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MONITORING AND EVALUATION OF ECOTOURISM INITIATIVES AT COASTAL BIRD SITES

Series of training resources for bird-related tourism

What is Monitoring and Evaluation?

Monitoring and evaluation comprises methods and tools to assess the performance of projects, programs, and institutions, but can also be used to assess, for instance, a single tourism campaign or event. Monitoring and evaluation is essentially about measuring success, to increase performance and positive impacts over time.

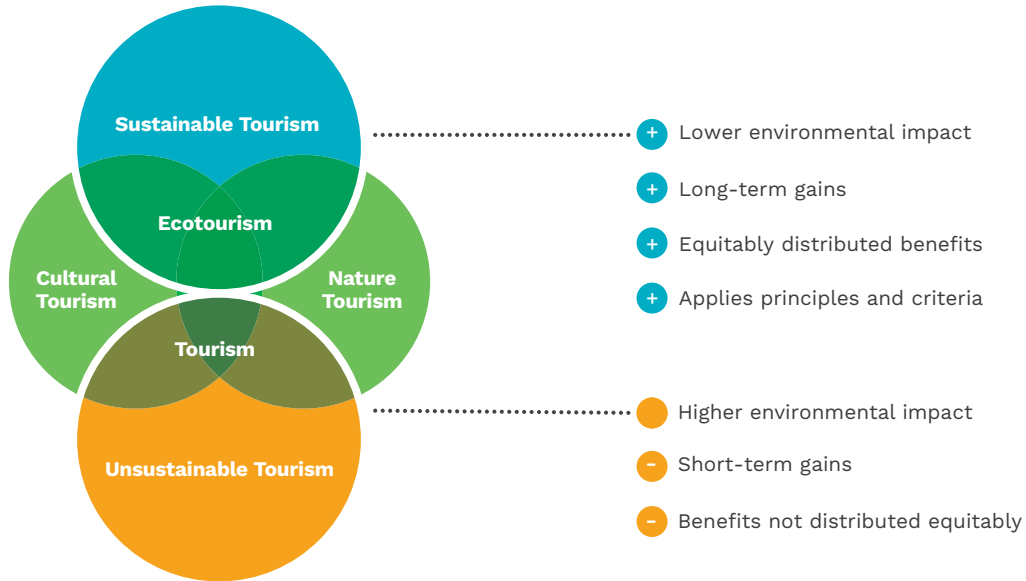
Monitoring implies regularly collecting and analyzing information to track progress towards activities, goals, or targets. Monitoring supports day-to-day decision-making and planning. A simple monitoring exercise could regularly convene the initiative's executive committee to discuss progress, deadlines and so on, with minutes or a report as an output.

Evaluation is usually an exercise with a wider scope, which may consider long-term goals and impacts. The evaluation can be carried out by those responsible for

the initiative, but expert support may be useful to carry out special assessments, for instance related to conservation or socio-economic benefits in the host community. Evaluations can be carried out at the end of an activity period or at specific milestones, and can serve to inform the development of the next edition of a business plan or bird-related event.

Ecotourism initiatives have a lot to gain from monitoring and evaluation approaches, which allow for learning from experience, understanding strengths and weaknesses, and more accountability towards partners, stakeholders, and/or sponsors. Examples of tools adaptable to ecotourism include performance indicators, formal surveys of key stakeholders, facilitated discussions with local business or community representatives, festival exit surveys, and social media polls.

