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This paper examines the ways in which conventional tourism and ecotourism are conceptually, operationally, and spatially linked in Phuket and surrounding provinces in southern Thailand. Phuket's two oldest and most prominent ecotourism companies are used as case studies to illustrate how the principles of ecotourism are implemented in practice even as structural connections to the existing conventional tourism industry are maintained. The collective number of ecotourism customers, the packaged nature of ecotourists' holidays, the marketing strategies employed by Phuket's ecotourism companies, the close proximity of ecotourism activities to conventional tourism areas, and the nature and structure of daily ecotourism operations all bind ecotourism in southern Thailand to more conventional tourism, Phuket's ecotourism companies nevertheless continue to promote the most prominent principles found in definitions of ecotourism: nature-based activity; conservation; sustainability; ethical management; local-orientation in terms of control, benefits, and scale; and environmental education.

Keywords: conventional tourism, mass ecotourism, ecotourism, Thailand

Introduction

Is the successful implementation of ecotourism principles possible in established resort areas characterised by conventional tourism? The majority of tourism scholars, ecotourism advocates, and self-identified ecotourism operators would answer no, claiming that a symbiotic and interdependent relationship between the two is impossible, or at least highly unlikely. The principles of ecotourism are often considered incompatible and, in practice, impossible when conventional tourism is the dominant form of tourism found in a specific destination. Conceptually, conventional tourism represents convenience, undifferentiated marketing, mass-consumed experiences centred on the pleasure principle, and the efficiency, predictability, and calculability associated with the process of rationalisation (Poon, 1993; Ritzer, 1998).

Ecotourism, by contrast, represents a wide range of concepts considered not only antithetical to the spirit and practice of conventional tourism, but also vital in the sense that the future survival of the industry is premised by some critics on the proliferation of such principles (McLaren, 1998). The rapid and simultaneous emergence of ecotourism studies in just the past decade has precluded the acceptance of a common definition of ecotourism (Fennell, 2001), but most definitions of ecotourism feature a combination of the following principles: *empowerment* (Brandon, 1993; Scheyvens, 1999);

local participation (Acott et al., 1998; Khan, 1997; Ross & Wall, 1999); education and environmental learning (Kimmel, 1999; Miles, 1991; Orams, 1995); ethics (Amaro, 1999; Fennell & Malloy, 1995; Kutay, 1989); sustainability (Blamey, 1997; Cole & Sinclair, 2002; Nelson, 1994); conservation (Goodwin, 1996; Western, 1993); an interest in nature and nature-based activities (Diamantis, 1999); the provision of long-term benefits for local residents (Honey, 1999; Ziffer, 1989); and environmental appreciation (Ceballos-Lascurain, 1988; Wallace & Pierce, 1996).

Rather than explicitly making comparisons to conventional tourism, most discussions of ecotourism focus on clarifying internal differences within the category – for example, active versus passive (Orams, 1995), hard versus soft (Laarman & Durst, 1987), hard-core versus casual (Lindberg, 1991), and deep versus shallow ecotourism (Acott *et al.*, 1998) – but the implication that ecotourism stands in contrast to conventional tourism remains strong by virtue of the latter receiving no mention at all in many discussions of ecotourism. Moreover, among those who believe that conventional tourism and ecotourism remain conceptually and spatially discrete, some take it even further, claiming, or at least insinuating, that there exists no *operational* overlap whatsoever in practice and that ecotourism should therefore be seen as a totally separate, 'polar opposite' (Diamantis, 1999: 116) functional entity rather than as a subset of the existing tourism industry (Park & Honey, 1999).

Contrary to the dichotomous 'either/or' view outlined above, the proliferation of voluntary international projects such as the Tour Operators' Initiative (TOI) - launched in 2000 with the support of the United Nations Environment Programme (UNEP), the United Nations Educational, Scientific and Cultural Organisation (UNESCO), and the World Tourism Organisation (WTO) illustrates a growing emphasis in the conventional tourism industry on the practical implementation of the principles of ecotourism and sustainable development. Moreover, recent studies have begun to question the positioning of conventional tourism and ecotourism as two conflicting and mutuallyexclusive tourism paradigms. Departures from, and direct criticisms of the 'either/or' approach are based on one or more of the following claims: that conventional tourism and ecotourism do not in theory need to represent totally incompatible goals or concepts (Van Oosterzee, 2000; Western, 1993); that, in practice, conventional tourism and ecotourism can form symbiotic relationships that allow one to reinforce the other while still allowing the two to exist as separate theoretical ideas (Ayala, 1996; Butler, 1998; Weaver, 1998, 2001a); that ecotourism is simply one of many - and the most nature-oriented and sustainable - subset or niche of the tourism industry as a whole (Herath, 2002; Lew, 1998); that ecotourism can, and does, occur in areas that are far from natural or 'unspoiled', including urban environments (Dwyer & Edwards, 2000; Higham & Lück, 2002); that the large size and high level of comfort associated with some conventional tour operators do not necessarily preclude social and environmental sensitivity (Lück, 2002); that ecotourism is simply an attempt at 'greenwashing' on the part of conventional tourism operators (Mowforth & Munt, 1998; Wight, 1993); and that ecotourism itself is often no more sustainable or less commodified than its vilified conventional cousin (Ryan et al., 2000; Viviano, 2002; Wearing & Wearing, 1999).

At first glance, the dichotomous view regarding the structural discrepancies,

and fundamental incompatibility, between conventional tourism and ecotourism seems corroborated in Phuket, southern Thailand's most renowned beach resort destination. The rapid expansion of tourism in Phuket over the past several decades, and the consequent transformation of the area into a conventional tourism destination, have created a prevailing image of Phuket based on swimming pools, shopping arcades, girlie-bars, skyscraper hotels, and other facets of the international tourism industry. This image as a stereotypical resort destination manifests itself not only in the scathing, and often justified. critiques of Phuket's tourism industry (Cohen, 1996; Rakkit, 1992), but also in the almost total absence of research on ecotourism in southern Thailand (Dowling, 2000 and Weaver, 2002 are rare exceptions). There is more, however, than initially meets the eye in Phuket. In the midst of this dense and congested environment, a handful of small, independent ecotourism operators have begun, since the late-1980s, to offer a range of nature-oriented activities aimed at providing conventional tourists with brief glimpses into the natural environments of Phuket and surrounding areas. The introduction of naturebased activities has infused much-needed diversification into southern Thailand's tourism industry, but has also occurred amidst a steadily deteriorating environmental situation in which old tin mines scar the landscape, and more recently, an explosion of farmed shrimp cultivation has caused severe mangrove deforestation and salinisation of agricultural land (Braaten & Flaherty, 2001).

