b>Relevant (4)</b>	<b>Somewhat Relevant (3)</b>	<b>Not Very relevant (2)</b>	<b>Not relevant (1)</b>	<b>Rating Average</b>
<b>TECHNOLOGY</b>						
Monitoring and assessment systems	29	36	9	2	0	4.2
Human resources development	47	22	6	1	0	4.5
Optimizing technology for goal achievement	11	44	15	4	2	3.8
Optimizing technology for management (marketing, risk assessment, etc.)	18	36	19	2	1	3.9
Investing in the development of new technologies (e.g. Internet, community-based management systems)	23	33	18	1	1	4
Investing and contributing to knowledge exchange capacity	34	30	12	0	0	4.3
Stimulation of technology and infrastructure investments (host community)	18	36	17	4	1	3.9
<b>Variables ** new variables suggested by participants</b>						
Appropriate technology (cultural determined)	Economy level of regions (communities).	Participatory approach	Partnerships	Skills aspects.		
Based on evaluation needs	Education and training (technology)	Partnerships	Technology assessment (e.g. cost-benefit analysis)			
Community access to technology	Intercultural technological understanding (terminology and techniques used)	Proprietary vs. open access	Traditional technologies (inventory)			
Community involvement (participatory technology)	Investment (sources and sustainability)	Protection of authentic cultural values.				
Designed, monitored by the users themselves	Locally determined technological values	Research				

**Key Residuals Messages – Section 3**

- A set of preliminary attributes and variables for cultural sensitivity are assessed to be relevant to very relevant.
- A set of new variables emerged on the basis of participant suggestions and comments.
- The breadth of variable suggestions suggests/confirms that cultural sensitivity is very complex, particularly in the ecotourism case.
- Participant commentary suggests that complexity may present as barrier to cultural sensitivity for ecotourism.

**CONCLUSIONS AND NEXT STEPS**

The results of this survey round have served to identify a set of residual and unresolved issues regarding ecotourism and cultural sensitivity. However, as a group, we have made progress towards understanding what the relationship between cultural sensitivity and ecotourism is/should be, how this should be defined. From the definitional enhancement process, a set of key issues has emerged. They are to be used to inform the final definitional enhancement process; the product of which is to be introduced in Round #3.

On the basis of the aforementioned key issues and the cultural sensitivity attributes and variables, the next and final survey round is to focus the group on the identification of cultural sensitivity barriers and opportunities for ecotourism. By exploring these themes, the ambition is to better understand the complexities, challenges, and conflicts associated with making ecotourism culturally sensitive in a global community.

**Delphi Round #3: Final Summary Report**

**ECOTOURISM AND CULTURAL SENSITIVITY**



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## INTRODUCTION

This report contains a summary of the Round #3 survey results. For each of the survey sections and questions, the results are described and the key residual messages are presented.

In total, sixty-one ecotourism experts from twenty-one countries completed the survey (77.2% response rate). The expert panel in Round #3 is composed of academic experts (25%) professional experts (54%) and individuals with expertise in both academic and professional realms (21%).

## SECTION 1: CULTURAL SENSITIVITY DEFINITION

Collectively, we have been developing and refining a cultural sensitivity definition for ecotourism. In Section 1 of Survey #3, an enhanced definition was presented for final review. Delphi participants were asked to rate the appropriateness of the definition:

*Cultural Sensitivity requires that those who implement, support, and participate in ecotourism, minimize impacts to the natural and cultural environments, foster inter-cultural awareness and respect, contribute to and benefit from positive experiences and outcomes, contribute to the protection of built and living cultural heritage, foster the informed participation and empowerment of local and indigenous people, and respect the socio-cultural authenticity and environment of the host community.*

**RESULTS:** A majority agree (91.8%) that the definition is appropriate or very appropriate (Table 1).

**Table 1:** Question #1 Response Summary

Answer Options	Response Percent	Response Count
<b>Very appropriate</b>	<b>42.6%</b>	26
<b>Appropriate</b>	<b>49.2%</b>	30
Somewhat appropriate	8.2%	5
Not very appropriate	0.0%	0
Not appropriate	0.0%	0

Several participants made noteworthy comments. These include the following select comments from the group (minority) who rated the definition as “somewhat appropriate”. It is noteworthy that this group includes both academic and professional participants.