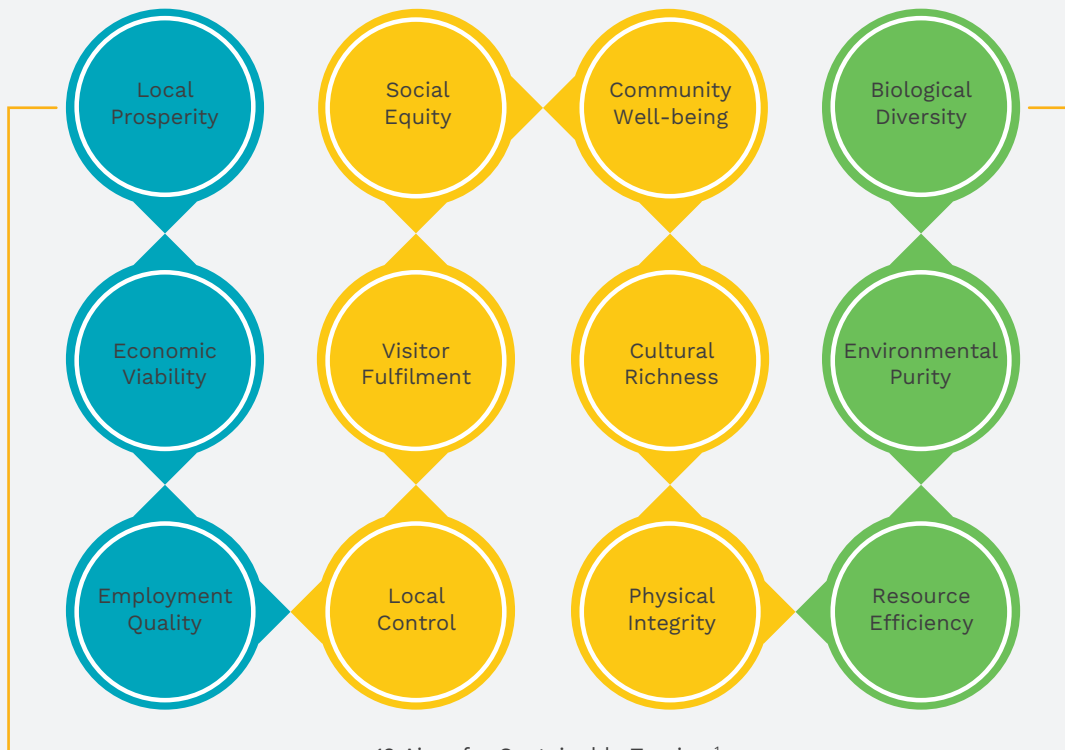
Ecotourism Characteristics



Planning for Monitoring and Evaluation

Monitoring and evaluation will take place after the launch of the initiative, but may be useful to keep in mind at the design and planning stage. What are the objectives of the initiative? How will success be measured, and using which methods and data sources?

Setting SMART (Specific – Measurable – Achievable – Relevant – Time-bound) targets will make assessing performance in the short and long-term much easier. The United Nations “12 Aims of Sustainable Tourism” and the International Ecotourism Society’s “Principles of Ecotourism” are useful examples of objectives and goals that have measurable targets or indicators.



12 Aims for Sustainable Tourism¹

Principles of Ecotourism (The International Ecotourism Society)²

- 1** Minimize physical, social, behavioural, and psychological impacts.
- 2** Build environmental and cultural awareness and respect.
- 3** Provide positive experiences for both visitors and hosts.
- 4** Provide direct financial benefits for conservation.
- 5** Generate financial benefits for both local people and private industry.
- 6** Deliver memorable interpretative experiences for visitors that will help raise sensitivity to the political, environmental, and social conditions of the host area.
- 7** Design, construct, and operate low-impact facilities.
- 8** Recognize the rights and spiritual beliefs of the indigenous people in your community and work in partnership with them.

Tourism and Conservation

Tourism programs that are promoted by coastal bird conservation site managers generally have one of the following general objectives:

- **Reduce the negative impacts of tourists and tourism services on coastal birds and other species that use coastal and beach habitats**
- **Promote ecotourism (or bird tourism) in little-visited natural areas and places to generate economic benefits and for conservation initiatives and the local communities.**



What is the general objective of your initiative?



Key Aspects of a Monitoring and Evaluation Plan Questions to Consider



What is the purpose of the monitoring and evaluation step?

The aspects to be measured should be defined according to the resources and objectives of the activity and program.



What resources will be necessary?

The minimum resources necessary should be defined according to the activity to be monitored.



Who is the audience?

The results can be used by decision-makers, managers, conservationists, tourism service providers, and investors.



What methods will be used?

The methods depend on the indicators to be measured and may be quantitative or qualitative. The most common are satisfaction surveys, interviews, focus groups, participatory evaluation workshops, review of official data and statistics, censuses, and field observations.



Who is responsible?

Local committees and site leaders should define how to conduct the monitoring, with the support of local institutions, universities, volunteers, tour operators, and the community itself.

