

SUSTAINABLE TOURISM AS A WORKING MODEL OF NEW
CONSERVATION IN THE MONTEVERDE ZONE, COSTA RICA

by

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INTRODUCTION

Tourism is the fastest growing industry in developing countries (TIES, 2009). The negative impacts of tourism including deforestation, pollution, indigenous culture loss, and habitat and biodiversity loss, have begun to take center stage in an effort to minimize these impacts and keep popular destinations pristine. Sustainable tourism is an aspect of tourism that, in the past, has been difficult to define due to differing shareholders and specific goals of tourism. For the purpose of this study, sustainable tourism is defined using The International Ecotourism Society (TIES) definition as 'responsible travel to natural areas that conserves the environment and improves the well-being of local people,' and is used interchangeably with the term "ecotourism" due to the environmental and social scope of this research (TIES, 2009).

With increasing pressure for a more responsible tourism industry, sustainable tourism has been an accessible goal within the tourism industry (Theobald, 1994). In 1987, the World Commission on Environment and Development, in the Brundtland Report, defines sustainable development as 'meeting the needs of the present without compromising the ability of future generations to meet their own needs.' Stronza (2001) states that tourism is an ideal candidate for studying political, social, development, environmental and cultural issues, allowing for a link to be made between conservation and development. There are arguments that tourism will never be sustainable, as the stress on the environment will continue to increase with the increasing number of tourist (Honey, 1995; Petrosillo, et al., 2006). Clark (2002, p.234) claims that 'no form of tourism can properly be described as sustainable; it is a question of degree and movement towards this desired state.' Placing a value on tourism has been researched from two main points of view: (1) the conservationist, who values nature or wilderness as the provider of beauty and lure to bring revenue to an area, while (2) developers view nature or wilderness as valuable for revenue by area (Stem, et

al., 2003b; Tyler & Dangerfield, 1999). The benefit of the conservationist view is that ecotourism is non-consumptive of resources and can be paired with environmentally responsible development (Stem, et al., 2003a; Hall & Lew, 1998).

The two largest contributions to the negative impacts of tourism include the increased amount of people in an area and the development required to house, contain, and occupy the tourists. Conservation efforts are imperative in keeping popular tourists spots pristine and sustainable. Conservation discourses previously used three accepted conservation paradigms: the classic approach; populist approach; neo-liberal approach. Within the classic approach, local inhabitants were seen as a direct threat to biodiversity, forming a strong divide between humans and nature. The populist approach used concepts of human empowerment and participation at basic levels to sustain the environment. And the neo-liberal approach places economic value on an ecosystem and biodiversity in hopes of discouraging the undermining of the area's actual value by institutions and markets. As a combination and compromise to all three approaches, Hulme and Murphree's (1999) *new conservation* approach explores the ways conservation can be used to complement development instead of conflict with it, placing value on biodiversity and including humans in the definition of nature. This innovation resulted from a paradigm shift in conservation thinking. Based mostly on a populist approach, three key issues are significant in new conservation: empowerment, participation, and sustainability (Brown, 2002).

A study by Brown (2002) puts new conservation into practice with three main applications, including integrated conservation and development projects, community conservation initiatives, and wildlife utilization projects. Within new conservation, the value of nature is a renewable resource that needs to be managed sustainably rather than be set aside and not used at all (Hulme & Murphree, 1999). Sustainable tourism serves as the vector of using this resource – nature – to its full potential with

minimal impacts. Since tourism is growing rapidly in areas that are typically rich in biodiversity, conservation needs to be inherently joined within tourism efforts. New conservation offers the balance of how humans not only fit in to the scheme of conservation, but can help contribute to conservation efforts. There is a gap in the research on how to properly measure or quantify tourism on the basis of new conservation.

