

Supply-Side Perspectives on Ecotourism in Northern Thailand

Nick Kontogeorgopoulos^{1*} and Kittinoot Chulikavit²

¹*International Political Economy, University of Puget Sound, Tacoma, Washington, USA*

²*Faculty of Agricultural Business at Maejo University, Chiang Mai, Thailand*

ABSTRACT

This study provides a supply-side perspective on ecotourism by exploring the ways in which travel agents and tour operators in Chiang Mai, Thailand conceptualise, prioritise and furnish ecotourism. Although travel agents and tour operators serve as crucial intermediaries between tourists and destinations, the ecotourism literature has largely ignored the ways in which retailers and suppliers of tourism experience approach and define ecotourism. Using quantitative data gathered from 300 travel agents and tour operators, this paper illustrates that the conceptualisation of ecotourism among agents and operators in Chiang Mai is expansive, flexible and, in some ways, internally contradictory. Copyright © 2010 John Wiley & Sons, Ltd.

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INTRODUCTION

Ecotourism has grown tremendously in the past two decades as a field of inquiry within the broader study of tourism. Despite the large number of publications devoted to the topic of ecotourism, consensus

has yet to emerge on an acceptable definition. However, as Fennell (2008) points out, there are several common threads that run through the majority of definitions. First and foremost, ecotourism involves an interest in and appreciation of nature and nature-based activities (Wallace and Pierce, 1996; Fennell, 2001, 2008). Second, many ecotourism definitions highlight outcomes relevant to local communities, such as participation (Acott *et al.*, 1998; Ross and Wall, 1999), empowerment (Scheyvens, 2002) and long-term benefits (Honey, 2008). Third, ecotourism encourages educational (Honey, 2002) and responsible (Fennell and Dowling, 2003) tourism. Finally, ecotourism promotes sustainability (Blamey, 2001; Cole and Sinclair, 2002) and conservation (Western, 1993; Wood, 2002).

Though many scholars have examined the meaning, impacts and limitations of ecotourism, relatively few have explored the perspectives and attitudes of actors on the supply end of the chain linking tourist to ecotourism 'product.' The purpose of this paper is to provide such a supply-side perspective on ecotourism by exploring the ways in which travel agents and tour operators in Chiang Mai, Thailand conceptualise ecotourism. Chiang Mai is northern Thailand's largest city and one of Thailand's most popular tourist destinations, receiving 3.6 million Thai and 1.8 million foreign tourists in 2007 (Tourism Authority of Thailand (TAT), 2009). Aside from possessing several historical, religious and retail attractions, Chiang Mai, and northern Thailand in general, serve as a centre of both cultural tourism, in the form of visits to indigenous minority 'hilltribe' villages, and ecotourism centred on jungle trekking, rafting and interactions with wildlife, particularly elephants.

Several authors have examined tourism in northern Thailand (Dearden, 1993; Cohen,

*Correspondence to: Associate Professor N. Kontogeorgopoulos, International Political Economy, University of Puget Sound, 1500 North Warner Street, Tacoma, WA 98416, USA.
E-mail: konto@pugetsound.edu

1983, 1996; Nimmonratana, 2000), and ecotourism specifically (Dearden and Harron, 1994; Hvenegaard and Dearden, 1998; Hayami, 2006), but there are only two studies — one published (Cohen, 1989) and one unpublished (Northrop, 2007) — in the English-language literature that examine the role played by travel agents and tour operators in supplying ecotourism, or at least nature-based excursions to tourists. Further, critics of ecotourism in Thailand (Shepherd, 2002; Vivanco, 2002) decry the industry's use of ecotourism as a marketing tool meant to 'greenwash' customers, but nobody has systematically amassed empirical evidence to assess the ways in which tourism businesses in Thailand conceptualise ecotourism in the first place. Using data gathered from surveys of 300 travel agents and tour operators in Chiang Mai, this paper confirms that nature-based tourism activities form a significant part of the tourism industry in Chiang Mai, and argues that the conceptualisation of ecotourism among agents and operators is expansive, flexible, and in some ways internally contradictory.

SUPPLY-SIDE PERSPECTIVES ON ECOTOURISM

While studies on the supply of ecotourism are rare compared with those examining how ecotourism is defined, evaluated and experienced from a demand-side perspective, that is not to say that no attention at all has been paid to certain supply-side themes. For example, several authors have identified supply-related factors most likely to lead to sustainable outcomes for tour operators. Boon *et al.* (2002) argue that in the temperate and marine and coastal environments of south-eastern Australia, ecologists could play a key role in providing planners and managers of tour operators with essential environmental information needed to create a successful adaptive management strategy. Focusing specifically on supply chain management, Schwartz *et al.* (2008, p. 298) indicate that tour operators could improve 'sustainability performance' by following a framework that includes the following steps: 'engaging the business and setting policies, integrating sustainable supply chain management (SSCM) into the business, assess-

ing suppliers, setting priorities for actions and evaluating progress.' At a broader level, Swarbrooke (1999) suggests that tour operators interested in practising more sustainable forms of tourism follow a three-pronged strategy that includes enhancing the power of locally based operators, favouring small-scale specialist tour operators and encouraging more responsible behaviour on the part of mass market tour operators.

