

The
FORESTRY
PRIVATE
ENTERPRISE
INITIATIVE



School of Forest Resources
North Carolina State University



School of Forestry and Environmental Studies
Duke University



Office of International Cooperation and Development
Forest Service Forestry Support Program and
Southeastern Forest Experiment Station



Supported and funded by
Bureau for Science and Technology
Agency for International Development

Southeastern Center for Forest Economics Research

Box 12254, Research Triangle Park, N.C. 27709

Telephone (919) 541-4221

Natural History and Nature-Oriented Adventure Travel for Rural Development and Wildlands Management: Diagnosis of Research Needs and Project Opportunities for Thailand

By

Patrick B. Durst

FPEI Working Paper No. 12

FPEI Working Paper Series
June 1987

The SCFER Institutions
USDA Forest Service Southeastern Forest Experiment Station

Durst, Patrick B. 1986. Natural History and Nature-Oriented Adventure Travel for Rural Development and Wildlands Management: Diagnosis of Research Needs and Project Opportunities for Thailand. Southeastern Center for Forest Economics Research, Research Triangle Park, NC. FPEI Working Paper No. 12, 21 pp.

About the Authors

Patrick B. Durst is a Special Projects Coordinator for the Forestry Support Program of the USDA Forest Service, Washington, D.C.

About FPEI Working Papers

FPEI working papers are a special series of SCFER working papers issued by the Southeastern Center for Forest Economics Research for the purpose of sharing the research findings of the Forestry Private Enterprise Initiative. These papers are distributed in order to promote the timely release of new theories, data and findings. Working papers represent various levels of research findings and readers are encouraged to contact the author(s) for more information. Some of the papers may be published in modified form elsewhere. An updated list and copies of FPEI Working papers are available from the Center at P. O. Box 12254, Research Triangle Park, NC 27709, (919) 541-4221.

THE FORESTRY PRIVATE ENTERPRISE INITIATIVE

FPEI is a cooperative project executed by the Southeastern Center for Forest Economics Research (SCFER) in collaboration with the USDA Office of International Cooperation and Development (OICD) and the USDA Forestry Support Program (FSP). The primary members of SCFER are the USDA Forest Service Southeastern Forest Experiment Station, North Carolina State University, and Duke University. FPEI is supported and funded by the United States Agency for International Development (AID), Bureau for Science and Technology (S&T) [through its Office of Forestry, Environment, and Natural Resources (FENR)].



Forestry Support Program

Natural History and Nature-Oriented Adventure Travel
for Rural Development and Wildlands Management:
Diagnosis of Research Needs and Project Opportunities
for Thailand

Patrick B. Durst
Special Projects Coordinator
USDA Forest Service, Forestry Support Program
P.O. Box 2417
Washington, DC 20013

September, 1986

funded by the
U.S. Agency for International Development
Bureau for Science and Technology
Office of Forestry, Environment and Natural Resources

through
RSSA BST-5519-R-AG-2188

which is jointly managed by the
USDA Office of International Cooperation and Development
and the
USDA Forest Service, Forestry Support Program

usaid/usda



NATURAL HISTORY AND NATURE-ORIENTED ADVENTURE TRAVEL
FOR RURAL DEVELOPMENT AND WILDLANDS MANAGEMENT:
DIAGNOSIS OF RESEARCH NEEDS AND PROJECT OPPORTUNITIES
FOR THAILAND

September, 1986

Patrick B. Durst, Special Projects Coordinator
USDA Forest Service, Forestry Support Program
P.O. Box 2417
Washington, D.C. 20013

"The Forestry Private Enterprise Initiative"

Project of the Southeastern Center for Forest Economics Research
with the USDA - FS Forestry Support Program
and AID's Bureau for Science and Technology

1

NATURAL HISTORY AND NATURE-ORIENTED ADVENTURE TRAVEL
FOR RURAL DEVELOPMENT AND WILDLANDS MANAGEMENT:
DIAGNOSIS OF RESEARCH NEEDS AND PROJECT OPPORTUNITIES
FOR THAILAND

This report presents personal observations and results of interviews in Thailand during the period September 6-12, 1986. The short diagnostic visit was made to identify opportunities for research and future projects that will promote rural development and wildlands conservation by expanding nature-oriented tourism in Thailand.

The information-gathering procedure used for this reconnaissance closely followed the approach used by Jan Laarman during similar trips to Costa Rica and Ecuador in May, 1986. This report is purposefully presented in a format consistent with Laarman's earlier report ("Nature-Oriented Tourism in Costa Rica and Ecuador: Diagnosis of Research Needs and Project Opportunities", June 1986) for ease in comparing needs and opportunities in the countries surveyed.

An inherent risk of brief surveys is the possibility of drawing improper conclusions based on false or incomplete information. Lack of time limited the number of interviews in Thailand to a fairly small number, and there were no opportunities to survey parks or other natural areas outside Bangkok. Nevertheless, the issues of rural development, wildlands management, and nature oriented tourism were discussed with knowledgeable people with a variety of perspectives, and a number of problems, opportunities, and needs were consistently identified from these conversations.

Appendix A lists the persons in Thailand who sacrificed valuable time to present their ideas and information to me. I am very grateful for their assistance.

SUMMARY OF NEEDS

The following lists itemize the most obvious and immediate research and development needs for nature-oriented tourism in Thailand. Initiating a nature-based tourism industry that effectively stimulates rural development requires close cooperation between several government agencies, conservation organizations, universities, and the private sector. Management, marketing, and promotion must be implemented simultaneously.

Since most nature-related tourism activities depend on federally controlled natural resources, the government must take the lead, directly or indirectly, in natural resource management and tourism support. If the government lacks the money or motivation for direct involvement, it must alternatively create the proper atmosphere for private enterprise to assume aggressive development and managerial roles.

Marketing and promotion of tourism products are most effectively accomplished by public and private organizations working in concert. Examples of successful marketing and promotion by private firms working independently of government tourism boards can be cited, but since consumers traditionally seek travel information from government sources, companies working alone are at a distinct disadvantage.

