

Project Scoping Report, February 2017

Who wants what?

Assessing the supply and demand for
locally-produced tourism services around
Bwindi Forest, Uganda



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About the project

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'Local economic development through pro-poor gorilla tourism in Uganda' is a three year project funded by the UK government's Darwin Initiative. The aim of the project is to work with local people and established tour operators to develop and test new 'pro-poor' tourism products and services around Bwindi Impenetrable National Park. This report discusses the findings of the first two stages of the project; scoping the demand for 'pro-poor' tourism initiatives and assessing local capacity for supply. From a combination of tourist and tour operator surveys, as well as a scoping visit to the main tourism zones, the project team identified a range of existing initiatives with the potential to add value to the typical two night gorilla tracking package, increase community revenue from tourism and consequently improve local attitudes towards the park.



Photo: Craft shop signage near Bwindi Impenetrable National Park, Uganda (Dilys Roe, 2016)

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Introduction

Project overview

Tourism in Uganda is critical for generating revenue for conservation of mountain gorillas and other species and habitats. At Bwindi Impenetrable National Park (BINP) tourist numbers have increased from 1,300 per annum in 1993 to around 20,000 per annum today. International tourists pay US\$600 per head to track gorillas. Local people living around the forest receive a share of the revenue generated by tourism to the park including US\$10 per gorilla permit sold, plus 20 per cent of the US\$40 park entry fees in recognition of the importance of their support for conservation. The total amount of money generated by this revenue sharing scheme is allocated to parishes adjacent to the park, according to a formula set out in Uganda Wildlife Authority (UWA) guidelines, and is used to fund community projects such as clinics and schools.

Recent research conducted by IIED and partners¹ has shown that local people have a negative attitude towards the park and conservation, despite the share of the revenue that they are allocated. This is driven by the fact that many people suffer significant costs from living next to the park, such as crop raiding by wild animals. The park revenue that is shared with local people is not specifically targeted at those who bear the most costs. Furthermore, there are few conservation or tourism based jobs open to local people. Other direct benefits from tourism, such as cash from sales of locally produced souvenirs or other local tourist attractions, are also limited. This is partly due to the poor quality of many local products and services, as well as the low levels of skill development to improve job prospects or enterprise opportunities. It is also due to the limited opportunities for direct interaction between tourists and local people. Tourists tend to arrive at Bwindi with a guide in the afternoon, spending two nights in a lodge with a full day spent gorilla tracking and departing the following morning.

The result is that relationships between local people and the park authorities has been problematic, and poaching, snaring and other forms of illegal resource use continue. This represents a significant threat to the park and to the long-term conservation of the gorillas, as well as a missed opportunity for harnessing tourism as an engine for local economic development.

To begin to address this problem, IIED with partners the Institute for Tropical Forest Conservation (ITFC), the International Gorilla Conservation Programme (IGCP) and the Responsible Tourism Partnership (RTP) have developed a follow-up project funded by the UK government's Darwin Initiative. The project, which runs from 2016 to 2019, builds on the combined experience of the partners in designing and implementing strategies for 'pro-poor' tourism². The aim is to develop and test new 'pro-poor' tourism services that have the potential to increase local revenue from tourism around Bwindi Forest, thus contributing to poverty alleviation, improving local peoples' attitudes to conservation and reducing threats to gorillas.

The project focus is on delivering training to selected beneficiaries who have the capacity to engage with the tourism industry in order to increase the quality, transportability and utility of products for which there is proven demand. Improving the quality of products is anticipated to increase both their value and desirability, thus the value and number of sales. A key element of the project is to leverage contacts and relationships with lodge owners, tour operators and their guides in order to persuade them to direct their clients to the new/improved products and, ideally, include them in their itineraries.

Few tour operators (based in-country or internationally) offer anything other than one, or exceptionally two, gorilla trekking experiences at BINP. A small number sampled from a wide market spectrum

¹ Twinamatsiko *et al.* (2014) Linking Conservation, Equity and Poverty Alleviation: Understanding profiles and motivations of resource users and local perceptions of governance at Bwindi Impenetrable National Park, Uganda. IIED, London.

² See for example: Ashley C *et al.* (2001) 'Pro-poor' Tourism Strategies: Making Tourism Work for the Poor; Goodwin H *et al.* (2002) Harnessing Tourism for Poverty Elimination: A Blueprint from the Gambia, NRI Report No. 2693; Bah A and Goodwin H (2010) Improving Access for the Informal Sector to Tourism in The Gambia. PPT Working Paper No. 15, London; Goodwin H and Boekold (2010) Beyond Fair Trade - enhancing the livelihoods of coffee farmers in Tanzania. In: Jolliffe L, *Coffee Culture, Destinations and Tourism*. Channel View Publications, Bristol.

showed that optional extras of Batwa trail and village visits along with guided birding walks are available. Most visitors are on pre-planned and time poor itineraries. Little to no effort, at UTB or local tour operator level, has been made to define 'new' product and have this offered to international tour operators to include in their pre-planned itineraries.

A further element of the project is to develop a Gorilla Friendly™ ecolabel that will be used to differentiate between products and services which benefit the people most affected by the costs of living close to the park from those produced through business as usual. The Gorilla Friendly™ label certifies that:

- Products and/or services meet a high quality standard
- Products and/or services are produced by people living within a radius of one kilometre from the park boundary, and the benefits are shared transparently and through good governance best practice^{3,4}, and
- Products and/or services are produced in a way that does no harm to gorillas or to their habitat.

In the short term, it is expected that this project will bring improved and new livelihood benefits from tourism to up to 250 individuals involved in piloting the local tourism products/services. Local women and men, especially those who are marginalised from receiving tourism benefits, will acquire the necessary skills to offer quality tourism products and services to international tourists and manage basic enterprises. Based on experience in developing and implementing similar initiatives, resulting benefits will likely comprise: increased income, increased entrepreneurial capacity, reinforced cultural traditions and pride and improved social status.

In the medium term, by explicitly linking the delivery of benefits from a vibrant tourism industry based on a healthy population of mountain gorillas to front-line, marginalised communities the project will improve local attitudes to conservation and hence reduce threats to the park.⁵ Benefits from tourism will also help to mitigate the costs local people face from living alongside wildlife. In the longer term, project beneficiaries will extend beyond the households targeted by the project as the successful approaches are replicated by others and become integrated into standard tourism packages. Rural areas around Bwindi Forest will support sustainable local economic development that maximises the contribution from tourism as opposed to simply existing alongside it. Box 1 describes the key steps involved in the project.

