

SUSTAINABLE TOURISM REALITIES: A CASE FOR ADVENTURE SERVICE TOURISM

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Dedication:

This paper is dedicated to my family. Without their support this research (along with many other accomplishments in my life) would not have been possible. Thank you for supporting me in all I do. I hope to give my children the same opportunities you have given me.

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ABSTRACT

After spending several years in Peru it became obvious that certain forms of tourism were simply not sustainable. Poverty is evident in Peru with over half its population living in such conditions. Yet, thousands of tourists are spending millions of dollars. Endowed with rich natural resources including beautiful beaches, exotic jungle and pristine mountains, adventure in Peru is ubiquitous for the enthusiastic seeker.

In exploring what sustainable tourism is and what it can be like in Peru, the question was posed: “What are the issues for developing an adventure service tourism product in Peru that is economically viable, environmentally conscientious, culturally respectful and politically acceptable?” First, an in-depth literature review is presented. Next, two distinct case studies of tourism endeavors are outlined and framed against sustainable tourism, service tourism and adventure principles.

The issues extracted from the cases are categorized according to the operator’s commitment to sustainable tourism, and the relevance to economic, ecological, socio-cultural and political aspects. Five best practices are given on how to successfully do adventure service tourism: 1) inventory resources, 2) know the reality, 3) pilot projects 4) build a network and 5) monitor and evaluate.

These findings are potentially useful to tourism managers, Non-Governmental Organizations (NGOs) operating volunteer programs and potential social entrepreneurs. In addition, potential volunteers who are preparing themselves for a service tourism endeavor may benefit from the investigation.

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INTRODUCTION AND STATEMENT OF RESEARCH QUESTION

Tourism not only provides an escape from the everyday working life of many, but it also represents *the* everyday working life of many more. Some call tourism the world's largest industry. Volunteer opportunities around the globe are now available in some exciting off-the-beaten-path destinations. Adventure travel to exotic places provides alternative leisure activities whose paying customers are willing to take calculated risks. In seeking the connection between tourism, volunteering and adventure travel, I will explore sustainable tourism principles from a subjectivist or actor-based paradigm to establish an adventure service tourism model.

I began my research in tourism as a Peace Corps Volunteer. In 2001, Peace Corps re-started its programs in Peru after a 28-year hiatus. The current projects in the Peace Corps Peru program (Small Business Development, Community Health, Youth Development and Environmental Action and Awareness) complement each other with the aim to unite community members for a common good. In collaboration with different "host" agencies and local governments, volunteers work toward community development. Cultural exchange and integration are important for Peace Corps Volunteers, who try to live at the same economic level as the community members they serve.

The main goal of the Small Business program in Peru is to better the quality of life of local citizens through improved economic opportunities. For two years I served in this program. I was assigned to the rural organic coffee and ecological sugar producing district of Sícchez in the department of Piura, located in the remote tropical mountains of northern Peru. I worked with local farmers, who were part of a coffee and sugar growers union – CEPICAFE (Central Piurana de CAFETeleros), on a variety of income generating projects. One of the most exciting

projects was introducing community members and farmers to the ideas and potential of sustainable tourism. This experience was the impetus for the current research.

In January of 2006, I began working as a third-year volunteer coordinator in the new Environmental Action and Awareness program. The men and women in this program work toward conserving Peru's diverse environment through projects promoting community conservation skills, sustainable ecotourism, and the development of youth conservation leaders. As a coordinator, I contribute to the Peace Corps Peru program as a mentor for volunteers and work with staff on a variety of program development projects. Additionally, I began working with the Peruvian Foundation for the Conservation of Nature (ProNaturaleza) and their nascent volunteer tourism projects in February of 2006.

Since 1984 ProNaturaleza has been dedicated to protecting and conserving the environment through various projects (ProNaturaleza, 2004). Maintaining biodiversity, promoting sustainable use principles and fostering a culture of conservation in national protected areas throughout Peru's society are the pillars of this effort. As Peru is one of the top five most biodiverse countries in the world, ProNaturaleza would like to offer volunteer initiatives in support of nature conservation. Strengthening and developing new volunteer tourism opportunities using the infrastructure and networks of ProNaturaleza is the focus of my voluntary work with the organization.

My previous experience as a volunteer teaching basic tourism principles to CEPICAFE farmer association members piqued my interest in identifying where volunteering and tourism can come together. The desire to implement sustainable tourism in an adventurous destination became the focus of my work as a small business consultant. Adventure travel in Peru is a segment of the tourism market that continues to increase due to the natural resources and diverse

environmental settings. The convergence of sustainable tourism initiatives (such as volunteering while on vacation), and socially conscious adventure travel motivated me to explore the issues in developing adventure service tourism.

My research question is: What are the important issues to be considered while developing an adventure service tourism model that is sustainable in the sense that the volunteers' involvement generates an economic benefit for that community, conserves the ecological environment, respects the host community culture, and is politically acceptable?

My sub questions are: What is the typology of tourism for adventure-seekers in a volunteer initiative in Peru? What are the profiles of adventure-seeking, socially-minded volunteers? How can a social entrepreneurship endeavor respond to this demand? What form can an adventure service tourism product take in the mountains? What can an adventure service tourism product look like in the jungle? What structure is best suited to provide such products to complement 'gap year' programs offered?

Current research on sustainable tourism is quite varying in concept and content. The approach of this research is to examine how sustainable tourism evolved, and identify where volunteer and adventure tourism intersect, framed against the reality of two cases in Peru. Peruvian destinations are plentiful with the adventure experience in mind, perhaps including various volunteer opportunities; however, the relevance to current sustainable tourism literature has been little explored.

Peru is an ideal candidate for further study as demonstrated in case study descriptions. The cases of *adventure conservation* and *coffee tourism* reveal issues to be explored more relative to the conceptual framework and evolution of sustainable tourism, adventure tourism, and volunteer tourism (recently referred to as "VolunTourism"). Social entrepreneurship and the

implied social responsibility are logical building blocks that guide the discourse for the development of adventure service tourism products. In order to best understand the implications for the future of such ideas related to tourism and volunteering, it is prudent to look into the past and how sustainable tourism evolved.

LITERATURE REVIEW

A brief history of sustainable tourism

In order to best capture the evolution of sustainable tourism, a tourism management perspective with a focus on sustainability is used to look at the chronological development of sustainable tourism. Establishing the prominence and economic base that tourism carries helps us understand the importance of analyzing the sustainability aspect. Rooted in sustainable development theory, world events and global conferences have also played a significant role in the development of sustainable tourism. The contributions made to the development of sustainable tourism in the 1990s culminate with numerous definitions that echo the origins of ecotourism. A recapitulation of this evolution follows.

The tourism industry is one in which a significant amount of money is transacted. According to the World Tourism Organization, worldwide earnings on international tourism reached a new record in 2004 at \$623 billion (www.world-tourism.org/facts/menu.html, accessed 04/24/06). If current trends continue, the industry will affect even some of the most rural locations.

The history of sustainable tourism can be dated to even earlier than the 1980's and is marked by a series of global events and conferences. In the 1993 inaugural edition of the *Journal of Sustainable Tourism*, Bramwell and Lane connect sustainable tourism to the 1973

release of *Ecological Principles for Economic Development* (Dasmann et al., 1973 quoted in Ritchie and Crouch, 2003: 33). The International Union for the Conservation of Nature and Natural Resources (IUCN) echoed some of those same guidelines for development planners in the 1980 publication of the *World Conservation Strategy* (IUCN, 1980; Ritchie and Crouch, 2003: 33). Sustainable Development gained popularity in 1987 with the World Commission on Environment and Development's Report, *Our Common Future*, the *Brundtland Report* (WCED, 1987; Hunter, 2002: 3). The Rio Earth Summit was carried out by the UN in 1992 (the UN Conference on Environment & Development – UNCED). This summit, an attempt at global consensus, led to the release of Agenda 21, the Rio Declaration on Environment and Development and the Statement of Principles for the Sustainable Management of Forests (<http://www.un.org/esa/sustdev/documents/agenda21/index.htm>, accessed 3/22/2006). The Convention on Biological Diversity, also known as the Biodiversity Treaty, was also endorsed at the summit (<http://www.ciesin.org/TG/PI/TREATY/bio.html> accessed 7/8/06). As seen in the wide-ranging desire and support for sustainable development endeavors by the global community, the theoretical underpinnings of sustainable tourism were formed. The popularity and attention given to sustainable development within the global community led to the convergence of sustainability and tourism.

Substantial advancements in the conceptual development of sustainable tourism, for a variety of reasons, occurred in 1993. It marks the year the *Journal of Sustainable Tourism* was introduced, highlighted by the invaluable contribution of Bramwell and Lane, giving sustainable tourism its own rite. The platform was created from which sustainable tourism grew. Cater (1993) outlined three objectives (for sustainable tourism) including: “1) meeting the needs of the host population in terms of improved living standards both in the short and long term; 2)

satisfying the demands of a growing number of tourists; and 3) safe-guarding the natural environment in order to achieve both of the preceding aims.” (Ritchie and Crouch, 2003: 34).

These valuable sustainability and diversification perspectives help cement what can be considered tenets of sustainable tourism in the context of a growing tourism industry. Moreover, it is the economic, social, environmental and political concerns from which the research question is built.

Ecotourism in the Mix

Ecotourism and sustainable tourism were conceptually born around the same time. However, ecotourism does not have the same relationship with sustainable development that sustainable tourism enjoys. While ecotourism, defined as “responsible travel to natural areas that conserves the environment and improves the well-being of local people” (www.ecotourism.org accessed 5/16/06), is grounded in primarily environmental and social issues, sustainable tourism includes economic aspects as well. The distribution of economic profit is a distinguishing characteristic of sustainable tourism. Sustainable tourism and ecotourism both continue to evolve in their subjectivity. Ecotourism has been subject to sensationalism and a sense of trend that imply, however vaguely, ecological soundness.

Sustainable tourism may be subject to abuse as well, however, it maintains focus on the goals of sustainable development. The profitability and reinvestment in social and environmental efforts is more characteristic of sustainable tourism than ecotourism. Therefore, this research will focus on sustainable tourism, specifically on the important issues that surface in the two case studies presented, albeit understood that some aspects presented relate to ecotourism.