PROMOTION

1. Empirical quantification of the economic impacts of nature-oriented tourism in Thailand. Possible areas of focus include the Khao Yai wilderness trekking program, trekking in the Chiang Mai and Chiang Rai areas, nature resorts in Kanchanaburi, and the national parks. The purpose of such assessments is to educate government officials about the potential economic importance of nature tourism (especially to rural economies) and encourage increased public expenditures for wildlands protection, management and promotion. (Similar impact analyses are underway by the Forestry Private Enterprise Initiative in Costa Rica and Ecuador).
2. Study of the effectiveness of the Tourism Authority of Thailand (TAT) in promoting nature-oriented tourism abroad. (A general study of the responsiveness of over 100 developing countries to mail requests for nature tourism information is nearly completed by the FPEI. The study could easily be expanded to assess the TAT's effectiveness in more detail).
3. Workshops or familiarization ("fam") tours to national parks for Thai tour operators and travel agents to stimulate their interest in natural history. Having been exposed to the potentials of nature tourism, operators may be encouraged to develop new nature-oriented destinations and services. Travel agents may similarly become more confident in recommending nature-related destinations and activities to their clients.
4. Update tourist information on national parks and natural areas. Revision of the out-of-print 1982 Shell Guide to the National Parks of Thailand, or production of a new guide, would encourage a huge increase in the number of visits

to the national parks, especially by foreigners. Development of more appealing promotional materials, written in English or other foreign languages, would also stimulate interest. Analysis of the availability, quality, and affordability of posters, postcards, books, and T-shirts which feature wildlands and natural history is also desirable.

5. Development of natural history education programs. More journalists and media representatives should be invited to participate in natural history trips like those sponsored by the Wildlife Fund Thailand (WFT). They should then be encouraged to report on the trip and write nature and environmental articles for newspapers and magazines. Similar trips could also be used to stimulate appreciation of nature by students. Films, slide programs and other educational materials featuring natural history and nature-oriented recreation also need to be developed and distributed to schools and media centers.

6. Workshops for tour operators and nature resort managers on developing more effective promotional brochures and advertising campaigns. Provide advice on effective distribution of promotion materials.

7. Analysis of the costs, cost-sharing possibilities, and benefits of "fam" trips for domestic and foreign travel agents which are designed to stimulate purchases of nature-related tourism.

MARKETING SURVEYS

1. Survey of foreign tourists in Thailand with respect to their perception of nature-oriented tourism in the country, the availability and usefulness of information on nature destinations, and preferred activities. For visitors who have actually participated in outdoor activities in the country, an analysis of satisfaction levels, reasons for visiting or participating in specific activities, likes and dislikes, and intentions to return can also be made. (The FPEI is planning similar studies for Costa Rica and Ecuador).

2. A specific study similar to # 1 just above is needed for visitors to national parks. Results will help park planners, developers, and managers to be more responsive to the demands of park visitors. The National Park Division (NPD) plans a study of this type, contingent on available funds. (The FPEI is currently assisting the Costa Rican National Park Service conduct a survey of this type).

3. Survey of local (Thai) tour operators to identify constraints and problems associated with organizing and running nature-related tours. The survey should specifically probe for evidence of government disincentives to private sector development and seek answers to the question of why so few operators are currently active in nature tourism. Determine preferred destinations and activities among current nature tourism opportunities.

4. Survey of U.S.-based or European-based tour operators with respect to their perceptions of leading nature-oriented tours to Thailand. Operators would be asked to define advantages and disadvantages of Thailand versus competing destinations. Suggestions should be sought for improving Thailand as a destination for nature tourism. (A general survey of U.S.-based tour operations and wholesalers is currently being made by the FPEI).

5. Survey of U.S. conservation organizations, nature-related professional societies, and university groups to identify constraints and potentials for attracting them to Thailand for nature study tours and outdoor recreation. (A survey of this type, with reference to Costa Rica and Ecuador, is being planned by the FPEI).

MANAGEMENT

1. Organization of a national-level public/private council to define policies, programs, and projects for nature-oriented tourism in support of rural development. The council would include representatives of the TAT, NPD, conservation organizations, tour operators, hotel and resort operators, universities, the National Economic and Social Development Board, and the airlines. (A similar council is being organized in Costa Rica with the help of the FPEI).

2. Development of training programs and short courses for natural history guides. Tour operators, nature resort managers, NPD officials, and university representatives should collaborate in designing the curricula, selecting instructors, identifying training sites, and determining criteria for monitoring and evaluating trainees. Analysis of costs, cost-sharing arrangements, and demand must be completed prior to the implementation of a training program.

3. Improvement of national park protection and management. The following tasks are needed: Completion of parks assessment (ongoing by the NPD and Kasetsart University), demarcation of park boundaries, development of park management plans, hiring of more protection officers and interpretive specialists, identification of management zones, and

implementation of community development programs. Maps, brochures, and interpretive materials are also needed.

4. Development of park infrastructure. As prescribed by management plans, construction of access roads, hiking trails, wildlife-viewing blinds and towers, visitor centers, accommodations, restaurants, concession stands, campsites, and picnic areas should be completed to facilitate visitors.

5. Analysis of national park development policy with respect to private investment in lodging facilities, restaurants, shops, concessions, and tour businesses operating in and near national parks and protected areas.

6. Analysis of the user fee structure for national parks. Consideration should be given to a two-tiered fee structure (separate rates for foreigners versus Thais). Concession rates for tour operators and other businesses within national parks also require analysis.

7. Analysis of income generation and distribution of revenues from parks and protected areas. Of special interest is the extent with which revenues are retained and distributed among the local residents.

8. Identification of suitable managers for the Khao Yai wilderness trekking program (and other programs the government or conservation groups may want to place in the hands of private sector managers). Procedures for selecting acceptable managers and transferring the programs to them must be developed.