A number of authors have also measured whether individual businesses abide by ecotourism principles. In a frequently cited study, Wallace and Pierce (1996) evaluate registered 'ecotour lodges' in the Brazilian state of Amazonas, and find that while the lodges promote certain ecotourism principles such as the creation of local employment, the improvement of local access to services and the use of small-scale and appropriate architecture, they also fail to abide by other principles, including the conservation and management of legally protected areas, the creation of opportunities for local ownership of ecotourism ventures and the provision of educational and training opportunities. In a survey of 22 nature-based operators in British Columbia, Canada, Bottrill and Pearce (1995) find that fewer than a quarter of the operators could be classified as ecotourism, as defined by certain key measurable elements related to tourist motivation, management and location of operations.

The role played by tour guides in fostering interpretation, conservation, and responsible behaviour is another supply-side theme found in the ecotourism literature. Weiler and Ham (2001) argue that tour guides can facilitate tourists' understanding of natural phenomena by ensuring that interpretation is enjoyable for visitors, remains relevant for visitors, follows a theme, features a high level of organisation in presentation and avoids taking too academic of an approach. In their exploratory study of one Galapagos National Park tour operator hoping to improve tourists' support for conservation and educational outcomes, Powell and Ham (2008) assert that a well-designed and well-delivered interpretation programme is indeed able to increase several outcomes pertinent to ecotourism, including attitudes towards resource management issues, knowledge of a high-protected area and support for

conservation. On the other hand, Weiler (1999) points out that although Australian ecotour guides receive high satisfaction scores from tour customers, they fall short in the areas of interpretation and conservation.

Several publications offer guidance on how to establish and operate a nature tourism company (Patterson, 1997; United Nations Environment Programme, 2003). One of the earliest examples comes from The Ecotourism Society (1993), which provides advice on several topics, including visitor education, prevention of cultural and environmental impacts, training, conservation and local employment. In addition to these valuable sets of guidelines meant to assist ecotour providers, numerous compilations document and describe particular tour operators that provide examples of successful ecotourism in practice. Honey (2008) investigates examples of 'genuine ecotourism' in seven countries, while Buckley (2003) draws on cases studies from every continent, offering analysis of over 170 private tours and lodges, community projects, private reserves, and public enterprises.

Notwithstanding the efforts outlined above to shift focus onto the supply side of ecotourism, few studies have evaluated what ecotourism actually means to tourism suppliers such as hotels, travel agents and tour operators — some rare exceptions include Sirakaya and McLellan (1998), Sirakaya *et al.* (1999), Carr (2007) and Kay (2007). This is unfortunate because such intermediaries shape both the kinds of activities in which tourists participate and the ways in which tourists are connected to particular experiences. For this reason, it is important to understand how suppliers approach and define ecotourism because this fundamentally shapes not only immediate and long-term impacts on destinations (Swarbrooke, 1999), but also the expectations and actual experiences of tourists participating in activities that are labelled 'ecotourism.'

METHODS

The research on which this paper is based took place over a period of approximately 3 months in mid-2008, and focused exclusively on travel agents and tour operators in Chiang Mai, Thailand. Although travel agents and tour

operators perform different functions — with agents selling the products of others and operators assembling their own packages based on negotiated deals with various suppliers — travel agents and tour operators in Thailand are not separate entities as far as the law is concerned. In particular, Thailand's *Travel Agency Business and Guide Act* of 1992 defines 'travel agency businesses' as those that arrange or provide transportation, accommodation, food or guide services for tourists. This definition of 'travel agency businesses,' which more accurately describes the functions of tour operators than travel agents, in practice combines all agents and operators into one catch-all category. This category is then used by the TAT to compile a list of what it calls 'registered travel agents.' (For this reason, the term 'travel agency business' is used in this paper to refer to both travel agents and tour operators.)

According to the *Travel Agency Business and Guide Act*, all travel agency businesses must acquire a license from the Tourism Business and Guide Registration Office of the TAT. Initial licenses are valid for two years, after which businesses can apply for 4-year renewals. Companies are also required to pay a security deposit ranging from 10 000 Baht (\$292) for special-area licenses (to sell or operate marine or cultural tours, for example) to 50 000 Baht (\$1461) for domestic tourism licenses, to 100 000 (\$2921) and 200 000 Baht (\$5843) for outbound and inbound tourism licenses, respectively. In 2007, there were a total of 9890 registered travel agency businesses in Thailand, divided into the following categories based on the type of license held: special-area (4113 businesses), domestic (1223), inbound (614) and outbound (3940) (Bureau of Tourism Business and Guide Registration, 2009).