In this paper, I address how conventional tourism and ecotourism are connected and structurally dependent on one another in southern Thailand. By arguing that conventional tourism and ecotourism can, and in some cases should, remain closely related, I wish ultimately to reconceptualise the meaning and role of ecotourism in the southern Thai context. Although some authors (Diamantis, 1999; Honey, 1999; Mastny, 2001; Pleumarom, 2001) deplore overlaps between conventional tourism and ecotourism and employ the disparaging term 'mass ecotourism' to indicate a corrupted, watered-down version of 'true' ecotourism (Burton, 1998), I would argue that it is unfair, unproductive, and unrealistic to give up on conventional tourism entirely as potential (if not, in some instances, actual) sites of environmental education, ethical management practices, and other such worthy imperatives of ecotourism.

Methods

This paper is based on the results of a total of over 13 months of fieldwork in southern Thailand undertaken first in 1996 as part of dissertation research, and then again in 1997, 1999 and 2001 on follow up visits. The fieldwork took place in the province of Phuket on Thailand's southwest coast (Figure 1), and in Ao Phangnga Marine National Park, a 400 square kilometre bay that straddles Phuket and the neighbouring provinces of Phangnga and Krabi (Figure 2).

Virtually all tourism development – conventional, 'eco', or otherwise – in southern Thailand has traditionally, and continues to be, centred on Phuket, marketed as the 'Pearl of the Andaman' by both public agencies and private tourism operators. Although small groups of foreign and (mostly) domestic

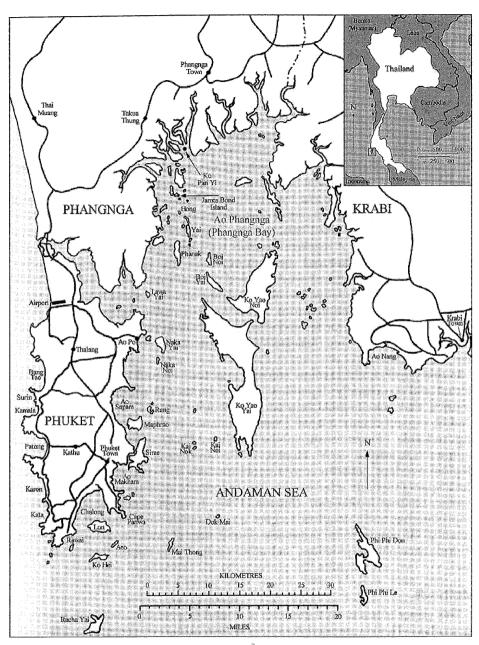


Figure 1 The provinces of Phuket, Phangnga, and Krabi, Thailand

tourists began to visit Phuket as early as the late-1960s, it was not until the 1980s that Phuket stepped onto the international tourism stage, growing from a little known tin mining and rubber region with a few thousand predominantly hippie, drifter tourists to an internationally renowned tourism destination servicing a complex tourism industry. International tourist arrivals, which stood at approximately 20,000 in 1976, shot up precipitously during the

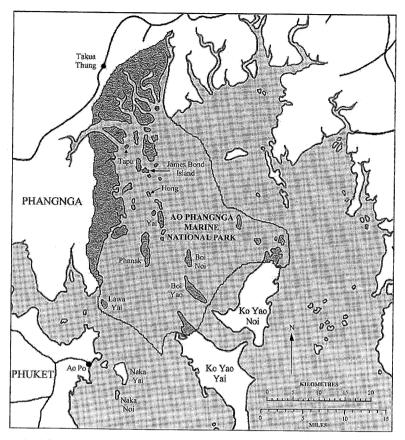


Figure 2 Ao Phangnga Marine National Park

1980s, reaching over 530,000 by 1989 (Ludwig, 1976: 23; TAT, 1997). The feverish pace of tourism development continued into the late-1990s and by 2001, international tourist arrivals in Phuket had reached 2.7 million (TAT, 2003).

Since Phuket is home to over 160 tour agents and operators – many of which have begun to offer nature-oriented sightseeing trips as part of their overall product range – the task of clearly identifying 'ecotourism' companies remains a challenge. Nevertheless, for the purpose of this paper, ecotourism companies are considered only those operators that fit Fennell's (1999: 43) definition of ecotourism:

A sustainable form of natural resource-based tourism that focuses primarily on experiencing and learning about nature, and which is ethically managed to be low-impact, non-consumptive, and locally oriented (control, benefits, and scale). It typically occurs in natural areas, and should contribute to the conservation or preservation of such areas.

Many have tackled the issue of what exactly ecotourism means, or at least *should* mean (see Diamantis, 1999), but I use Fennell's comprehensive definition because it reflects the incorporation of the most important features of previous definitions found in the ecotourism literature. Using Fennell's definition of

ecotourism as the baseline, the selection criteria for tour operators thus include the following components: stated concern for sustainability, environmental education, ethical management, local orientation, operation in 'natural' areas, and an interest in conservation.

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When those companies that deliberately promote ecotourism and match the selection criteria are distinguished from conventional tour companies that merely offer sightseeing trips to natural areas, one finds approximately 20 ecotourism companies in Phuket. These 20 ecotourism companies fall into two categories. First, sea-based ecotourism companies concentrate their activities on Ao Phangnga National Park. Sea-based ecotourism companies offer kayaking and cave exploration within the many limestone islands in Ao Phangnga, and feature tours with a wide range in duration, cost, and intensity. Second, land-based companies utilise the natural resources of Phuket and surrounding provinces by offering activities such as mountain biking, trekking, elephant riding, river canoeing and rafting, camping, and birding. All land-based ecotourism companies offer tours ranging from one or two hour adventure trips to more intensive week-long camping and trekking trips to nearby wildlife reserves or national parks throughout southern Thailand. Of the 20 ecotourism companies operating in Phuket, six are sea-based and 14 are land-based.

Tourists staying in Phuket have, for decades, participated in nature-oriented sightseeing excursions into Ao Phangnga on long-tail boats, but ecotourism, as defined in this paper, emerged only in the late-1980s and was until recently offered by very few companies. Although I conducted research with several companies, the majority of my time was spent with *Sea Canoe* and *Siam Safari*, the island's two original ecotourism operators. Sea Canoe is the oldest seabased ecotourism company in Phuket, and was founded in 1989 by a Californian conservationist with a long history of environmental activism. Sea Canoe offers daytrips to Ao Phangnga, where tourists are taken into open-air lagoons (known as *hongs*, the Thai word for 'room') via cave passages that are filled and emptied of water as sea tides ebb and flow (Figure 3).