5/1

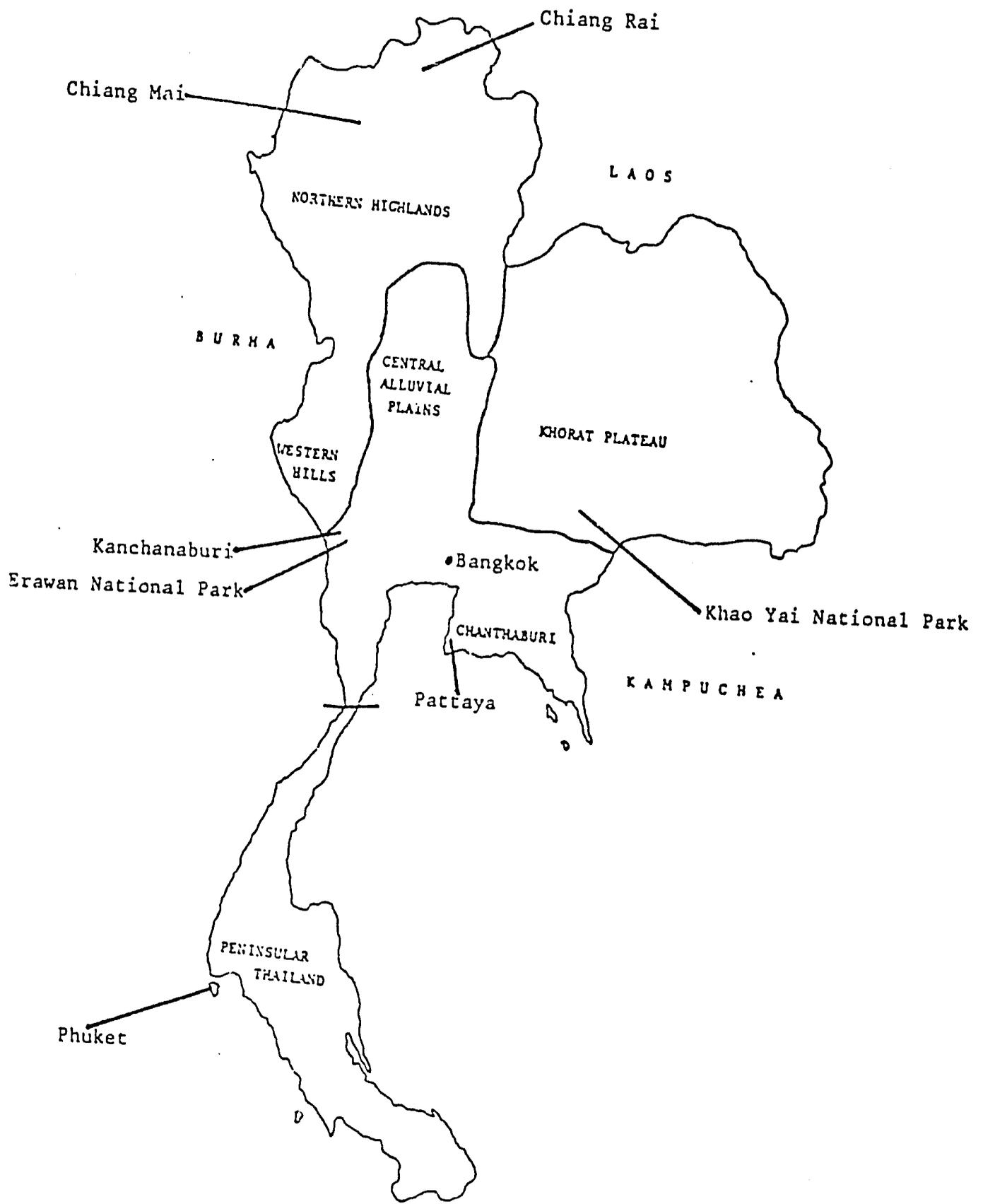


Figure 1. Major nature tourism destinations in Thailand.

OBSERVATIONS AND BACKGROUND

1. Definition of Nature-Oriented Tourism

Tourism is now the top foreign exchange earner for Thailand, having surpassed earnings from rice exports in 1983. Approximately 2.0 to 2.5 million foreign visitors enter Thailand each year. Even more are expected in 1987, as next year has been targeted as "Visit Thailand Year" by the government which is planning a major international promotional program to attract more tourists.

Despite the importance of tourism to the country, nature-oriented tourism is still largely undefined and undeveloped in Thailand. The concepts of ecological tourism, nature-related tourism, nature-oriented tourism, and tourism based on natural history are not widely understood or promoted. More specific concepts of "nature tourism for conservation" and "conservation for rural development" are understood by still fewer individuals in the country.

Surprisingly few tour operators conduct natural history trips or tours to natural areas even though several parks and reserves are easily accessible from Bangkok. Promotion of natural attractions by Bangkok-based tour operators is almost non-existent. While other "theme" tours (e.g., focusing on Thai culture, Buddhism, Thai history, shopping, markets, etc.) are common, almost no similar tours highlighting natural attractions are organized by Bangkok tour operators.

Where nature-oriented tourism does occur, it is usually combined with other recreational activities or general-interest tourism. Packaged tours frequently include brief stops to view waterfalls, caves, or national parks on the way to historical or cultural attractions. Tours may also stop for picnic lunches in natural settings. Fishing and diving are often offered as alternative activities during packaged beach vacations. A few excursions even include short "jungle tours", where bird watching, wildlife viewing, nature photography, and hiking are possible at a casual level. The only visible trips dedicated solely to natural history interests, however, are those occasionally operated by non-profit conservation organizations such as the WFT and the Siam Society.

A few resorts located in the northern and western parts of the country operate in natural settings and appeal to customers on the basis of aesthetics, escape from urban conditions, and exoticism of the jungle. The River Kwai Village in Kanchanaburi, for example, is located in a jungle setting, and features trips to waterfalls and caves and guided hikes in the forest, in addition to tours of historical sites

along the Kwai River. The operators claim customers are attracted more by the natural features surrounding the resort than by the historical sites in the region.

Trekking is a popular tourist activity in northern Thailand, but some people question its validity as a true nature-oriented activity. Certainly, enjoyment of the natural scenery and hiking in the forest are motivations for some participants. However, these benefits may be overshadowed by most hikers' interests in hill-tribe cultures and opportunities to sample locally produced opium.

A more serious natural history trekking program was initiated at Khao Yai National Park in 1984 by the WWF/IUCN Elephant Conservation and Protected Areas Management Project. The treks are designed to serve as a method of generating income for villagers in and around the park as well as expose participants to a high-quality natural history experience.

Many people in Thailand define nature-oriented tourism to include coastal recreational activities (e.g., swimming, diving, snorkeling, deep-sea fishing). Several marine parks are even under the jurisdiction of the National Park Division (NPD) of the Royal Forest Department (RFD).

Other natural history and nature-related adventure activities available in Thailand include bird watching, wildlife viewing, nature photography, butterfly collecting, river rafting, and specialized botanical studies. Except for bird watching, however, none of these activities enjoy widespread popularity in Thailand.

2. Nature-Oriented Destinations

Figure 1 illustrates the locations of major nature-related tourism destinations in Thailand.