Alternative Tourism

Alternative tourism provides alternative opportunities to mass tourism. For the purpose of this research, alternative tourism can be defined as: “forms of tourism that set out to be consistent with natural, social and community values and which allow both hosts and guests to enjoy positive and worthwhile interaction and shared experience” (Wearing, 2001: 32). This definition includes the ecological, social, and economic tenets of sustainability and encapsulates various forms of alternative tourism. A few alternative tourism types relative to developing an adventure service tourism product are: rural, agricultural (coffee), Fair Trade, volunteer, and adventure tourism.

Rural, agricultural, and fair trade tourism provide a conceptual landscape for the cases in Peru. Rural tourism typically refers to venturing off the “beaten path”, which oftentimes involves staying with a local family. Agriculture tourism deals with any tourism whose main attraction is the agricultural output of an area. One example of agriculture tourism associated with the production of coffee can be termed *coffee tourism*. Coffee tourism in this research can be thought of as the outside interest expressed in the production chain of organic, fair trade coffee and sugar and the willingness to learn more about it. Fair trade tourism looks to offer *just* prices for services rendered in the delivery of a tourism product.

Volunteer (Service) Tourism

Volunteer tourism is another form of alternative tourism important for the theoretical development of adventure service tourism. Accepting that a person is rarely forced to go on vacation, we can then infer that tourism as an activity is voluntary. An exploration of volunteer tourism consists of the principles it adheres to, its goals, and the characteristics that define it. The motivations of volunteers can broadly be stated as volunteer-minded and vacation-minded. Push and pull factors also look at the motivations of participants.

One of the pioneers of volunteer tourism is Stephen Wearing. Wearing's seminal work Volunteer Tourism: Experiences that Make a Difference (2001) outlines "types of experience that involve specific activities and motivations being considered Volunteer Tourism - so the volunteer is used to create a category rather than describe a motivation" (Wearing, personal communication: 4/35/06). Well researched and referenced, Wearing refers to volunteer tourists as "those tourists who, for various reasons, volunteer in an organized way to undertake holidays that might involve the aiding or alleviating the material poverty of some groups in society, the restoration of certain environments or research into aspects of society or environment" (Wearing, 2001: 1). Consistent with sustainable tourism ideals, the goals of volunteer tourism are to participate in "community development activities, scientific research or ecological restoration" (Wearing, 2004: 217-218). In other words, volunteer tourists provide a service to the destination.

Capturing what can be considered the essence of volunteer tourism, a volunteer tourism product has an interaction element with both volunteer and community - a desired consonance of expectations and motivations among these participants. Inter-cultural exchange between volunteer and community is a key aspect of volunteer tourism.

The volunteer motivation can be categorized into two mindsets: volunteer-minded and vacation-minded (Brown and Morrison, 2003 in Brown and Lehto, 2005: 480). Volunteer-minded tourist can be thought of as those who have a strong volunteer motive and spend the majority of their vacation volunteering. Volunteer activities are the main focus of the time spent in a destination. This is contrasted with vacation-minded volunteers who travel and spend only a portion of the vacation volunteering.

Historically, VolunTourism has been more closely associated with the vacation-minded volunteers (Brown and Lehto, 2005: 480); however, that association may be shifting.

VolunTourism as defined by www.VolunTourism.org is: “A seamlessly integrated combination of voluntary service to a destination and the best, traditional elements of travel—arts, culture, geography, and history—in that destination”. VolunTourism successfully takes out the redundancy of using volunteer and tourism together and adds a key word in its definition—*service*. From here one can state that volunteer tourism can also be considered ‘service tourism’.

Credited to Dann (1977) push and pull factors have also been outlined as motivators for volunteer tourists. Push factors can be considered those internal socio-psychological motivators of the volunteer (e.g. desire for adventure, willingness to explore remote locations in the world) while the pull factors are those external cultural factors of the destination (e.g. organic coffee production, exotic animals) (Swarbrooke, et al. 2003: 67, Brown and Lehto, 2005: 482). Additionally, beyond these factors, Wearing (2001) add the development of identity and self as strong motivators for volunteer tourists. Regardless of the motivation categorization, the overarching goal of volunteer tourism is providing some form of service to the destination.

Adventure Tourism

Adventure tourism occupies a unique place in the tourism paradigm because ‘adventure’ can mean many things to many people. With the release of a book on the topic, Adventure Tourism: The New Frontier (Swarbrooke et al, 2003), adventure tourism is now receiving the attention it deserves. Adventure tourism helps create a foundation for the concepts and issues presented in the case studies because of adventure tourism’s popularity, the defining characteristics and how the industry is poised to grow.

Studies have shown that adventure tourism is gaining popularity. According to the winter 2006 edition of *AdventureTravelNews* two studies show that roughly 69% of survey participants plan on taking an adventure vacation in the future

(http://www.adventuretravel.biz/research_ati_w06.asp accessed 7/20/06). The same study showed a strong willingness to include hiking and bird watching in the soft adventure category. The increase in popularity may also be due to the broadening of adventure tourism's definition to include more focus on cultural exchange.

According to Swarbrooke, the following are characteristics which can be used to measure whether a given activity can be classified as an adventure: 1) uncertain outcomes, 2) some element of danger and risk, 3) challenge, 4) anticipated rewards, 5) novelty, 6) stimulation and excitement, 7) escapism and separation, 8) exploration and discovery, 9) absorption and focus and 10) contrasting emotions (Swarbrooke, et al. 2003: 9). As many of these characteristics are related, it is the authors' belief that if all these elements are present an adventure is assured. Some of the stimuli that can impact these characteristics include: the environmental setting, the core activities undertaken and the transportation needed (Swarbrooke et al, 2003: 27). Other factors include remoteness, skills needed, effort required, responsibility and level of contrivance.

Adventure tourism has the potential to grow significantly relative to the participants, the activities and products, the destinations and the operators (Swarbrooke et al. 2003: 256). As the number of interested parties increases the number of suppliers also increases to satisfy the demand. Paige Schneider, PhD candidate at Michigan State University (MSU) shows that "Research Points to Adventure Travel Industry Growth over the Next Five Years". She adds:

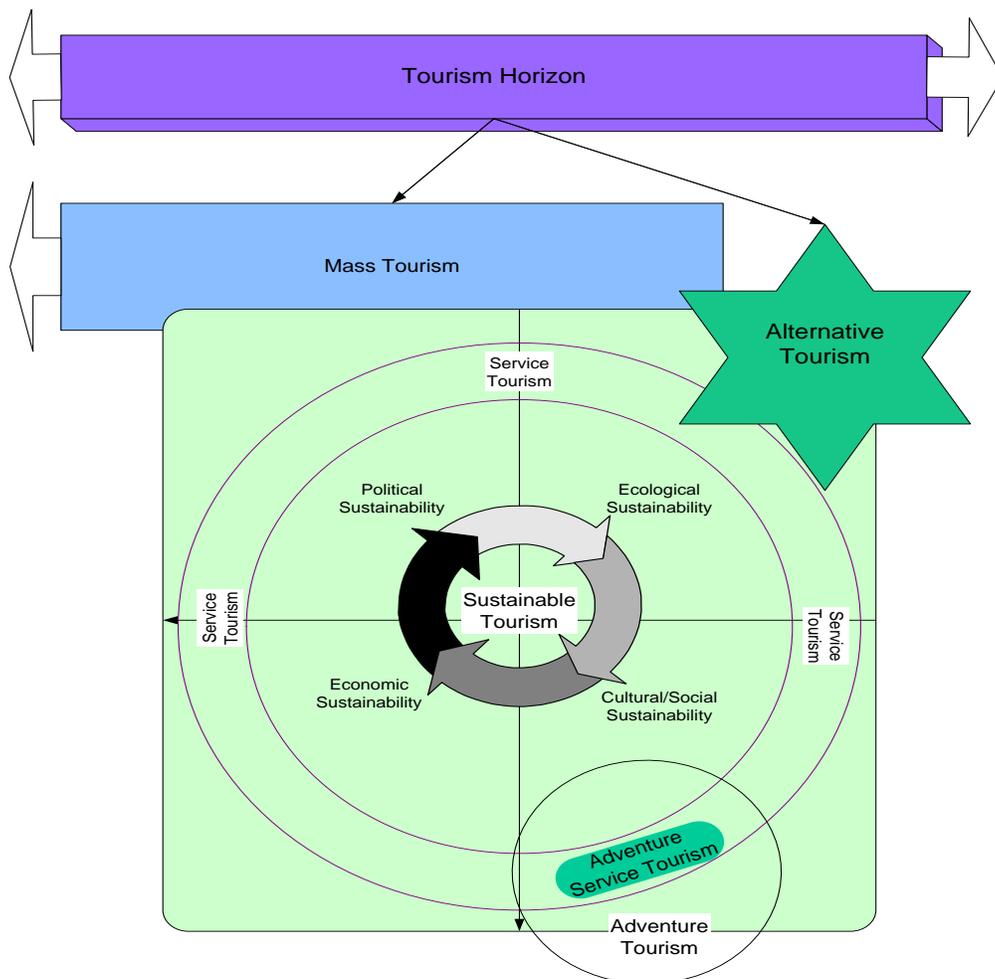
"Today's globally-driven adventure traveler's mindset, which now includes increased interest in culture and ecotourism, casts a wider net of potential travel experiences, from learning about Mayan civilizations or visiting a village in Nepal to volunteer nature or ecology excursions.. the growth looks positive over the next five years." (http://www.adventuretravel.biz/research_ati_w06.aspa accessed 7/20/06).

The 'volunteer nature or ecology excursions' hint toward adventure service tourism considering the volunteer nature and association with adventure through the use of the word 'excursion'.

Adventure Service Tourism

Adventure service tourism is service tourism activities (commonly referred to as volunteer tourism) that qualify as an adventure. In other words, where volunteer tourism (congruent with sustainability aims) overlaps adventure tourism is adventure service tourism (see diagram 1). However, not every volunteer opportunity is necessarily an adventure. As seen with the adventure tourism outline, the defining characteristics, the location, and those involved determine the activity's association with adventure.

Diagram 1 - conceptual schematic Adventure Service Tourism.