Sea Canoe also offers long-range, overnight trips where customers get to paddle for themselves and camp overnight on the beaches of uninhabited islands in Ao Phangnga. With just one inflatable canoe and a couple of Thai partners, the American founder of Sea Canoe initially sold trips to customers of Le Meridien – amongst the most exclusive resorts in Phuket – who paid \$US90 to explore the hidden lagoons of Ao Phangnga. By 1992, Sea Canoe had grown from a company with 700 baht (\$US16) in operating capital to one with 17 million baht (\$US392,000) in total revenue. Despite fluctuations in revenues and inter-company stability, Sea Canoe today continues to serve approximately 9000 customers per year.

Initially, my research focused only on Sea Canoe, but in an effort to compare different facets of ecotourism in southern Thailand, I also conducted research with Siam Safari, Phuket's first land-based ecotourism operator. Siam Safari has offered 'eco-nature tours' for over a decade, and claims to be the first registered 'specialist eco-nature tour company' in Phuket. Siam Safari claims to bring the 'real natural Thailand' to tourists, and its tours include elephant hill treks, river canoeing, mountain biking, and nature trail walking. All trips originate and conclude at Siam Safari's 'nature compound' located on a 35



Figure 3 Enclosed inner lagoon ('hong') of an island in Ao Phangnga

acre plot of land located in Chalong on Phuket's southeast coast. The founder of Siam Safari is an English agricultural scientist who first visited Thailand in 1983 while working as a dairy farm manager in Saudi Arabia. After moving to Thailand permanently in 1987, Siam Safari's founder initially operated a cafe and bungalow resort, but in 1989 he sold the bungalows and used the money to start the company. By the summer of 1992, between 150 and 200 people were participating in Siam Safari trips each month. A little later, in just a 3-year period between 1994 and 1997, Siam Safari expanded rapidly, growing from 4000 to 30,000 customers per year. By 2001, the figure had stabilised at roughly 40,000 annual customers.

Though there are 20 ecotourism companies in Phuket, Sea Canoe and Siam Safari were chosen as the central case studies because, as the original landand sea-based ecotourism companies in Phuket, they have set the standard for the subsequent development of ecotourism in the region, and therefore carry great influence over the other 18 ecotourism operators in Phuket, 13 of which were also founded by expatriates. As the oldest ecotourism companies in Phuket, Sea Canoe and Siam Safari possess the most history and experience to draw from when examining the links between ecotourism and conventional tourism. Moreover, due to their financial success and high public profiles, the two companies are the most renowned ecotourism companies in Thailand. In addition to receiving attention from tourism academics (Buckley, 2003; Dowling, 2000; Shepherd, 2002), Sea Canoe and Siam Safari are also mentioned in a number of 'responsible' travel guidebooks (Mann, 2002; Neale, 1999). Further, in recognition of their efforts to promote sustainability, both companies have received the following honours: a British Airways Tourism for

Tomorrow Award, a Best Tour Programme Award from the Tourism Authority of Thailand (TAT), the *Sunday Times'* (of London) favorite global tour operator, and a Gold Environment Award from the Pacific Asia Travel Association (PATA). While research with all 20 of Phuket's ecotourism companies would surely prove fruitful, the status, success, and visibility of Sea Canoe and Siam Safari, coupled with their willingness and ability to host a researcher for months at a time, make them ideal case studies and the best sources of information for those hoping to understand ecotourism in Phuket.

During the 13 months of fieldwork, several forms of data were collected. First, self-administered surveys were completed by 209 customers of Sea Canoe. The survey consists of 26 questions and gathers the following information: demographic data such as gender, nationality, age, and occupation; reasons for participating in a Sea Canoe daytrip; numerical rankings of various elements of the daytrip; and answers to multiple choice questions that test a person's geographical knowledge gained during the daytrip. Tourists completed surveys during the concluding portion of a daytrip, when escort boats would take an hour or so to sail back to shore from Ao Phangnga. Besides gathering information on the demographic profile and motivations of Sea Canoe passengers, the survey was also used to formulate interview schedules for tourists participating in the trips of Phuket's ecotourism companies.

Second, face-to-face interviews were conducted with several groups of people. Taped interviews, lasting just over an hour each, were conducted with 62 tourists, eight tour company representatives, two officials from the Tourism Authority of Thailand, and six owners and three managers of Phuket-based ecotourism companies. A range of topics were covered during these taped interviews, including the social and environmental impacts of tourism, the motivations behind travel, perceptions of Thailand and Phuket, the logistics of purchasing vacations to and in Thailand, and people's enjoyment of kayaking and trekking excursions.

Untaped interviews were also conducted with 20 local travel agents, who answered questions from an orally-administered structured questionnaire dealing with the business aspects of the tourist industry in Phuket. Twenty-two Thai ecotourism guides also participated in untaped interviews that featured both a set of questions which required information of a personal or controversial nature (answers were memorised and recorded later that evening), and also a more formal set of questions, the answers to which were noted immediately in the presence of the interviewees.

Aside from interview data, which gave insights into the opinions of tourists, owners, employees, and travel agents towards the relationship between ecotourism and conventional tourism, participant-observation also yielded a significant amount of information regarding the ways in which Sea Canoe and Siam Safari promote the principles of ecotourism while simultaneously utilising structural and conceptual connections to the conventional tourism industry. By participating directly in a total of 43 trips with Sea Canoe and Siam Safari, I enjoyed many opportunities to observe how ecotourism is practised on a daily basis. Combined with quantitative survey data and qualitative data gathered in interviews, direct observations made while participating in daytrips produced the data on which this paper is based.

The Implementation of Ecotourism Principles in Phuket

In just the past decade, international tourism arrivals in Thailand have nearly doubled, growing from 5.1 million in 1991 to 10.1 million in 2001 (TAT, 1993: 17; TAT, 2002: 12). Although large-scale resorts, spatial concentration of tourists and tourist facilities, and rapid social and environmental changes have characterised the tourism industry of Thailand since the 1970s (Cohen, 1996; Seabrook, 2001), the past 15 years have also seen the emergence of ecotourism, and other forms of 'alternative' tourism, throughout the kingdom. Of course, ample evidence exists throughout Thailand to indicate that much of what passes for, or is labeled as, ecotourism fails in practice to promote conservation, environmental education, or social justice at the local level (Pleumarom, 2001; Viviano, 2002). However, ecotourism companies operating in Phuket, in particular the two original sea- and land-based companies profiled in this paper, demonstrate that implementing the principles of ecotourism is in fact possible, even when deep structural links to the conventional tourism industry are maintained. In other words, Sea Canoe and Siam Safari are, first and foremost, ecotourism companies that happen to tolerate and pursue – by necessity – overlaps with conventional, packaged tourism. Despite following conventional systems of organisation and distribution in logistical, quantitative, and structural terms, Sea Canoe and Siam Safari nevertheless promote ecotourism simultaneously, and in this section, I outline the ways in which the ecotourism companies of Phuket adhere to every single dimension of the rigorous definition of ecotourism used in this paper.