The data collected for this study derive from researcher-administered surveys of 300 Chiang Mai travel agency businesses. In order to determine the names and locations of travel agency businesses, the authors acquired an undated booklet from the Northern Office of the TAT titled *List of Registered Travel Agents*. This English-language booklet was aimed at foreign tourists and lists 366 businesses in the Chiang Mai city district (known as *Amphur Muang Chiang Mai*). However, after learning from a staff member at the TAT office that this

published list is incomplete and outdated, the authors requested and received a more recent digital file in Thai that lists 602 firms. Using a random sampling method, businesses were then selected from this population of 602 firms. The authors and a graduate research assistant then visited selected businesses in person to administer the surveys, until 300 businesses completed the survey. All but a handful of businesses agreed to participate in the survey. Among those respondents surveyed, 33.3% were owners of the business, 22% were managers, and 44.7% were regular staff members.

THE SUPPLY OF ECOTOURISM IN CHIANG MAI, THAILAND

Because official lists of 'registered travel agents' in Thailand lump together all travel agents and tour operators into one category, it is normally impossible to ascertain just from official records whether a business is a travel agent or tour operator. Survey findings indicate that of the 300 businesses surveyed, 27.3% are 'pure' travel agents (i.e., they only sell the tours of other companies and do not themselves put together tours), 14.7% sell only their own tours (essentially, these 'agents' are actually just the retail branches of tour operators) and 58% act as both a travel agent and tour operator, whereby tours are not only assembled but also sold on behalf of other tour operators. Among those that sell their own tours as well as the tours of others, an average of 50.3% of the tours sold are assembled and operated by the companies themselves.

The typical Chiang Mai travel agency business is young, independent and small. The average age of agencies at the time that the surveys were administered is just over 9 years old, and half of all businesses began operations after 2002. Further, though a handful of businesses (10 out of 300 to be exact) date back to prior to 1980, three-quarters (74.7%) are less than 10 years old, while one-half (49%) have been around for less than 5 years. This pattern of recent growth among travel agencies and tour operators in Chiang Mai reflects not only the rapid growth of tourism in Thailand in the past decade, but also more importantly the low barriers to market entry and the high degree of

turnover in the Thai tourism industry (Konteorgopoulos, 1998).

Though many travel agents and tour operators in Chiang Mai sell and operate tours aimed at the package tourist market, a majority (53.8%) of their customers are Foreign Independent Tourists, who walk in off the street and purchase services independent of their existing package vacations (for those who came to Thailand on packages). This weak, or at least partial, association with the existing national and global tourism industry is also reflected in the very high percentage (90.7%) of travel agency businesses that are independently owned and operated. Further, nearly 80% of surveyed businesses operate out of a single office location.

In addition to featuring a high degree of independence, travel agency businesses in Chiang Mai are also heavily local in ownership and employment. Only 5% of businesses surveyed are headquartered outside of Chiang Mai province. Moreover, unlike the Thai tourism industry as a whole — which 'leaks' up to 70% of revenues (Ryan and Hoontrakul, 2004) because of what some say is the foreign control of the Thai tourism industry (Truong, 1990; Pleumarom, 1999) — there is very little foreign involvement in the ownership of Chiang Mai travel agents and tour operators: of the 28 (out of 300) businesses that belong to a parent company, only five (or 1.7%) are headquartered outside Thailand (three in Japan, one in Korea and one in the United States). The employees of travel agency businesses come largely from the northern region, with 67% of all employees originally from Chiang Mai province. It is interesting to note the high level of educational achievement among travel agency business workers. While only approximately 7% of the Thai population over 15 years of age has completed post-secondary education (Termpitayapaisit, 2006), 58% of the employees of surveyed businesses hold post-secondary degrees.

It is perhaps predictable, considering their independent and local nature, that travel agency businesses in Chiang Mai also tend to be small in both the number of employees and the value of their fixed assets. In particular, travel agency businesses employ only 7.4 people on average; when all company

employees are included (i.e., employees in the surveyed location as well as all other business locations), the number jumps up only slightly to 9.1 people. Only 9.2% of surveyed businesses employ more than 20 people.

The customers of travel agency businesses in Chiang Mai are largely from Western Europe, North America, or Australia. When asked to list the top five countries of origin for their customers in an average year, travel agency businesses listed the United Kingdom the most often (64.7% of the time), followed by the United States (62.3%), France (52%), Australia (43.7%) and Germany (36.3%). Three-quarters of surveyed businesses do not list a single Asian country in their top five customer markets. This is interesting considering that Asian countries constituted in 2007 the top five markets among the 14.46 million international tourist international arrivals to Thailand as a whole, with 39% coming from one of five Asian countries: Malaysia, Japan, Korea, China and Singapore (TAT, 2009). Even though Malaysia represents the largest source of inbound tourists to Thailand, only 11.3% of travel agency businesses surveyed listed it in their top five customer markets.

There are two possible explanations for this discrepancy between national tourist arrivals and the customer base of Chiang Mai travel agency businesses. First, it could be the case that a majority of Asian tourists in Thailand travel on package holidays arranged by foreign, or at least-Bangkok-based, tour operators. Second, Chiang Mai tends to attract more 'Western' tourists than the rest of the country. For instance, though tourists from the United States made up 4.3% of all international arrivals in Thailand in 2007, they represented 13.4% of all tourists in Chiang Mai province (TAT, 2009). Similarly, albeit less pronounced, French and German tourists represented 2.4% and 3.7%, respectively, of international arrivals in Thailand, but accounted for 7.3% and 7.5% of foreign tourists visiting Chiang Mai. The five Asian countries listed above, which account for 39% of international arrivals in Thailand, make up only 25% of arrivals in Chiang Mai (TAT, 2009).