³ Research to Policy (R2P): building capacity for conservation through poverty alleviation' (2012-2015) is a 3-year project funded by the UK government's Darwin Initiative. IIED, Poverty and Conservation Learning Group. <http://povertyandconservation.info/en/pages/research-policy-final-research-workshop>

⁴ Research from the R2P project showed that people living within half a kilometre from the national park boundary were significantly poorer than people living further away. The poorest people also lived in remote areas far from trading centres or road transportation. Subsequent research by the ITFC on Revenue Sharing found very few households within the half kilometre zone and assessed the poorest, 'frontline' households as being within one kilometre from the park boundary.

⁵ Based on the finding by Blomley *et al.* (2010) Development AND Gorillas? Assessing fifteen years of integrated conservation and development in south-western Uganda. IIED, London; success of many ICD interventions was in large part due to the fact that beneficiaries made the link between park conservation and the ICD, hence the importance of making these linkages explicit.

Box 1 Overview of the 'pro-poor' gorilla tourism project approach

'Pro-poor' tourism project approach

1. Scope demand

Consult with tour operators and survey tourists to clarify demand for local tourism products and services including their type, price, quantity and quality.

2. Assess supply

Survey households within the tourist zones to identify current benefits from tourism, current attitudes to conservation and capacity to engage.

3. Match supply and demand

Share results with tour operators, agree the most viable products/services, and identify quality criteria and sources of products/service development training.

4. Build capacity to meet demand

Work with existing guides, performers and handicraft makers to deliver training. We will also adapt the emerging 'Gorilla Friendly' enterprise standards and test them on project products and services.

5. Test, refine and roll-out

Tour operator's partners will include the new products/services in the Bwindi packages that they offer to tourists and collect feedback, starting in one tourist zone and rolling out to others. We will share lessons learnt with other tour operators in Uganda and internationally.

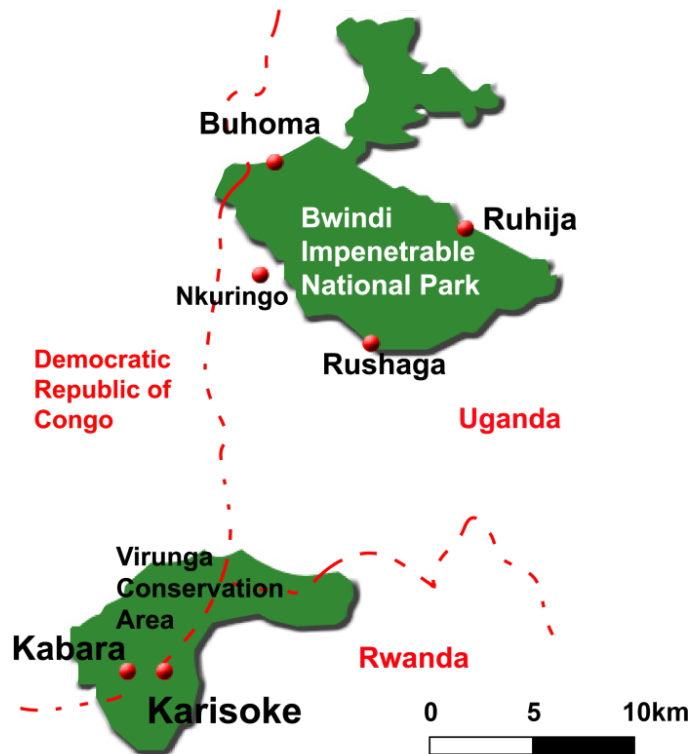
Project approach

This report addresses the first two steps shown in Box 1. It describes the current demand for local tourism products and services as expressed by tourists and tour operators and assesses current supply. Demand for local tourism products and services was determined by conducting a tourist survey (distributed to tourists by lodges and tour operators) and a telephone-based survey of tour operators (administered by RTP). Supply of local products and services was assessed using an inventory compiled during site visits to each of the main tourism zones. Both the supply and demand findings were supplemented with focus group sessions, interviews and site/enterprise visits during a single week scoping visit by the project team in August/September 2016.

Tourism at Bwindi Impenetrable National Park

Bwindi Impenetrable National Park (BINP) is located in Southwest Uganda and covers an area of 331 square kilometres (Figure 1). Situated on the edge of the Western Rift Valley, BINP occupies the highest part of the Kigezi Highlands. The park lies along the border of the Democratic Republic of Congo, approximately 29 kilometres by road northwest of Kabale town and 30 kilometres north of Kisoro town. Bwindi is home to approximately 480 critically endangered mountain gorillas (*Gorilla beringei beringei*), around half of the world population. BINP has been managed as a protected area since 1932, first as a forest reserve, then as a game sanctuary and from 1991 as a designated national park (with subsequent evictions of the resident indigenous Batwa people). The park was declared a World Heritage Site in 1994.

Figure 1 Location of Bwindi Impenetrable National Park



The loss of income and livelihoods resulting from Bwindi's designation as a national park led to violent conflict between local people and the Uganda Wildlife Authority (UWA), who are responsible for its management (Baker *et al.* 2011). In 1994, as a result of the tense relationship between the community and UWA, a collaborative forest management approach was agreed, permitting limited forest resource access and use by the frontline communities that shoulder the opportunity cost of land not used for agriculture and also suffer crop damage from gorillas and other wild animals. In addition, a revenue sharing programme was introduced during the late 1990s whereby 12 per cent of gorilla tracking fees were allocated to a fund for community development projects such as schools and clinics. In the early-mid 2000s, the scheme changed to an allocation of 20 per cent of park entry fees to the community fund resulting in a significant lowering of the total funds disbursed to local development projects. After lobbying from local government, residents and international organisations in the area, an additional allocation of 1 per cent of the gorilla tracking fee (US\$500 per permit) was added to the fund from 2010 onwards in the form of a 'gorilla levy'. Then in 2015, based on research from the (R2P) project³ and lobbying from the Uganda Poverty and Conservation Learning Group, the gorilla levy was increased to US\$10 per permit sold.

