The Use of Client Evaluations in the Ecotourism Process: An Example from Costa Rica

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ABSTRACT
A need has emerged for both standards and procedures to monitor compliance with these standards. The client evaluation is a simple procedure available to all ecotourism operations that can serve to both enhance tourist education and provide a simple system of monitoring. As an educational tool it can be used to focus the tourists’ attention upon ecotourism criteria. As a monitoring system it has an advantage over either surveys or on-site investigation because it provides information by observers supplied over an extended period of time. This paper presents a new instrument for client evaluation with results received from a group of ecotourists recently returned from a lodge in Costa Rica. It argues that these results may not only monitor compliance with the environmental code, but gauge the success of the operation in building a constituency for ecotourism through involving the tourists in an on-going process.

As the concept of ecotourism becomes increasingly popular, a need has emerged for both standards and procedures of monitoring compliance with these standards. Such standards and monitoring procedures can distinguish valid ecotourism projects from the many enterprises that have appropriated the ecotourism label without real commitment to its principles. They are also necessary to help honest ecotourism projects critique their performance and move closer to the ideal of sustainability.

Beatrice Blake and Anne Becher addressed the need for standards in their survey of sustainable tourism in Costa Rica. They identified the criteria of sustainable tourism as three fold: “low impact on the environment, supporting the local economy, and promoting the best of local culture.”¹ To these criteria I propose adding one more component as essential to the success of ecotourism: the education of the tourist.

Tourist education is more than an addition to the list of criteria. It is so essential to the success of any ecotourism enterprise that it can be regarded as the essential keystone without which the other objectives will collapse. Ecotourism is a market-driven activity based upon satisfaction of the tourist. Competition to attract clients and keep prices low can lead to all manner of environmentally destructive activity unless an enlightened clientele demands quality and objects when standards are compromised. The client must be educated, not simply on the facts of natural history, but on the theory and practical realities of ecotourism as well. Fortunately, there is a method that combines education and monitoring yet is so easy and available that it can be used routinely in every ecotourism operation. That is the client evaluation form.

The decision-makers in ecotourism are generally educated individuals motivated by a desire for more education. They are pleased to participate in an evaluation that asks them to provide intelligent and critical observations on the performance of the tourist operation. Typically, the ecotourist is accompanied by family members or companions who may not have the same level of ecological interest or awareness. Part of the practical challenge of ecotourism guides and operators is to inspire these less motivated travelers to a commitment to environmentalism. If they succeed, travelers will return to their home community with an enthusiasm that makes them ongoing supporters of the ecotourism movement. They will tell their friends about it, plan to take another vacation, and perhaps even become a contributor to environmental organizations. If we are successful in educating the tourist, we have also sowed seeds for the future success of the ecotourism movement.

Over the years, my company has followed the practice of including client evaluations with every set of preparation materials and travel documents sent to our clients. We have found client feedback to be invaluable as a source of information about conditions at hotels and nature lodges. It has become an important factor in the selection of accommodations and has frequently lead to suggestions for improvements in our services. These first-hand reports of customers often seem a more reliable source of information than the ratings of guidebooks or even independent researchers because they comprise a set of independent personal experiences. By contrast much evaluation of sustainable tourism is based upon surveys and therefore depends upon what project owners and managers report about their own operations. Even on site investigation is rarely done over the extended period of time that is possible through a consistent system of client evaluations. Client evaluations contain such valuable information that they ought to be maintained systematically in the files of every well managed ecotourism operation and shared with suppliers and investigators.

In the past, evaluation forms supplied to our clients covered standard criteria of traditional tourism: comfort of lodging, convenience of flights, quality of guide service. Yet they also included an invitation to clients to "help us with criticism, compliments, or suggestions for improvement," which resulted in some travelers writing extensive comments, frequently continued on the reverse of the evaluation page. These unstructured commentaries afforded valuable insight into the context of ecotourism—how authentic were the rain forest experiences, how effective were the guides in inspiring the clients as well as providing information, how well did each nature lodge measure up to standards of environmental friend-
liness that ecotourism clients had acquired at home?