The coastal resources of Thailand (especially in and around Pattaya and Phuket) attract a large number of tourists to the country. Pattaya and Phuket receive approximately 600,000 and 250,000 guests, respectively, each year. Many other lesser known beach areas in southern Thailand attract fewer, but still significant, numbers of travelers.

Forest-based tourism is centered at the country's national parks. Thailand currently has 52 national parks, 50 forest parks (primarily designated for recreational purposes), 31 wildlife sanctuaries, and 40 non-hunting areas. Parks and reserves total about 10% of the country's land area and include about 50% of the remaining primary forests. Parks are located in every province, but the largest parks are in the central region of the country within easy reach from Bangkok.

Most of the national parks located in the south are marine parks.

The national parks receive a total of about 4 million visitors annually. Only about 3% (112,000 in 1985) of the visitors are foreigners, however. Khao Yai, established as the country's first national park in 1962, is the best known and largest of the parks. Erawan and Khao Yai are the most frequently visited parks with about 500,000 and 400,000 annual visitors, respectively. Both are within 200 kilometers of Bangkok. Bird watching and hiking are the most common activities enjoyed at the parks.

Sixteen bird sanctuaries scattered throughout the country (some within national parks) have also been identified by the TAT, which distributes a brief information sheet listing locations and species that can be observed.

In addition to the national parks and bird sanctuaries, the northern areas around Chiang Mai and Chiang Rai and the western province of Kanchanaburi attract a significant number of nature-oriented tourists. As previously mentioned, trekking activities are concentrated in the northern provinces. Other visitors are attracted to the region's waterfalls, rivers (for rafting and swimming), and forests. Waterfalls, caves and jungle flora are the main natural attractions in Kanchanaburi. Private forest and jungle resorts are mainly located in northern and western Thailand.

3. Natural History Image and Attractions

Thailand suffers from a serious lack of image as a destination for nature-oriented tourism. Although the country has a diversity of ecosystems, covering an especially extensive range of geographical variability north to south, and a variety of wildlife species, very few foreign visitors are aware of the country's natural attributes. Except for the country's beaches, natural attractions have rarely been used in past promotional campaigns of the TAT, Thai Airways International, or other groups.

Part of the image problem stems from the fact that few Thais are well aware of the natural features possessed by their country. Thais are social oriented and tend to make visits to parks and natural areas social events, unlike Westerners who visit parks with the intention of communing with nature. According to conservation leaders, Thais have only recently begun to appreciate wildlife and natural ecosystems for their recreational value. Thus, most Thais fail to recognize the potential of nature for attracting foreign tourists because they themselves are only marginally attracted to nature.

Compounding the lack of a positive image for nature tourism is that many foreign tourists have a negative image of rural tourism in Thailand. Safety questions are foremost in the minds of many foreign visitors. Past robberies and murders of tourists in the extreme northern and southern areas of the country (although infrequent) still dominate the conversations of many tourists considering trips to these regions. Safety concerns often extend beyond these two areas and discourage travelers from entering any rural areas of the country.

Despite image problems, conservation leaders in Thailand believe the country's national park system ranks favorably among those of developing countries. As evidence, they point to Khao Yai's recognition in 1971 as one of the world's top five parks. Two of Thailand's parks were also recently selected as ASEAN Heritage Parks. A sizeable portion of the country is protected by park status and a wide range of ecosystems is represented in the system. Although encroachment and destructive forces are evident in several parks, many others remain in good condition.

The major wildlife attractions in Thailand are elephants, tigers, gibbons, and a variety of bird species. Birds are commonly observed at a number of locations in the country. Wildlife viewing is much less predictable.

Except for beach activities, trekking is probably the most common nature-oriented activity enjoyed by foreign visitors. Nature photography, bird watching, and hiking are also popular. Less common interests include butterflies, orchids, and botanical studies.

4. Rationale for Encouraging Nature-Oriented Tourism

The primary reason given by conservation leaders for wanting to increase the number of nature-oriented tourists (especially foreign tourists) is to generate economic justification for the continued existence and protection of national parks. Unless local residents realize the benefits of parks, they have no incentive not to poach the wildlife or destroy the vegetation within park boundaries. Tourism is one way of generating income and employment for residents near national parks.

The Khao Yai wilderness trekking program, organized by the WWF/IUCN Elephant Conservation and Protected Areas Management Project, is an example of tourism supporting rural development and conservation. Local residents are given preference for guide and porter positions. Each trek generates

about \$400 in direct revenue for the local village of Ben Sap Tai. Planners are hoping to expand the trekking program at Khao Yai as well as grant more concession licenses to local residents.

Nationwide, the NPD collected approximately \$640,000 in entrance fees, park concessions, accommodation tariffs, and fines at national parks in 1985. This revenue is used directly by the NPD for park management. Park officials agree that total revenue could be increased dramatically if efforts are made to attract more visitors.

Conservation leaders further feel that increasing nature-oriented tourism will encourage Thais to develop a stronger appreciation for the environment. This can be accomplished in two ways. If Thais increase their visits to parks and reserves, they will likely develop greater appreciation for the beauty and value of natural areas. Similarly, if Thais see foreign visitors traveling thousands of miles to visit nature areas in Thailand, a greater sense of pride for the resources is likely to emerge.

A third reason for encouraging nature-oriented tourism is that it tends to be highly dispersed. Therefore, the economic benefits are shared by a large number of rural communities rather than being concentrated in a few metropolitan centers.

Finally, foreign visitors who travel to rural areas tend to stay in the country for longer periods than visitors that remain in the large cities. Although they may spend less money per day than urban-oriented tourists, nature-oriented visitors may have greater impacts on the economy overall.

It must be noted that not everyone agrees on the beneficial impacts of nature-oriented tourism in Thailand. Some spokespersons are especially critical of the impacts of trekkers in the north. They say that competition among trekking operators has forced the price of treks so low that the resulting economic impacts are minimal. Families in the host villages reportedly receive very little compensation for providing overnight shelter and guides are underpaid. The social costs of foreigners intruding on the lifestyles of the hill tribes are also substantial in villages that are visited frequently.

5. Structure of the Supplier Firms (Tour Operators)

Bangkok literally sports hundreds, if not thousands, of travel agencies and tour operators. Many of these firms began by offering cut-rate international air fares in the 1970's when Bangkok was a major hub for international air connection in Asia. Since then, the city has lost much of the air traffic to

Tokyo and Hong Kong. Most of the travel firms that have survived, have done so by offering more domestic tours or by diversifying into other marketing areas.