In addition to the revenue sharing programme, a tourism programme was established as part of a range of local development projects supported by the Bwindi and Mgahinga Conservation Trust (BMCT) – an endowment fund established by the Global Environment Facility (GEF) in 1994. For example, in 2002, with support from BMCT, the ‘Buhoma Village Walk’ was established in the community adjacent to Buhoma gate and park headquarters.

Since formal, state-managed gorilla tourism started in 1993 tourist numbers have exponentially increased from 1,313 in 1993, to 18,000 in 2012⁶ and 21,500 in 2014.⁷ Like many other African countries, tourism to Uganda has suffered as a result of the Ebola outbreak in 2014, with tourist numbers visiting Bwindi dropping to 16,500 in 2015.⁷ According to the tour operator survey conducted as part of this project, Uganda has also suffered from the rise in popularity of Rwanda as a tourist destination, and the comparative difficulty and expense of reaching Bwindi compared with Rwandan gorilla parks.

As tourist numbers have increased so have the number of tourism facilities. In 1993 Buhoma was the only tourism centre. Now Ruhija, Nkuringo and Rushaga centres are also operational, with Rubuguri acting as a hub around the ‘Southern Sector’ of the park. There are a total of 14 habituated gorilla groups: three in Buhoma Sector, two in Nkuringo Sector, three or four (one group has recently split in half) in Ruhija Sector and five in Rushaga Sector. The 14 gorilla groups have a total of 104 tracking permits available daily, at an average of 60 per cent daily occupancy. This spread of habituated gorilla groups has associated challenges, particularly the increased human-wildlife conflict caused by gorillas ranging outside the park on community land. Six of the habituated gorilla groups are known to range on private land. This contributes to the perception among local communities that costs are associated with the park.

The revenue sharing scheme, gorilla levy and other tourism initiatives, whilst well-motivated, have not generated significant benefits for the majority of people living around the park. This is partly due to the corrupt systems of dispersal which have resulted in some funds failing to reach intended beneficiaries. It is also due to poor targeting of benefits which fail to reach those households who bear the costs of conservation (the poorest households who live closest to the park). Furthermore, Bwindi is surrounded by one of the most densely populated areas of rural Africa, with up to 300 people per square kilometre (Plumptre *et al.* 2004). There are 101 villages in 27 parishes along Bwindi’s boundary comprising approximately 70,000 people, of whom approximately 1,000 are from the indigenous and politically marginalised Batwa ethnic group. Under UWA’s Revenue Sharing Guidelines, all should receive a share of the income that UWA raises from park entrance fees and gorilla tracking permits. The total amount of revenue is, however, limited. In 1996 a total of 76 million Ugandan shillings (£19,000) was disbursed, rising to 662 million (£165,500) in 2012, before reducing to 500 million (£125,000) in 2013 and 2014.⁸ In addition to this revenue, a survey of 23 tourism lodges around Bwindi conducted by IIED and IGCP in 2015 estimated that only 450 local people (mostly male) are employed in tourism. Overall, therefore, benefits to poor people from tourism are very low.

Research carried out under the R2P project looked at motivations for unauthorised use of resources from Bwindi Impenetrable National Park, Uganda. Among other factors, employment of local people in park and tourism related activities were found to contribute to perception that the distribution of benefits from the park were not fair. Perceptions of unfairness contributed toward the unauthorised use of park resources by local people. Local people believe that they do not get a fair share of the available jobs, especially when considering the park-related costs they incur (Twinamatsiko *et al.* 2014)⁹.

⁶ Uganda Wildlife Authority (2015) Bwindi Impenetrable National Park General Management Plan 2014-2023.

⁷ IGCP email to author, Dilys Roe. 22 November, 2016.

⁸ No disbursements have been made since 2014. Namara A (2015) Tourism-related employment of local people around Bwindi Impenetrable National Park, Uganda. IIED, Poverty and Conservation Learning Group. <http://pubs.iied.org/G03942>

⁹ Twinamatsiko, M *et al.* (2014) Linking Conservation, Equity and Poverty Alleviation: Understanding profiles and motivations of resource users and local perceptions of governance at Bwindi Impenetrable National Park, Uganda. IIED, London. <http://pubs.iied.org/14630IIED>

The supply side: what local tourism products and services are available?

An inventory of locally owned/managed tourism initiatives was compiled in August 2016 and validated during the scoping visit to the three main tourism zones. Table 1 shows existing enterprises and their supplied products and services. The inventory does not include every craft outlet, café, bar or hotel in the tourism zones, but rather the enterprises that involve and are intended to benefit local people.

Table 1 Inventory of existing community tourism enterprises

Name	Type of enterprise
<i>Tourism zone: Buhoma</i>	
Buhoma-Mukono Community Development Association: Buhoma Community Women Group Buhoma Community Village Walk Ride for a Woman	A membership organisation. Owns two lodges – one of which operates a guided walk. Womens group produces handicrafts.
Batwa Experience	Women's craft cooperative that produces mainly baskets and fabric crafts; started as an initiative to create employment for disadvantaged women through hiring bikes to tourists.
Batwa Experience	A guided, cultural walk managed by the Batwa Development Programme (an NGO). BDP also operates a craft shop and offers tourists an opportunity to help in the construction of houses.
Bwindi Orphans Development Centre	Dancing displays.
Buhoma Community Orphans and Vulnerable Children Centre	Dancing displays.
Community Initiatives for Biodiversity Conservation	Market gardeners and tourist restaurant serving local food.
Community Tourists Guides Association Bwindi Nature Walking Safaris Batwa Cultural Walk Bwindi Community Experience Ruhondeeza Peace Walk Bwindi Bird Guides	Group of local guides offering a variety of local nature and cultural walk.
Nyundo Valley Hill Links Tour Limited	Guiding services particularly bird watching and community walks; dancing displays .
<i>Tourism zone: Ruhija</i>	
Mpungu Community Conservation Association	Membership association includes handicraft producers and dancers.
Ruhija Community Gorilla Tourism Development Association including: Ruhija Beekeepers Association, Ruhija Community Trail, Ruhija Women Community and Cultural Group	Membership association including: craft shop stocked by locally made baskets, fabrics, carvings; a guided village walk; and bee keepers group.
Change a Life Bwindi Men Beekeepers Association	Reformed poachers turned beekeepers operating in Mpungu.
Change a Life Bwindi Women Weavers	Womens group producing baskets and fabric handicrafts.
Ruhija Community Walks with Batwa	Private initiative which runs a guided walk to a re-located Batwa family and also sells handicrafts
Ruhija Community Orphans and Disabled Little Angels	Dancing displays.
Children Gorilla Organisation	Dancing displays.
Batwa Craft Shop	Handicraft sales.