(Adapted from Wearing 2001: 30 and Wearing 2004: 211 based on Mieczkowski, 1995)

The conceptual schematic (Diagram 1) shows adventure service tourism in relation to other forms of tourism; namely mass tourism and alternative tourism. The four critical aspects of sustainable tourism are more a part of alternative tourism than mass tourism. These four aspects of sustainability (economic, ecological, social/cultural, and political) constitute a framework that rotates on a sustainable tourism axis. A segment of mass tourism, but a greater portion of alternative tourism may qualify at different times under one or more of the sustainability aspects. What is referred to as service tourism, (e.g., volunteer tourism and VolunTourism) is part of all four of the sustainability framework aspects.

As the four aspects of sustainability rotate around the sustainable tourism axis, parts of these quadrants can be applicable to either mass or alternative tourism. For example, a government-sponsored mass tourism project may be politically acceptable and conform to any state regulations. This is not to say that the surrounding communities' culture or traditions will be taken into account or that the benefits of tourism will trickle down to them. Likewise, a community-inspired rural tourism project may be characterized as an alternative tourism endeavor such that the local culture is respected and local employment opportunities created. Service tourism can be present in the government-sponsored and/or the community-inspired projects if a service tourism opportunity is present. The service tourism ring maintains a channel of sustainability.

Adventure tourism endeavors can overlap with any of the four sustainability aspects at any moment, but has a permanent presence of sustainability through the service tourism ring. In the intersection of adventure tourism and service tourism sustainability remains constant as the economic, political, ecological and social/cultural aspects rotate through. How this theory appears in practice will be explored in the adventure service tourism case studies.

Sustainability Framework

Based on the historical development of sustainable tourism and tourism types presented (including those of Ritchie and Crouch, Swarbrooke, and Wearing) relative to sustainability, I pose a number of leading questions to explore the sustainability potential of a tourism project. The economic sustainability focuses on the impact of the money that exchanges hands. Ecological sustainability refers to the impacts, effects and implications to the natural environment. Social sustainability is the community participation of the project and the impact on their culture. The political sustainability explores the politics of the destination and other governance issues that can impact the project. This sustainability framework will be used to evaluate the case studies and related issues in developing a sustainable tourism product.

Economic Sustainability

- Does the endeavor generate enough funds to cover its costs?
- How can the financial outlay of volunteers benefit many, not few?
- How is job security implied?
- What are the wages, salaries and benefits for the local community members?

Ecological Sustainability

- How does the project work towards protecting the natural environment?
- How is money used to promote conservation and preservation?
- How are the carrying capacity / ecological footprint of activities taken into account?

Social Sustainability

- What steps are taken to ensure community/local participation?
- How is local labor utilized?
- How is culture respected and not trivialized?

- What is done to minimize negative social impacts and foster pride?

Political Sustainability

- Is the project politically acceptable?
- What governance issues are present – civil vs. state local/regional/national?
- Is certification on the horizon?

By answering such questions in two cases in Peru the sustainability of these tourism endeavors can be measured. The thought process involved in analyzing these aspects can also yield important issues for developing a sustainable tourism product. Since sustainable tourism can incorporate such a wide variety of aspects it is prudent to explore a number of commonly used tourism terminologies to best describe the cases in Peru.

What approach can take us there?

What structure best suits organizations who want to offer adventure service activities? A social entrepreneurship approach combined with the tenets of service tourism is a logical framework for the development of a new program because of the potential consonance it represents between theory and practice. According to Dees (1998) in his piece: *The Meaning of 'Social Entrepreneurship'* he states:

- “Social entrepreneurs play the role of change agents in the social sector, by:
- Adopting a mission to create and sustain social value (not just private value),
 - Recognizing and relentlessly pursuing new opportunities to serve that mission,
 - Engaging in a process of continuous innovation, adaptation, and learning,
 - Acting boldly without being limited by resources currently in hand, and
 - Exhibiting a heightened sense of accountability to the constituencies served and for the outcomes created.”
- (Dees, 1998: 4)

These tenets of social entrepreneurship nicely describe what adventure service tourism hopes to accomplish in various community settings. The social mission of an operator is a key element.

Continuous improvement and the transparent pursuit of new opportunities are standard for such an approach. The combination of mission and operation can take various forms.

The website www.VolunTourism.org outlines a VolunTourism Social Enterprise Model to assist not-for-profit organizations in the development of a potential social enterprise. By first determining whether or not the social enterprise relates to the mission or not (and assuming that most volunteer initiatives do), two options are given for what product/service the organization will sell. First, as a VolunTourism vendor, the organization sells services (logistics, materials, insurance, coordination fees, coordination & implementation) to another operator or destination. In the other option, the organization acts as a VolunTourism operator themselves and takes on the additional risk and benefits (<http://www.voluntourism.org/news-soyouknow.html>).

Regardless of whether the vendor is the operator or seller of the services, a format is needed to convey what the NGO is hoping to accomplish and how they plan on doing it.

A feasibility plan for a social entrepreneurship endeavor should include a number of key points. An executive summary outlines the key points and should include: the business narrative, an outline of the service being offered, a description of the market and marketing plan, who is going to lead the enterprise – according to what strategy, and a financial plan.

A brief description of these facets follows. A logical first step is a depiction of the business who offers the service. Next, an outline of the product or service should be given. Market research and analysis describes potential beneficiaries, the market, the current actors and competitors. The operations plan outlines where the facilities are and the process a volunteer goes through from beginning to end. The human resource management section outlines the leadership and the compensation and benefits associated. Strategic planning shows where the program is heading through explicit economic, environmental, social and political statements.

Legal and insurance concerns are also made clear in the operations plan. Major events (such as the first time the enterprise yields a profit) in the program's development are important to delineate. Risks of what could potentially go wrong in the functioning of the program are addressed and diffused. Progressive checkpoints outline different monitoring and evaluation processes to be undertaken and how. The financial plan is a crucial piece in showing the economic sustainability over a 3-year period. Although a feasibility plan is not the only approach to new social enterprises, it is a thorough one.

RESEARCH METHODOLOGY

Methods for Data Collection

The purpose of this research was to explore how adventure service tourism fits into the paradigm of sustainable tourism and extract salient issues to consider for replication. Primarily qualitative measures were taken. A literature review provides a theoretical background and working definitions for the two case studies. Ethnography, rooted in anthropology and sociology, and action research were the research methods chosen. Participant observation was a technique utilized throughout the methods. A number of tools, such as questionnaires and interviews, were also employed with volunteer adventure tourism hosts, operators, and participants before, during and after tourism activities.

The literature selected for review was chosen to give a comprehensive evolution of sustainable tourism. Development and tourism literature in the forms of books, magazines, journal articles, monographs, and videos was reviewed. From this review, it was possible to identify the breadth of existing terms, principles, and a framework for sustainable tourism. The review also revealed the lack of available information connecting sustainable, adventure and

service tourism. In order to explore the convergence of these types of tourism, appropriate research methods and techniques were selected.

The use of case studies was chosen to gather information about issues encountered while exploring adventure service tourism in action. A case study is an examination “of the particularity and complexity of a single case, coming to understand its activity within important circumstances” (Stake, 1995: xi). Two case studies describe the local reality and living conditions of community members in two diverse “bounded systems” (or case studies as referred to by Louis Smith (Stake, 1995: 2)). Drawing data from real experiences over a period of time in determined locations was complemented by the use of ethnographic methods.

Ethnography is a description and interpretation of the way people live, think and act. Considered by some to be the most basic form of social research, it has a long history and “bears a close resemblance to the routine ways in which people make sense of the world in everyday life” (Hammersly and Atkinson, 1995: 3). Participant observation was a data collection and description technique used, emphasizing critical events. Data gathered from observation of community members accomplishing tasks in their everyday life, as well as during critical events, complement the theoretical basis found in the secondary data analysis (literature review). Participant observation allowed entrée into the more intangible, cultural realities of the case studies. The entire cultural system, including the various subgroups of populations, was the unit of measure. As stated earlier, the thrust of the research is grounded in ethnography and participant observation; however, it was enriched through the use of action research.

The focus of the case studies was narrowed through the use of action research, which can be considered the iterative process of spiraling-in on important themes that become identifiable as time and inquiry continue. It is defined as “a participatory, democratic process concerned

with developing practical knowing in the pursuit of worthwhile human purposes” (Bradbury and Reason, 2001: 1). With little previous exposure to the case study communities, a dynamic and interpretive approach was appropriate. Not limited to men the population subgroups, or units of measure, also included youth as they were among the most curious about my presence as an outsider.

In order to collect information, different tools were appropriate with the different actors. These tools varied from questionnaires and informal discussions to personal communication with tourism professionals. In addition, field notes, a personal journal and community integration provided increased understanding of the local reality. A questionnaire was used to gain insight into the profiles and motivations of the private, independent operators (Otra Cosa and FairGround Sessions). A questionnaire was also presented to participants in both cases. Personal communication was invaluable in collecting specific information about niches within the tourism industry. (An outline of important contact is made available in [Appendix A](#)). Together, those tools provided the data to be analyzed.

Data Analysis

The data collected was systematically described, analyzed and interpreted. The case studies were the source of the data. Ethnography and action research techniques were employed to make sense of the data. Participant observation was used throughout. As with any research, the collection and analysis was subject to distortion and error.

The data from the case studies for analysis came in various forms. The intention is to clearly describe the process and findings in order to facilitate future replication. Information was deemed useful when it gave insight into the questions outlined in the sustainability framework and the four associated aspects (economical, ecological, social/cultural and political). Direct

interpretation of the ProNaturaleza case was used to extract meaning from the early stages of adventure conservation, while a form of categorical aggregation was used in the coffee tourism case. The data collected was transformed into useful segments by describing the cases, sorting through relevant information and interpreting the data with regards to the literature review undertaken earlier.

Ethnography and action research also generate significant data through participant observation. My brief involvement with the conservation culture found in the jungle was complemented by the sorting procedure and analysis of the questionnaire results. These results were significant as they represented the perspectives of both men and women in their respective management groups. The dialogue that ensued in conversations with the operators was a source of analysis. The results are evident in the issues revealed and interpreted as such.