Most Bangkok tour operators offer a similar array of packaged tours of the city, short 1-3 day excursions to historical or cultural destinations near Bangkok, and longer trips to the beaches or to Chiang Mai. Some of the shorter trips include stops at natural areas, but these are not a major focus of most tours.

A few companies (e.g., Alternative Tour Thailand) seriously research destinations and custom design trips to suit the specific interests of their clients. These types of firms would be the best source of logistical support for the serious nature-oriented traveler in Thailand at this time. Tour operators that were interviewed, however, indicated they would not arrange specialized travel for groups of less than 8 or 10 members.

Several Bangkok-based travel companies maintain ties with trekking operators in Chiang Mai and the few nature resorts located in northern and western Thailand. All bookings for transportation, accommodations, treks, and other services are possible prior to client's departure from Bangkok. Most treks, however, are booked by travelers after they arrive in Chiang Mai.

The TAT lists 15 Chiang Mai trekking operators in one of its information sheets, but the actual number probably exceeds 40. The companies provide logistical support (i.e., boat and bus transportation), food for the trek, guides, and overnight lodging in villages along the trek. Some treks include the chance to ride on elephants for part of the trip. Fees vary widely, but reportedly average about \$10 to \$15 per person per day.

A few private firms based in foreign countries also organize treks and other nature-oriented trips to Thailand. All fees are collected prior to departure and include air fare, food, lodging, guides, etc. The rates charged by these companies tend to be substantially greater than those charged by Thailand-based firms, but the quality of the trips also tends to be superior. Most of the foreign-based firms subcontract local companies for services required by their tours while in Thailand.

Except for foreign-based tour operators, very few firms attempt to directly market their services to clients outside of Thailand. Some firms sell tours to foreign-based wholesalers, but many simply rely on attracting tourists after they arrive in the country.

Most major hotels have contracts with one or more tour or travel companies, allowing them to maintain booking offices in the hotel. Representatives are then available with brochures and information on various tours.

Most tour operators do not enjoy such special arrangements with hotels, however, and must rely on other ways of reaching potential customers. Most operators market their products aggressively to travel agents to ensure they display brochures prominently and mention their tours to interested clients. Many operators also advertise in the informational magazines and newspapers distributed free to tourists at airports, TAT offices, and hotels. Other operators place ads in the two daily English language newspapers.

In addition to private firms, the government and some non-profit organizations are active in supplying nature-oriented services. Both the TAT and the RFD maintain lodging facilities at Khao Yai National Park, and offer night time wild life viewing trips into the park. The RFD also maintains bungalows and lodges at a number of other national parks. Fees range from \$8 to \$64 per night, although the average is about \$20 per room per night.

A few non-profit societies offer specialized nature trips to national parks and reserves. Costs range from \$8 to \$25 (depending on the destination) for a one-day trip, to about \$75 or \$100 for a 3-day excursion.

6. Growth Opportunities in Nature-Oriented Tourism

Despite the high number of tourists already visiting national parks in Thailand, nature-oriented tourism is presently at a fractional level of its full potential. The opportunities to increase nature-oriented tourism activities are substantial for both domestic tourists and foreign visitors. At least one conservation leader feels Thais are on the threshold of a sincere appreciation for the environment and ecology that could fuel an explosion of domestic interest in natural history tourism. And foreign travelers (especially Europeans, Americans, and Japanese) have demonstrated strong and sustained interest in nature-oriented activities wherever they travel. Presently they are offered few opportunities in Thailand to satisfy these interests.

The demand for nature tourism already appears strong. Serious natural history trips sponsored by local conservation organizations fill up quickly despite relatively hefty charges of up to \$100 for 3-day trips. Many foreign tourists travel to the national parks even though the parks are not now adequately prepared to accommodate foreign visitors. By offering better services and improving promotion, the number of foreign

visitors to parks would almost certainly multiply.

Thailand has many advantages that would permit rapid expansion of nature-oriented tourism. Attractive resources are available in nearly every region of the country. Major parks and reserves are located close to Bangkok, the point of entry for most foreign visitors. The country maintains a good transportation system that permits easy access to most parks by car, bus, or train. And with the possible exception of the hill-tribe areas of northern Thailand, no areas appear to be near to surpassing their carrying capacity for tourists.

7. Growth Constraints

A. Location. One constraint to increasing the number of foreign visitors active in nature-oriented tourism in Thailand is simply the country's location. Situated relatively far from the major European and American markets, even major increases in promotion would not likely effect large increases in the number of visitors from these markets. Encouragingly, however, the country already receives a large number of foreign visitors. Currently only about 6% of the foreign tourists visit national parks and an undetermined number participate in other nature tourism activities. With relatively little effort, the number of visitors participating in nature-related activities could easily be doubled or tripled, even if the overall visits by foreign tourists remain constant. Aside from the European and American markets, great potential exists to increase the number of visitors from the relatively close and potentially lucrative Japanese market.

B. Promotion and Marketing. The most visible constraint over which control can be maintained is the lack of promotion and marketing of nature-oriented tourism by the government and the private sector. Conservation leaders and officials of the NPD complain that the government fails to adequately budget for promoting national parks and that TAT officials are not cognizant of the potential for nature-based tourism. Private tour operators also express disappointment at TAT's lack of extensive promotion for nature-related attractions.

C. Tour Guides. Management and supply constraints are numerous, but only one constraint appears critical in the near-term. That is the need for well-trained and experienced bilingual natural history guides. Tour guides usually spell the difference between a satisfying experience and a disappointing one. Nearly everyone interviewed identified the lack of quality guides as the most serious constraint to increasing natural history tourism in the country. Since only a small percentage of the population is fluent in foreign languages, and an even smaller minority has had formal training

in natural history or interpretation, it is extremely difficult to find individuals that combine these skills.

Only a few guides, many of whom are expatriots, are capable of providing knowledgeable nature interpretation in English or other foreign languages. Of these, only a small subset is available to lead tours at any given time. The result is that experienced bilingual guides command fees of up to \$100 per day.

Kasetsart University is currently attempting to build up a cadre of capable guides by training students in nature interpretation. Although such initiatives are encouraging, progress is slow.

The WFT is now negotiating with the University Conservation Club to provide guides to lead their tours. This would seem to be a perfect arrangement, allowing students to earn money and gain experience, while providing WFT with reasonably priced guide services. Furthermore, such arrangements should encourage students that employment opportunities for nature interpreters will be available upon graduation.