The introduction of voluntary environmental programs has been one step toward the measurement of sustainable tourism. Rivera (2004) examined voluntary environmental programs and the institutional pressures they face in developing countries, focusing primarily on the Certification for Sustainable Tourism Program (CST) established in Costa Rica. According to Rivera, voluntary environmental programs complemented by institutional pressures, such as government monitoring and trade association membership, show success in promoting beyond-compliance behavior. There are currently over 100 social and environmental certification initiatives within the tourism industry, sixteen within Central America (Bien, 2002; Mowforth, Charlton, & Munt, 2008). Problems with this high number of programs arise with distinction and accreditation. Accreditation is highly valuable to consumers when researching the reliability of certification programs (Buckley, 2002). Hotels should be the role models in all sustainable tourist destinations, not only for tourists but also for the local communities (Stem, et al. 2003b).

The Certification for Sustainable Tourism was developed in 1997 by the Costa Rican Tourism Institute and the National Accreditation Commission as part of their government's national and regional programs to promote sustainability within the country. Standards for the certification program were developed by the National Accreditation Board which includes members from the Ministry of Tourism, academic institutions, members from hotel associations, and environmental sectors (Rivera, 2004). All hotels that participate in the program are audited by third-party teams in

four areas including physical-biological environment, hotel facilities, customers and socio-economic environment (See Table 1) (Costa Rican Tourism Institute, 2008). The National Accreditation Board oversees and manages the auditing process (Rivera, 2004). Participants are then given a score that is calculated from its total CST standards score and its maximum possible score to yield a percentage that will result in a final rating between 1-5 'leaves'(Rivera, 2004; Costa Rican Tourism Institute, 2008). Currently, there are 84 hotels that are CST certified and only 4 hold the highest rating of 5 leaves.

With the boom of tourism beginning in the early 1990s, Costa Rica experienced significant destruction of the popular park and beach destinations within the country. According to Rivera (2002), the average size of a hotel in Costa Rica is 16 rooms, offering basic services, and located in close proximity to beaches and national parks. Research has shown that larger hotels are more likely to take part in voluntary certification programs because they have greater resources, but also because they will benefit more from the recognition. However, small to medium hotels and operators protect and care for the environment more cautiously and independently. For example, the four 5 leaf hotels in Costa Rica all have less than 35 rooms available (Rivera, 2002; Honey, 1995; Videras & Alberini, 2000).

The concept of new conservation, in the context of tourism, requires a symbiosis between economics, culture and the environment. The purpose of this study is to examine the CST program as a working and successful model for new conservation while maintaining the highest level of tourism. I hypothesize that the CST program maintains the ability to rate hotels according to levels of community participation, sustainability and local empowerment while promoting sound tourism and environmental practices.

Table 1: CST evaluation of environmental performance (Rivera, 2002).

General area	Categorization questions
A. Management of the physical and biological environment	1. Policies and programs 2. Emissions and wastes 3. Gardens 4. Natural areas 5. Protection of flora and fauna
B. Environmental management of hotel facilities	6. Formulation of policies 7. Water consumption 8. Energy consumption 9. General supplies consumption 10. Waste management 11. Employee training
C. Guest environmental education	12. Communication of environmental programs 13. Room information and management 14. Incentives for environmental awareness 15. Measurement of environmental satisfaction
D. Cooperation with local communities	16. Direct benefits to local communities 17. Indirect benefits to local communities 18. Contribution to local culture 19. Contribution to public health 20. Contribution to local infrastructure and safety

STUDY AREA AND METHODS

Costa Rica set the stage in the early 1980's as a destination where the tourism industry could take off with endless possibilities for interested tourist and the local economy. Local conservationists began to lobby for the protection of their valuable land being deforested in the form of private reserves. Now, approximately twenty-seven percent of Costa Rica's land is protected under national parks, preserves and reserves that contain some of the most biologically diverse areas in the world (See Figure 1) (Holl, Daily, & Ehrlich, 1995). The creation of these parks, with funding from local and international institutions, led a movement to promote Costa Rica's natural beauty as a commodity to conservation and then, in turn, to travel. With this new park system in place, and in combination with a Nobel Peace Prize winning president and an abolished army, Costa Rica became seen as an "ecological paradise"(Bien, 2002). The support of leaders and political stability are necessary factors in a successful tourist destination, particularly in remote areas (Thomlinson & Getz, 1996). In the case of Costa Rica, tourism has remained a success partly due to the high level of education and size of its' middle class (Hall & Lew, 1998). Holl et al. (1995) and Orams (1995) stress the need for environmental education to infiltrate schools and the work place to allow this success to continue. Studies show that local employment within the ecotourism industry, particularly in Costa Rica, promotes pro-conservation practices (Stem, et al., 2003a).