On average, surveyed businesses operate 4.8 tours of their own, while selling 3.3 tours on behalf of other companies. Only 10.6% operate

more than five different tour packages of their own, while 22.8% of businesses sell more than five tours on behalf of other companies. However, despite operating and selling a small number of tours, Chiang Mai's travel agency businesses operate and sell tours that feature a large *range* of activities and sites (Table 1).

In light of the tourist attractions normally associated with northern Thailand, and the Chiang Mai vicinity specifically, it is not surprising that the activities most often featured in tours operated and sold by travel agency businesses include either outdoor, nature-based activities such as elephant riding, elephant shows, visits to orchid and butterfly farms, bamboo and whitewater rafting, and jungle trekking, or activities associated with cultural tourism, such as visits to Buddhist temples and 'hilltribe' villages, Thai cooking lessons, and traditional Thai dinner ceremonies known as *khantoke*. Moreover, the most popular activities — in particular, elephant riding, visits to 'hilltribe' villages, rafting, and trekking — are commonly packaged together as part of single full-day tours in which many international tourists in Chiang Mai participate. Coupled with the small number of tours operated and sold on average by individual travel agency businesses in Chiang Mai, the large number of businesses and available tour activities hints at a lack of consolidation among Chiang Mai travel agents and tour operators. In short, agent and operator business in Chiang Mai is characterised by a dispersion of trade across hundreds of small, independent businesses that operate and sell tours which are limited in number, but filled with a wide range of activities.

TRAVEL AGENT AND TOUR OPERATOR CONCEPTUALISATIONS OF ECOTOURISM

In order to explore how ecotourism is conceived and packaged to international tourists in Thailand, travel agency businesses surveyed for this research were asked several questions that assessed their conceptions of ecotourism. For example, businesses were asked whether or not, in their opinion, particular tour activities and sites qualify as ecotourism (Table 2). Additionally, businesses were asked to rate the importance of various components to their

Table 1. Activities/sites included in the tours operated and sold by Chiang Mai travel agents and tour operators

Activity/Site	Percentage of businesses (N = 300)				
	Neither operate nor sell tours with activity/site	Operate own tours with activity/site	Sell (but do not operate own) tours with activity/site	Both operate and sell tours with activity/site	Average percentage of all tours with activity/site
Elephant riding	3.7	22.4	38.8	35.1	58.5
Elephant show	4.3	21.7	40.0	34.0	57.4
'Hilltribe' village	4.0	20.3	43.3	32.3	54.5
Bamboo rafting	6.0	18.0	45.3	30.7	51.7
Orchid or butterfly farm	9.7	19.3	38.3	32.7	48.0
Trekking (one-day)	10.7	14.7	46.3	28.3	46.8
Whitewater rafting	18.0	11.7	47.3	23.0	45.8
Trekking (overnight)	12.7	13.3	47.3	26.7	45.4
Golden Triangle ^a	6.0	19.0	41.3	33.7	44.5
Doi Suthep ^b	5.0	23.0	34.3	37.7	42.3
Handicrafts center	14.0	19.7	34.3	32.0	36.0
Doi Inthanon ^c	7.0	20.3	41.0	31.7	35.7
Temple	9.0	22.3	37.7	31.0	34.8
Khantoke dinner ^d	7.0	18.0	49.7	25.3	30.0
Thai cooking lessons	16.7	9.3	53.7	20.3	28.2
Snake farm	21.3	14.0	37.0	27.7	22.3
Monkey show	23.7	12.7	37.0	26.7	20.9
Ping River cruise	15.1	13.4	46.8	24.7	18.7
Chiang Mai Night Safari	22.7	14.7	38.0	24.7	14.6
Buffalo farm	37.0	9.3	31.3	22.3	14.2
Cycling	26.0	10.0	46.0	18.0	13.3
All terrain vehicle driving	27.3	7.7	48.3	16.7	11.7
Chiang Mai Zoo	32.3	15.0	32.7	20.0	11.6
Massage or spa treatment	23.4	10.0	47.8	18.7	11.5
Museum/art gallery	36.7	13.3	30.7	19.3	9.0
Rock climbing	31.7	5.7	46.3	16.3	8.8
Golf	49.3	11.3	26.7	12.7	8.6
Birdwatching	48.5	7.0	30.8	13.7	7.4
Shooting range	44.5	7.0	36.8	11.7	7.0
Cabaret show	92.3	1.0	4.7	2.0	1.4

^aThe Golden Triangle is a traditional opium growing region that lies at the confluence of the borders of Thailand, Burma and Laos.

^bDoi Suthep is a mountain at the top of which lies a famous Buddhist temple.

^cDoi Inthanon is a national park located approximately 60 kilometers from Chiang Mai town, and named after the highest mountain in Thailand.