First, ecotourism in Phuket occurs in natural areas, including Ao Phangnga Marine National Park and pockets of rain forest in central Phuket. The natural environment, and specific resources such as rock formations, flora, and fauna, serve as the underlying basis of both sea- and land-based ecotourism in this area of southern Thailand. The locations in which ecotourism in southern Thailand occurs may not be geographically remote or untouched by human influence, but they are nevertheless natural, protected areas.

Second, ecotourism in Phuket contributes to environmental conservation not only in and around Phuket, but also throughout the entire southern region and even, in some cases, the country as a whole. For example, Siam Safari has paid particular attention to wildlife conservation in Thailand, raising several thousands of dollars for various conservation projects and building many daytrips around issues such as elephant protection. By introducing and popularising elephant trekking in Phuket, Siam Safari has provided an economic outlet for many northern and northeastern elephants that are either 'unemployed' due to the Thai logging ban in place since the late-1980s, or overworked in illegal logging camps. Siam Safari has made the protection of Asian elephants an explicit company objective. In 1998, Siam Safari teamed up with Dusit Laguna, a well-known five-star hotel in Phuket, to form the Elephant Help Project (EHP). The participation of Dusit Laguna, a famous player in Phuket's conventional tourism industry, facilitated the initial suffusion of necessary capital and organisations such as the Tourism Authority of Thailand, the Phuket Chamber of Commerce, and the Thai Hotels Association were also brought on board soon after EHP was launched. The money raised for EHP - which

comes partly from donations from Siam Safari customers, direct contributions from Siam Safari itself, and the proceeds of Siam Safari sales of elephant-themed t-shirts and souvenirs – pays for the following conservation services: educational campaigns on the problems faced by elephants throughout Thailand, a veterinarian (who also works for Phuket's livestock department) specialising in the treatment of elephants, training for mahouts (elephant handlers), a mobile clinic that conducts regular health checks on Phuket's elephants, and medical supplies needed to treat sick or injured elephants. Because of EHP, and the demand for elephant trekking caused directly by Siam Safari's success, the number of elephants in Phuket has grown from roughly 12 in 1994 to nearly 200 in 2001.

Sea Canoe has also contributed to environmental conservation efforts in Phuket. As a result of Sea Canoe's environmental lobbying efforts, the regional TAT office in Phuket decided several years ago to erect life jacket instructional signs in various tourism sites around the island. At the community scale, Sea Canoe pays a local resident of Ao Po, the launching point for all of Sea Canoe's (and several other sea kayaking companies') trips, over 30,000 baht (\$686) annually in order to maintain the cleanliness of the pier and surrounding area. Further, Sea Canoe also provided, until recently, funds and volunteered the labour of one guide to the Gibbon Rehabilitation Project, located at Bang Pae Waterfall in the northeast corner of Phuket. Founded in 1992, this project aims to rehabilitate white-handed gibbons that are taken forcefully from their mothers and then put on display in bars and on the streets of Patong and other prominent tourist areas. Assistance for the project comes from many sources, including the Thai government, which allocates land to the project, local businesses such as Sea Canoe and Siam Safari, which provide financing by sponsoring 'rehabilitation stage cages', and volunteers, who often pay for the opportunity to volunteer their services.

Third, ecotourism in Phuket is sustainable, low-impact, and non-consumptive. With rare exceptions, tourists participating in the daytrips of the 20 ecotourism companies in Phuket refrain (and are prevented) from consumptive activities such as fishing, hunting, or collecting plant species. Further, the owners, managers, and staff of these companies pay great attention to the notion of environmental and social carrying capacity, which in addition to promoting sustainable and low-impact ecotourism experiences, also represents a good marketing tool from a purely business-oriented perspective. Indeed, the most important 'tool' in promoting a sense of personal attention, flexibility, and freedom from the 'hordes' of tourists is also what ensures that ecotourism remains sustainable and low-impact: the relatively small, and strictly-monitored, tour group size characteristic of all Phuket ecotourism companies.

Each Siam Safari Land Rover, itself painted jungle green to project an adventurous, off-road feel, carries a maximum of eight passengers, who travel together the entire day and, thus, participate in the trip as a 'team'. The guide serves as the team leader, or coach, who leads the team through nature-based adventure experiences. Two Rovers work well for full groups, since they can be divided into two groups of eight, but the half-day schedule can safely accommodate up to 100 passengers per day since staggered tour schedules

allow different groups to come to the Siam Safari nature compound at different times of the day, and thus depart with a feeling of isolation and intimacy since individual passengers, and the small teams they belong to, are freed from the strains of competing with other groups of tourists for attention and even sheer physical space. Hence, in addition to sustaining the interest of conventional tourists through this small-scale, personalised approach, Siam Safari also ensures the sustainability of the activity itself, since the environmental damage done to the nature compound and surrounding jungle is minimised by strictly controlling overall tourist numbers.

Similarly, Sea Canoe decided early in its operations that the number of people entering the lagoons should not exceed 12, but by January 1993, the maximum limit was set at 16, a figure that remains firm to this day. Based not on any scientific assessment, but rather on the opinions and 'gut instincts' of its founder, the carrying capacity established by Sea Canoe fixed the maximum number of people allowed in the lagoons at any one time. Only a handful of local fishermen had ever entered the lagoons prior to Sea Canoe's explorations in the late-1980s, and thus the lagoons initially remained 'safe' from passengers of other sea-based sightseeing and sailing tour operators, particularly since the owners and employees of Sea Canoe stood alone in both their knowledge of critical cave passages and their ability to navigate entry using daily tide tables. However, Sea Canoe's success, and the high (for Thailand) prices they charged encouraged the entry of local entrepreneurs intent on turning quick profits from the sea kayaking business. Between 1992 and 1999, roughly 20 companies emerged in quick succession as barely-disguised replicas of Sea Canoe, leading to increased tourist activity in Ao Phangnga. Coupled with a lack of government regulation, monitoring, and licensing requirements, the heightened competition among sea-kayaking companies has made the goal of strictly limiting the number of tourists inside lagoons more difficult to implement.

Despite this increase in visitation in the caves and lagoons of Ao Phangnga, there remains limited potential for damage because, on the one hand, there is a fixed amount of space in the standardised rotation of those caves open for visitation, and on the other, it is impossible to get motorised vessels inside the lagoons. Thus, ecotourism in Phuket, even in areas such as Ao Phangnga which receives higher numbers of kayaks staggered throughout the day than it did just a decade ago, remains relatively sustainable and low-impact, thereby replicating a key dimension of ecotourism.