Figure 1: Map of Costa Rica's National Parks, Wildlife Refuges, Biological Reserves, Wetlands and Private Nature Reserves (Toucan Guides, 2004).

Monteverde shines as Costa Rica's number one eco-tourist destination and their most famous private reserve and also serves as primary focus of this paper (Honey, 1995). Monteverde is located in the Tileran Mountains in a rare cloud forest within the province of Puntarenas (See Figure 2). The Monteverde Zone, as it has been most recently referred to due to a clustering of economic activity due to tourism in surrounding areas, consists of the communities of Santa Elena, Cerro Plano and the original Monteverde village (See Figure 3) (Martin, 2004; Monteverde Institute, 2008). Monteverde was established in the 1950s by a group of American Quakers in search for a better life. As soon as they settled, they made a proactive decision to set aside approximately half of the 1,200 acres of purchased cloud forest to protect their mountain water supply. This land was the beginning site for what is now the famous Monteverde Cloud Forest Reserve. A lease and management were taken over by the San Jose-based Tropical Science Center (TSC) in the 1970s when a biologist raised extra funds for this proposed reserve. The TSC basis of scientific research and education was welcomed with a blend of Quaker values, including simplicity, democracy, nonviolence and

cooperation from already residing locals (Monteverde Quaker Community, 2001; Honey, 1995). The Monteverde Zone currently has approximately 3,300 residents, with many of the original Quaker generations as prominent community members (Monteverde Quaker Community, 2001; Martin, 2004). The Monteverde Zone community serves as a unique case study because of the founding value of conservation. The tourism industry has indeed posed a challenge to the community; however, conservation ideals have remained consistent. This presents an interesting travel destination to study how successful tourism, based on sustainable practices, works in conjunction

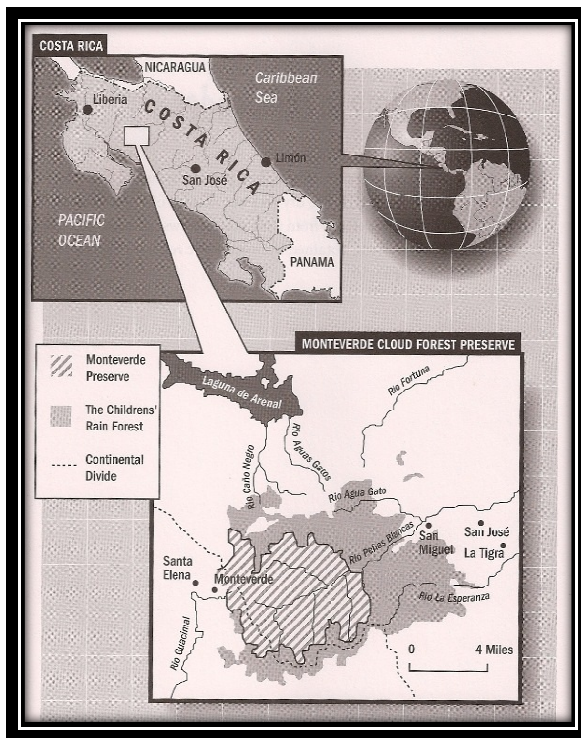


Figure 2: Scale and location of Monteverde, Costa Rica (Collard, 1997).

with a voluntary certification model to promote conservation.