Recommended Indicators for Monitoring and Evaluation of Sustainable Tourism and Ecotourism

Community Well-being



Local satisfaction with tourism

- Percentage of the population (by gender and age) that say ecotourism benefits them.
- Number of tourism-related complaints registered locally.



Participation of interest groups

- Diversity of community sectors that participate on local committees and boards where ecotourism plans are discussed, including indigenous peoples.
- Existence of advanced, free, and informed mechanisms for consultation with indigenous peoples and local communities.



Effects of visitors on communities

- Proportion of tourists relative to the local population.
- Percentage of residents who have changed from traditional occupations to ecotourism.
- Increase or decrease in cultural activities and social traditions.

Tourist Fulfillment



Tourist satisfaction

- Level of visitor satisfaction (based on questionnaires).
- Perception of the experience's value relative to the cost (based on questionnaires).
- Percentage of returning visitors.



Tourist safety

- Percentage of sites accessible to the elderly and differently abled persons.
- Percentage of visitors aware of the safety risks and measures at the sites.

Limiting the Environmental Impacts of Visitors



Wastewater management

- Percentage of wastewater treated before being released into the sea or on the beach.



Solid waste management

- Proportion of solid waste management facilities to the number of visitors to the coast.
- Number of days devoted to cleaning the beaches and coasts after use by visitors.



Management of tourism activities

- Number of measures and their effectiveness in reducing the impact of tourism managing seasonality; limiting the number of people per activity; defining wildlife watching areas and trails, etc.



Education and interpretation

- Percentage of visitors with access to information, education, and interpretation of cultural and natural values.

Protection of Natural Assets



Protecting critical ecosystems

- Percentage of legally protected key ecosystems.
- Percentage of the area that is managed, including restoration.



Habitats for coastal birds and other priority species

- Rate of change in habitat quantity and quality for shorebirds and other priority species.
- Annual rate of beach gain and loss.



Effect on populations of coastal bird species

- Type and scope of disturbance generated by visitors (change in reproductive success, change in behaviour, habitat change, interrupted foraging, etc.).
- Percentage of visitors familiar with measures to reduce wildlife disturbance.
- Population status (annual census).
- Percentage of critical habitat areas that are protected from tourist access in key seasons.



Contribution of tourism to conservation

- Resources generated by tourism via concessions, sales of services, donations, and others, channeled to conservation.

Economic Benefits of Ecotourism



Local employment

- Number of local persons (by gender) employed in ecotourism activities.
- Number of ecotourism experiences undertaken with community involvement.



Ecotourism revenues

- Number of tourists (by gender) who participated in annual ecotourism.
- Average daily spending per tourist on ecotourism activities.
- Proportion of ecotourism revenues relative to conventional tourism in municipal or state revenue statistics.



Investment and business

- Percentage of local businesses that participate in ecotourism and sustainable tourism activities.
- Public and private resources devoted to tourism sustainability and the promotion of ecotourism.

Viability and Competitiveness of Ecotourism



Ecotourism planning

- Existence of current ecotourism plans prepared with the participation of key stakeholders and local communities.
- Definition of the limits of acceptable change and zoning.



Training and partnerships

- Number of training events for specialized human resources (local guides, etc.)
- Strategic marketing partnerships with national associations and organizations.



Local government support

- Percentage of resources channeled by local governments to the promotion of ecotourism.
- Existence of local policies that support a vision of tourism sustainability.

Monitoring and Evaluation of Bird Tourism

Since birding is an ecotourism niche, many indicators suggested for ecotourism can be adapted to specifically monitor and evaluate the impact of bird-related tourism. Examples of specific indicators include:



- 1 Minimum distance for observation boats established.
- 2 Noise disturbance limits in place.
- 3 Limits to number of visitors to nesting and foraging sites in place.
- 4 Number of birdwatching groups that can visit the site each day and per season.
- 5 Number of trained local birding guides.
- 6 Revenues generated in the locale by bird tourism.
- 7 Number of local and out-of-town participants attending bird festivals.

Case Study: Impact of Wildlife Watching on Ecotourism in Baja California Sur, Mexico⁴

Ecotourism began at the San Ignacio lagoon in Baja California Sur, Mexico, in the mid 1990s, with guided whale-watching visits during the whale mating season.