Tourism zone: Southern sector	
Rubuguri and Nkuringo Reformed Poachers	Market gardeners selling some produce to lodges.
Rubuguri-Nteko Handcraft Cooperative Society Limited	Women weavers group.
Nkuringo Beekeepers Association	Honey producers.
Buniga Forest Experience	Guided walks and Batwa culture.
Nkuringo Honey Pot Cooperative	Honey producers.
Kikomo Youth Association	Market gardening.
Rubuguri Guides Association	Guides available to hire for bird watching for example.
Rubuguri Women Weavers Association	Handicrafts production.
Rubuguri Porters Association	Portering services for gorilla tracking.
Bwindi Reptile Farm Organisation	Visitor attraction.
Nkuringo Artisans Cooperatives	Handicraft production.
Rubuguri Beekeepers Association	Honey producers.
Nkuringo Indigenous Private Forest Owners Association	Guided forest walks.
Nkuringo Community Conservation and Development Foundation	Membership organisation which includes Shareholders in Clouds lodge and guided walks.
Nkuringo Orphans Group	Handcraft production.
African Craft Shop	Craft shop.
Nkuringo Foundation Nursery and Primary School Gift Shop	Craft shop.
Nkuringo Local Craft Shop	Craft shop.
Amazing Mountain Gorilla Craft Shop	Craft shop.
Nyabaremura Handcraft Group	Handicraft production.
Rushaga Craft Shop	Craft shop.
Rushaga Community Walks	Guided village walks.
Nshongi Orphan Craft Shop	Craft shop.
Batwa Craft Shop	Craft shop.
Nshongi Sunrise Craft Shop	Craft shop.
Gorilla Gallery Craft Shop	Craft shop.
Batwa Forest Experience	Guided walk.
Rushaga Youth Carvers	Handicraft production.
Rushaga Batwa Valley	Market gardeners selling vegetables to lodges.

This inventory gives the impression of a vibrant local tourism industry around Bwindi. However, many of the enterprises listed, particularly the guided walks and other guiding services, are occasional and opportunistic rather than viable businesses. Other enterprises are aspirational, for example the many honey producers and market gardeners have limited sales to lodges. Key challenges include: inadequate capacity to produce quality products and services, inconsistent supplies and poor agricultural practices. In the case of the craft producers and outlets, there are numerous small craft shops and producer groups. However, the majority sell the same products – gorilla carvings, baskets and fabric crafts – with quality standards being fairly low.

The demand side: what do tourists want?

Tour operator perspectives

Few tour operators, based in-country or internationally, offer anything other than gorilla trekking experiences at Bwindi. A small number sampled from a wide market spectrum provided optional extras of Batwa trail and village visits along with guided birding walks, but these are a minority. A wide variety of international tour operators who organise trips to Bwindi were interviewed at the start of the project in order to explore the kinds of community products and services they currently offer their clients, and their perceptions as to what new or improved products would be of interest. The tour operators pointed out that often limited time to undertake additional activities as many tourists only spend one full day in the area, which is occupied with the gorilla trek. If trips are longer than two nights then tourists will have a day free after doing the gorilla trek on their first full day in Bwindi. However, an increasing number of tourists are choosing to repeat the gorilla trek on their second day as it is such a highlight. Sometimes the gorilla trek will only take half a day if the gorillas are sighted early on. This then leaves the remainder of the day free but obviously this can't be predicted so any activities offered in the afternoons would need to be on the basis that tourists could turn up and do the activity then and there instead of booking in advance.

Tour operators had a wide range of views as to what additional activities would be of interest. They highlighted a wide diversity of tourist preferences, but noted that there were some products that always seemed to be popular – for example dancing and drumming. They also noted that the tourists are there to see wildlife and so additional activities based on walking and/or wildlife are generally attractive. However, other than the gorillas, the local guided wildlife tours on offer often disappoint either in comparison to the highlight of the gorilla trek or to the plentiful wildlife in other locations) (particularly evident if tourists are on a multi-country tour). To counter this, tour operators thought that the existing offer could be made more attractive by:

- Making walks more about the scenery, having good lunch, experiencing village life. Any wildlife seen would be an added bonus rather than the focus. They noted, however, that cultural offerings would have to be authentic, not contrived or intrusive.
- Improving the existing network of trails so that they appear more professional and attractive.
- Developing new products such as night walks.

The tour operators also highlighted that tourists who were travelling with a company with an overtly responsible ethos would be likely to be happy to spend additional funds on activities and products that they know are benefiting the local community. They also like to buy local souvenirs, if the products are right. They highlighted however, a common problem of poor quality of products, or lack of awareness of the craft producers of tourists constraints in terms of the weight and size of products that they can carry home. The tour operators suggested that there was a lot of potential to develop crafts which are associated with the gorilla trekking experience but that these need to be locally produced, high quality, unique and affordable. Importantly they pointed out that a key issue affecting tourists willingness to buy local products was the location where they were presented and the atmosphere – hassle and hard sells to be avoided at all costs.

Tourist perspectives

To complement the tour operator perspectives, another survey was distributed to tourists in Bwindi in July and August 2016. A total of 112 tourists completed the written survey in which they were asked to indicate which products and services they had seen available, those they had purchased and those which they would purchase had they been available or had they had the time. The survey demographic is outlined in Table 2. It should be noted that not all respondents answered all questions. The figures presented below therefore refer to the **percentage of those who responded to the individual question concerned**, rather than the entire 112 tourists surveyed.