Preliminary field research in the Monteverde Zone (See Figure 3) was completed over the course of six months in 2008. After initial research at various hotels in the geographical zone, three out of the four CST rated hotels were initially chosen due to their high CST rating, accessibility, and close proximity to the main road; however only two hotels agreed to the study. The two participating

hotels are referred to as Hotel A and Hotel B to protect anonymity. Primary data collection consisted of three night stays at each hotel, which

draw upon the researchers lived experiences on collecting information for an understanding of the methods in which the hotels operate. During each stay, in-depth, semi-structured interviews with open-ended questions were given to each hotel manager. The interviews lasted approximately one hour and consisted of questions focusing on aspects of the Certification of Sustainable Tourism and

“new conservation”. To understand the three components of new conservation, the structure of each question was designed to focus on at least one of the three components. All three components can be found in one or more of each general area of the CST questionnaire (See Table 1). The issue of empowerment was referred to in interview questions relating to the hotel employees’ benefits, livelihoods and training. Long term environmental impacts, waste management and CST rating

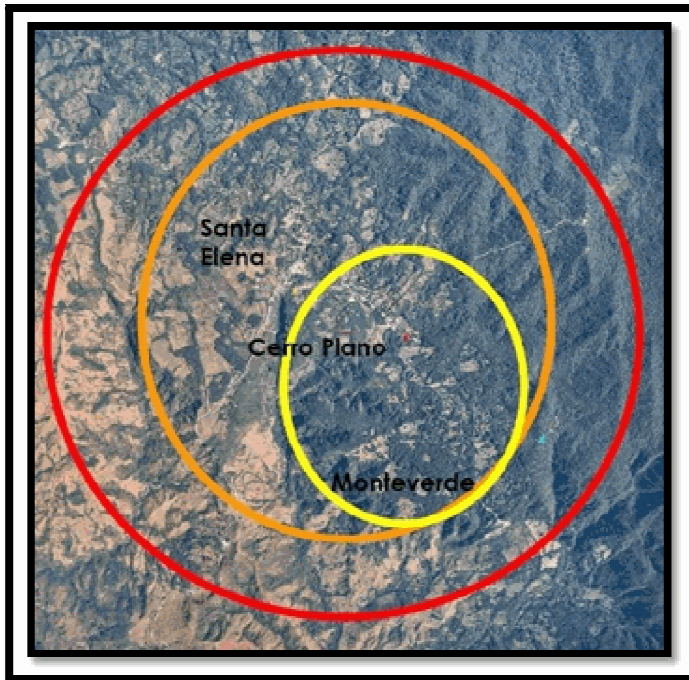


Figure 3: Spatial border representation of the Monteverde Village (yellow), the legal district of Monteverde (orange) and the tourism recognized area of the Monteverde Zone (red)(Fitzgerald, 2002).

standards measured sustainability and activities involving education, outreach and the community measured participation.

In addition to the interviews, the researcher participated in tours and activities through each hotel, made visual inspection of the premises guided by each hotel owner and interacted casually with many local community members. These multiple data sources serve as supporting

triangulation of the data. Experience as a tourist at each hotel allows for the researcher to inform research directly and is viewed as legitimate academic evidence (Hill, 2009).

RESULTS

Empowerment

Hotel A, the smaller of the two hotels with an overall CST evaluation score of 80.95%, has the convenience of being able to train every staff member in each department of their hotel. The importance, to them, is to have a staff of equals, creating equal skill levels in the work environment. Every month a different topic from CST, on site recycling for example, is analyzed and discussed in full staff meetings. Since all staff members are from the local community, the managers encourage skill sets acquired, at the hotel, to be practiced and used at home, citing that “the purpose is not to make them do it because they have to do it but because they understand the importance of doing (the skill)” (Hotel A, 2008). The high level of importance of training and educating their employees is based on the personal connection the owners have with the Monteverde area and the resources it provides. By training hard working and educated employees they are also training above average community members that can serve as environmental and social stewards. The manager at hotel A reflected on a particular employee who, when hired, was previously trained in using chemicals that were detrimental to the environment; once he acquired a personal connection to the environment through CST training, however, he changed his mind set and now uses more natural cleaning methods.