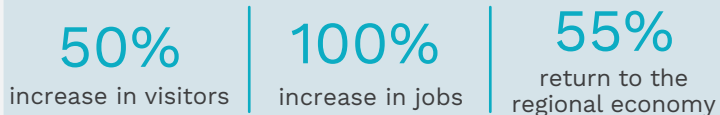
Many fishermen have joined this activity to complement their traditional year-round economic activities.



To evaluate the activity's contribution at the local level, a study was conducted with 34 indicators to determine the socioeconomic impacts of whale-watching ecotourism from 1994 to 2002.



The results show that there were economic benefits:



Social benefits included improved relations among stakeholders, a more equitable distribution of the benefits of ecotourism, and improved standards of living. Local stakeholders were empowered and local tour operators used new techniques and activities, gaining a portion of the ecotourism market. The results also show such barriers as weak marketing strategies, different levels of training among local operators, and insufficient infrastructure to support ecotourism. The results will be used to inform the management plan for the El Vizcaíno Biosphere Reserve. This study shows the value of social and economic monitoring of ecotourism for decision-making and for strengthening tourism programs.

How to make an effective survey to evaluate sustainability⁵

1 Don't reinvent the wheel.

If you're trying to measure attitudes, concepts, and behaviours, you will probably find that someone has done it already. Take a look at the literature before starting.

2 Think about the way in which you'll conduct the poll/survey.

The design of a poll/survey can vary. In a poll/survey that will be conducted face-to-face or on the telephone, think about the way the questions will be received. In an online poll/survey, it is important that the information is clearly presented.

3 Keep it short.

People are more likely to respond to a short questionnaire than to a long one.

4 Consider the order of the questions.

Offer a brief introduction. It is better to begin with more general and simple questions, and leave more specific subjects for the end.

5 Tailor to your audience.

Make sure that the questions apply to the audience, and indicate when a question is only directed to a segment of the population.

6 Consider the type of questions.

Open-ended questions allow people to respond freely, although they can generate too much information and require more analysis. Closed-ended questions, when they are done well, can offer a lot of information as well. The format of answers must be clearly defined.

7 Use scales to evaluate questions about attitudes.

A scale usually ranges between 0 and 5-7. Generally, providing a middle value improves the results. The options on the scale must be clearly defined.

8 Take the time to prepare good questions.

Ideally questions must meet three criteria: 1) they must measure the concept that is being analyzed, 2) they avoid measuring other concepts in the same question, and 3) the concept must mean the same for all survey respondents.

9 Review your wording.

Do not use technical jargon. Avoid vague terms and complex sentences. Review your wording. For multiple choice questions, make sure to include all possible responses. Avoid using emotional or evocative words.

Question Examples

How many times have you visited a natural area in the last year?

(Using a scale) In the last year, what percentage of your spare income did you spend on ecotourism services?

10%

30%

50%

70%

100%

Ecotourism Series

1	Planning an Ecotourism Initiative	2	Marketing Ecotourism for Wildlife and Bird Watching	3	Community and Stakeholder Engagement in Ecotourism	4	Interpretation at Coastal Bird Sites
5	Cultural Values in Ecotourism	6	Birding Festivals as Ecotourism Experiences	7	Monitoring and Evaluation of Ecotourism Initiatives at Coastal Bird Sites	8	Bird-related Ecotourism Case Studies

About this Work



The Commission for Environmental Cooperation's (CEC) project "Conserving Shorebirds through Community Engagement" aimed to build capacity in communities along North American migration routes to conserve habitat and develop ecotourism linked to bird migration cycles. Bird-related ecotourism can be a significant source of additional income for local economies, and can incentivize communities to sustain conservation efforts. To this end, the project supported the development of education and outreach materials and training to improve knowledge, increase local support and strengthen the capacity of communities to deliver bird-related ecotourism activities such as bird watching, habitat conservation and celebratory events. For more information visit: www.cec.org

References

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3. Adapted from UNWTO, 2004. *Indicators of Sustainable Development for Tourism Destinations: A Guidebook*. UNWTO, Madrid.
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5. Harvard Institute for Quantitative Social Science. 2007. "Tip Sheet on Question Wording". Harvard University Program on Survey Research. <https://psr.iq.harvard.edu/files/psr/files/PSRQuestionnaire_TipSheet_0.pdf>. Accessed 19 December 2019.

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