Distortion and error in the data collected can arise from a number of sources. First, communicating in a foreign language can create misunderstandings. Although an intermediate level of Spanish is required for all Peace Corps volunteers, local dialects and language idiosyncrasies can be the source of misinterpretation. Next, a willingness to please an outsider may have erroneously represented community members' true feelings toward tourism endeavors. The hospitality and non-confrontational approach taken by community members may have covered sources of fear or concerns with tourism visitors. If I were to conduct the research over again, it would be beneficial to spend more time living and working in the jungle to better understand the idiosyncrasies related to the adventure conservation idea. Finally, as no set formula for sustainable development exists, the sustainability framework must not be taken as an end-all recipe for sustainable tourism.

PRESENTATION OF CASE STUDIES

Volunteer Adventure Conservation

Overview - the ProNaturaleza case

Adventure conservation is in the developing phase. The situational background explains the high caliber product being offered, while the feasibility format offers a logical presentation on how to formalize the operation. Based on the plan, the activities are placed into the sustainability framework and verified as an adventure against the established operational definition. Economic, ecological, social/cultural and political aspects reveal issues to take into account in developing a successful adventure service tourism product.

Situational Background

As mentioned earlier, ProNaturaleza has been active in the conservation of nature in Peru for over twenty years. Relying on limited philanthropic donations, a common dilemma for many Non-Governmental Organizations (NGOs), was taking its toll. In order to diversify its funding sources and complement the resource-rich Pacaya Samiria National Reserve project with an established infrastructure, establishing a volunteer tourism program was viewed as a possible solution.

The Pacaya-Samiria Reserve is Peru's second largest protected area covering over two million hectares and home to over 1000 species of plants, 450 species of birds, 102 species of mammals, 130 species of reptiles and amphibians and 250 different fish species (ProNaturaleza, 2002). ProNaturaleza is and has been active in conservation efforts in the Reserve since 1994 by promoting environmental awareness activities with community members and natural resource management and monitoring through local management groups.

The local management groups direct conservation activities. The management groups were formed to help administer the Reserve's management plan. Each year the members of these local groups join for planning meetings and set goals for the year's management and protection activities. Monthly planning meetings outline specific activities such as identifying new access routes of egg poachers and defining palm tree reforestation activities. Both men and women are involved and the demonstrated level of organization attracts NGO and government support.

Currently, the focus of the conservation efforts is on endangered species of flora and fauna. The 'Paiche' fish (*arapaima gigas*), the world's largest freshwater fish, can reach 10 feet in length and almost 500 pounds, and the re-nesting of Yellow Spotted Side-neck Turtles (*podocnemis unifillis*) receive the most attention. In addition to these fauna species, flora is the focus of sustainable use as well. 'Huasaí' heart palm (*euterpe precatoria*) and 'Aguaje' moriche palm (*auritia flexuosa*) are fit for human consumption. The 'Yarina' palm (*phytelephas macrocarpa*) 'Tagua' seeds are used for artisan work. The communities in the Reserve that conserve these natural and cultural resources provide the basis for the volunteer adventure tourism experience; embedded in a bigger conservation effort.

Feasibility Format

Considering the wealth of natural and human resources in this jungle setting, there is potential for an extraordinary adventure service tourism opportunity. In order to transform possibility into reality a format for formalizing the operation is needed. A feasibility plan (See [Appendix B](#)) outlines the components of developing volunteer opportunities in the Reserve. The VolunTourism model is used to put social entrepreneurship theory into practice.

As seen in the VolunTourism Model for Social Entrepreneurship, ProNaturaleza acts as both a seller of services to the conservation arena, as well as the operator. As a seller of services,

ProNaturaleza sells the opportunities to an operator in the United Kingdom, who, in exchange, promotes the opportunity and attracts volunteers via the Web. Additionally, the opportunities are listed for free on other clearinghouses of volunteer opportunities (e.g. idealist.org). As an operator, ProNaturaleza markets adventure conservation on the institution's website to complement direct in-country marketing at institutions such as the South American Explorers club (www.saexplorers.org). While numerous inquiries have been made about the programs, few volunteers have come to live the experience.

In the case of ProNaturaleza, adventure conservation is offered as a volunteer tourist experience. This means volunteers pay (or donate) a reasonable amount of money to cover costs of food and transportation, and to assist with the variety of projects within the Pacaya Samiria Reserve. The potential areas of involvement include six themes related to flora and fauna conservation projects: Turtle conservation, sustainable fishing, palm tree management, women's work group, sustainable tourism advising and youth environmental education. To avoid a management or top-down approach, a questionnaire was presented to the various management groups in the activity theme areas, where their opinions and suggestions were documented. (See [Appendix C](#) – Management Group Survey).

A concrete step to formalize the operation was the implementation of a short-term pilot project. This pilot project consisted of a current Peace Corps Volunteer Coordinator (PCVC) visiting the project area with his brother as volunteers and consultants. As volunteers they carried out daily activities with management group members such as construction of boats and buildings in addition to sustainable fishing. As consultants, the PCVC reported observations on the logistics and made suggestions for improvement. Questionnaires were given to the

participants before and after the experience to compare their expectations to the reality encountered. Through such tools, the program can be continuously improved.

The Adventure Aspect

This volunteer program, offered by ProNaturaleza, fits into the adventure rubric as an adventure conservation experience. Merely entering the amazon river basin fits a variety of Swarbrooke's characteristics of an adventure such as: uncertain outcomes (what flora/fauna are going to be seen?), some element of danger or risk (what animals are a threat?), anticipated rewards (seeing wildlife in the undisturbed jungle) and escapism/separation (the inherent seclusion and remoteness).

The thrill and exhilaration of visiting the jungle carries with it a level of stimulation and excitement, exploration and discovery, and novelty. As a volunteer adapting to the way of life in the jungle, the food, the working hours of the counterpart management group, and the transportation systems can be a challenge requiring levels of absorption and focus. Having visited the jungle myself as part of the research, the experience was an adventure I will never forget – as the characteristics of an adventure were present.

Sustainability Framework

The sustainability framework outlined [earlier](#) also presents a valuable contribution to understanding the adventure conservation experience. By answering questions relative to critical aspects of sustainability, the potential for continuing activities into the future in a responsible manner is captured. The economic, environmental, social and political sustainability perspectives are outlined below.

Economic Sustainability

Does the endeavor generate enough funds to cover its costs? The infrastructure is already in place (e.g., a regional office and staff in Iquitos) to facilitate the arrival of volunteers. The additional work required of staff in Lima and Iquitos is minimal. According to the feasibility plan analysis roughly 22 volunteers are needed over the course of a year for the endeavor to cover the cost of the volunteer coordinator's full-time salary (the break-even point). Maintaining a strong Web presence, accessible via multiple channels will ensure exposure among potential volunteers.

How can the financial outlay of volunteers benefit many, not few? The program works with management group as opposed to one individual. Part of the volunteer fee goes toward purchasing gasoline that extends conservation activities over a larger area. This means that more turtle eggs can be collected, protected and more hatchlings released into the wild.

What kind of job security is implied? Conservation efforts continue regardless of volunteers' presence and the staff has job security independent of the volunteer program. As conservation is a perpetual activity, the management group members also enjoy the "security" of conservation.

What are the wages, salaries and benefits for the local community members? Local pricing systems are used to ensure fair prices for goods sold by community members. A chicken would be sold at an equal or minimally higher price to visitors to the community. Providing services such as cooking, clothes washing, and transportation also benefit communities.

Ecological Sustainability

How does the project work towards protecting the natural environment? Volunteers work on conservation activities of river turtles, palm trees, fish, women in development, sustainable tourism, and youth environmental education. Orientation is provided in Lima and Iquitos to teach

volunteers about the environment and activities in order to minimize negative impacts on the communities.

How is money used to promote conservation, preservation? Extra supplies are purchased by the volunteer in order to further the goals of the project. A group of volunteers could purchase a solar panel for a communal meeting hut - facilitating the possibility of meeting at night and increasing the efficiency of the management group.

How are the carrying capacity/ ecological footprint of activities taken into account? Carrying capacity refers to a sustainable amount of tourist visits to an area. Limits are placed on the number of volunteers sent to the communities. The reason for this is twofold: 1) to avoid foreigners constantly conversing with each other--detracting from community interactions, and 2) to limit the trash and negative impact generated by visitors. Volunteers are encouraged to follow the lead of conscious community members in trash disposal.

Social Sustainability

What steps are taken to ensure community/local participation? ProNaturaleza was able to gauge the management groups' level of interest and commitment to the program through a survey. This same survey asked what potential activities a volunteer could do with the work group. Emphasis was placed on the intercultural exchange aspect as opposed to the financial benefits that could accompany visits by foreigners in order to avoid unrealistic expectations of acquiring wealth from service tourism.

How is local labor utilized? All of the in-country services contracted by the volunteer program go to local labor (e.g., the people hired to drive the boat, cook the food, and wash clothes). In addition, the advisory staff at the ProNaturaleza regional office in Iquitos is Peruvian including the promoters and zonal coordinators.

How is culture respected and not trivialized? The promotion material, the selection process, and the orientation training emphasize the conservation and cultural exchange aspects of the opportunity. On the community level the volunteers are described as equals interested in the jungle way of life so the stage is set for equitable exchanges. The activities of the management group and their culture of conservation attract new volunteers.

What is done to minimize negative social impacts and foster pride? The arrival of outsiders with a distinct appreciation for the wildlife, and natural setting instills a sense of pride among the locals. The orientation training instills a mindset of respect, and reminds volunteers they are guests to the management groups and communities.

Political Sustainability

Is the project politically acceptable? As the presence of a volunteer will benefit the communities and the volunteers alike, politically the endeavor is acceptable. Tourism in Peru is on the rise and the current government is promoting conservation initiatives and tourism alike.

What governance issues are present – civil vs. local/regional/national? As the project takes place in a National Reserve, entrance fees must be paid. The feasibility plan specifically outlines economic, environmental, social and political impact statements; therefore civil governance issues are proactively addressed. The program aims to comply with all national, regional and local decrees set forth in the Reserve's master plan for development.

Is certification on the horizon? In the case of adventure conservation a standard does not appear forthcoming considering the nascent state of sustainable tourism certification.