Hotel B trains each department head about a different CST topic at weekly staff meetings. Since the entire staff numbers more than 200, each department head is responsible for passing each new CST topic to their individual staff members. This can lead to some disconnect from the actual topic and the importance of it. Some of the lower staff and maintenance positions can have a turnover rate of approximately six months, allowing for some people to slip through the cracks of the CST training

system, since they may not ever acquire CST skills while working at the hotel. Each department head acts as a support system to a smaller group of employees in hopes of creating a comfortable environment to ask questions and ultimately educate them in skills they may not find anywhere else.

Both hotels allow all employees to bring waste products from their home to be disposed of in a more environmentally-friendly manner. This allows for a greater understanding of the importance of waste disposal but also cuts back on garbage costs for individual household disposal.

Participation

Over the years, Hotel A has been an integral component in starting community projects including a bilingual school, a creative learning center, and also serving on boards such as the local Monteverde Institute. Hotel A encourages their guests to get involved with a community activity while staying with them, for example attending a marimba dance program at a local school or taking a tour at the local cheese factory. Within a small town like Monteverde, word travels fast allowing the hotel employees to be up to date on local events. In addition, they provide a book in every room full of history relating to the area and hotel, along with pages of documentation regarding the sustainable practices of the hotel as outlined by the CST. Front desk employees offer guests, at their time of check out, an opportunity to add a donation to a local charity, to their total bill in an effort to make the donation transaction convenient. Hotel A donates time, effort, and their own money to local schools.

Hotel's B approach is slightly different; their community focus is mainly on the usage of the hotel property for social aspects. For example, they allow swimming lessons to be held in their facilities. Hotel B offers an educational program to high school and college groups, including one free night stay and a tour of the hotel grounds highlighting all aspects of the CST. They also host and arrange

groups of guests to partake in a dinner and dance show with children from the community. They try to participate in a wide range of community events and donate money to local infrastructure projects.

Sustainability

Both managers interviewed have a firm understanding of the importance of sustaining the environment so future generations can enjoy it as we are today, “we are trying to improve our practices...and also trying to make our visitors understand about this responsibility that we have in offering them a good service but taking care of the environment as well” (Hotel B, 2008). This rather simplified version of environmental issues regarding tourism is humbling because the best and most easily understood version of these issues is stripped of politics but rather raw and personal.

Hotel A and Hotel B have similar practices on site for waste disposal and reduction. Protected gardens and land are present on both sites including hiking trails for guests and Monteverde Zone residents alike. All cleaning supplies are the least environmentally-harsh available and local produce and bath products are used as much as possible. Bio-digesters are present at both hotels but vary in scale. Recycling programs are in place at both hotels, allowing guests the opportunity to separate their own trash in labeled wastebaskets but also requiring housekeeping employees to compensate for improper separation (See Figure 4).

The importance of preserving the resources of the community was noted by each hotel. Striving to offer a unique and somewhat luxurious experience to their guests while maintaining the lowest environmental impact is a shared goal by each hotel. Hotel B offered some concern of the difficulties of recycling on such a large scale with a large staff, some of which who do not understand the importance of the skill. They understand that it takes initial costs to implement sustainable practices but can see the benefits in the long run.



Figure 4: Recycling with self-separation at Hotel A.

DISCUSSION

In Hulme and Murphee's (1999) research on sustainable tourism in Africa, they found that in tourist destinations where the high intrinsic value is placed on a resource, in Africa's case wildlife, the importance of conservation of this resource is dependent on passing down the value of the resource to future generations. In the case of Monteverde, which preserves strong community values partly due to the original Quakers, educating the community members and tourists alike is imperative to facilitate successful and long-lasting conservation. Both hotels interviewed placed a high intrinsic value on the conservation of their area, placing it at the forefront of all CST endeavors. The value of their precious ecosystem is the basis of each component of new conservation in question.

According to Brown (2002), 'empowerment can be understood as the process by which people, especially poor people, are enabled to take more control over their own lives and secure a better livelihood with ownership of productive assets.' Within this case study, empowerment was most easily measured by the amount of training provided at each hotel, employee benefits, and overall demeanor exhibited by employees. Both hotels provide their employees with ample CST training although practices vary due to scale. Notwithstanding, all practices equally provide employees with sustainable practice benefits including training and the use of the hotel as an educational tool. This creates a friendly and symbiotic relationship between employer and employee that exudes positive and welcoming attitudes towards tourists.