^dKhantoke is a traditional northern Thai dinner, usually accompanied by a show featuring traditional Thai dancing.

general understanding of what ecotourism entails (Table 3). Several observations can be made regarding the conceptualisation of ecotourism among Chiang Mai's travel agents and tour operators. It is clear, for example, that a large number of businesses count, as ecotourism, certain tour activities that are clearly cultural in nature. A total of 88.3% of travel agency

businesses believe that visits to Doi Suthep, a Buddhist temple that dates back to the a fourteenth century, usually or always qualify as ecotourism. The exact same percentage of businesses believe that visits to 'hilltribe' villages, a tour activity motivated by an interest in interacting with the cultural 'Other' (Cohen, 1989; Hayami 2006), usually or always qualifies as

Table 2. Qualification of specific activities and sites as ecotourism

Activity/site	Percentage of respondents (N = 300)					Mean	SD
	Never	Not usually	Sometimes	Usually	Always		
Doi Inthanon	0.3	1.7	4.0	43.0	51.0	4.43	0.68
'Hilltribe' village	0.7	1.7	9.3	43.3	45.0	4.30	0.76
Doi Suthep	0.7	4.0	7.0	42.3	46.0	4.29	0.82
Trekking (overnight)	0.7	3.0	13.0	37.0	46.3	4.25	0.84
Trekking (one-day)	0.7	3.0	14.3	39.3	42.7	4.20	0.84
Elephant riding	0.7	2.7	15.0	47.3	34.3	4.12	0.81
Birdwatching	2.3	5.7	13.7	35.7	42.7	4.11	1.00
Bamboo rafting	1.0	4.3	15.3	47.0	32.3	4.05	0.86
Elephant show	2.7	3.3	13.3	47.3	33.3	4.05	0.92
Orchid/butterfly farm	2.0	4.7	14.3	51.7	27.3	3.98	0.89
Chiang Mai Zoo	3.3	6.0	13.3	50.7	26.7	3.91	0.97
Chiang Mai Night Safari	4.0	5.7	14.7	50.0	25.7	3.88	1.00
Whitewater rafting	1.3	5.3	22.0	48.0	23.3	3.87	0.88
Cycling	0.7	7.3	20.3	48.0	23.7	3.87	0.88
Golden Triangle	3.0	6.3	18.0	48.7	24.0	3.84	0.96
Ping River cruise	2.7	5.7	21.7	48.0	22.0	3.81	0.93
Rock climbing	3.0	13.0	30.7	37.0	16.3	3.51	1.01
Buffalo farm	8.0	10.7	23.0	43.7	14.7	3.46	1.11
Snake farm	10.7	12.3	25.3	39.7	12.0	3.30	1.16
Monkey show	11.0	13.0	25.7	38.0	12.3	3.28	1.17
All-terrain vehicle driving	9.0	14.0	34.3	31.7	11.0	3.22	1.10
Golf	20.3	19.0	23.0	26.3	11.3	2.89	1.31
Shooting range	22.7	21.0	26.0	23.3	7.0	2.71	1.25

SD, standard deviation.

ecotourism. Compared with activities, such as trekking, that are closely related to interactions with and experiences in natural environments, the higher rank of activities that are driven by an interest in culture or history illustrates the importance of culture and cultural tourism to travel agency businesses' conceptions of ecotourism.

Overall, the view of ecotourism held by agents and operators is expansive and flexible, where a very large number of activities and sites qualify as ecotourism. Though activities such as all-terrain vehicle (ATV) riding, golf and shooting at a firing range are ranked lowest among all activities listed, it is still telling that 42.7%, 37.6% and 30.3%, respectively, of respondents believe that these activities, widely recognised as having little to do with even the broadest definitions of ecotourism, usually or always count as ecotourism (Table 2). These three activities, furthermore, are the only ones among 23 activities or sites

listed in the survey that are not considered by at least half of all travel agency businesses to usually or always be ecotourism. By considering virtually every activity that takes place outdoors as ecotourism, Chiang Mai's travel agency businesses essentially go well beyond even the most flexible and inclusive category of 'soft ecotourism,' which is 'associated with a high level of services and facilities to mediate encounters between venues and potentially large numbers of visitors more casually engaged with the natural environment' (Weaver and Lawton, 2007, p. 1170).

When asked whether they consider themselves an ecotourism company, exactly three-quarters of surveyed businesses stated yes (specifically, 57.3% stated 'probably' and 17.7% stated 'definitely'). With so many activities qualifying as ecotourism to so many businesses, one could reasonably expect the majority of travel agency businesses in Chiang Mai to consider themselves a part of the ecotourism