Coffee Tourism

Overview

Coffee tourism in northern Peru is undergoing an exciting evolution with the involvement of two operators (Otra Cosa and FairGround Sessions). The situational background of their involvement is rooted in my two-year experience in Sícchez helping develop tourism and the different steps taken with community members. The first and recent experiences are highlighted by the adventure involved in service tourism presented in the sustainability framework. Similar to the adventure conservation case, the issues revealed are organized according to economic, ecological, social/cultural and political factors.

Situational Background

In order to put a context to the participation of Otra Cosa (OC) and FairGround Sessions (FGS), I will briefly describe my involvement with tourism in Sícchez. For the first six months of 2004 a diagnostic was completed to assess the needs, priorities and interests among community members concerning how my involvement with them could complement the goals of the Peace Corps Small Business Development program. This diagnostic tool included informal and formal discussions in community meetings, listening and observation to understand community member's perspectives and concerns.

Project Design and Management training offered by the Peace Corps was the basis for the C2C (coffee to the coast, coast to the coffee) framework (See [Appendix D](#) – C2C). A local government official, acting as a community counterpart, helped develop this outline for initiating tourism in Sícchez. Participation was achieved by formally inviting (in writing) authorities, community organizations and youth leaders to a general interest meeting. The outcomes of this meeting included a completed survey which outlined an inventory of tourism resources.

Additionally, the vision for an organic coffee and ecological sugar festival as a concrete event to draw tourist to the coffee-producing region was outlined.

Another desirable outcome was the formation of a committee by the name of “the committee for the promotion of tourism” which acted as the coordinating force behind the first organic coffee and ecological sugar festival. It also continues to serve as a contact point for tourism organizations interested in operating in Sícchez. At committee meetings, tourism training took place. (See PowerPoint presentations [appendix E](#)). Planning for the festival was also a focus of the open-invitation meetings. Announcements made over the town loudspeaker, the same method for advising community members of incoming phone calls (on community phones), informed interested parties of the planning meetings.

Promotion for the festival was undertaken through the OC web page, the Piura regional government web page, word of mouth, and posters collocated in the regional capital (Piura), known tourist locations in the vicinity and in neighboring communities. APPAGROP (agriculture association) San Marcos, in coordination with the local government, constructed the exposition hut. CEPICAFE helped with the multimedia presentation in providing movies, a nationally renowned coffee taster and the institution’s director made an appearance (a report on the outcome of the event is outlined in [Appendix F](#)).

First Volunteer Experiences

The first volunteer experience took place at end of the coffee festival as a short-term pilot project (three nights in length). The volunteer’s activities included subsistence farming activities and assisting with the sugar processing plant activities. This experience was a success, as all involved (the volunteer, the APPAGROP association, and the host family) were satisfied. The basic level of Spanish spoken by the volunteer proved useful as it showed the necessity for future

volunteers to possess an intermediate level. No money was exchanged as the physical labor provided was in exchange for food and lodging, similar to the approach taken by World-Wide Opportunities on Organic Farms (WWOOF) (www.woof.org).

Otra Cosa's motivations for becoming involved with the volunteer aspect of tourism are threefold: personal, economic and past experience. Peter DenHond, one of the owners and founders of Otra Cosa, identified a 'hole in the market' that could be filled by complementing his vegetarian restaurant with a volunteer agency. His previous experience managing volunteers in Holland and work as a tour guide left him feeling that "normal tourist trips are superficial and not rewarding enough to do" (DenHond, personal communication, 5/28/06). In response, he created unique opportunities for travelers to volunteer and get to know a destination differently.

Socially-minded volunteers seeking an adventure with Otra Cosa have an important profile. "Typically they are highly educated, between 18 and 28, more female than male; they are traveling on a tight budget, staying 4 to 8 weeks on average, and want to get to know a country in a more in-depth way". (DenHond, personal communication, 5/28/06). Ideally they are looking for an adventure that can include "living and working in primitive conditions, willing to immerse themselves into the local situation and ways of life and fulfill a specific volunteer vacancy as written on the webpage" (DenHond, personal communication, 5/28/06). They arrive at Otra Cosa through webpage databases connecting potential volunteers with service opportunities, word-of-mouth and Otra Cosa's own webpage.

Potential volunteer sites are developed by Otra Cosa owners before placement, support is offered during volunteer service, and guided processing is done at the conclusion of the experience. In the case of Sicchezpampa, a community within Sícchez, the site identification visit included meeting with the host agency APPAGROP Sicchezpampa and participating in

typical volunteer activities – preparing land to be plant coffee and other agricultural products. It was determined that the volunteers can provide human resources for the association by helping carry-out daily activities and/or filling a gap designated by community members. In essence, the experience in Sícchez is designed for the ‘volunteer-minded’ potential volunteer.

In order to monitor the success of where Otra Cosa’s theory meets reality, a number of steps are taken. First, extensive information is provided and exchanged via the web before volunteers arrive. This includes volunteers writing what they imagine a day as volunteer to be like in addition to other application information such as a motivation statement and a resumé. A pre-departure briefing is held to explain the project, past volunteer experiences, and to identify what the volunteers hope to get out of the experience to better prepare them for the service they will be offering. After the experience is over, a written evaluation takes place. This allows the information on the webpage to be updated and outlines issues for OC directors to discuss with the farmers about the past and futures experiences. An electronic newsletter is sent out periodically to keep past and present volunteers up-to-date on developments where they served.

The second volunteer to serve in Sícchez, facilitated by OC, came equipped with an intermediate level of Spanish. Her work answered the stated community desire to work with youth and teach English classes. At the end of her stay a small donation was given to the family she stayed with. A strong bond was formed between the community and the volunteer over the three weeks she spent living in the Sicchezpampa community, without electricity and running water. Three other volunteers have served in Sícchez since that time and provided various services to the community such as English classes and work in the fields.

Recent Experiences

Similar to Otra Cosa, FairGround Sessions (FGS), ‘the company for global fun and fair productions’ has a strong social element to their business as evidenced in their FairGround Foundation (set up to contribute to social projects). They offer business events and sustainable travel opportunities to support projects in Brazil, Indonesia, South Africa and recently in Peru. The trips are organized in order to offer ‘a better life’ for project participants and are complemented by ‘fair fun’ fundraising business events. A portion of the proceeds raised at such events goes directly to the projects with which they work.

FGS’ motivations for working with the service aspect of tourism grew out of an innovative idea on how to support people in the developing world. This idea consists of a resource-based approach to development. Instead of the outright donation of money, the founders “really try to understand and respect the local situation and strengths of the locals” (Dijkman, personal communication, 5/30/06). To do this they aim to create a situation that brings people, their knowledge and experiences together through sharing and service visits.

The volunteers that FGS attracts also have distinct characteristics. According to one of the founders, Dionne Dijkman, the ideal client is “flexible and willing to open their heart and soul to a new unknown situation”. They can pay the higher price for airline tickets, yet are able to live with less luxury, and show respect for the local situation. Ages are typically over 25 and the volunteers have a personal interest in global politics and situations abroad. They are attracted to FairGround Sessions on a personal level. The feeling created is maintained by sending digital newsletters, inviting clients to parties, and the owners “being there ourselves for questions, brainstorming and beers” (Dijkman, personal communication, 5/30/06). Another aspect of their monitoring and evaluation process is how the owners try to visit the project sites once a year to see what’s been accomplished, and how the trips can be improved in the future.

In the case of Peru the first experience can be categorized as one that attracted the ‘vacation-minded’ traveler. August 12th through August 16th, 2006, was the first time FGS brought volunteers to Sícchez. The participants were interested in a wide variety of off the “beaten-path” locations and how those destinations relate to the issue of globalization. As a result of this interest, the group is making a documentary film about their travels and experiences, subsidized by the Dutch government, to share with friends and family in the Netherlands and create awareness about the issues encountered.

The activities and interactions during the experience provided many opportunities for cultural exchange. First, the ‘committee for the promotion of tourism’ put on a welcome party for the visiting group with local dishes, cocktails and dancing. Next, an after-school visit with the youth club focused on the youth’s perceptions and thoughts on tourism. Based on the limited experience with tourism the thirty youth participants talked about the landscape and climate being a major reason for tourism in Sícchez. According to the group of youth, the ‘good’ that tourism brings includes more money, development, and exchange of cultures and ideas. The ‘bad’ that tourism brings was denoted by words such as exploitation, contamination and marginalization. Finally, a guide service was organized by the tourism committee which showed the travelers neighboring towns, archeological ruins and a cloud forest.

A brief survey completed by a few Dutch participants indicated they left Sícchez with many fond memories to share with friends and family. The landscape and children had an impact on the visitors. Two respondents mentioned playing with children in reference to their time in Sícchez as an adventure. The average overall rating of the experience on a scale from 1 (terrible) to 5 (excellent) was 4. All of the respondents felt they were providing a service to Sícchez through future presentations of the documentary film and the ensuing conversations.

The Adventure Aspect

A service experience such as the ones experienced by the previous volunteers can be considered an adventure for a number of reasons. In order to arrive in Sícchez by public transportation, a six to eight hour mini-bus ride must be taken from the department capital, Piura. Often replete with passengers, chickens, fish and other supplies of limited availability in the mountains, various forms of cargo accompany those who have Sícchez as a destination. The uncertain outcomes, the novelty, and the stimulation and excitement continue as about three hours into the trip the paved road ends and a dirt road continues up into the tropical mountains of Ayabaca. Beautiful natural scenery along the switch-backs is highlighted by sections of steep valleys and terraced farming which lends itself nicely to escapism and separation from the city and modern comforts.

Arrival in Sícchez can be a challenge during the rainy season from December to April as the road becomes muddy and slippery, heightening the risk. Some level of absorption and focus is involved in adapting to the unique way of life in the tropical mountains of Piura. Inherently, some elements of danger and risk exist due to the presence of certain wildlife species such as spiders and snakes. Although equipped with a health center, a serious fall while traversing and hiking the rugged terrain adds to the list risks and dangers. The anticipated rewards of seeing and experiencing the production chain of organic coffee and ecological sugar and taking part in the everyday life in the community, far outweigh the slight discomfort and lack of services intrinsic to the experience.