In the research done by Stem, et al. (2003b) employment in eco-tourism was directly linked to pro-conservation practices. Tourism in Monteverde serves as an example of how conservation efforts are advancing through an increase of awareness and number of jobs created. The new pro-conservation jobs are empowering locals to become better stewards of the environment they live in.

It is then the job of the hotel to provide community support by being good neighbors and models, which both hotels have successfully established in their reputation within the Monteverde community (Stem, et al., 2003b). Community programs and local school initiatives, both of which are promoted by each hotel, are simple and wonderful ways for citizens to feel empowered (Honey, 1995).

Participation by tourists requires the hotel to have strong ties in the community to be able to promote involvement. Each hotel interviewed proves to be a strong community participant involved in donating time and money to various organizations and projects. The programs that are presented to tourists can provide materials and activities that merely give the tourist opportunities, but it is up to the tourist to follow through and participate. Each hotel provided ample information regarding the history of Monteverde, community events, nature tours from reputable outfitters and leisure activities. Employees at both hotels manage to find a balance of promoting activities off site while not pressuring guests to take part in them. A separate tour desk at hotel B encourages guests to seek out tour information on their own schedule. By providing opportunities, the hotel is making the transition for tourist to participate in community or conservation events easier and more accessible (Orams, 1995; Stem, et al., 2003a). Similar tours are provided by each hotel with varying outfitters, all outdoor adventure activities are the same including canopy tours, coffee plantation tours, horseback riding, nature hikes and transport to multiple museums in surrounding areas. Hotel B offers spa services in an on-site facility while Hotel A has a Jacuzzi for guest use in the afternoons. In our experience, all employees we encountered in the tour services from each hotel are respectable, educated and entertaining.

According to Honey (1995), Monteverde is a community full of socially responsible citizens who are blessed with a relatively inaccessible town that is closely monitored by scientists and educated tour

guides. Being blessed by Monteverde is something that both hotel managers and owners mentioned. Monteverde provides a destination to tourists that emphasize the community values that make it so unique. Each hotel respects Monteverde and the resources the land provides. Hotel B is heavily influenced by the original Quaker ideals that include simplicity and cooperative societies. Even though the original founding Quakers were the minority when Monteverde was settled, their values were adopted by the area and still maintain to this day. Marvin Rockwell, an original Quaker who settled the area notes, “when we first came here...the people of the area were used to people being interested in conservation here and now nearly all the hotels and tourist attractions are owned by local people, so the owners have grown up with that feeling (of conservation), that’s probably one of the reasons its different than other areas in Costa Rica” (Rockwell, 2008).

Both hotels have acquired a humbling sense of place that was based on their roots in the community but is encouraged by giving positive experiences back to the tourists that visit. The gap between how the hotel is managed and the science behind the ecosystem is bridged because of the intrinsic value placed on their town (Williams & Stewart, 1998). Having a positive impact on the environment was not a question of how do we carry out this task, but more of how can we improve the sustainable practices we have been carrying out already? This attitude was shared by each hotel in relatively simple tasks such as garbage documentation but also in large-scale tasks such as organizing recycling efforts and energy conservation.

Both hotels cite using sustainable practices since the start of each hotel but now the CST provides them with an outline of more specific tasks to tackle. All on-site CST audits base almost half of all evaluation questions on sustainability and environmental impacts (See Table 1). Hotel A noted that they expand and research new sustainable technologies because of interest and passion not because the CST requires them to. For sustainability, the CST program offers each hotel

encouragement and incentive to improve practices but to also document them. Documentation was mentioned by each hotel as somewhat of a hurdle to get a higher certification level because of the meticulous documenting requirements. Hotel A did state that they understand fully the importance of documentation to help improve their own practices but practices of other hotels, within the CST program and outside as well.