In the trekking region of northern Thailand, guides are usually local residents or members of hill tribes. They seldom have formal training and are hired on the basis of their knowledge of the local topography, acquaintances with local tribal leaders, and at least a limited foreign vocabulary. Even minimal qualifications in each of these categories are seldom possessed by a single person, and trekkers reportedly are often disappointed in their guides. A tour operator in western Thailand also complained of the difficulty in finding capable guides and stated that proficiency in English was his only criteria in hiring guides. He then trains the hires in basic nature interpretation.

D. National Park Management. The NPD currently has an annual budget of about \$4.5 million. Most of the budget goes for park protection, as many of the parks are seriously threatened by encroachment, poaching, illegal fishing, dynamite fishing, and illegal logging. Until additional funds are allocated, little progress can be made by the NPD to develop facilities for visitors or improve interpretive services.

The NPD is fortunate that fees it collects are retained for management and protection of the park system. Currently entrance fees are charged at only 20 national parks, however, and maximum entrance charges are only about \$0.20 per person. Thus, the opportunity exists to substantially increase revenues from entrance fees, especially with respect to charges for foreign visitors.

When additional funds become available (from budget increases or increased gate receipts), management priorities include hiring more personnel, developing management plans, improving park infrastructure, and expanding interpretive services.

Additional NPD employees (especially those with interpretive and bilingual skills) are needed if the parks are to host more foreign visitors. One spokesperson commented that he was recently at Khao Yai National Park when two foreign visitors arrived and not a single park employee conversant in English was available to assist the new arrivals.

At the present time, only one national park (Khao Yai) has a completed management plan. Plans for other parks are desperately needed to ensure development follows an orderly pattern with a minimum of environmental damage.

Eventually, more and better park infrastructure (including hiking trails, roads, wildlife viewing blinds and viewing towers, accommodations, campsites, concession stands, etc.) will be needed to support continued increases in park visitors. Interpretive structures and services (e.g., visitor centers, brochures, signs, exhibits, bulletin boards, leaflets, etc.) are also needed. A common complaint now is that there is nothing to see or do at many of the parks, because there are no trails or interpretive facilities. If NPD budgets remain tight, the agency should consider creating incentives for private sector development of park infrastructure.

E. Infrastructure and Facilities. Thailand is fortunate in that it has already developed an excellent internal system of roads and railroads. Almost all of the country's national parks are easily accessible by public and private transportation. The RFD has also built accommodations at many of the parks. More and better lodging facilities are needed at some parks, however. Already, accommodations at the most popular parks (e.g., Khao Yai, Erawan) are fully booked on most weekends. Tour operators and resort owners in Kanchanaburi also point to the need for communications facilities (i.e., phones, telegram services) to serve tourists in that province.

F. Tourist Protection. Tourists need protection from, and information on, a variety of dangers in Thailand. Among the most damaging are irreputable tour operators who provide poor quality services. As noted earlier, such operators have done great damage to the image of trekking in northern Thailand. Apparently, little or no regulation of the industry exists, so unscrupulous operators are able to remain in business and continue to undermine the reputation of the entire industry.

A second area of tourist protection lies with physical safety. Tourists need to be protected from hold-ups, muggings, accidents, and illness. Accurate information on the risks encountered in various parts of the country needs to be provided so tourists can make reasonable decisions on destinations and suitable precautions. Health tips and appropriate preventive medicines need to be suggested for travel to certain parts of the country. Finally, when accidents or deaths do befall tourists, complete and accurate accounts of the incidents should be well-publicized along with suggestions on how to avoid similar situations. Measures taken by authorities to prevent unfortunate recurrences should also be widely publicized.

A final area of tourist protection concerns visitor expectations. Several conservation leaders warned against exaggerated claims of opportunities to see exotic wildlife, hike "unspoiled jungle trails," or see spectacular natural vistas. An earlier produced book on national parks is a case in point. As the author himself admits, the book led to false expectations by some visitors. If, for example, there is only a remote chance of spotting a tiger in a particular park, tourists should not be led to expect an encounter with that species.

8. Statistics and Data Base

The TAT is responsible for compiling general tourism statistics in Thailand. Each year the TAT publishes a detailed annual report on tourism arrivals, expenditures, accommodations, country-of-origin, etc. No specific data are collected with regard to nature-oriented motivations or destinations, however.

The NPD maintains records of visitor numbers at each national park and length-of-stay data are collected at some parks. Even officials of the NPD question the accuracy of some of the statistics though, and cite current efforts to institute a consistent procedure for gathering data on visitors at all the national parks.

A few special studies of visitors to Thai national parks have been conducted within the past few years (e.g., "Visitors' Opinions on Development Prospects at Phu Kradueng National Park," by Preyaporn Promphitak and Surachet Chettamart; "The Relationship between Involvement in Outdoor Recreation Activities and Environmental Attitudes of Residents of Bangkok," by Nittaya Wiroonrat). A cursory profile of visitors to Khao Yai National Park and their recreational patterns was also prepared as part of the "Khao Yai National Park Management Plan, 1985-1989." Such studies have been infrequent, however, and lack consistency in design, methodology, and approach. NPD

officials and university researchers agree on the need for more detailed studies of visitor motivations, satisfaction levels, activity patterns, and preferences for future park development.

USAID is currently sponsoring an assessment of Thailand's national parks, including review of the status of protected wildlands, management options, constraints on protection and management, and proposals for international collaboration. A follow-up workshop is scheduled for November, 1986 (see Appendix B for draft workshop framework).

9. Marketing and Promotion

A. Markets. Malaysians account for about one-fourth of all foreign visitors to Thailand. Japanese account for another 9%, followed by Americans, British, and Singaporeans with about 7% each. Other important markets for Thai tourism are Australia, Taiwan, West Germany, France, India, and Saudi Arabia.

Tour operators indicate a belief that Europeans are more interested in natural history than tourists from other regions, although no marketing research is available to support this claim. National park officials and resort operators also point to the importance of domestic tourism. Thais make up about half of the clients at two nature resorts in Kanchanaburi, for example.