Sustainability Framework

These types of adventure service tourism experiences will be analyzed against the sustainable tourism framework outlined earlier addressing the ecological, social/cultural,

economic, and political aspects. From this framework issues for developing an adventure service tourism project in the future will be addressed.

Economic Sustainability

Does the endeavor generate enough funds to cover its costs? Otra Cosa charges a symbolic placement fee to help cover the costs incurred as an operating institution. Placing volunteers is not the main source of income for OC as they also operate a vegetarian restaurant. FGS offers a more comprehensive package with higher prices. In the case of the first trip to Peru, the Dutch government helped finance the trip with a subsidy.

How can the financial outlay of volunteers benefit many, not few? By working with an association of farmers as opposed to an individual, benefits are spread among community members according to the rotation set-up internally. Entrepreneurs in town also benefit from the sale of their products and services.

How is job security implied? Farm activities are going to continue regardless of the presence of a volunteer. Peak times of the seasonal calendar are taken into account and marketing of the volunteer opportunities reflects times of greater need. The volunteers do not replace local labor.

What are the wages, salaries and benefits for the local community members? The benefits are to families that host volunteers and to APPAGROP associations as they are able to accomplish more in the fields and their children can potentially benefit from English classes taught by the volunteers. The design of FGS is to directly benefit the town members who own restaurants, hotels and shops through tourism. Additionally, the local guides are monetarily compensated for their services. Capacity building for the guides is accomplished through feedback on how to improve their guide services. The women's association can sell weavings.

Ecological Sustainability

How does the project work towards protecting the natural environment? The focus of the visits is on the organic and sustainable harvesting techniques employed by the farmers.

Moreover, local inputs were used in the construction of an exhibition hut made for the organic coffee and ecological sugar festival. Organic agriculture, particularly the strict certification standards of coffee and sugar required for export ensure a conservation ethic. (See Appendix G).

How is money used to promote conservation, preservation? Threats can first be seen as changes due to tourism occur - currently little tourism means minimal threats to be addressed with money generated from the programs. The little money involved covers costs and pays for services, however, the sale of organic coffee and ecological sugar to visitors directly benefits the farmer associations.

How are the carrying capacity / ecological footprint of activities taken into account? Special attention is given to the frequency and duration of the visits so as not to create a burden on the associations or community in general. OC has set the limit to two volunteers at one time so as to facilitate communication across cultures. FairGround Sessions specifically takes small groups on local transport in order to avoid using private modes and burning additional fossil fuel.

Social Sustainability

What steps are taken to ensure the community/local participation? Men, women and youth are involved with coffee tourism. Farmers not only request and accept volunteers; they orient them in what they can do to help in the fields. The youth welcome tourists and provide guide services.

How is local labor utilized? Guides and food services are provided by local community members (including the youth). Volunteers participate in activities organized by the coffee associations, so as to not take jobs away from community members.

How is culture respected and not trivialized? The organic coffee and ecological sugar festival is scheduled in conjunction with the town anniversary – the biggest event of the year in the town. The festival aims to highlight the culture of organic farming. Intercultural exchange is ensured as the volunteers provide a service directly to farmers and community in general.

What is done to minimize negative social effects and foster pride? The arrival of outsiders with appreciation for the landscape and natural scenery instills a sense of pride among the locals. The information and orientation provided by OC and FGS help mitigate inappropriate behavior by the volunteers because of their previous computer-mediated exposure to the local reality.

Political Sustainability

Is the project politically acceptable? The local municipal government has been a proponent of tourism as outlined in their strategic plan. Both OC and FGS met with the town mayor to discuss the potential programs and create mutual understanding. With municipal elections coming every three years a constant relationship building is required.

What governance issues are present – civil vs. local/regional/national? As coffee tourism is new to the tourism paradigm, the operators are answering to themselves and the communities they serve by setting their own performance standards.

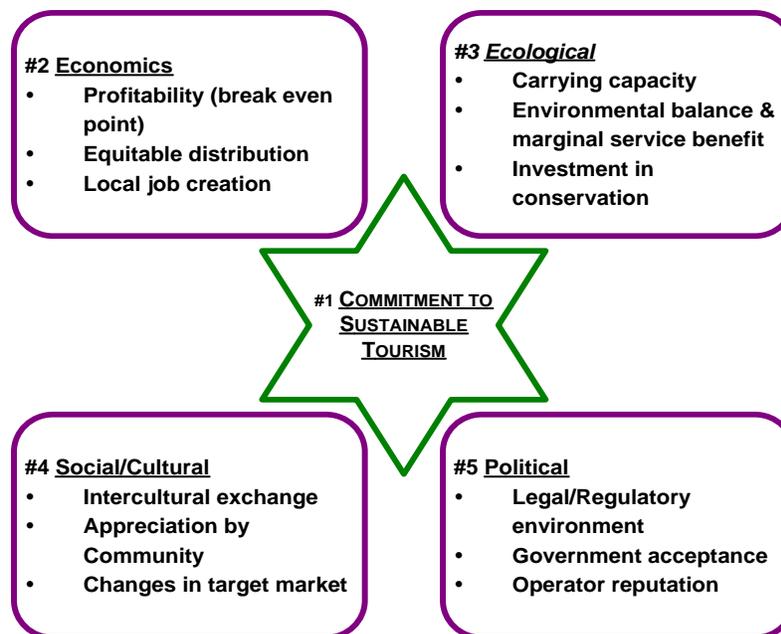
Is certification on the radar? In the case of any service tourism a standard does not appear forthcoming considering the nascent state of sustainable tourism certification.

CONCLUSIONS

The literature review outlines a plethora of information concerning the development of sustainable tourism. This breadth of perspectives was narrowed down from tourism in general to a typology of alternative tourism highlighted by a fresh outlook in adventure service tourism. The purpose of this research is to reveal the issues that arise in developing a sustainable tourism product in Peru. The two cases presented offer unique perspectives on adventure service tourism in jungle and tropical mountain communities. As seen in the case studies of adventure conservation and coffee tourism, major issues are present. Examined here, utilizing the sustainability framework, **five key issues are discussed** and then best practices on how to successfully do adventure service tourism are presented.

Summary of Issues

After first determining the operator's level of commitment to sustainable tourism principles - the economic, ecological, social/cultural and political aspects are then used as a guideline to organize the issues applicable on broad scale. Diagram 2 summarizes the issues.



Issue #1: Is Sustainable Tourism the Optimal Approach? (Commitment)

For all the major issues to be relevant one must first determine the level of commitment to sustainable tourism theory and practice. However, even determining what sustainable tourism signifies can be a daunting task as it means different things to different people. Approaching an endeavor sustainably can be more work than a strictly profit-maximizing model. The commitment to sustainability can be more costly too; however, the overall bottom line can be positively impacted by taking into account not only the economic aspects, but the ecological balance and the social/cultural value of a project including the political implications. As learned from the adventure conservation case, the value of doing a feasibility analysis, according to a social entrepreneurship approach, is highlighted. This type of investigation should be based on a strong diagnostic component including a SWOT (strength, weakness, opportunity, threat) analysis. When commitment and understanding of sustainable tourism is established, the other issues can be better addressed.

Issue #2: Will the project be Profitable and How Will Benefits be Distributed? (Economics)

In order for an adventure service tourism project to be economically sustainable, it must be profitable and those profits enjoyed throughout the host community. Considering the increased competition for capturing volunteer “customers”, and the typically limited NGO financial resources, techniques must be employed to ensure the project achieves the most impact.

As with any for-profit enterprise, in order for an adventure service tourism organization to be sustained it must make money, that is, its revenues must exceed (or at least meet) its expenses. Calculating the break-even point can help an institution determine its prices and number of volunteers (break even point) needed for the project to make money:

$$\text{Break Even Point} = \frac{\text{Project Administrative Overhead (fixed costs)}}{\text{What volunteer pays (unit price) - Cost to host volunteer (variable costs)}}$$

Once the price per volunteer that will yield profitability is determined, an associated issue is how those revenues are distributed in the community. Ideally, volunteer fees and donations benefit community members who participate in hosting volunteers. Many organizations are concerned with paying a just wage, consistent with Fair Trade principles, but *how* and *to whom* those wages are paid is of equal importance. As revenues are disbursed more broadly in a community (as more jobs are created), benefits can be shared by more people which, in turn, creates more buy-in for community partners and authorities. Social entrepreneurs in the adventure service tourism industry must consider not only profits, but also how those profits are distributed.

Issue #3: Does it Improve or Damage the Environment (Ecological)

As with any sustainable tourism endeavor, conserving the natural environment is of utmost importance. The two cases do a good job outlining some important factors to be considered. First, the determination of the tourism carrying capacity should be done cognizant of what point an additional volunteer participant starts to have negative effects. This can be considered the marginal service detriment; however a marginal service benefit should be sought where each additional volunteer yields more conservation benefits.

An important ecological aspect to address is: Does the adventure attraction disrupt the natural environmental balance? One example of such disruption is mountain bikers running over and destroying ground stabilization plants. The adventure aspect should have minimal negative environmental consequences. Steps should be taken so that the money generated goes directly to

the conservation effort. If new buildings are to be built, sustainable construction techniques and local inputs can be employed to reduce negative ecological impact.

Ideally, an investment in conservation should be made. To effectively do this, the money generated from the adventure service tourism activity (realizing that not all activities do so) should respond to a conservation threat. In the adventure conservation case with ProNaturaleza, the purchase of gasoline with program funds allows more turtle eggs to be collected by boat and eventually more turtles safely released. However, in the case of Sícchez, the threats from coffee tourism to the environment are minimal but must be constantly monitored. Scenario planning or back-casting might be one way to proactively address potential threats.

Issue #4: Does it Appreciate Local Culture (Social/Cultural)?

The social and cultural aspects of adventure service tourism should value intercultural exchange. Does the adventure activity incorporate interacting with community members where it is taking place? Adventure conservation does this as activities are undertaken in direct collaboration with the management groups. What happens in the case of a bad experience between the volunteer and the community – how can continued community enthusiasm be fostered? The marketing of such adventures and how the volunteers are presented to the community and their way of life should be done in a culturally sensitive way. For example, in Sícchez, the posters to advertise the Organic Coffee and Ecological sugar festival were designed in a way that both outsiders and Síccheños could appreciate.