CONCLUSION

Costa Rica's combination of political stability, an impressive park system, and a strong presence of active conservationists has transformed the country into 'a mere perfect tourist destination' (Bien, 2002). In the case of Monteverde, it is the attitudes of the local community that keep the area pristine, by supporting programs like CST. The model that Monteverde provides serves as a successful example of how a voluntary program, CST, can support and encourage new conservation. New conservation when measured by empowerment, participation and sustainability can provide insight on how a community functions and manages itself in terms of environmental impact. The CST leaf rating system functions as an incentive for hotels to decrease their footprint on the environment while providing their guest with an educational and entertaining experience within their local community. It should be noted that the cooperation of each hotel when prompted about CST practices is outlined in the evaluation; however one of the original three hotels outlined in the methods refused to cooperate when asked repeatedly for an interview. Hotel A and Hotel B offered hospitality and information voluntarily and without question.

Although there are many eco-tourism labels worldwide, CST goes beyond the market strategy and encompasses not only sustainability and environmental attributes but also new conservation as seen in this case study. The uniqueness of Monteverde and the community values that are shared by all locals should stand as a new standard model for tourist destinations. While CST is currently only active in Costa Rica, the potential to move to neighboring Central American countries and beyond is endless. Strong community values and sense of place should be the only limits for adaptation of CST. Currently 32 organizations, including the Rainforest Alliance, the United Nations Environment Programme (UNEP), the United Nations Foundation, and the United Nations World Tourism Organization (UNWTO), are working on standardizing sustainable tourism criteria in a global effort:

Global Partnership of Sustainable Tourism Criteria (GSTC Partnership). This would alleviate “green-washing” eco-labels and allow for a more common understanding of sustainable tourism (Sustainable Tourism Criteria, 2008). By maintaining a high level of participation and membership with organizations such as the Rainforests Alliance and the International Ecotourism Society, CST remains a highly regarded eco-label. Although the global criteria will consist of basic guidelines, successful and reputable programs like CST will serve as more in depth guides to educate tourists in areas of community participation, local empowerment and sustainability.

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VITA

Morgan Ashley Dezendorf was born on November 26, 1984 in Durango, Colorado. She is the daughter of Susan Morgan and John Dezendorf. After attending All Saints Episcopal School in Fort Worth, TX in 2002 she received her Bachelor of Science degree from Fort Lewis College with a major in Environmental Science in 2006.

At Fort Lewis College, Morgan served as a student ambassador for three years and was heavily involved with the Admission and Foundation offices along with campus wide environmental efforts. She managed having a strong presence on campus while working part time at local schools, restaurants and retail stores throughout her entire school career.

In August 2008, she moved back to Fort Worth to attend graduate school at Texas Christian University to pursue her Master of Science degree in Environmental Science with the hopes of researching in Costa Rica. While at TCU she worked as a TA in Principles of Environmental Science and was a lead member in planning a citywide conference based on the future of our urban environment.

ABSTRACT

SUSTAINABLE TOURISM AS A WORKING MODEL OF NEW CONSERVATION IN THE MONTEVERDE ZONE, COSTA RICA

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Since 1990 Ecotourism has been growing, on average, 25-30% per year worldwide. This is especially important for developing countries where tourism is the major foreign exchange earner. Tourism is Costa Rica's largest industry, earning the country 1.9 billion dollars per year. To maintain this industry in a sustainable way, Costa Rica has adopted a certification process to rate hotels and tour operators called the Certification for Sustainable Tourism (CST.) This program looks at four main criteria: physical and biological parameters, infrastructure and services, external clients and the socio-economic environment to accurately assess the sustainability in Costa Rica. One of the most biologically diverse and frequently visited destinations in Costa Rica is the Monteverde Zone. Since the very survival of this area is dependent on how well it is being preserved, Monteverde is an important case study. This paper looks at the three aspects of new conservation: (i) empowerment, (ii) participation and (iii) sustainability to measure the success of the CST program at three hotels in the Monteverde Zone, Costa Rica.