Table 2 Characteristics of tourists visiting Bwindi (from a survey conducted in July/Aug 2016)

Age	32% ≤ 35	56% 36-60	12% ≥ 61	
Origin*	28% USA	22% UK	11% Germany	8% Netherlands
Duration of stay at Bwindi:	10% 1 night	52% 2 nights	32% 3 nights	7% 4 nights+

*the remainder were from Europe (France, Italy, Switzerland, Slovenia, Spain, Norway, Belgium and Austria), New Zealand, Canada, South Africa, Mexico, UAE and Uganda

The tourist survey revealed that the most commonly available and purchased products were wood handicrafts, with baskets and fabric handicrafts also being popular. Locally cooked and served meals were also commonly purchased (although from the comments on the survey forms it appears that many respondents were including lodge-provided meals in this category rather than ‘experiential’ local meals), as were local trails and cultural visits. Table 3 summarises the findings of the survey, demonstrating that there is good awareness of the availability of most products, with the exception of guided birdwatching walks and local artisan foods and products. However, there is certainly scope to increase purchase levels. One respondent commented that their tour agency had told them only about gorilla tracking and nothing about the other options, which they felt presented a missed opportunity.

Guided birdwatching walks

Awareness of this service was lower than others, and take-up particularly low. In some cases the birdwatching walk was provided free by the respondents’ guide. However, the quality and value for money of the walks was rated highly by respondents.

Batwa/cultural trails and village/home/farm/walks/visits

Many respondents conflated these experiences or had been on a tour that offered an element of both – thus the two are considered together here. Awareness of this offering was high, and take-up significantly better than birdwatching walks. One tourist considered that it was a good activity to do while waiting to go on a gorilla trek.

Opinions on quality and value for money varied. Some enjoyed being able to gain an experience of local culture and meet friendly people. Some were happy to pay US\$20 for a tour; another felt that the price they paid of US\$25 was too high. One tourist stated that s/he did not agree with such tours. However another felt the tour offered mutual benefit “*for the community economy and cultural understanding of visitors*”. Many found it interesting with one tourist describing it as an “*unforgettable experience*”. Highlights identified included the village camp, school, cooks, local doctor, orphanage, local dance, women’s group and banana brewing.

Tourists’ experiences of the product itself varied, perhaps depending on the provider of their particular tour or walk. For example, one respondent’s tour was organised by local people Ruth and Pansor – the respondent was enthusiastic about their guiding and the tour itself. However, another respondent was disappointed that the local people on his/her tour were in Western clothing. Another commented that they would have liked to have seen more of the skills of the community displayed, such as basket making, with products for sale.

Others felt that there was too much pressure to buy or donate – some parts of the tour “*seemed all about getting dollars*”. One respondent was not told the price before taking the tour. However another valued the opportunity to see directly where their donations were going. Some guests walked through the village themselves, although one found it touristy and the sellers a little too aggressive. Another found the trail to the village unsafe in the dark.

Locally cooked and served meals

Overall, 62 per cent of respondents had seen local meals available, of which 54 per cent purchased them. Almost all (95 per cent) rated their quality as four or five out of five and 91 per cent rated their value for money as four or five out of five. However, many appeared to be referring to the food served at their accommodation and it was not easy to identify which had independently purchased meals sold

outside. One respondent expressed concerns about hygiene if eating outside, while others thought that the food was wonderful, tasty and had exceeded their expectations.

Handicrafts

A number of tourists observed that it would be nice to see handicrafts being made, which might have encouraged them to purchase. One respondent also commented that it was hard to tell if products were locally made and sustainable. In some cases, the tourists could not take certain products back to their country. The types of products purchased included small wooden gorilla carvings, baskets made by local women, printed T-shirts, aprons, shopping bags and fabric for dressmaking. Some guests bought items from a guide, or more commonly from the lodge where they were staying.

Generally tourists were satisfied with the quality of products (particularly basket handicrafts) and their value for money once negotiation had taken place (prices tended to start high and varied markedly between shops). One tourist felt that the price was too high compared to the quality, but bought a carving to support the local economy. Others stated that the colour came off the carving and that they felt that the shops could improve both the quantity and quality of the carvings on offer.

Local artisan foods and related products

Purchasing of artisan foods and related products was low. Some respondents had bought items such as pineapples, bananas and ginger. Others had already bought products elsewhere on their trip, such as honey and tea. Respondents from the USA and New Zealand pointed out that there are restrictions on importing such products to their home countries. One respondent was concerned about their digestive system not being resilient to certain bacteria.

Other products and services seen available and/or purchased

Very few respondents had seen any other goods or services available. Those mentioned were a tour of the orphanage and school, a dancing and singing performance by local school children, and selling of crafts and paintings by local children. There was a feeling from tour operators that this was the type of thing they would like to support but they needed to know more about who would benefit and so on.

Table 3 What Bwindi tourists currently buy

Product or service	Seen available	Have purchased	Opinion on quality Rating 1-5 (poor to excellent)	Opinion on value for money Rating 1-5 (poor to excellent)
Guided birdwatching walks	41%	7% 21% had no time	100% rated as 3 or above 92% rated as 4 or 5	100% rated as 4 or 5
Batwa/cultural trails	71%	27% 20% had no time	89% rated as 4 or 5	92% rated as 4 or 5 but 8% rated 1 or 2
Village/home/farm walks/visits	78%	44% 21% had no time	82% rated as 4 or 5	75% rated as 4 or 5 but 16% rated 1 or 2
Locally cooked and served meals	62%	54% 7% had no time	95% rated as 4 or 5	100% rated as 3 or above 92% rated as 4 or 5
Wood handicrafts	86%	55% 12% had no time	100% rated as 3 or above. 77% rated as 4 or 5	71% rated as 4 or 5
Basket handicrafts	79%	36% 13% had no time	100% 3 or above 92% rated as 4 or 5	77% rated as 4 or 5
Fabrics/fabric handicrafts	71%	31% 13% had no time	85% rated as 4 or 5	72% rated as 4 or 5 but 4% rated as 1
Local artisan foods and related products	48%	17% 8% had no time	100% rated as 3 or above 83% rated as 4 or 5	75% rated as 4 or 5

What would tourists *like* to buy?

The tourist survey asked respondents to indicate which products and services they would purchase if available and whether they would stay longer at Bwindi in order to do so. Table 4 provides a summary of the results. It should be cautioned that in some cases respondents stated that they would purchase a particular product if available, but from their previous answers it was apparent that they had seen that product available and had not in fact purchased it. However, time is an important factor which may explain this disparity to an extent. Almost every two out of three respondents were staying at Bwindi for two nights or less, meaning that their only available free time is the afternoon of the day they arrive or after the trek if they happen to spot gorillas relatively easily and so have a shorter trek.