Communities also need to appreciate the tourism product. The adventure service trip should foster pride in their own culture and community such as participating in a local coffee festival, versus a sense of paternalism and dependency (e.g. outsiders building the “poor Peruvians” a school). The community must also consider the experience to be appealing to an

outsider, instead of simply a normal day-to-day activity that feeds their families (e.g., where fishing is the community livelihood, community members must understand that fishing the world's largest freshwater fish is adventurous to tourists whom have never done it before). Finally, community members must not be confused or belittled by the tourism activity (e.g., a community might not initially understand why a tourist would want to perform agricultural labor in exchange for food and lodging, fruits of their normal toil). It is important that community members understand the program and see clear benefits from their involvement.

Some changes in the adventure tourism market affect the importance given to the local culture. First, the broadening of the definition of adventure tourism to include “softer” activities promotes greater intercultural exchange and community appreciation. Once hosts understand that a service-tourist wants to pick coffee alongside them, the hosts build pride in their communities. As biking, fishing, hiking, and bird-watching become cemented as adventure tourism options, these activities begin to attract older volunteers more so than traditional adventure activities did; these volunteers tend to bring disposable income and even more appreciation for local culture. Second, with the current breed of adventure service tourists, who tend to be under forty years old, these tourists have worked and saved enough money to afford extended (one- to two-month) trips, which lends itself to more profound cultural interchange.

Issue #5: Is it Acceptable to Local Authorities? (Political)

In addition to the local culture, local authorities also influence the viability of an adventure service tourism project. There is an assortment of permissions necessary to implement a project: registration requirements, tourism regulations, visa laws, and land-use customs all must align. Local, regional and national governments can help or hinder a project through granting or withholding any of these permissions. On the other hand, governments can support a

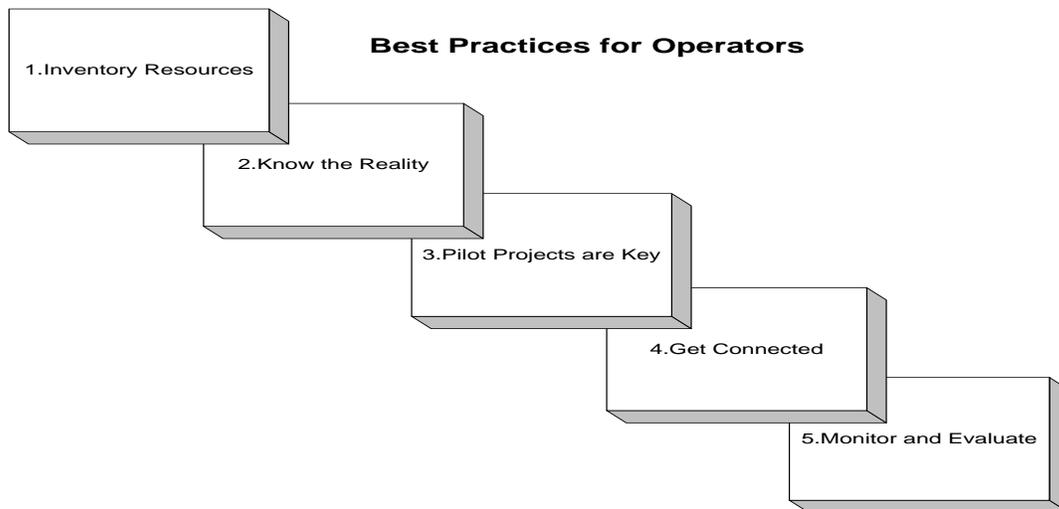
project through advertising on municipal tourism web pages, lending land, waiving park fees, etc. A significant challenge in this respect is that the regulatory environment in developing countries can be ambiguous, confusing, and changing.

Because of the power that local governments can wield, it is important to consider the political acceptability of an adventure service tourism project throughout the project's life. This acceptance is largely predicated on the credibility an operator established with authorities. Building person-to-person relationships is important, as is an operator's integrity. This integrity includes a reputation for trustworthiness, equitable labor relations, contributions to the local economy, safety, respect for local norms and land ownership rights, and success in previous endeavors. Certain third-party certifications can also bolster this reliability (e.g., Fair Trade, Blue Flag, CST, etc.). Credibility can even be affected by whom the operator associates with on a personal level within the communities.

Since adventure service tourism products almost exclusively utilize resources controlled by local authorities—such as rivers, forests, and farmland irrigation schedules—it is critical to ensure the project is politically acceptable.

How to do Adventure Service Tourism

Based on the issues extracted and analyzed from the case study experiences presented here, some best practices can be identified. A best practice can be considered a positive aspect or result that has worked well in Peru and that has potential for replication. An outline is given in Diagram 3, below, on how to implement adventure service tourism.



Best Practice #1: Inventory Adventure Service Tourism Resources

One of the primary steps to take in developing an adventure service tourism endeavor is to analyze the available resources. What resources (human, political, ecological, and economic) does an area have? Who is there to work with? A resource-based approach will set the stage for the most comprehensive examination of the sustainability framework. A complete diagnosis, taken over a period of time, is ideal. This diagnostic study must include getting to know the concerns and motivations of those who are interested in being community counterparts. The better one understands the concerns and motivation of those involved, the better chance one has for success. Through an inventory of resources, outlined by the community, a better grasp of the economic, ecological, political, and social/cultural situations and priorities can be acquired.

Adventure and legitimate service should be among the combination of resources. Remembering that adventure is subjective, certain attributes can be found in all adventures. For example, the case studies outlined two different, yet distinct adventures. A legitimate service element should also be clear in the tourism offering. An example of this in adventure conservation is providing participants with the opportunity to conserve the rainforest by reforestation activities. Additionally, a good service tourism opportunity includes a strong

intercultural exchange element in its design which harvests positive interactions with community members before, during or after the experience.

Best Practice #2: Know the Reality

Knowing the environment one steps, surfs, hikes or bikes into increases the probability of enjoyment and success. Getting to know the environment is the task of the operator offering the opportunities to participants. Various approaches can be taken, but most important is the information gathered and plans made accordingly. A feasibility plan provides a nice structure for organizing the required information, but informal approaches have proven to work as well.

The structure of a feasibility plan is simple, yet complete. A description of the business includes the organizational form of the enterprise, while the description of the service includes the enterprise's goal. A market research and analysis includes the beneficiaries and what benefit is desired. The operation plan outlines how the endeavor will function, while the human resource management section states who is involved in the completion of tasks. The leadership section states who is involved and indicates their previous experiences, giving credibility to the enterprise. The strategic planning uses the previously mentioned environmental and social/cultural impact statements. Scenario planning or best guesses and different views as to how the world might evolve relative to the organization, can be used to 'backcast' and figure out what steps should be taken in the present. Major events, risks, and progressive checkpoints are the basis for the monitoring and evaluation plan of the project. Finally, a financial plan outlines what capital is needed to get the project off the ground and initial funding ideas.

As seen with the ProNaturaleza case study, the social entrepreneurship approach allowed program coordinators an opportunity to analyze the issues spanning the sustainability framework (economic, ecological, social/cultural, and political aspects). The feasibility plan allows for a

focus on operations while demonstrating the strong ethical convictions and mission of the institution. This analysis tool should include written environmental and social/cultural impact statements. By having these statements in writing, outsiders (including potential 3rd party certification agencies) can gauge the institution's level of commitment to social responsibility.

The coffee tourism case with OC and FGS took a less formal, but equally important feasibility plan approach. The beauty of such organizations is their size and flexibility to customize the experiences based on the knowledge of the area through their network of contacts and direct communication with the farmers and tourism committee. As mentioned earlier, the FGS trip to Sícchez was subsidized by the Dutch government. A written explanation and proposal outlining and analyzing the situation was needed to receive the funding. An important step taken in the proposal writing process was to visit the destination. OC also did this, in addition to researching Sícchez through dialogues concerning my extensive knowledge of the area before sending volunteers there. This informal planning proved successful in getting to know the reality and being able to navigate issues as they arose.

Best Practice #3: Practice makes Perfect - Pilot Projects are Key

In addition to a feasibility plan, a pilot project is an effective way to test the feasibility plan assumptions. For example, as seen in Sícchez, the first short-term visit of a volunteer was beneficial. Community members gained exposure on how to work together with a foreigner in their town and created excitement for future visits. The operator was able to see what infrastructure was needed to accommodate a volunteer. Additionally, understanding was gained on how to prepare and educate future volunteers. Practice visits or trial runs on a short-term basis can provide useful information in preparation for longer stays. It is important to consider

the local reality and customs and form realistic time lines in developing a new adventure service product (e.g., the experiences in Sícchez have been developed over the course of three years).

After an initial intervention with community members and volunteers, an operator should maintain a strong presence to ensure sustained motivation and participation in the communities. Continued presence in the communities is important, particularly in the early phases of development to answer questions, address challenges and receive feedback from community hosts; this promotes a sense of inclusion in the planning process, giving community members some ownership. Forming strong relationships with these hosts facilitates future plans.

Best Practice #4: Build a Network/Resource Base

A network base refers to those people in the industry who have an interest the success of the project. Involving contacts and players both in and out of the community can mitigate problems and mistakes encountered during previous attempts by similar enterprises. Getting connected to a network of people with a shared vision increases the chances of success by increasing access to resources, receiving helpful recommendations, and learning about other industry best practices.

Finding local leaders and those who can be considered internal and external motivators are also part the Network/Resource base. Internal motivators are the people in the operating area that have a desire and interest in the success of the enterprise. These are the folks commonly referred to as community counterparts. External motivators are those outside the operating area or who are involved from a distance or who do not have a permanent residence where the project is taking place. Expanding the local network by including both internal and external motivators facilitates growth, and broadens the scope of possibilities by increasing the knowledge base.