Table 3. The importance of specific components to definitions of ecotourism

Component	Percentage of respondents (N = 300)					Mean	SE	95% confidence interval
	Not at all important	A little important	Somewhat important	Very important	Extremely important			
Contributes financially to environmental conservation	0	0	3.3	42.7	54.0	4.51	0.033	(4.44–4.57)
Promotes conservation awareness	0	0	7.3	42.7	50.0	4.43	0.036	(4.36–4.50)
Provides education to tourists	0	0.3	11.3	57.0	31.3	4.19	0.037	(4.12–4.27)
Teaches tourists about Thai culture	0	2.0	13.7	53.7	30.7	4.13	0.041	(4.05–4.21)
Provides authentic experiences	0	1.7	11.3	63.7	23.3	4.09	0.037	(4.01–4.16)
Provides education for community members	0.3	1.0	17.7	52.3	28.7	4.08	0.042	(4.00–4.16)
Provides employment	0.3	1.7	16.0	62.0	20.0	4.00	0.039	(3.92–4.07)
Provides fun experiences	0.7	4.3	21.7	54.7	18.7	3.86	0.045	(3.77–3.95)
Involves locals in decision-making	0.7	4.0	24.3	51.3	19.7	3.85	0.046	(3.76–3.94)
Takes place in rural locations	0.3	3.3	25.0	54.7	16.7	3.84	0.043	(3.76–3.92)
Provides adventurous experiences	0.3	4.7	26.3	51.7	17.0	3.80	0.045	(3.71–3.89)
Produces profits for businesses	0.7	3.3	31.3	51.0	13.7	3.74	0.044	(3.65–3.82)
Involves human interaction with animals	2.0	9.0	39.7	37.0	12.3	3.49	0.052	(3.39–3.59)
Takes place in remote locations	2.0	8.7	42.3	37.0	10.0	3.44	0.050	(3.35–3.54)
Involves only certain kinds of tourists	7.7	17.0	46.0	22.3	7.0	3.04	0.057	(2.93–3.15)

SE, standard error.

sector of the overall industry. Of course, this is understandable from a marketing perspective as well, because Chiang Mai's travel agency businesses estimate, on average, that 56.2% of their customers express an interest in ecotourism. It is clear that many owners, managers and staff members believe genuinely that their firms are ecotourism companies, likely because they operate and sell tours that feature what are believed, in their minds at least, to qualify as ecotourism activities.

Chiang Mai agent and operator conceptualisations of ecotourism both confirm and challenge existing definitions commonly found in the ecotourism literature. Prevailing notions of ecotourism are confirmed in the priority placed by businesses on conservation and education when asked to rate the importance of specific components (Table 3). Out of the 15 components measured, the top four all involve either conservation or education. This coincides with the frequent focus in ecotourism definitions on conservation and education, the second and third most frequently cited features of ecotourism ('nature-based' being the first) according to a thorough content analysis of 30 ecotourism definitions (Donohoe and Needham, 2006).

On the other hand, with only 7% of businesses believing that it is extremely important that ecotourism involve only certain kinds of tourists, the findings of this research contradict the idea held by some authors (Diamantis, 1999; Mastny, 2001) that ecotourism represents a selective and specialised market not open to mass, conventional tourists. Further, while cultural respect and cultural education are included as components of ecotourism by some authors (Zeppel, 2006; Honey, 2008), few definitions of ecotourism prioritise culture to the same extent as travel agency businesses. At the very least, many scholars of ecotourism would not consider visits to Buddhist temples and 'hilltribe' villages as salient examples of ecotourism.

THE IMPORTANCE OF ECOTOURISM TO TRAVEL AGENCY BUSINESSES

In addition to providing information on what they consider the most significant components and examples of ecotourism, travel agency businesses also answered several survey ques-

tions related to the importance of ecotourism. For instance, the survey asked travel agency businesses to estimate the importance of ecotourism to particular tourist markets (Table 4). In order to assess the importance of certain attributes normally associated with ecotourism in the literature, travel agency businesses were also asked 'how important are the following items when you sell or organise a tour?' (Table 5).

Judging from the large proportion of all tours offered and sold by Chiang Mai travel agency businesses that feature ecotourism (or at least nature-based) activities (Table 1), it is clear that ecotourism is important to the tourism industry of Chiang Mai. As Table 4 indicates, travel agency businesses also clearly think of ecotourism as a preference of 'Western' tourists rather than of tourists from Asia and the Middle East. This partly explains why such a high percentage (75%) of businesses claim to be an ecotourism company; considering that Western Europeans, Americans and Australians serve as their top customer bases, travel agency businesses obviously benefit from claiming to provide ecotourism experiences. This also explains why 95.7% of surveyed businesses believe that Thailand should promote ecotourism.

By a wide margin, 'safety' is the most important attribute of the tours put together, sold, and operated by businesses (considered extremely important by 56.3%), followed by 'rest and relaxation' (35.7%), and 'fun' (30%). In addition, when asked to rank the importance of six specific characteristics to the tours that they sell or operate, 64% of travel agency businesses chose 'safety' as the most important, followed in frequency (as the selection as the single most important characteristic) by 'authenticity' (14.7%), 'impact on business profits' (7%), 'adventure' (6%), 'impact on the environment' (4.7%), and 'comfort' (3.7%). As businesses dealing with paying customers, travel agency businesses are understandably concerned much more with the safety of their tours than their environmental impact. This perhaps explains why consideration of the environmental impact of tours seems comparatively low, with over one-third (37.7%) of businesses ranking the 'impact on the environment' as the least or second least important