Fourth, ecotourism in Phuket is ethically managed and locally oriented in terms of control, benefits, and scale. The founders of Sea Canoe and Siam Safari both started ecotourism companies in this area to counter what they saw as the unethical nature of previous tourism development in Phuket. Ethical considerations inform not only the non-consumptive and educational nature of the tourist experiences offered by Sea Canoe and Siam Safari, but also the labour practices found in both companies. Sea Canoe pays its guides, cooks, and drivers – the vast majority of whom have no more than a grade six education – more than twice the wage level found at other sea kayaking companies in southern Thailand, and three times more than the national average wage and salary earnings of the relatively well-paid group of clerical, sales,

and services workers (National Statistical Office, 1999: 20). Coupled with a fun and relatively unsupervised workplace atmosphere, an extensive set of benefits, including health and life insurance, disability allowances, and free language, paddling, and tourism certification training, serves to create a rewarding and ethical working environment for Sea Canoe's employees.

Although founded and initiated at first by non-Thais, Sea Canoe and Siam Safari quickly became, and remain to this day, entirely Thai, and mostly southern Thai specifically, in their ownership structure. Further, though both companies had in the past employed locally based expatriates as managers, the current management is almost exclusively Thai, and most managers are from either Phuket or other southern provinces of Thailand. Other than promoting local ownership and management, Sea Canoe and Siam Safari also ensure that the benefits of ecotourism remain in local hands. As mentioned earlier, the efforts of ecotourism companies in Phuket not only enhance local conservation efforts, but also provide employment opportunities to local residents, most of whom are poorly educated and have few, if any, prospects of finding rewarding and well-paying jobs. Over half of Sea Canoe's kayaking guides, and virtually all boat captains, deck hands, and on-board cooks, are native residents of Ko Yao Yai, a large island just off the east coast of Phuket that hosts several small Muslim fishing communities (see Figure 1). Similarly, Siam Safari employs mostly local residents and reaches beyond southern Thailand for workers only in the case of elephant handlers (mahouts), the majority of whom originally come from northern and northeastern Thailand.

There are surprisingly few leakages associated with the spending of ecotourism companies in Phuket, and thus the bulk of capital circulates locally. With the exception of specialised equipment, such as inflatable canoes manufactured in the United States, Sea Canoe spends over 98% of its total costs locally. In an average month, Sea Canoe contributes approximately two million baht (US\$46,500) to the local economy, with one-third going to payroll and roughly three to four hundred thousand baht going towards paying the owners of three contracted and two 'freelance' (i.e., part-time) escort boats. The leakage rate is also low for Siam Safari, which in addition to providing funds for the Elephant Help Project (EHP) and other local conservation efforts, pumps tens of millions of baht annually into the local economy and purchases few of its goods or services from outside the immediate region surrounding Phuket.

The activities, scope, and scale of the activities of Phuket-based ecotourism companies are also local in nature. By strictly limiting the number of people visiting its nature compound at any given moment, Siam Safari ensures that the scale of its activities remains small. While the company does arrange overnight trips to areas beyond Phuket, these trips all centre on nearby natural attractions in southern Thailand, thereby making the ecotourism offered by Siam Safari local, and occasionally regional, in its scale and scope. Although, as mentioned earlier, the rapid recent proliferation of sea kayaking companies has made the total number of tourists visiting the caves and lagoons of Ao Phangnga collectively high, there are nonetheless rarely more than 40 people in a lagoon at any one moment. Further, as long as sea-based ecotourism companies in Phuket continue to offer daytrips only during the morning and

early afternoon, ecotourism in Ao Phangnga can stay small-scale, thereby also limiting the impact of tourist visitation. In terms of keeping ecotourism local in scale, it should also be noted that every single ecotourism company in Phuket is independently owned and operated, contrary to the trend in the global tourism industry towards mergers, consolidation, and multinational corporate ownership (Mastny, 2001).

Lastly, ecotourism in Phuket focuses primarily on allowing both employees and tourists to experience and learn about nature. Sea Canoe and Siam Safari provide spontaneous and novel nature-based experiences to tourists often accustomed to more ritualised forms of recreation, such as poolside swimming and shopping. However, these ecotourism companies go beyond merely providing experiences in nature; a learning component is also clearly visible in virtually all of the trips offered by Sea Canoe and Siam Safari. The educational aspects of Sea Canoe's tours begin very early into the trip, as passengers travelling in minivans from their hotels to Ao Po, the bay from which Sea Canoe escort boats depart, are given a steady flow of information from the guide who accompanies the minivan driver. Once on the escort boat, passengers receive a presentation from the lead guide aimed at providing information, outlining the details of the day's trip, and building excitement around the adventurous and natural elements of kayaking in Ao Phangnga. During the on-board presentation, the lead guide holds in his hands a bound folder containing several laminated information sheets. This folder serves as an informal presentation outline and guide, and passengers are encouraged to peruse the folder throughout the day. Although tourists are kept busy for most of the day, and the informational folder is not mentioned again after the initial leadguide presentation, 64% of Sea Canoe passengers surveyed nevertheless perused the folder on their own at some point during the trip. Even if these passengers only glance at the written material, the emphasis placed by Sea Canoe on 'subtle education' and learning serves to project the image of a form of tourism centred on edification, self-improvement, and environmental awareness.

This is especially important because most conventional tourists in Phuket do not participate in ecotourism for educational reasons, and people are attracted to sea kayaking, specifically, for reasons other than education. For instance, adventure and experiencing 'nature' are by far the two most common answers selected by Sea Canoe passengers (64 and 63%, respectively) as reasons for choosing to participate in a sea kayaking trip. Additionally, the 'importance of learning about the ecology and natural history of the area' received the lowest average ranking among nine variables that tested the importance to tourists of various components of the kayaking daytrip. However, regardless of pre-trip motivations, most Sea Canoe customers leave the trip with not only a bolstered geographical knowledge of the area, but also with a heightened sense of environmental appreciation and awareness. When asked whether the daytrip made them more aware or concerned about the natural environment, 40% answered 'definitely' with another 41% selecting 'probably'.

Adventure and fun underpin many of Siam Safari's daytrips, but perhaps more than any other ecotourism company in Phuket, Siam Safari promotes

education, environmental awareness, and responsibility among its passengers. Siam Safari customers receive a tremendous amount of information from guides, and it is impossible for a tourist to participate in a Siam Safari daytrip without learning something, however minimal, about elephants, Thailand's natural history, local fauna, or Thai culture. Since all trips originate and conclude at the company's 35-acre 'nature compound' in Chalong, all Siam Safari customers are exposed to posters featuring a large variety of environmental information, including ways in which they can help protect Thailand's environment through such initiatives as the Elephant Help Project (EHP).