Best Practice #5: Monitor and Evaluate

The monitoring and evaluating process is essential to continuous improvement before, during and after volunteer visits. The feasibility plan can serve as a guideline for evaluating the operating environment before entry. This should include a comprehensive diagnostic element to be completed with community counterparts. As the adventure service experience unfolds, monitoring systems such as periodic surveys should be used to capture feedback and suggestions for improvement provided by the community's local knowledge. A final evaluation including input from participants and the community will help guide the future of the adventure service tourism endeavor. Follow-up activities such as newsletters and questionnaires gauge the level of satisfaction of all involved. For example, as a result of the post-experience surveys given to the FGS participants we see that the guides could use more training and that bottled water is an invaluable item for the local shops. Feedback given to the guides and orders put in with the shop owners constitute continuous improvements.

Key Conclusions

Adventure service tourism opens the door to how adventure travel can address sustainable development. Adventure service tourism is economically, environmentally, socially and politically sustainable. Adventure service tourism is synonymous to intercultural understanding.

Adventure. These opportunities are unique. An adventure is different for every person. More experiences are becoming classified as adventures. Service adventures can happen anywhere in the world.

Service. Communities benefit from the presence of volunteers willing to help. Volunteers benefit from communities opening their doors and hearts to a new experience. Adventure service tourism opportunities are meaningful.

Tourism. Participants want significant intercultural exchange while traveling and alternatives to mass tourism. Adventure service tourism provides a fresh approach on how adventure tourism can achieve sustainable development—through service.

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APPENDIX

Appendix A – List of Personal Communication

Who?	When?	What do they do?	What happened?
Clemmons, David	July 17, 2006 September 12, 2006	Voluntourism Forum Director	e-mail communication e-mail communication
DenHond, Peter / Smeulders, Janneke	September 30, 2004 November 26, 2004 April 21-23, 2005 July 9, 2005 August 28, 2005 November 10, 2005 February 17, 2005 March 28, 2005 November 20, 2005 May 28, 2006	Owners Otra Cosa vegetarian restaurant and Volunteer Agency	Initial contact – via email My first visit to Otra Cosa – meeting in person Their first visit to Sicchez – meeting in person My 2 nd visit to Otra Cosa – meeting in person 3 rd visit to Otra Cosa 4th visit to Otra Cosa 5 th visit to Otra Cosa 6 th visit to Otra Cosa Email contact – survey Email contact - survey
Dijkman, Dionne / Koldewijn, Niels	March 16-23, 2006 August 12-16, 2006	Owners Fairground Sessions/Foundation	Initial meeting and visit to Sicchez Fairground Sessions visit to Sicchez with group of 10 tourists
Heyniger, Christina	July 17, 2006	Adventure Travel Trade Association (ATTA) associate and consultant, Xola Consulting Owner	E-mail communication

	July 20, 2006		E-mail communication
Raynolds, Laura	May 11, 2005	Fair Trade Research Group, Professor Colorado State University	E-mail communication
Schneider, Paige	July 20, 2006	PhD Candidate, Michigan State University, Consultant ATTA	E-mail communication
	July 26, 2006		E-mail communication
	July 30, 2006		E-mail communication
Wearing, Stephen	April 24, 2006	Author, Professor University of Technology, Sydney	E-mail communication
	July 25, 2006		E-mail communication

Appendix B – Feasibility Plan ProNaturaleza (Original in Spanish)

The ProNaturaleza feasibility plan outlines all of the aspects discussed in the social entrepreneurship section and then reviewed in the Best Practice #2. Due to its length and complexity only a Spanish version of the plan exists.

Appendix C – Management Group Survey (Original in Spanish)

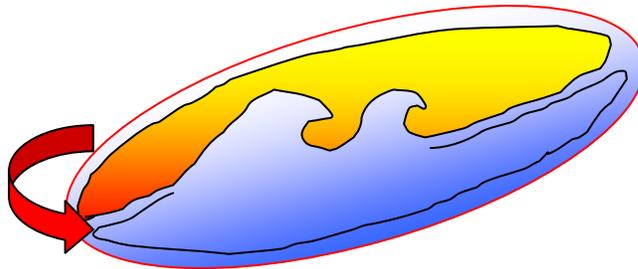
This Survey was designed for Management Group members in the Pacaya-Samiria Nacional Reserve. The questions are as follows:

- 1) Do you think there is a possibility for your management group to work with volunteers? Yes or no – circle one
- 2) My feelings toward volunteer visitors (predominantly from abroad) Mark one – between 1 and 5. 1-very good idea, 5 – bad idea
- 3) I think I can dedicate a little of my time toward a volunteer tourism projects (for example) speak with a volunteer, explain to them activities, orient them in what they should do with you. Yes or no.
- 4) To me a volunteer means.... (describe your feelings) fill in the blank
- 5) Ideally, the activities that foreigner volunteers can do with our group are: (three blank lines for them to write answers in)

Appendix D – (C2C) Coffee Tourism Proposal (Original in Spanish)

This document outlines a Coffee Tourism Proposal designed as an outline for introducing tourism to Sícchez. The two main phases are: 1) first take coffee to the coast (sell coffee in the national market) and then 2) take the coast to the coffee (bring tourist to Sícchez from where the majority of tourism in Northern Peru is currently focused – the coastal beaches).

The sections of the proposal are as follows: Introduction, Description of the project, Vision, Goals and Objectives, Monitoring and Evaluation, and Sustainability Statements (social, economic, ecological). The document was created in collaboration with the local government's agronomy department. The proposal's logo of a wave inside of a coffee bean is below.



Appendix E – PowerPoint Presentations (Originals in Spanish)

These presentations were used in presenting tourism ideas to the tourism committee and APPAGROP farmer association members.

The first presentation was titled “Sustainable Tourism: Coffee Tourism and the potential of ecotourism in the mountains”. This presentation included slides on the definitions of tourism, ecotourism, sustainable tourism, alternative tourism, and coffee tourism. Characteristics and importance of the latter was complemented by the opportunities and types of ecotourism in Peru.

The second presentation was titled “The creation of a tourism product in Sícchez”. This presentation also included slides on the definitions of tourism, ecotourism, sustainable tourism, alternative tourism, and coffee tourism (to re-enforce the ideas presented earlier). Additionally, a discussion was lead on the components of a tourism product in Sícchez. An example was used concerning the ‘touristic offering’ and ‘conceptualization’ of the planned organic coffee and ecological sugar festival. Steps were given on how to take full advantage of the visitors in a just way – through creating opportunities for them to spend money.

Appendix F – Report on the Coffee and Sugar Festival (Original in Spanish)

This text has a general description of the festival – how it came about, where it took place, the goals of the festival, etc. Bullet points outlined seven successful activities and twelve suggestions for improving the festival. Pictures taken during the event were also included.

Appendix G – Going beyond the Absence of Agro-Chemicals

Going beyond the absence of agrochemicals: Cepicafé and the experience with BioLatina in the North of Perú

Basic Principles

(Central Piuranos Cafeteleros) Cepicafé is a union of over 50 coffee and sugar producing associations benefiting over 3,000 people in the northern department of Piura. Pidecafe (Programme Integral de Desarrollo de Café) is a Non-Governmental Organization formed to offer technical assistance and advising to the member associations of Cepicafé. Both formed in 1995. Certain basic principles underlie organic productions as outlined by Cepicafé. They include:

- Implementing adequate practices without altering natural cycles
- Using adequate renewable natural resources
- Guaranteeing the production of highly nutritive food in a sustainable way
- Avoiding environmental contamination by effectively using water resources
- Promoting a harmonious interchange between production systems and animal husbandry.

Cepicafé and Pidecafe have established mechanisms that guarantee sustainable use of the principle resources – in this way contributing to conserving the environment. The established norms are oriented at maintaining and bettering the production water and soil inputs.

Organic Certification

Practice and documentation are the two pillars of Organic Certification as outlined by BioLatina. To be certified organic a producer must undergo a transition period. The practice of transition from conventional to organic begins with the first inspection of the certifying agency in which the creation of an “Annual Production Plan” APP is verified. The APP is the foundation of the documentation aspect. During this three year transition of practices no use or storage of chemical fertilizers is permitted nor the burning of the soil. Other practices include ground control through organic fertilization, reforestation, erosion control which need further explanation.

Organic Fertilization comes from products of animal or vegetable origin such as fecal matter, banana waste, coffee grinds, ash, etc. Also included in this denomination is organic compost, biol, purin and humus de lombriz. *Reforestation* of various tree species such as guabos or bananas provide shade for the young coffee plants. Ground beans or peanuts add to the richness of the soil and provide *ground cover*. *Erosion control* techniques include the creation of live fences (lemon grass, pajul, frejolillo, pasto elephante, vituca, yuyo) as well as dead fences (fallen banana plants or trees, rocks, etc). Level curves, individual terraces, weed, plague and sickness control are also considered in the certification process.

Small Animal Husbandry

Raising animals provides an important aspect for organic production including the manure as organic fertilizer and other sources of income for the family well-being. A few considerations for small animal husbandry:

- Sufficient space should be provided for the animals including areas for food, water and reproduction
- Sufficient food and balanced diet including fresh grains and grasses when available.
- Overgrazing should be avoided to curb erosion.
- Phytosanitary (pest) control should use vegetable based products

Processing Guidelines

For Coffee

- The washing and depulping of the coffee should be done in an area with a drainage system and a place for the pulpy water
- Appropriate areas for the decomposition of the pulp (compost)
- Drying platforms that doesn't allow for the coffee to touch the ground
- Depulpers in good condition, used only for coffee
- Avoid excessive use of water during the washing process
- The processing plant for exportation should take into account the norms using only ecological products approved by the certifying agency.
- The environmental impact should be taken into account; maximizing renewable energy use.

For Sugar

- The collection and processing should have appropriate storage areas
- The installations should have a drainage system and platforms for the "cachaza" byproducts and ground stalks
- The processing areas should be protected from bugs and bees.
- Water and energy use should be monitored and minimized
- Higeine and cleanliness should be a focus

Sacking and Storage

- The "pergamino" (parchment) coffee should be placed in clean, well-marked, burlap bags (sugar in nylon) – separating conventional and organic products.
- The areas and transport used should be exclusively for coffee or sugar.

Accounting and Records

The producers should report their principle activities related to their APPs in the "Organic Producer Notebooks" which should be available to inspectors. Each producer should have a folder with receipts indicating quality, quantities and dates entered. The social aspect of trainings or capacitations should also be indicated.