Table 4. The importance of ecotourism to various tourist markets

Tourist market	Percentage of respondents (N = 300)					Mean	SE	95% confidence interval
	Not at all important	A little important	Somewhat important	Very important	Extremely important			
North America	0.3	0.7	16.3	60.0	22.7	4.04	0.039	(3.96–4.12)
Europe	0	1.0	16.3	61.7	21.0	4.03	0.037	(3.95–4.10)
Australia	0	1.0	17.7	59.0	22.3	4.03	0.038	(3.95–4.10)
Japan	2.3	15.0	49.0	27.7	6.0	3.20	0.049	(3.10–3.30)
Rest of Southeast Asia	3.7	19.0	55.7	18.3	3.3	2.99	0.047	(2.89–3.08)
Thailand (domestic)	7.0	24.7	41.0	23.0	4.3	2.93	0.056	(2.82–3.04)
East Asia (China, Taiwan, and Korea)	6.0	21.0	52.0	18.3	2.7	2.91	0.049	(2.81–3.00)
Middle East	13.7	19.7	44.0	18.3	4.3	2.80	0.060	(2.68–2.92)

SE, standard error.

characteristic (among the six listed above) of the tours that they sell or operate.

Aside from 'degree of benefits to the natural environment,' other attributes usually associated with ecotourism, such as 'natural authenticity,' 'education about the environment,' and 'education about animals' rank low in importance (Table 5). The low relative ranking of 'education about animals' is especially indicative of internal inconsistencies when it comes to conceptualizing ecotourism, because elephant riding is not only considered by 81.6% of travel agency businesses to usually or always qualify as ecotourism (Table 2), but is also the single most popular activity included in all tours operated and sold in Chiang Mai (Table 1).

At the same time, however, the low ranking of environmental impact belies some of the other findings of this research, namely that 84.7% of travel agency businesses believe that the environmental benefits associated with their tours make up a very or extremely important tour attribute (Table 5), while 75% believe that they are 'probably' or 'definitely' an ecotourism company; the latter figure would seem to indicate a high priority placed by many businesses on the environmental impact of tourism. Nevertheless, it appears that the importance of environmental factors and ecotourism values to the actual design and delivery of tours in Chiang Mai is at best mixed, and at worst marketed and communicated at a level that exceeds the actual importance of environmental values to travel agency businesses.

CONCLUSION

This paper has discussed the ways in which travel agents and tour operators in Chiang Mai, Thailand conceptualise, prioritise and supply ecotourism. Based on quantitative data collected through surveys of 300 (out of 602) Chiang Mai travel agents and tour operators, it is clear that activities which, in theory at least, represent ecotourism are popular and easily accessible components of the tours sold and operated by what TAT calls 'travel agency businesses.' The availability of so many nature-based activities to tourists visiting Chiang Mai mirrors the large range and diversity of tour

Table 5. The importance of specific tour attributes

Attribute	Percentage of respondents (N = 300)					Mean	SE	95% confidence interval
	Not at all important	A little important	Somewhat important	Very important	Extremely important			
Safety	0	0	4.7	39.0	56.3	4.52	0.034	(4.45–4.58)
Rest and relaxation	0	0.3	9.3	54.7	35.7	4.26	0.036	(4.18–4.33)
Fun	0	0.7	10.3	59.0	30.0	4.18	0.036	(4.11–4.25)
Degree of benefits to the natural environment	0	1.3	14.0	56.0	28.7	4.12	0.039	(4.04–4.20)
Comfort	0.3	2.0	14.0	52.7	31.0	4.12	0.043	(4.04–4.20)
Quality of food	0	1.0	12.0	61.0	26.0	4.12	0.037	(4.05–4.19)
Natural authenticity	0	1.3	12.7	61.0	25.0	4.1	0.038	(4.02–4.17)
Education about Thai culture	0	1.7	16.0	55.0	27.3	4.08	0.041	(4.00–4.16)
Cultural authenticity	0	0	16.0	58.7	25.0	4.08	0.037	(4.01–4.16)
Education about the environment	0	1.7	15.0	59.0	24.3	4.06	0.039	(3.98–4.14)
Degree of benefits to Thai or 'hilltribe' cultures	0.7	0.3	18.7	56.0	24.3	4.03	0.041	(3.95–4.11)
Adventure	0.7	3.3	21.3	51.0	23.7	3.94	0.046	(3.85–4.03)
Price	0.3	0.3	29.7	50.0	19.7	3.88	0.042	(3.80–3.97)
Novelty	0.3	3.3	29.0	43.3	24.0	3.87	0.048	(3.78–3.97)
Education about animals	1.3	6.7	28.3	47.3	16.3	3.71	0.050	(3.61–3.81)

SE, standard error.

offerings in general. While a number of activities are predominant in the typical tour purchased by tourists — 10 different activities, several of which could be considered ecotourism, are featured in the tours operated and sold by over 90% of businesses surveyed — there is little standardisation or even predictability in the supply of tourism services generally and ecotourism activities specifically, because they are furnished in Chiang Mai in a scattered fashion by hundreds of small, independent and recently established enterprises.