Unlike many self-professed ecotourism operators that focus exclusively on tourist education, Sea Canoe and Siam Safari pay an enormous amount of attention to the education of its Thai employees. Sea Canoe spends over half a million baht (\$11,600) annually on employee training, and guides personally receive 50,000 baht (\$1160) in training by the time they receive promotion to a lead guide position. Sea Canoe guides receive environmental education through an extensive range of Thai- and English-language informational materials located at Sea Canoe's main office in Phuket Town. Further, guides augment this written information with informal, ongoing lessons on natural history, geology, flora, and fauna.

The intense training regimen required of Siam Safari guides also reflects a high priority on educating Thai employees about the natural heritage of Thailand, in areas such as wildlife, botany, and geology. Four hours of weekly classroom instruction required of all guides, regardless of experience, serves to inculcate a sense of education and environmental awareness among staff. Utilising connections to national government agencies and environmental organisations, Siam Safari has also attempted to disseminate its environmental message from its employees, and the local community in which Siam Safari operates, to the wider national Thai audience. Two Thai television programs have featured stories on Siam Safari, and the company was the subject of a major article in the Tourism Authority of Thailand's monthly Thai-language travel magazine in June, 1994. Through consultation projects and training assistance, Siam Safari serves as an example and springboard from which other Thai-owned land-based ecotourism companies throughout Thailand can enter the small-scale, adventure, and ecotourism niches of the lucrative tourism industry.

Structural, Operational and Conceptual Links to Conventional Tourism

Ecotourism operators in southern Thailand such as Sea Canoe and Siam Safari confirm that certain ecotourism principles, including ethical management, education, and conservation, are indeed possible in locations long associated with only conventional forms of tourism, but what these successful companies illustrate most clearly and persuasively is the symbiotic relationship between conventional tourism and ecotourism. In particular, although such companies replicate the central precepts of ecotourism, it is not the case that ecotourism in this context exists in conceptual or physical isolation. Rather, ecotourism in Phuket has emerged *out of*, not in complete opposition to, the established packaged tourism industry. In this section, I will illustrate

this symbiotic relationship by focusing on the following five links between conventional tourism and ecotourism in southern Thailand: tourist numbers, tourist clientele, marketing, spatial proximity, and operations.

The number of people participating on daytrips offered by Sea Canoe, Siam Safari, and all other ecotourism companies in Phuket are usually divided into small sub-groups or 'teams' that range in size from one person to 20 people. Despite this small individual group size, however, the collective number of tourists visiting geographically confined spaces like Ao Phangnga on a daily basis remains high, especially in comparison to small groups of backpackers and specialty tour customers travelling elsewhere throughout Thailand. Determining a specific number of tourists beyond which tourism becomes conventional is, of course, highly relative to the particular destination – and one could argue it is perhaps impossible – but most would agree that two to three hundred tourists a day inside the confined space of an open-air lagoon falls closer than most other examples of ecotourism to the 'mass' end of the spectrum in terms of sheer tourist numbers (see Mecir, 2000).

The customers of Phuket-based ecotourism companies are conventional tourists who stay in four- and five-star resort hotels, visit Phuket either en route to another destination or on short holidays (which last 11 days, on average, for Sea Canoe customers), and arrange many aspects of their holidays, including daytrips with ecotourism operators, through travel agents, tour operators, and other intermediaries of the global tourism industry. Le Meridien, one of Phuket's most exclusive five-star hotels, accounts for the largest share of Sea Canoe passengers (16%), and 45% of all surveyed Sea Canoe customers were at the time staying in one of just five large, luxurious hotels: Le Meridien, Dusit Laguna, Sharaton Grande, Banyan Tree, and Cape Panwa. Tapping into existing conventional tourist markets, specifically certain natureoriented segments therein, has given successful ecotourism companies in Phuket access to a large, readily available pool of activity-seeking tourists. Fifty-five percent of Sea Canoe's customers stay in hotels situated in Patong, Phuket's most developed and congested beachside resort location. An additional 25% stay in the 'Laguna Bay' enclave, an integrated complex of five-star hotels on Bang Tao Beach in northwestern Phuket. Since Patong and Laguna Bay host willing and financially able tourists, ecotourism operators are able to charge the relatively high prices needed to fund community-based economic development initiatives. For example, Siam Safari for the past 12 consecutive years has organised short 'eco-daytrips' for customers of the Club Méditerranée resort located nearby in Kata Beach. As the quintessential example of conventional, packaged tourism, Club Med attracts many critics, but Siam Safari's founder stated that his company does 'quite a lot of business with Club Med, a good company to work with. Everybody thinks their image is probably a little bit different, but they're certainly helping us out on our conservation efforts'.

The marketing efforts of Sea Canoe and Siam Safari interweave existing conventional tourism advertising outlets such as industry travel magazines (including some 'adventure' journals such as *Outside* and *Action Asia*), travel exhibitions, tourism conferences such as the Pacific Asia Travel Association (PATA) annual conventions, and local marketing outlets, including travel

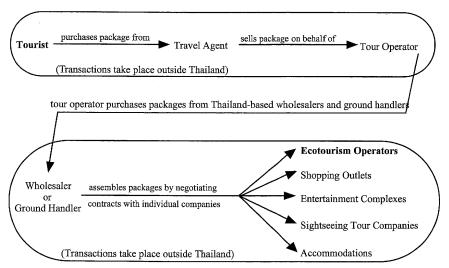
agent counters, local newspapers and magazines, and the Tourism Authority of Thailand. Sea Canoe has held consultations with Philippines Airlines, among others, to include sea kayaking information during in-flight video presentations, and Siam Safari has even organised a fashion show in Bangkok to raise money for the Asian Elephant Foundation of Thailand. Mainstream media advertising and popular culture have thus opened up the possibility of disseminating the principles of ecotourism to a wider audience, enhancing in turn the business prospects of ecotourism operators who require financial support to make the principles of ecotourism both feasible and sustainable.

The reason why ecotourism companies in this area of Thailand can tap into conventional tourist markets in the first place is because of the close physical proximity of ecotourism locations to the resort enclaves of Phuket. Patong and Laguna Bay are both only approximately 20 miles from Ko Phanak, the principal island visited by sea-based ecotourism companies. The driving distance between Patong and Chalong, the location of Siam Safari's central 'nature compound,' is even smaller at 8 miles. Such small distances not only make the task of transporting customers from conventional tourist destinations to 'natural' areas operationally straightforward, but they also simultaneously enable conventional tourists concerned with nature-oriented excursions to participate in trips that do not necessitate long, uncomfortable, or inconvenient journeys.