The qualitative feedback from tourists and tour operators also underlines the need for any products and services developed to be easily accessed by tourists. The principal reason they are in Bwindi is to track the gorillas and often this is a long, strenuous, tiring day with an early start. Some respondents commented that they needed a break after trekking.

It therefore needs to be made as easy as possible for tourists to access and buy products. This may mean having more products available for sale in the lodges, or providing information and booking facilities for tours and other activities at the lodges or as nearby as possible. Another operator pointed out that anything offered would need to be decided with the local tour operator as there is a large amount of interaction between them and the clients who tell him/her what they are interested in doing, before the itinerary is organised.

A number of the tour operators interviewed commented that their clients are strictly wildlife-oriented. However, as the table below demonstrates, even taking into account the possible attitude/behaviour gap there appears to be strong interest in cultural activities, although when asked to suggest new activities some respondents did suggest alternative nature-based activities (see below).

Table 4 What Bwindi tourists would like to buy

Product or service	Would/might buy if available	Would/might stay longer if available	Quality would have to be? Rating 1-5 (poor to excellent)	Price willing to pay (Very few responded to this question)
Guided birdwatching walks	43%	Yes 20% Maybe 8%	96% stated 4 or 5	US\$10-100
Batwa/cultural trails	74%	52%	All stated 3 or above 88% stated 4 or 5	US\$10-30
Village/farm/home walks/visits	69%	52%	All stated 3 or above 84% stated 4 or 5	US\$5-50
Locally cooked and served meals	71%	37%	89% stated 4 or 5	US\$10-30
Wood handicrafts	75%	36%	93% stated 4 or 5	US\$2-50
Basket handicrafts	69%	40%	92% stated 4 or 5	US\$10-30
Fabrics/fabric handicrafts	61%	30%	95% stated 4 or 5	US\$10-50
Local artisan foods and related products	67%	36%	84% stated 4 or 5	US\$10-50

Tours and walks

Feedback from the tour operators interviewed highlighted some general points to note about the type of activities that appeal to their particular client groups:

- Some clients would prefer something not too strenuous after a day out trekking the previous day, whereas others are quite active and would like something active for example more walks or a cycling tour.
- Others are there for walking and wildlife so may appreciate something like canopy walks, or night walks for bushbabies and other nocturnal wildlife.

- Existing nature trails sometimes disappoint in comparison to the highlight of the gorilla trek and plentiful wildlife in other places, particularly on multi-country itineraries. It is important to make walks more about the scenery, a good lunch, seeing a village for example and then any wildlife spotted is a plus.
- A better network of trails is needed.
- High quality, confident and well-trained local guides are key. It's important to revive storytelling, modernise and professionalise it.

Guided birdwatching

Two tourist survey respondents commented specifically that they would have liked to do such a walk had they been aware of it. Those who were interested felt that it would be important to have a knowledgeable guide, diversity of wildlife, photo opportunities and that the walks should take place near other sightseeing opportunities. Walks should last from two hours to a full day.

Batwa/cultural trails

Three quarters of respondents would be interested in this product if available and half would extend their stay in order to do it. Some respondents were concerned about the possible exploitation of local culture: the involvement of local people and a guide to explain the history is important – *“It would need to be very well done to convince me to participate.”*

Many of the tour operators commented that their clients are interested in cultural activities and performances, but struggle to find things that are genuinely authentic rather than artificial, staged, contrived or intrusive. They appreciate activities which they can see the benefit of and that involve the local community, but which are not ‘charity’. They like to be able to observe and participate in daily life and in particular not to feel like poverty tourists. The cultural offer and the quality needs to be improved, with local people encouraged to feel proud of their culture.

Some Swiss operators observed that if something is perceived as authentic and they are able to determine the origins of the product or to make a difference locally through purchase, then they have high purchasing power and will spend a considerable amount of money: *“they love supporting local products”*. One tourist suggested *“a cultural centre where guests could learn about the history of the Batwa and other cultures; exhibits with photos, artefacts and information; cultural performances (dances); and artisan workshops specific to cultural skills (weapon making, herbal and non-traditional medicine) so the skills/traditions are not lost, but passed on to future generations”*.

Village/farm/home walks/visits

This was similarly a popular option, with similar comments to the Batwa/cultural trails. One respondent suggested a two hour trip length, whereas another would want to know that the local people were *“ok with it”* and suggested that tourists could perhaps stay with a family and help them with daily chores.

Locally cooked and served meals

The survey found that 71 per cent of respondents would like to try a local meal, although less than one third would stay longer at Bwindi in order to do so. One operator explained that guests tend to eat at their accommodation after returning from the gorilla trek and then have an early night, anticipating that they would not wish to go out again.

Limited specific comments from respondents on what they would expect from a local meal provider included clean facilities, easily understandable ingredients and the ability to accommodate dietary restrictions. One respondent suggested that it would be nice to know the recipes and be able to buy the spices to take and try at home.

Developing an experience based on local food received mixed feedback from the tour operators interviewed. One was negative; a number of others thought it might appeal if based on getting involved, seeing real life (eg seeing the market, home cooking), modelled on tea/coffee/banana plantation visits. One operator said it would be best if it did not include meat. Cooking workshops might work –

particularly if it could appeal to a whole family. One operator suggested that a food experience is most likely to appeal to guests if rolled into a cultural activity.

Handicrafts

As one operator observed, handicrafts are *“not the reason people go on this kind of trip but are a nice to have if they’re right.”*

Tourists would like to watch and understand how things are made and even to try making them themselves. For example, one tourist commented that *“increasing the variety of crafts available and improving the quality would help sales. I would have liked to have been able to visit an artisan’s workshop to meet the artisan/craftsman and watch him/her work”*. Guests also wish to feel that they are contributing to the community and local people’s livelihoods. Products need to have a genuine story as to who benefits.

Craft products need to be locally made, easily transported, quality, affordable and made of sustainable materials – particularly in the case of wood. Items should be small enough to put in a suitcase and be of practical use or aesthetic quality over and above the ‘sentimental’ trip-associated reasons for purchase. One respondent suggested items such as aprons, bags or wall hangings. One operator commented that their clients are interested in traditional clothing and jewellery.

It is also crucial to differentiate products from those available on other parts of guests’ longer itineraries such as carvings and beads. One operator considered that there is a lot of potential to develop crafts which are associated with the gorilla trekking experience rather than more generic ones (eg animal carvings, particularly gorillas – since clients visiting Bwindi are wildlife-oriented). Another made the point that their clients see stunning hardwood carvings in the lodges but what is on offer to them are softer wood carvings.