One persistent problem with the systematic use of these evaluations is the very small percentage of forms returned (ten per cent would be a high estimate). Enclosing a stamped, addressed envelope with evaluation forms in the packets of materials sent to each client before their trip brought some small increase in the percentage of forms returned. Follow up telephone calls also elicited information similar to that included on forms, but tended to replace rather than augment the written response. Yet these observations were of such value that we focused on finding ways in which feedback might be improved. We decided to focus on two improvements. First, we attempted to increase the percentage of responses, and second we improved the instrument itself, so as to involve the client as an active participant in ecotourism research.

In the spring of 1996 we experimented with a new instrument for evaluation intended to focus the client’s attention specifically upon ecotourism criteria, thus enforcing the circle of client education–client feedback. This paper will present this instrument as it was tested with one group of ecotourists traveling to Marenco, a well known ecotourism lodge in Costa Rica. Results are not presented as a scientific method of determining impact. The numbers were too small to be of statistical value. However they do give us important information on the quality of operations at this lodge and even more valuable insight into how management of the program might be improved. Questions were deliberately framed in a manner that invited comments.

In framing the questionnaire, we began with those elements of ecotourism that involve the tourists’ behavior: Were they good conservationists who refrained from disturbing wildlife, collecting plants, or leaving trash behind? Upon the advice of Anne Becher, we took this as an opportunity to remind travelers of the ethics of ecotourism. I personally introduced an environmental code at the group’s orientation meeting in San Jose. I also explained the importance of the questionnaire and my intention to present the results in an ecotourism conference.

The questionnaire started with a statement of our environmental code and asked tourists to check whether it had been observed. The list of principles we used was adapted from a Code of Environmental Ethics promulgated by the Department of Responsible Tourism as reported in *The New Key to Costa Rica.* The list was modified to include only those principles that resulted in easily observed behavior. Not surprisingly, all of the forms returned with check marks after each principle. The question had succeeded in its primary objective of enforcing the tourist’s awareness of environmental ethics.
Next we asked whether travelers had received enough advance information. This was a test of our own performance in preparing clients to get the most from their experience. In addition to conducting the orientation meeting in San Jose, we had supplied the group with a detailed itinerary and a packet of information both on Costa Rica and on Marenco. The only negative responses to this preparation question came from two clients who commented that they wished they had known about the steep steps leading to the lodge, an important reminder to us that we must be very careful to present information about the physical demands of the experience to each individual before he or she commits to the trip.

Our next questions concerned the quality of the personnel employed by the lodge or tour operation. We are convinced that the performance of the naturalist guide is the single most important factor in determining the success of the tour experience. A good guide can turn a trip full of hardship and mishaps into a grand adventure. He stands before his group as the embodiment of the ecotourism ideal. His observance of the ecotourism code is a model and inspiration to the members of his group. Any infractions by him can put the integrity of the project and even the ecotourism philosophy into question. A good guide not only knows his subject, but projects enthusiasm for it. We have seen guides who transform a simple nature walk into a near religious experience. On the other hand, we have a few who either do not know enough or care enough to communicate their expertise. We have even heard of guides who compromise environmental principles in order to please their clients. The preliminary statement of principles thus did the guides a service in calling attention to sound ecological practices and rewarding them for behaving responsibly. If a guide knows that he is being evaluated by environmental criteria, he will almost certainly perform better.

Also important is the attitude and performance of other personnel at the hotel or nature lodge, generally referred to as service staff. Staff attitude not only impacts the tourist’s experience, but reveals the character and competence of the lodge management. Ideally the guides and service staff should come from the local community. They may be the only community members that tourists interact with. Even if they are drawn from outside the area, because of a shortage of labor or skills in the local community, their attitude to the tourist tends to reflect the management’s attitude toward the people they employ. Hostility, dishonesty, or apathy all indicate that something is amiss in the relationship that this lodge has with the local human environment. We were pleased to find that the responses of our clients were enthusiastic to all questions regarding the quality of guides and service staff. Even though they had been
exposed to several guides in the course of their tour, they wrote comments such as “Great!” and “Excellent.” One conscientious respondent wrote “All were very knowledgeable and if asked a question they didn’t know (rarely), they found out.”

Enforcing the principle that tourism should benefit the local community as directly as possible, we asked whether our travelers had interacted with local people and whether there was any barrier that might prevent them from doing so. As expected, clients reported that language was the chief obstacle. The one member of the group who was fluent in Spanish had more interaction with locals. Her response indicates that the atmosphere was one of friendliness and that there were no social barriers other than language. She reported:

   I joined the workers when they were dancing. I spoke and took pictures with several workers. I spoke to all in their own language.