The nature and structure of daily operations provide the most important and obvious link between conventional tourism and ecotourism. The development of ecotourism in Phuket has depended largely on building intricate structural links to the existing conventional tourism industry. In particular, ecotourism in Phuket relies heavily on all three principal tourism intermediaries, namely hotels, tour operators, and travel agents. Tourists often first hear about Sea Canoe and Siam Safari in their hotels, and because the customers of these and other ecotourism companies remain so spatially concentrated in a handful of resorts located in Patong and Laguna Bay, hotels play an obvious role in channeling conventional tourists towards ecotourism.

Global tour operators and local travel agents deal with slightly different sectors of the conventional tourism market, but together, these intermediaries provide the bulk of customers for sea- and land-based ecotourism companies. Most tourists visiting Thailand, and Phuket specifically, purchase their vacations and make their arrangements through travel agents at home. These travel agents, in turn, sell vacation packages on behalf of global tour companies such as Kuoni, Thomas Cook, Cosmos, and Jetset; there are at least 15 European tour companies operating in the Patong area alone. Global tour companies acquire their packages from travel wholesalers or 'ground handlers' based in Thailand, which assemble packages by entering into contracts with local tour companies, restaurants, shops, and hotels (Figure 4).

Packages purchased by tourists outside Thailand usually include accommodation and air transportation to Thailand, and often come with a small range of local daytrip options, purchased separately through tour representatives in Phuket. Sea- and land-based ecotourism daytrips serve as simply one branch or niche of these daytrip options, which also include recreational, leisure, entertainment, shopping, and health-related activities. Global tour companies



 $\label{lem:Figure 4} \textbf{Figure 4} \ \textbf{Typical transaction flow between international tourists and Phuket-based ecotourism operators}$

are represented by tour representatives who live in Phuket and deal directly with tourists. In regularly scheduled meetings, tour representatives officially welcome each wave of tourist arrivals, and also provide information on Phuket and Thailand. It is also during these meetings that tourists are presented with a range of daytrips available for purchase. Through direct purchasing and marketing links, global tour operators, and their representatives, serve as important generators of daily business for sea- and land-based ecotourism companies in Phuket. Fifty-nine percent of Sea Canoe customers purchase a daytrip either directly through their tour representative or independently based on a recommendation of a tour representative. For all but a few of the remaining 41% of customers, daytrips are purchased through local travel agencies and streetside kiosks in Phuket that sell excursions to 'walk-in' tourists, known also as FITs (Free Independent Travellers). Since only 23% of Sea Canoe customers know about the company before coming to Phuket, conventional tourism intermediaries such as hotels, tour companies, and travel agents play a fundamental role in selling the trips of Sea Canoe, not to mention of the other local ecotourism companies that enjoy far less national and global recognition.

It is clear that the most significant determinant of the overall success or failure of individual ecotourism ventures in Phuket remains the degree of incorporation into conventional tourism infrastructural and logistical networks. In asking what it takes for an ecotourism venture to 'work' or succeed, therefore, one must assess a company's linkages to conventional channels of capital, tourist distribution, and marketing. The original founders of Sea Canoe and Siam Safari understood early on that in order to succeed in Phuket, one must first seek integration, however partial, into the well-developed physical and organisational infrastructure of Phuket's conventional tourism industry. When Sea Canoe sold its first trips out of Le Meridien, it received marketing and transportation support from Diethelm, the largest ground

handler operating in Thailand. Nearly a decade later, Diethelm still provides Sea Canoe with the majority of its passengers and revenues, and Sea Canoe in turn has, until recently, represented Diethelm's largest single source of revenue in Phuket. The transaction flow illustrated in Figure 4 - from foreign tourists to conventional tourism intermediaries such as travel agents, tour companies, and ground handlers, and finally to Phuket-based ecotourism companies - illustrates the necessity of building links to travel wholesalers such as Diethelm and compels companies like Sea Canoe and Siam Safari to pursue wholesaler business despite very high commissions that can reach over 30%. For this reason, Sea Canoe has signed major contracts with 10 wholesalers whereas Siam Safari has stayed away from the two largest wholesalers, Diethelm and World Travel, choosing instead to conduct business with half a dozen of the other ground handlers operating in Phuket. As a result of reaching out to so many wholesalers, Sea Canoe and Siam Safari attract tourists from a large number of countries and receive business from a large number of global tour companies. In the case of Sea Canoe, although England, Australia, and Germany accounted for nearly half of all passengers, the 209 daytrip passengers who were surveyed came from 28 countries in total and represented customers of 34 different global tour companies.

In a destination such as Phuket, where conventional tourism intermediaries are firmly established and control the vast majority of tourism-related movements of capital, people, and even ideas, it is imperative that ecotourism companies wishing to promote ethical management, sustainability, local control, environmental education, and other principles of ecotourism begin to forge connections to the existing tourism industry. But does this mean that ecotourism companies in Phuket are little more than conventional tourism wolves cloaked in green clothing? Is the ecotourism found in Phuket merely an attempt on the part of the conventional tourism industry to greenwash environmentally conscious tourists? I would argue that the answer is no, and, furthermore, that denigrating this form of ecotourism as a shallow version of the real thing not only strips away, fatalistically, any possibility of reforming conventional tourism, but also incorrectly assumes that companies sharing connections to conventional tourism must always somehow fail to promote the principles of ecotourism.

Conclusion

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To many tourism scholars and self-identified 'hard-core' ecotourists, conventional tourism and ecotourism are not only mutually exclusive, but also diametrically opposed in their philosophical principles, clientele, and day-today operations. However, the experiences of the sea- and land-based ecotourism companies of southern Thailand challenge such assumptions of exclusion and contradiction. Established and successful ecotourism companies such as Sea Canoe and Siam Safari utilise many connections to, and overlaps with, the existing conventional tourism industry in Phuket: the collective number of customers, the conventional, packaged nature of these customers' holidays, the marketing strategies employed by Phuket's ecotourism companies, the close proximity of ecotourism activities to conventional tourism areas, and the nature and structure of daily ecotourism operations all connect, in integral

ways, ecotourism in southern Thailand to more conventional tourism in the region. This connection to conventional tourism may seem surprising to advocates of a more exclusive or elitist form of ecotourism, but despite what one would expect in light of the image of Phuket as a conventional tourism enclave, this paper's identification of ecotourism in southern Thailand confirms all three major themes of Asian ecotourism identified recently by Weaver (2002): spatial concentration; hybridised forms of ecotourism linked to other tourism categories; and the importance of external environments.