B. Tourism Authority of Thailand (TAT). The TAT, first known as the Tourism Organization of Thailand (TOT) when it was established in the early 1960's, has primary responsibility for coordinating Thailand's promotion programs. Budget data were not available from the TAT, and newspapers variously report the annual TAT promotion budget at \$2.7 million up to \$6.4 million. A major program promoting 1987 as "Visit Thailand Year", aims to generate 2.9 million visitors to the country next year.

The TAT targets its promotion efforts toward Japan, the U.S., the United Kingdom, West Germany, France, Australia, Scandinavia, Switzerland, and Italy. Special efforts are being made to increase the number of U.S. visitors to the pre-Vietnam war levels. Although Malaysia and Singapore are major suppliers of tourists to Thailand, TAT officials feel that their proximity renders more aggressive marketing unnecessary in these countries.

The TAT provides mimeographed information sheets on national parks, bird sanctuaries, and other areas of the country where nature activities can be enjoyed. Sheets can be obtained from TAT offices or by mail. Unfortunately, however, the sheets provide only sketchy information, are unimaginatively designed, and are sometimes outdated.

C. Competitors. Thailand's major competitors for tourists are Hong Kong, Singapore, and the People's Republic of China. The TAT combats the first two by promoting Thailand as a destination for "shopping plus..." The new "most exotic country in Asia" theme of the TAT is designed to compete with China for visitors wanting to experience unique Asian cultures.

Many years ago Thailand, Malaysia, and Singapore cooperated in regional tourism promotion. No similar cooperation exists today. In fact, Thai officials frequently accuse Malaysia and Singapore of sabotaging the TAT's promotional efforts by playing up security problems and reports of crimes against tourists in Thailand.

D. Images. The TAT promotes a variety of images for Thailand, including: "the most exotic country in Asia," "a country of smiles," "the most colorful country in the world," and an inexpensive destination. Culture and history are also major themes in the TAT's advertising.

Unfortunately, negative images of Thailand also abound. The country is widely viewed as a major "sin-and-sex" center, a dangerous place where tourists are likely to be victims of violence, and a politically unstable country in a politically unstable region. Promotional campaigns in Europe and the U.S. therefore take pains to dispel the threats to tourists' safety.

It is readily apparent that marketing and promotion of nature-oriented tourism opportunities could be improved dramatically in Thailand. Except for images of sun-drenched beaches, nature plays only a minor role in the promotional scheme of the TAT. Some natural scenes appear in TAT's brochures, but nature is not a central focus of TAT advertising.

E. Promotion by the Airlines. Although airline promotion of Thailand focuses on Thai culture, posters sometimes include nature scenes and in-flight magazines often include short articles of interest to nature-oriented travelers. A recent issue of Thai International's in-flight magazine, for example, included stories on trekking in northern Thailand and nature aspects of the Kanchanaburi region.

F. Tours for Journalists and Travel Agents. Hotel and resort owners and tour operators give high marks to the airlines and the TAT for helping arrange "fam" tours at low cost for foreign travel agents coming to Thailand. Similar discounts are offered to Thai operators who wish to travel to Europe, Australia, and the U.S. to market services directly to travel agents and wholesalers in these markets. Foreign travel

writers are also offered discounted travel to Thailand and contracted to write stories on various tourism destinations in Thailand.

Similarly, the WFT invites one or two media representatives to join their nature trips free of charge. The WFT has found that journalists exposed to quality natural history experiences become solid supporters of environmental causes and work hard to educate their readers on ecology and environmental issues.

G. Marketing and Promotion by Individual Firms. All firms contacted have promotional brochures prepared in English that they distribute widely to foreign and domestic travel agents, hotels, the TAT, and foreign wholesalers. Other promotional approaches include advertising in tourist magazines and newspapers distributed at no cost to travelers, and direct contact with potential customers at hotels. Some of the firms contacted also offer discounts to travel agents on "fam" tours. Discounts for travel agents usually run about 50%, but one operator said he hosts foreign travel agents entirely free of charge in order to gain more exposure for his business. None of the firms contacted take part in foreign trade fairs or travel shows.

10. Relations Between Private and Public Sectors

It is the stated policy of the government to encourage private sector development in the tourism industry. Yet the TAT and the RFD maintain virtual monopolies over tourist accommodations at national parks. Some spokespersons speculate that the TAT and the RFD stifle private sector development of accommodations in and near the parks in order to retain what they view as profitable operations.

The TAT cooperates with private companies to a limited extent by maintaining information sheets for tourists which list tour operators, travel agents, and hotels in various tourist destinations. These are distributed by the TAT at their offices and by mail. The TAT was not observed distributing brochures of private firms, however.

Familiarization tours are organized through the cooperation of private and public entities and private nature-oriented tour operators and resort managers express appreciation for TAT's occasional promotions that feature nature areas. Most individuals interviewed, however, would like to see the TAT become more aggressive in promoting nature tourism.

To their credit, the TAT occasionally sponsors training workshops for tourism industry employees. These are generally

well received, especially by the hotel and resort sectors that are the main beneficiaries.

Tour operators that make stops at national parks feel the NPD provides adequate facilities at most parks, but indicate a need for better maintenance.

Within the government, better coordination and cooperation are needed to support nature-oriented tourism. For example, the NPD and the TAT have had a long-running struggle for control of parts of Khao Yai National Park. NPD officials and conservation leaders further complain that the TAT and other government agencies have a very limited understanding of the reasons for having national parks, the potential benefits from the parks, and how the parks should be promoted for tourism.

APPENDIX A: CONTACTS IN THAILAND

- Warren Brockelman, Faculty of Graduate Studies, Mahidol University (executive committee member for the Siam Society)
- Rachet Buri, Faculty of Medicine, Mahidol University, Bangkok (executive committee member for the Siam Society)
- Mr. Chavalit, East West Tours, Bangkok
- Surachet Chettamart, Faculty of Forestry, Kasetsart University, Bangkok
- Duangkamol Chansuriyawong, Alternative Tour (Thailand), Ltd., Bangkok (editor of Alternative World)
- Robert Dobias, former Project Coordinator, WWF/IUCN Elephant Conservation and Protected Areas Management in Thailand Project
- Vichai Jienjittlert, Sales Manager, River Kwai Village Hotel, Kanchanaburi
- Will Knowland, Environmental Officer, USAID/Bangkok
- Pisit na Patalung, Secretary General, Wildlife Fund Thailand, Bangkok
- Poottan Tours, Bangkok
- Sirirat Rimprasopkhon, Managing Director, Patras Trading and Travel Service, Bangkok
- Ms. Saovaluk, Marketing Coordinator, Amtra Air Services Co. Ltd., Bangkok
- Kasem Srinian, Project Officer, USAID/Bangkok (formerly with the Tourism Authority of Thailand)
- Seri Vejaboosakorn, Chief, Extension Section, National Park Division, Royal Forest Department, Bangkok
- Kruawan Wongbubpa, Asian Tours Centre, Co., Ltd., Bangkok