*“Looks like a nice, all-inclusive statement, whether it is practically workable in all situations is another question. Rather than trying to fit everything into a definition how about focusing on actual ethics and values such as respect, benefit sharing, consensus decision making, etc. Part of the problem of treating this subject academically is the fact that the academic lens always focuses on a subject-object relationship in which one part (the scientist) does all the observing and the object is a more or less hapless ‘thing’ that is ‘done to’.”*

*“May be subsumed under fostering intercultural awareness but would like more emphasis on learning from other cultures- otherwise there is a danger of patronising attitude and western-centricity.”*

*“Ecotourism by definition minimizes natural impacts, and this is not and does not need to be part of the definition of cultural sensitivity. As has been mentioned by contributors in the past, protection of built cultural heritage, empowering local indigenous people and respecting socio-cultural authenticity and environment all need to be used with qualifiers, as some of these in some societies might go against the precepts of ecotourism and conservation, such as the taking of rare birds for their feathers, female circumcision, burning of rare habitats for crops; and through empowerment local decisions made that benefit decision-makers, either the locals generally or even one clan or tribe, but go against regional or world conservation or wildlife preservation values.”*

Other select comments and suggestions from those that rated the definition as appropriate or very appropriate are organized on the basis of a number of recurrent themes:

**Authenticity:** Residual concern exist regarding the socio-cultural authenticity of host communities. Respecting values, behaviours, and environments is perhaps a better way of addressing intangible and contested definitions of ‘authenticity’.” Representative comments include:

*“In general, I think this definition hits all the “big item” issues that should be addressed in a definition. My only comments would be that “respect the socio-cultural” authenticity of the host community assumes one authenticity that people can identify and plug into to respect. Of course, that is rarely the case. I’m not sure how to resolve this in a definition; it’s likely an on-going place-based discussion at the local site or amongst the indigenous group.*

*“Authenticity is difficult. I would say, respect the socio-cultural and environmental value systems of the host community.”*

**Outcomes:** Residual concern exists about the inclusion of ‘positive experiences and outcomes.’” Several participants, in this round and previous rounds, have contested the inclusion of the statement. In this round, several recommended removal of this statement on the basis that it is vague, context specific, and that it is difficult to implement and measure. Representative comments include:

*“I’d drop “contribute to and benefit from positive experiences and outcomes.” All the other statements are very specifically related to culture. This statement is vague; “outcomes”? - what sort of outcomes? You’re confusing the experience of ecotourism (i.e. outcomes I guess) with the cultural elements of the experience.”*

*“The phrase “contribute to and benefit from positive experiences and outcomes” seems a bit weak. I would drop it entirely.”*

*“I don’t think you can “require” people to benefit from positive experiences and outcomes. Otherwise, I like it.”*

**Indigenous Peoples:**

*“Please use the spelling “Indigenous Peoples” which was something we fought hard for recognition from the UN and won. It is similar to saying americans or Americans. The “s” at the end also indicates plural nationalities. If you do not use that then you will never get the respect of numerous Indigenous leaders working through the UN and around the world.”*

**General comments:**

*“Anybody who can do all that this definition asks is either a Genius or a Saint! The definition clarifies what is expected when we use the term “cultural sensitivity”. It is logical that there is judgment and*

*perspective in this definition (minimize, foster, contribute): this allows the definition some malleability. A more rigorous and specific terminology may provide a concise and measurable definition, but it would be an impractical one. The shades of grey in this subject matter must be allowed their space.”*

**Length:** Many participants were critical of the length of the definition.

### **Key Residual Messages – Section 1 – A CONSENSUS DEFINITION**

On the basis of participant feedback, comments and suggestions, minor definitional enhancements have been completed and a consensus definition is introduced:

*Cultural Sensitivity requires that those who implement, support, and participate in ecotourism: minimize impacts to the natural and cultural environments, foster inter-cultural awareness and respect, contribute to the protection of built and living cultural heritage, foster the informed participation and empowerment of local and Indigenous Peoples, and respect the socio-cultural value systems of the host community.*

## **SECTION 2 AND 3: CULTURAL SENSITIVITY BARRIERS AND OPPORTUNITIES**

Throughout the research process, participants have been eluding to a set of cultural sensitivity barriers and opportunities. Sections 2 (barriers) and 3 (opportunities) of the survey were meant to elucidate a set of salient opportunities and barriers that may help us to better understand the complexity that is cultural sensitivity for ecotourism.

A thematic content analysis of the survey data was completed in order to identify barriers and opportunities. For ease of reporting, barriers and opportunities are grouped and described on the basis of a set of five macro themes (Figure 1). These five themes reflect the major thematic trends in the data set. They are described in the sections that follow.

**Figure 1:** Cultural Sensitivity Barriers and Opportunities: Macro Themes

1. Perceptions, Attitudes, and Values
2. Ecotourism Objectives
3. Planning and Management Frameworks
4. Planning and Management Resources
5. Institutional Structures and Power Dynamics

## MACRO THEME #1: PERCEPTIONS, ATTITUDES AND VALUES

**Barriers:** Misunderstanding, insensitivity, lack of awareness, false expectations, conflicting values.

In general, there was a strong representation of concern about the potential for misunderstanding (or limited understanding) to present as a barrier to cultural sensitivity amongst all stakeholders. For example, tourists may expect ‘authentic’ but unrealistic experiences, the host community may expect tourists to be sensitive to their value systems and traditions, and the operator may expect cultural sensitivity to be the product of the experience rather than a key component of the process. Key concerns were related to the level of staff training (tour guide), understanding amongst supporting agencies in the public and private sectors, and the ability to begin sensitivity training for tourists *before* they arrive in the host community. Thus, an understanding of perceptions, attitudes, and values amongst stakeholders is critical for the achievement of cultural sensitivity. The majority of participants who made reference to (mis)understanding linked this potential barrier to education and awareness training as a means for addressing this problem. Select participant comments:

*“Lack of understanding on the part of travelers about appropriate and responsible behaviours, respecting and positively contributing to the communities they visit.”*

*“Lack of understanding of ecotourists and their needs by the local communities”*

*“Lack of education/awareness of visitors to local cultural sensitivities”*

*“Lack of understanding of the culture, history, and social and spiritual traditions of Indigenous peoples.”*

*“Ecotourism operators lack of sensitivity to visitors of different cultures.”*

*The "eco" implies the environment instead of the home. It perpetuates the foolish assumption, that there is a pristine "wilderness" out there. It's like ecological integrity with Parks Canada; the term as it implies suggest that humanity is not an integral component of ecosystems. The culture in "ecotourism" much like parks and protected areas came as an afterthought. The problem with ecotourism is the environment and wildlife (devoid of humans or people who may live there) is often promoted. Learning is poor interpretation without challenging assumption and stereotypes.*

**Opportunities:** Education, inter-cultural understanding and awareness.

Education and awareness was identified by the majority of the group as a noteworthy opportunity related to cultural sensitivity. Opportunities to shape, enhance, and contribute to evolving perceptions, attitudes, and values related to cultural similarities and differences exist in a culturally sensitive ecotourism environment. For example, education could be in the form of organized and purposeful cultural education training and learning programs. It could also be in the form of informal inter-cultural exchange opportunities. Education is thought to lead to improved understanding and sensitivity and a reduction in conflict related to differing perceptions, attitudes and values. It is also thought to lead to opportunities for promoting diversity and preserving cultural heritage (value driven). It is also a critical component in the tourist experience. It can facilitate a “richer overall experience and a better understanding of the tourism destination” as well as “genuine concern and good will among hosts and guests.” Education is identified as the key opportunity for operationalizing cultural sensitivity for ecotourism and for increasing awareness about the social, cultural, environmental and economic impacts of tourism. Select participant comments:

*“Education is key in making ecotourism culturally sensitive. It is important to practice respect to the local cultures and their natural heritage not just using ecotourism as a marketing tour to promote travel companies or tourism to a specific area.”*

*“A sharing of cultures (between the ecotourist and the host community) can highlight the deficiencies in both cultures and the lessons learned will make room for acceptable change by both parties.”*

*“The furthering of a Global community based on the acceptance of our differences and an appreciation of our similarities.”*

*“Learning to respect other cultures and build global friendships and networks.”*

*Education is already a key component of ecotourism. This component is not limited to the natural landscape and should be extended to human systems as well. In addition to education, direct experience with local cultures can foster sensitivity.*

## **MACRO THEME #2: ECOTOURISM OBJECTIVES**

### **Barriers: lack of consensus, definitional confusion**

Participants expressed concern over the apparent confusion about the objectives of ecotourism. We know that ecotourism seeks to achieve sustainable outcomes by balancing economic ends with conservation and social responsibility. However, there exists a range of interpretations across the ecotourism stakeholder spectrum. Participants expressed concern about achieving a laudable balance between the pillars of sustainability based on a legitimate understanding of ecotourism’s objectives. Some argue that a disproportionate emphasis has been placed on the potential economic benefits, thereby submersing the importance of the environmental and social-cultural outcomes. Others argue that ecotourism is about the environment and that ‘culture’ is the realm of ‘other’ tourism types. One participant asks: “Balancing natural protection and cultural protection: which comes first? When? Which one must come first?” Confusion about what ecotourism’s key objectives are and are not is present amongst the world’s leading experts in the field. And, if a lack of consensus exists at the highest order, this presents a barrier to operationalizing cultural sensitivity in the places and communities where ecotourism activities occur. One participant argued that there exists real opportunity to operationalize cultural sensitivity when a balanced approach is assumed: “Linking cultural and natural heritage experiences as complementary ways to understand and connect with the essence of the destination.” Select participant comments:

*“Key Barrier: A lack of consensus among stakeholders in the objectives of ecotourism development”*

*“The desire of the industry to profit from any form of tourism will always compromise the efforts to achieve the spirit of the definition.”*

*“The disproportionate importance that has been given to potential economic benefits of ecotourism putting aside the richer cultural lessons it can provide.”*

*“Ecotourism is too much identified to nature; community tourism would identify more with the culturally sensitive aspect.”*

*“Ecotourism destinations are often sold to tourists by international travel agents/tour operators based on natural resources/sights/ecosystems, with no regard for cultural sensitivity.”*

### **Opportunities: definitional consensus**

By way of discussing and operationalizing cultural sensitivity, there exists opportunities to address the apparent confusion about ecotourism’s objectives and definition. In addition, when a culturally sensitive approach is assumed, an inclusive space for consensus may be possible. This presents opportunities to address and resolve lingering confusion and unresolved concerns about what ecotourism is and is not and what it should and should not do. Furthermore, it

provides many opportunities for ecotourism to continue to contribute to the sustainable development imperative, particularly if a balanced approach – between economic, environmental and socio-cultural principles – is assumed. Select participant comments:

*“Bridge the realities natural and cultural heritage and current realities are not independent nor separable. While some travellers favour one perspective to understand the other, it must be made clear that a balanced and composite perspective is essential to a viable ecotourism experience.”*

*Increased emphasis on sustainability should give increased incentive for cultural sensitivity. 'Preserving the culturally familiar and strengthening cultural diversity...should rank alongside the preservation of biodiversity and increasing incomes as a goal of sustainable livelihood strategies' (Glavovic et al, 2002, p 6) Glavovic, B., Scheyvens, R. and Overton, J. (2002)*