Conventional Tourism and Ecotourism in Phuket

Contrary to what dismissive critics of conventional tourism would predict, ecotourism's connections to conventional tourism in Phuket do not necessarily preclude the possibility that individual companies could preach, and more importantly, put into practice the principles embodied by ecotourism. Having deliberately applied among the most comprehensive and exclusive definitions of ecotourism recently proposed, this paper has provided evidence that despite featuring many conventional features, ecotourism in Phuket does indeed qualify as ecotourism for the following reasons: it produces experiences in natural areas; it contributes to environmental conservation; it encourages sustainable, low impact, and non-consumptive tourist activities; it is ethically managed and remains locally oriented in terms of control, benefits, and scale; and it allows employees and tourists to experience and learn about nature. Thus, although on the surface, and without closer examination, some would perhaps label ecotourism in Phuket as an example of 'greenwashing' (Mowforth & Munt, 1998), 'shallow ecotourism' (Acott et al., 1998) or 'ecotourism lite' (Honey, 1999), an intellectually honest approach would reveal that despite not conforming to normative, idealistic visions of what ecotourism should look like, the place-specific version of ecotourism in southern Thailand fits virtually all definitions of ecotourism closely and unproblematically. Moreover, although the dichotomous approaches to ecotourism discussed in the introduction are correct in defining conventional tourism and ecotourism as different, and at times conflicting, tourism paradigms, I agree mostly with the critics of this 'either/or' approach: defining ecotourism stringently or narrowly does not necessarily preclude the possibility of conceptual, spatial, or operational overlaps between the two types of tourism.

What this paper has also illustrated is that a one-size-fits-all approach is insufficient when defining ecotourism or assessing its potential for promoting sustainability, environmental education, and ethical management. The necessary combination of conventional tourism infrastructure, markets, and networks, on the one hand, and ecotourism principles of conservation, local control, and education, on the other, contribute to the production of a unique local form of ecotourism in southern Thailand, whereby a rich but vulnerable resource base, a well-developed tourism industry, and a long history of economic development require the reconceptualisation of ecotourism's meaning, implications, and potential contribution to sustainability and communitybased development. Although some authors (Mastny, 2001; Pleumarom, 2001) have correctly used 'mass ecotourism' as a derogatory label to describe the 'green' marketing efforts of transnational tourism corporations operating in Thailand, the term can also be used accurately to identify one of many localised manifestations of ecotourism in practice, in this case within the context

of southern Thailand where particular opportunities and constraints have forced a synthesis between the existing tourism industry and the principles introduced recently by local ecotourism companies. I would therefore concur with Weaver (2001b: 112) when he states that 'mass ecotourism should be recognised, celebrated, and exploited as a great opportunity for the enhancement of the ecotourism sector itself, for mass-tourism in general, and for protected areas'.

Essentially, then, what this paper calls for is an acknowledgment of the fundamental diversity of ecotourism experiences. Rather than totally relinquishing hope that conventional tourism can ever be reformed or infused with environmental principles, it is ultimately more realistic and practical - considering the preferences of most tourists and the growth trends of tourism throughout the world - to discover ways in which the worthy principles of ecotourism can be implemented in specific locations (Butler, 1990). In southern Thailand, ecotourism companies have succeeded not by seeking isolation from conventional tourism, but rather by forging structural, spatial, and conceptual links to the existing packaged tourism industry. Due to these links, ecotourism in Phuket represents a new facet of the overall industry rather than a completely distinct or independent sphere of activity. Further, the function and practice of ecotourism extend beyond merely allowing a rejuvenated conventional tourism industry to perpetuate the status quo under an ecotourist guise. Ecotourism in Phuket represents more than just 'old wine in new bottles' (Wall, 1994), whereby tourism relies on a business-as-usual approach within a supposedly new framework. In particular, the proverbial old bottles provided in Phuket by established conventional tourism infrastructure, advertising channels, and distribution mechanisms are being increasingly filled by a new wine based on the gradual implementation and dissemination of ecotourism principles by small and medium-sized ecotourism companies. Ecotourism in Phuket has developed as a by-product of conventional tourism, and as such, remains fundamentally linked to and dependent on the continued and future health of national and regional tourism development.

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Ecolodge Performance Goals and Evaluations

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The success of ecotourism depends in part on the performance of ecolodges, an infrequently researched component of this field. On-site, in-depth interviews were conducted with owners and managers of 21 ecolodges in Costa Rica and Mexico to discover their performance goals and to assess the performance of the lodges. The ecolodges were sampled from a range of ecolodge types: casual, dedicated, scientific, and agri-ecolodges. A total of 84 performance goals were identified and classified using a new framework, partially derived from organisational strategy and management literatures. Sustainable economic development goals were mentioned most frequently. Performance goals varied by ecolodge type, with, for example, managers of scientific ecolodges expressing the goal of education of ecotourists more consistently than the other types. While individual ecolodges have multiple types of performance goals, managers and owners actually used objective, financial goals to evaluate the overall success of their ecolodges. About two-thirds of the interviewees evaluated their ecolodge as successful overall.

Keywords: ecotourism, ecolodges, performance, management, Costa Rica, Mexico

Ecolodge Performance Goals and Evaluations

After more than a decade of debate about the meaning of ecotourism (e.g. Boo, 1990; Ceballos-Lascurain, 1991; Fennell, 1999; Orams, 1995; Sirakaya & Sasidharan, 1999), it appears that a consensus has emerged that the key elements of ecotourism concern nature conservation, economic benefits, community involvement, and nature interpretation/education (United Nations World Ecotourism Summit, 2002; Weaver, 2002a; Wunder, 2000). Ecotourism is nature-based travel that embraces principles of sustainability, and thus is managed to conserve the natural environment on which it depends, provide economic benefits to the local community and the industry, and to educate and satisfy the tourists. Researchers from more than a dozen disciplines have addressed the basic question of whether ecotourism is successful from the perspective of particular stakeholder groups of ecotourism. For example, many have examined ecotourism's effects on the natural environment (e.g. Jacobson & Lopez, 1994; Jim, 2000; Obua, 1997; Sherman & Dixon, 1991) and on local communities (e.g. Alexander, 2000; Belsky, 1999; Carballo-Sandoval, 1999). But the effectiveness of ecotourism for infrastructure providers, such as lodge owners, has rarely been considered, even though their services and practices are critical components of ecotourism. Moreover, there has not been an analysis of what constitutes 'success' to lodge owners, who comprise private individuals and companies, communities, governments, and NGOs.

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