While responses from other group members indicated little interaction, they did specify products and services purchased directly from local people such as crafts, T-shirts, and a horseback ride “with a super nice guide.” The minimal responses received from this question suggest that we need to examine this area a bit more closely. Perhaps more information on local culture, particularly the interaction between man and environment, would increase the tourists’ interest in seeking local contacts. The lodge may also need to be reminded of the importance of involving local people.

Our next question returned to more traditional criteria of tourism evaluation, namely, level of comfort. While this may seem to be a low priority in ecotourism, it must be satisfied if we are to build a sustainable enterprise. Clients who feel they have suffered undue hardship will never return or send their friends. On the other hand, clients who have been made aware of the importance of sustainability will be more likely to accept “rustic” lodging if it is in keeping with the environment. Our group had been forewarned of inconveniences such as lack of hot water or round the clock electricity. They had been given explanations of the problems of generating energy in such a remote location. Their responses to this question indicated that they accepted and enjoyed the accommodations, even though one respondent went so far as to make some recommendations for improvement that included “hot (or warm water) solar heated tank.”

We also included a question on safety concerns. Our group orientation in San Jose included safety issues both in the wilderness and in walking city streets. Only two comments were offered here—
one regarding the real hazards on the streets of San Jose, the other suggesting that steps to the lodge were “very unsafe.” This comment seems related to concerns that the steep stairs from dock to lodge at Marenco are too strenuous for most older people and again underscores the importance of informing all clients of the physical demands that will be made from them.

With the final questions we arrive at the true measure of success, whether individual clients had added to their knowledge of natural history, culture, and ecology, and whether they would continue to participate in environmental causes and recommend similar experiences to their friends. “Yes” was the uniform response to the question regarding knowledge. The majority also replied that they would support or participate more actively in environmental causes and that they would do the trip again and/or recommend it to their friends. Two respondents, however, expressed some reservations. One replied, “Costa Rica, yes - Marenco, no.” The other, the one with the suggestions for improvement of physical comfort, noted, “Would tell them it is very primitive.” These were the same clients who had objected to the steep steps at Marenco, underscoring how important it is to match the client with the physical demands presented by each tour.

The testing of this evaluation instrument had one major disappointment. Responses were mailed to us from only five of eleven households represented on the trip. We had not yet overcome the problem of a low rate of return. Still, the effort was worthwhile. Every person who replied became involved in the ecotourism process. This is a process that does not stop when the tour ends, but continues in the commitment and interest of each traveler in ecotourism. Follow up through telephone calls, notes of appreciation, and informative mailings can help to seal this commitment and to establish a constituency for our tour programs, and more important yet, for the cause of environmentalism. That constituency will determine the future viability of ecotourism.

EVALUATION FORM
A. Please make a check mark to indicate whether each of these principles of environmental tourism was observed by the nature lodge/lodges that you visited. If you believe that a principle WAS NOT observed, please explain on the reverse.

Principles:
1. Wildlife and natural habitats must not be needlessly disturbed.
2. Waste should be disposed of properly.
3. Tourism should have a positive influence on local communities.
4. Tourism should be culturally sensitive.

This is a process that does not stop when the tour ends, but continues in the commitment and interest of each traveler in ecotourism.
5. There must be no commerce in wildlife, wildlife products, or native plants.
6. Tourists should leave with a greater appreciation of nature, conservation, and the environment.
7. Ecotourism should strengthen the conservation effort and enhance the natural integrity of the places visited.

B. Did you receive sufficient advance information to help you prepare for your trip?

C. Please comment on the attitude of guides and service staff. Did you find them friendly and helpful?

D. Did your naturalist guide have a competent knowledge of the subject and an ability to share and communicate this information?

E. Did you have an opportunity to interact with local people?
   1. Please describe the kind of interaction. What barriers did you need to overcome?
   2. Did you buy products or receive services from local people?

F. How do you rate the comfort level of the lodge? Please feel free to add suggestions for improvement.
   Luxurious ______  Comfortable ______
   Rustic, but in keeping with the environment _____
   Unsatisfactory _____

G. Please comment on any safety concerns.

H. Did this experience add to your knowledge and understanding of natural history, local culture and economics, and/or ecological issues?

I. As a result of this trip do you plan to support or participate more actively in environmental causes?

J. Would you do it again? Would you recommend it to your friends?

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