### **MACRO THEME #3: PLANNING AND MANAGEMENT FRAMEWORKS**

**Barriers:** lack of frameworks, guidelines, regulatory support and evaluative tools.

When participants considered operationalizing cultural sensitivity (creating programs, policies, training modules, measuring progress, and reporting outcomes) concern emerged about the lack of formal support in the form of guidelines and tools for professionals. Participants clearly indicated that the creation of guidelines, the development of policy and regulatory measures, and evaluation frameworks were a logical next step for making ecotourism culturally sensitive. In the absence of management and evaluation frameworks, significant barriers exist to the delivery of culturally sensitive ecotourism experiences. It also raises concern about the ability of the industry to commit to providing culturally sensitive products, for facilitating informed tourist purchases, and for sharing culturally sensitive values and outcomes with supporting organizations. One participant went so far as to express concern about the potential for providers to “greenwash” or misrepresent their activities and intentions. Frameworks have been widely identified as a means for addressing this concern. Select participant comments:

*“Lack of guidelines in specific destinations (for by tourists, operators and hosts).”*

*“Lack of documented framework/guidelines/model.” “No protocols and visitor guidelines available.”*

*“Real versus superficial commitment. Greenwashing.”*

*“Policy strengthening- team up with the United Nations to strengthen policy and create eco memberships that can sanction establishment that do not adhere to its definition.”*

*“The inclusion of a more anthropological, sociological or psychological element in any ecotourism planning strategies may be a positive step forward in achieving minimal impact. In addition, conflict and differences in values, beliefs and attitudes may be difficult to resolve. From an outsider’s perspective, there could be the desire to maintain the status quo, yet from an insiders point of view the whole purpose of ecotourism development could be to initiate change and drive it in a particular direction. How are these two competing and conflicting directions to be resolved? Finally, if the above two factors can be tackled, what regulatory mechanisms should be in place to drive the development in the required direction? In many cases, although the principles of regulation may exist, how are these to be successfully enforced without alienating at least some of the stakeholders?”*

**Opportunities:** Framework development, accountability, best-practices and leadership, ethics

Participants identified the creation of planning and management frameworks as a significant opportunity for making ecotourism culturally sensitive. If operationalized, there exists

possibility for ecotourism to assume a leadership role and provide examples of best-practices, codes of conduct, evaluation frameworks and other management resources to other resource-dependant industries, tourism businesses, communities, and city planning departments. A trickle down effect may be possible, whereby the ecotourism industry can continue to ‘lead by example’ (by expanding its leadership to also include socio-cultural sustainability). Select participant comments:

*“This definition might provide a cornerstone for reinforcing the importance of ethics, both on the part of the industry (where codes of conduct might be developed and/or enforced) and on the part of visitors (who are expected to act in accordance with the principles suggested by the definition).”*

*“Could provide guidance for other natural resource agencies (e.g., National Parks) and their relationships with locals, gateway communities, etc.”*

*“Promotion of responsible tourism.”*

*“Create “How to” programs that can help the entrepreneur that is deciding to start an ecotourism venture.”*

*“Regulatory mechanisms that ensure the designation of ecotourism zones and development.”*

*“Develop guidelines of what is (and what is not) culturally sensitive ecotourism, methodological framework and best practices.”*

*“Some industry events (e.g., international or national travel expos) and partnerships do exist which can serve as examples of best practice.”*

#### **MACRO THEME #4: PLANNING AND MANAGEMENT RESOURCES**

**Barriers:** Costs, time, communication, education and training.

First, participants expressed paramount concern about the costs associated with cultural sensitivity. That is, staff training, policy development, community participation, and more, are perceived as a barrier to success. Furthermore, participants expressed concern about financial sustainability if ‘new’ investments are required. Second, the amount of time required to develop and implement cultural sensitivity plans, policies and programs is of concern. This concern is magnified when the amount of time diverted from other management areas is considered (e.g. marketing, conservation). Third, communication is identified as a barrier to cultural sensitivity. For example, language, communication tools (e.g. internet) can present as a barrier. Trust relationships between providers, communities, and tourists are also required to facilitate open and engaged dialogue. Thus, investments are required (staff training, technological investments, translation, relationship building, time, etc.) to overcome communication barriers. Fourth, education and training was identified as a potential barrier because of the time and cost required to train staff and educate members of the host and visiting communities. This barrier is clearly linked to the barriers associated with perceptions, attitudes and values. Select participant comments:

*“Financial sustainability may suffer while trying to accomplish such a wide range of goals”.  
“Operators have a lack of resources to address the issue; including time constraints, financial constraints, and knowledge base and educational constraints.”*

*“Language - it is hard to understand someone's framework of references if one can't communicate directly.” “It takes time and patience to work with communities, and to maintain ongoing favourable relations for culturally sensitive tourism.”*

**Opportunities:** supply and demand, conserving natural/cultural heritage, communications, marketing, education and training, and community development.

Increasing supply and demand for ecotourism is identified as an opportunity to propel the industry towards cultural sensitivity and it is an opportunity to share cultural sensitivity values with ecotourism stakeholders. Participants also identified opportunities to contribute to natural and cultural heritage conservation and to increase these activities as values change. In addition, cultural sensitivity could work to improve communications between visitors, providers, communities, and policy makers. Given that cultural sensitivity, ideally, facilitates open and inclusive dialogue, then if implemented, it could lead to improved communications. Though also identified as a barrier, its identification as an opportunity implies that investments could lead to positive outcomes. Marketing was identified as an opportunity for those who offer culturally sensitive experiences. Sensitivity is a ‘marketing asset’ that can be mobilized in marketing material and ecotourism products to attract ecotourists. It can also be used as a means to begin cultural sensitivity education long before the tourist arrives on site. Education and training is identified as a barrier to cultural sensitivity but it is also identified as a potential opportunity. Investments in staff education and training are thought to have the potential to accelerate cultural sensitivity implementation. It is also thought to have the potential to increase awareness amongst stakeholders (leadership/trickle down effect). Community development was considered to be the most important opportunity in this thematic area. Investments in infrastructure, financial infusions, community cohesion, and support for local initiatives (particularly those associated with natural and cultural heritage conservation) were identified as potential outcomes and opportunities. All of these opportunities not only benefit the community, but they may cycle back to provide resources and support mechanisms for ecotourism. Select participant comments:

*“Being human they are interested in how other people do things (their culture) so it is an elementary step in planning and marketing an ecotourism product to tie the experience to local food, lodging, recreational customs, working conditions and to learn how those cultures work to preserve and enjoy their own environment. This plethora of opportunities is what makes ecotourism so inherently interesting and exciting.”*

*“Program ecotourism experiences to include local conservation measures that are linked to local cultural values and customs.” “With the rising global concern for the environment, people are looking at ecotourism as the best way to travel. Thus, ecotourism products and services should be re-designed to foster cultural sensitivity.”*

*“Incorporate opportunities to understand the local culture within the tour; Put effort into developing “cultural experiences”, and ensure marketing materials reflect the experience.”*

*“What ecotourism operations need for success (from all perspectives) is smart, engaged, progressive people running them, people that can make prudent decisions when considering barriers (including those listed above).”*

## **MACRO THEME #5: INSTITUTIONAL STRUCTURES AND POWER DYNAMICS**

**Barriers:** democratization, western-centric, consumerism, commodification, inequality, power

Critical concerns emerged and they have deep-seeded roots and long-reaching implications for cultural sensitivity and ecotourism. Democratic process was identified as a particularly lofty goal given the number of stakeholders involved in ecotourism, their various perspectives and expectations, and the time and efforts required to ensure that everyone has a voice. Also of concern was the potential for indifference or a lack of interest to manifest amongst members of host communities, local governments, or visitors. Political structures and trends are also identified as a potential barrier, particularly in countries where democratic process is the exception and not the norm. This feeds directly into concerns about inequalities that exist

between ecotourism stakeholders. How do we address these inequalities and power dynamics? How do we ensure that the community maintains its values, its power, its voice(s)? This is linked with concerns about ‘Western-centric’ ways of knowing and doing ecotourism. How do we ensure that local ways are not subsumed by Western ideals and expectations? Given that the ecotourism paradigm is deeply entrenched in Western values, how do we ensure that ecotourism policy and practice is sensitive to local culture and local values? Consumerism and commodification of ‘authentic’ cultural experiences are also of significant concern to participants. Institutional barriers and contextual power dynamics have the capacity to shape ecotourism developments and the achievement of cultural sensitivity. However, understanding of these dynamics is limited both in theory and practice. Significant and long term investments are required to better understand and address institutional barriers. Select participant comments:

*“New questions always arise with the development of any definition. The most salient and problematic question associated with this definition of cultural sensitivity is what is meant by “authenticity”. According to whom?”*

*“I feel what is necessary is an almost complete change in existing economic and political structures. The global inequities found in our world - created and maintained by globalization - mean that the rich get richer and the poor get poorer. When these and other inequities exist, true partnerships between ‘hosts and guests’ cannot exist.”*

*“The imbalance between local populations and tourists, and the related north/south imbalance mean that locals do not have the education, wealth, or political power of tourist and tourist developers. Indeed, the way of life of many local populations around the world often conflict - or at least do not match - the capitalist system of Western nations. Local people are often pawns in a much larger system over which they have little control or understanding.”*

*“Personal values of key community leaders and political figures in control often distort the real meaning of cultural evolution and its value as a differentiator and key contributor to authenticity in the guests’ ecotourism experiences. One must educate these leaders to be guardians of cultural heritage and facilitators for community development rather than administrators of homogenized progress.”*

**Opportunities:** engagement, democratization, empowerment, social justice.

Opportunities exist for addressing the institutional barriers and power dynamics that present. Culturally sensitive ecotourism may contribute to community engagement; that is individual contributions to the local tourism economy and social fabric. This may lead to improved democratic process for ecotourism planning and management. Engagement and democratization has the potential to lead to community empowerment and improved social cohesion. It also has the potential to contribute to social justice for individuals and communities. It may contribute to the improved status of women, employment opportunities, minority inclusion, improved access to education and health care, human rights, quality of life, and improved distribution of financial benefits. Concomitantly, it may lead to improved understanding and acceptance amongst cultures. Select participant comments:

*“Cultural sensitivity must be set in a wider, dynamic, context where there are political (terrorism/conflict etc), economic, social, environmental (GEC etc), technological and institutional forces at work which mean that ‘culture’ is a far from static concept and that there are other, very powerful forces, at work militating against sensitivity: ecotourism will often be a drop in the ocean.”*

*“The definition might serve as a reminder to local community to consider what they value most when participating in and deciding on a course of action within the tourism industry. We cannot assume that all residents are uniformly supportive of ecotourism developments and for all the same reasons. The definition could provide a way of evaluating what the community values and what any development might do to reinforce -- or alter irretrievably -- about the community.”*

**Of note:** It is interesting that in Section 2 of the survey (barriers), participants identified opportunities for overcoming/mitigating barriers and in Section 3 (opportunities) participants identified opportunities as a means for focusing on positive outcomes, for mitigating negative outcomes, and for addressing cultural sensitivity barriers.

#### **Key Residual Messages – Sections 2 and 3**

- Barriers and opportunities can be understood on the basis of five macro themes
- Opportunities may prove useful for mitigating barriers
- Opportunities link directly back to the definition of cultural sensitivity (and its core principles)
- Investments are required to implement cultural sensitivity values within the ecotourism industry.

## **CONCLUSIONS AND NEXT STEPS**

The results of the Delphi Survey Round #3 have produced a consensus on the cultural sensitivity definition. It has also served to identify a set of barriers and opportunities for implementing cultural sensitivity in the ecotourism industry. These barriers and opportunities, in combination with the data gathered in previous survey rounds, are to be the basis for a discussion relating to complexities, challenges, and conflicts associated with making ecotourism culturally sensitive in a global community. The data is to inform a set of recommendations for making ecotourism culturally sensitive. These outcomes are to be made available in the final research report.