One tourist considered that the handicrafts available were the wrong type of products and that local people need support and guidance on providing alternative products in line with tourist demand – still wood, basket and fabric handicrafts but different products. Another UK-based tour operator (who is himself Ugandan) felt that it is important to modernise and professionalise existing products.

Operators remarked that how and where the crafts are presented is also important: at the accommodation works well, alternatively in a relaxed atmosphere for example in a cafe/bar with a nice view on the evening of the trek. Avoiding hassle is essential.

Local artisan foods and related products

Few specific comments were made, although a couple of tourists suggested a coffee or tea tour and sampling, particularly if the product was organic and they could purchase coffee beans.

Other suggested products and services

Tourists and tour operators also suggested a number of other products and services that they might be interested in if available. These included:

- Insect/butterfly safaris.
- Another gorilla/chimp or golden monkey excursion, suggested cost US\$60-250.
- Hike through Bwindi forest after the gorilla tracking, guided for birds, flowers, suggested cost US\$30.
- A cycling tour.
- A one-hour gorilla education talk on the evening before the trek, suggested cost US\$5.
- A one-hour massage after the trek, suggested cost US\$20.
- Music is popular, again if is of good quality and authentic and presents an opportunity to learn – for example a traditional musical evening in the camp with singing, dance or local drumming lessons. One tourist suggested being taught how to play, sing or dance by the local people, suggested cost US\$10.

- Alternative products including postcards of gorillas at a reasonable price and key fobs (US\$1).

Increasing the uptake of local products and services by lodges

One way of increasing tourist exposure to local products and services is through the lodges. Discussions were held with lodge managers during focus group sessions in each of the tourism zones as to the opportunities and constraints. Nearly all highlighted problems of quality, quantity and consistency of supply. Lodge managers reported that they would be willing to purchase a wide range of fresh fruit and vegetables, herbs and spices, honey, cut flowers, milk and (to a lesser extent) meat, if regular supply of good quality products could be assured. Beyond food products, a number of lodge owners noted problems in providing cultural services and other tourism products. They noted that there is a lack of coordination between suppliers of different services (for example dance groups) and lots of quarrelling about who will attend which lodge. It was also noted that with respect to the Batwa, many of their guests are interested in experiencing Batwa culture but it is unclear who is representing the Batwa, and guests are concerned to understand how the Batwa are benefitting. One lodge manager noted “everyone is more interested in getting money than in delivering a quality service.”

Lodge managers suggested that a brochure and/or map that summarises what local products and services are available in each tourism zone and that could be displayed in the lodge would be a useful source of information both for them and their guests.

Matching supply and demand: are tourists' needs being met?

It is clear from the tourist survey that there is a demand for local services and products that are complementary to the gorilla-tracking focus of most trips to Bwindi. In particular, there seems to be a large unmet demand for cultural tours and for better quality/unique handicrafts. However, there are limitations to the time availability for tourists to participate in additional experiences – something which would need to be factored in to tourist itineraries in advance (as a part of the overall Bwindi experience) in order for appropriate time to be made available. Evidence from the tourist survey indicates that if potential travellers know about something other than the gorilla experience and it offers good value for money, extending their stay for this part of the itinerary would be strongly considered.

By intervening to significantly improve the quality of guided experiences (increasing the confidence of operators, lodge owners and tourists in the “experience for money” on offer) it should be possible to increase awareness and pre-booking (planning-in) of guided tours to see birds and ‘meet the people’ and to increase the fee paid for the experiences. Local livelihoods will be improved both by fees paid for the experiences and through the opportunities that the ‘meet the people’ tours create for sales of craft and souvenir products to tourists.

As far as handicrafts and other products go, tourists are already purchasing souvenir products but they express dissatisfaction with the quality, variety and utility of what is offered. The site visits by the team confirmed that these are real issues and that transportability is an issue too. One lodge owner told a story of a wealthy client who wanted to spend some money and buy a quality souvenir to take home but could not find anything available locally that was up to his standards and that he would be prepared to exhibit in his house. The experiences expressed at Bwindi resonate with those heard from tourists in many other tourism destinations and there is clearly a gap in the market for high quality, authentic and unique souvenirs.

One issue that needs to be addressed, however, is the role of ‘driver guides’ – the individuals who are sent to escort groups of tourists to Bwindi and to act as a guide during their stay. Once the tourists set off on their journey the driver guide becomes the key source of trusted information. However, driver guides often seek to maximise their commission earnings and so the enterprises, experiences, markets and so on that they take their clients to are likely to be those with whom they have negotiated the best commissions and not necessarily those that offer the best experience for tourists or local people.

Currently there is no way for tourists to distinguish quality, authentic, ‘pro-poor’ products and services. The planned use of a Gorilla Friendly™ label in this project is intended to help address this problem. Awareness of the tourists, tour operators and lodge owners about the label and what it stands for will mean that they have more potential to override the preferences of the driver guides by insisting they are taken to the right guided tours and to the right sales outlets where the quality products will be on sale and clearly labelled.

It is important to recognise that while competition may exist between the lodges around Bwindi for particular market segments, few tourists visit more than one tourism zone. They travel to Bwindi, stay for varying periods of days and then leave. Improving weaving skills to enhance livelihoods in one tourism zone is non-competitive with the development of weaving skills in another zone. Along a route it would be inadvisable to develop similar skills and products in village after village as this would create competition between different groups of producers, but this is not the case at Bwindi.

Other needs that are not being met that would help increase support for and uptake of local products and services include:

- Development of maps/brochures of local tourism services and attractions in each zone for use by tourists in lodges.
- Collective tourism centres (craft markets or cultural centres) where tourists can buy from multiple producers in one location with assurance of quality and without being pressured.

Filling the gap: the product/service development focus of the project

Based on the tourist/tour operator surveys and the inventory of existing local enterprises, as part of the scoping visit the project team conducted interviews and visits with a number of individuals and enterprises. These all appeared to meet our criteria of involving the poorest households (those within a single kilometre of the park boundary) but also having real potential to engage with, and benefit from tourism (for example they were already showing some entrepreneurial spirit and had nascent enterprises or enterprises that could be further developed). We identified a range of initiatives that could benefit from training in product development and/or from technical support in order to improve the viability and quality of the products on offer. We particularly considered enterprises that were owned by, or working with, frontline communities within a one kilometre radius of the park boundary and that had an apparent interest and capacity to engage with tourism.