Travel agents and tour operators surveyed for this research conceive of ecotourism in an expansive manner, whereby, a large number of activities qualify as ecotourism. In fact, for many businesses, all that seems to matter when determining what constitutes ecotourism seems to be whether or not an activity takes place outdoors. In this way, the argument made by ecotourism critics, both abroad (Wheeller, 2005; Mowforth and Munt, 2009) and in Thailand (Pholpoke, 1998; Shepherd, 2002), that ecotourism is merely a buzzword seems partly corroborated. It would be unfair and inaccurate, however, to claim that travel agency businesses do not see the difference between on the one hand, pursuits clearly in the realm of nature-based tourism, such as trekking and bird watching and, on the other, activities that few could plausibly characterise as ecotourism, such as target shooting, (ATV) riding and golf. In other words, although there are some contradictions and inconsistencies in the way that travel agency businesses in Chiang Mai conceptualise ecotourism, they nevertheless prioritise (in their definitions of ecotourism) certain goals such as conservation and education which, along with a basis in nature, are widely recognised as the three most important components of the ecotourism concept (Donohoe and Needham, 2006).

This paper makes several contributions to the study of supply-side perspectives on ecotourism. First, this study contributes to our knowledge of how ecotourism is defined in the Thai context. In Thailand today, ecotourism is translated either as *gaan tong tieow cheung anoorak* ('conservation tourism') or *gaan tong tieow cheung niwet* ('ecological tourism'). This would seem on the surface to imply that the

core values that matter to scholars of ecotourism outside of Thailand seems also to matter to Thai agencies, businesses, and academics. However, even though this study confirms that travel agency businesses in Thailand do indeed identify certain common ecotourism elements such as conservation and education as being the most important, there is also a greater emphasis placed on culture and the inclusion of many locations, activities, and categories of tourists. This inclusive approach towards ecotourism among travel agency businesses corroborates the work of both Weaver (2002), who discusses the 'soft' nature of ecotourism in Thailand, as well as Konteorgopoulos (2004), who indicates that ecotourism in Thailand involves many conceptual, operational and spatial links to the conventional mass tourism industry. At the very least, this study confirms the point made by several authors (Cater, 2006; Cochrane, 2007) that there is a need to examine how particular circumstances and contexts shape the theory and practice of ecotourism at the local and national levels.

Second, though not mentioned thus far in the paper, it is important to note that one of the original goals of the research was to examine whether a relationship exists between the dependent variables of conceptualisation and importance of ecotourism and numerous independent variables such as company age, size (total number of employees), clientele (percentage of customers that are 'walk-in' versus package tourists) and function (travel agent, tour operator or both). Multiple linear regressions were run using the entire dataset, but this revealed virtually no statistically significant relationships between the independent variables and the ways in which travel agency businesses viewed, prioritised or classified ecotourism. The uniformity, or more accurately randomness, of agent and operator approaches to ecotourism in Chiang Mai reflects the diffuse nature of the industry itself, where activities considered ecotourism are offered not by a handful of large niche firms, but rather by a great number of small, independent companies with no particular specialisations. In many ways, therefore, this study provides a snap shot of an industry in its nascent stage, where low barriers to entry and

high rates of turnover result in a profusion of operators and a lack of significant conceptual variation based on observable differences among companies. On a positive note, the diffuse nature of the ecotourism market in Chiang Mai, not to mention the low barriers to entry and the high rate of national ownership, indicate that ecotourism in northern Thailand provides tangible economic benefits in terms of ownership and employment opportunities.

Lastly, an important lesson offered by this study is related to the difference between nature-based tourism and ecotourism. As several authors have noted, ecotourism is a subset of the broader category of nature-based tourism, which includes any tourism that utilises natural resources. Ecotourism, as it has come to be defined by the majority of scholars, takes as its starting points an interest in nature and the use of natural resources, but extends much further to include considerations of tourist motivation, ethical conduct, conservation and impacts on the community. As such, it is impossible really to know whether something is actually ecotourism unless one measures short-term environmental impacts, community perceptions, and tourist attitudes and behaviours.

In theory, Chiang Mai's travel agency businesses do conceive of ecotourism as embodying many of these components, but in practice, what qualifies as ecotourism to these businesses is almost any activity that takes place outdoors, from nature-oriented activities like trekking, to cultural activities like visits to 'hill-tribe' villages, to adventure tourism activities such as rafting. Without conducting research on the actual practices of tour operators, it is difficult to say whether surveyed businesses promote ecotourism — which embodies a set of principles and is defined partly by its impacts — or merely nature, adventure or cultural tourism, all defined more by the activities of tourists than by the immediate or lasting impacts of those activities. For this reason, the question of whether or not certain activities such as trekking or elephant riding should be classified as ecotourism remains debatable and can only be answered by comparing the practices of tour operators against either the guidelines established by such institutions as TAT and the Thai Ecotourism and Adventure Travel

Association, or the definitions established in the ecotourism literature. Ultimately then, this study demonstrates the need for more research on not only the distinction between ecotourism and nature-based tourism, but also the willingness of agents and operators to abide by ecotourism principles espoused by scholars, institutions and businesses themselves.

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