APPENDIX B

PROPOSED FRAMEWORK OF INTERNATIONAL CONFERENCE SUBMITTED FOR ADDITIONAL FUNDING

1. TITLE : International Conference on National Parks and Protected Areas Development in Thailand
2. OBJECTIVE :
 - 2.1 To present and discuss the current situation, problems and issues of Thailand's parks and protected areas management.
 - 2.2 To encourage participants to exchange ideas and establish common understanding toward national parks and protected areas management and development.
 - 2.3 To present project proposals (derived from comments and suggestions raised at the conference) for international collaboration in development of Thailand's parks and protected areas.
3. ORGANIZING AGENCY :

The Faculty of Forestry, Kasetsart University
Royal Forest Department (RFD)
Office of The National Environment Board (NEB)
4. SPONSORED AGENCY :

U.S. Agency for International Development (USAID)
5. DURATION : 3 days (15th-17th November 1986)
6. LOCATION : Phuket Merlin Hotel, Phuket Province

7. JUSTIFICATION

Thailand's natural resources have been exploited without strong emphasis on systematic approach and long-term resource management. As a result, the country's rich physical and biological resources have been seriously overexploited and degraded. However, this is not the case for national parks and wildlife sanctuaries in which protection and control are still possible under the existing laws and orders. Therefore, those protected areas, covering 10 per cent of the country's total land area, prove to be very beneficial to the public. They render many goods and services to the people e.g. water supply, soil stability, and essential genetic resources. Moreover, as being protected in their pristine state they apparently serve as an important research ground, domestic recreation and tourism base which contribute significantly to the social and economic development of the country thus far.

Nevertheless, the Kasetsart University's Faculty of Forestry, the Royal Forest Department and the Office of National Environment Board have realized that most parks and other protected areas are under serious threats of many kinds. There is no doubt they cannot remain in their present state and effectively serve the public unless solid foundation in management and interagency cooperation is built up as well as appropriate action in strengthening the organization capabilities is taken. Thus, an international forum is deemed necessary to foster common understanding among participants toward national parks and other protected areas management and development in Thailand. The conference is designed to bring up the study findings and the problems and issues involved in those protected areas which are now being carried on under the project "Assessment of National Parks and Sanctuaries Development in Thailand" by the Faculty of Forestry in collaboration with RFD and NEB and sponsored by USAID/thailand.

8. NUMBER OF PARTICIPANTS :	80
8.1 Participants	60
- from Thailand	45
- from foreign countries	15
8.2 Organizing committee	13
8.3 Conference liaison officers and secretarial assistants	7

9. EXPECTED PARTICIPATING AGENCY :

9.1 From Thailand : Kasetsart University; RFD; NEB; Ministry of Agriculture and Cooperatives; Ministry of Science and Technology; Tourism Authority of Thailand; Office of Social and Economic Development Board; Budget Bureau; Department of Technical and Economic Cooperation; Department of Lands; Mahidol University; Environmental Research Institute of Chulalongkorn University; Population and Community Development Association; Wildlife Fund Thailand; Nature Appreciation Association; environment consulting firms; other NGOs; mass media

9.2 From foreign countries and international organizations :

USAID; UNEP/Thailand; FAO/Thailand; IUCN-WWF; WWFUS; The Nature Conservancy of U.S.; administrative agencies responsible for nature conservation from U.S.A, New Zealand, Japan, Australia and Canada

24

10. EXPECTED OUTPUT :

- 10.1 Final report on "Assessment of National Parks and Sanctuaries Development in Thailand" including recommendations and suggestions for Thailand's parks and sanctuaries policy and management guidelines.
- 10.2 Project proposals for international collaboration in development of Thailand's parks and other protected areas.

15

Pre-conference Study Tour
Organized for International Participants
(6-12 Nov. 1986)

Thur. 6	2.00 p.m.	Leave for Khao Yai National Park by minibus
	5.30 p.m.	Check in at the Park's bungalow
	7.00 p.m.	Dinner with the park superintendent
Fri. 7	6.00 a.m.	Early morning walk through the tropical rain forest
	9.30 a.m.	Briefing and discussion
	10.30 a.m.	Viewing Khao Yai from helicopter
	1.00 p.m.	On-ground-tour to park's attractive spots and problem area(s)
	7.00 p.m.	Dinner
Sat.8	9.00 a.m.	Return by minibus to Bangkok
	3.50 p.m.	Leave for Chiangmai by plane(flight TH 106)
	5.30 p.m.	Check in at Chiangmai Hill Hotel
	7.00 p.m.	Dinner with Director of the National Parks Division
Sun. 9	8.00 a.m.	Breakfast
	9.00 a.m.	Visit hilltribe village and observe shifting agriculture within Doi Suthep National Park

26

- 12.30 p.m. Lunch at the park headquarters
- 1.30 p.m. Discussion
- 3.00 p.m. Sightsee Bhu Bhing Winter Palace
- 4.00 p.m. Return to Chiangmai Hill Hotel
- 7.00 p.m. Dinner

- Mon. 10 8.00 a.m. Breakfast
- 9.00 a.m. Leave for Mae Sa valley - observe private recreation and tourism development
- 1.00 p.m. Proceed to Doi Inthanon National Park
- 7.00 p.m. Dinner with the park superintendent
Overnight accommodation in the park's bungalow

- Tue. 11 9.00 a.m. Briefing and discussion
- 10.00 a.m. Visit the King's Agriculture Project
Observe the hill-evergreen forest at the mountain top
- 2.30 p.m. Leave Doi Inthanon for Chiangmai Airport
- 5.50 p.m. Board the flight TH 107 back to Bangkok

- Wed. 12 8.00 a.m. Leave by helicopter for Huay Kha Khaeng - Tung Yai Wildlife Sanctuaries
- 3.00 p.m. Return to Bangkok

Note Study Tour Fee : US\$ 240

The study tour is arranged through the coordination and cooperation of many agencies and individuals. The fee estimate might not reflect and cover an actual cost.