Following the scoping visit, ITFC reviewed the list of potential target beneficiaries and (in consultation with local government and Uganda Wildlife Authority) verified the characteristics of all the enterprises to select those to engage in a capacity building programme. The next stage of the project will be to deliver training to these enterprises focused on skill enhancement and value addition to meet the demands of the tourism industry. Table 5 provides a summary of the initiatives identified.

Table 5 Tourism enterprises to be supported by the 'pro-poor' tourism project

Name	Estimated no. of households involved	Training/technical support needed
<i>Tourism zone: Buhoma</i>		
Buhoma Batwa Cultural Forest Experience	17	Improve product - make more community oriented, more diversified, better marketing
Ride 4 a Woman (womens craft cooperative)	50 women	Improve quality, diversity product - baskets, fabrics jewellery
Community Initiative for Biodiversity Conservation (market gardens and restaurant)	39 youth and poachers	Improve product, increases linkages with lodges
Batwa house-building and land acquisition	25	Marketing
<i>Tourism zone: Ruhija</i>		
Ruhija Beekeepers Association (honey, beeswax production)	20	Value addition to honey processing and packaging
Change a Life Bwindi Men Reformed Poachers Association (honey, beeswax production)	16 reformed poachers	Improve product, marketing and selling to lodges
Change a Life Bwindi Women Weavers association	21	Improve products - fabric, baskets jewellery
Ruhija Women Cultural and Weavers group. Ruhija Community Gorilla Tourism Development Association	30 (20 baskets and 10 beads/fabrics)	Improve products - fabric, baskets jewellery

Tourism zone: Rushaga

Rushaga Batwa Valley Cultural Dancers and Gardeners (home gardens and livestock)	8	Improve lodge links, provide agricultural extension
Rushaga Community Tourism Walk (New village walk, including Batwa)	17	Develop new trail, train guides
Rubuguri-Nteko Handcraft Cooperative Society Limited (women weavers)	32	Diversify product (weaving and jewellery)
Rubuguri Women HIV Hope Group (women weavers)	7	As above
Rushaga Youth Carvers	5	Improve and diversify product

Tourism zone: Nkuringo

Buniga Batwa Forest Experience	12	Improve existing community walk and market including musical training for Batwa
Nkuringo Reformed Poacher Association (market gardeners)	23	Improve quality and range of products, lodge links
Rubuguri-Nteko Handcraft Cooperative Society Limited (women weavers)	59	As per Rushaga weavers

Across all zones

Bird guides for example, Bwindi South Birders Club and Buhoma Birders	10	Pilot in zone with highest number and/or length of stay of tourists. Roll out if successful in a follow up project; will need to take an entry test for training selection
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There are three target markets for these new enhanced products, produced and provided by the economically poor living within a single kilometre of the BINP boundary:

1. **Tourists** (interested in purchasing craft products and guided tours). Craft products can be sold at roadside stalls, close to the Bwindi entrance gates, and within lodges (the lodges were generally supportive of this in principle). Tourists aware of the new better products will ensure that the driver guides stop at outlets where they can see and potentially purchase the improved higher value products. The craft workers will be encouraged to demonstrate their craft making at the point of sale, to adopt a fixed price sales strategy and to improve the presentation of the craft products. Craft has the advantage that it can be produced some way from the point of sale and stored. For those tourists staying longer, the Gorilla Friendly™ label with its quality and fairness guarantee will ensure higher sales and better livelihoods. Guided tours are more difficult to sell to because purchase and consumption takes more time, and for most tourists the decision to take a guided community or bird tour needs to be planned into their itinerary in advance.
2. **National and international tour operators and guides.** The assurance of a quality experience will increase the willingness of international and national operators to offer these tours, improving the likelihood of tourists booking on to them in advance.

3. **Lodges** (interested in purchasing craft products, guided tours and locally grown food). Lodge owners and staff can encourage tourists to purchase Gorilla Friendly™ products and guided experiences, assured of their higher quality. The large majority of lodge owners appeared willing to consider retailing quality craft and to encourage tourists to purchase Gorilla Friendly™ labelled products. However, this will need to be tested and commissions may affect their willingness to do this in practice.

Nearly all of the lodge owners present at the workshops expressed interest in purchasing locally grown vegetables, fruit and meat. The key issues they raised were: quality, price, consistency and timely supply. In the absence of a viable wholesale market (and the inability from within the initiative to fund an intermediary with transport) the success of this part of the project will depend upon the agreements made between particular lodges and beneficiary horticulturalists, in particular the ability of lodge owners to forecast demand and for growers to meet it on a weekly basis.

Conclusion

Our tourist survey and scoping visit has confirmed that there is a demand for more local services and products that are complementary to the gorilla-tracking focus of most tourist trips to Bwindi. In particular, there seems to be a large, unmet demand for cultural tours and for better quality/unique handicrafts. However, at present there is no way for tourists to distinguish authentic, 'pro-poor' products and services, or for tour operators to be assured of their quality and offer these at the itinerary planning stage. The use of our Gorilla Friendly™ label is intended to help address this problem.

During the scoping visit the team identified a list of tourism enterprises that could be supported by the 'pro-poor' tourism project going forward. The next stage of the project will be to deliver training to these enterprises, focused on skill enhancement and value addition to meet the demands of the tourism industry. Enhancing the quality of these enterprises going forward is anticipated improve job opportunities, community revenue from tourism and the long-term prospects of the park.

'Local economic development through pro-poor gorilla tourism in Uganda' is a three year project funded by the UK government's Darwin Initiative. The aim of the project is to work with local people and established tour operators to develop and test new 'pro-poor' tourism products and services around Bwindi Impenetrable National Park. This report discusses the findings of the first two stages of the project; scoping the demand for 'pro-poor' tourism initiatives and assessing local capacity for supply. From a combination of tourist and tour operator surveys, as well as a scoping visit to the main tourism zones, the project team identified a range of existing initiatives with the potential to add value to the typical two night gorilla tracking package, increase community revenue from tourism and consequently improve local attitudes towards the park.



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