

**Proposal to
Climate Resilient Ecosystems and Livelihoods Project (CREL)**

**For a
Baseline survey on Tourism Enterprises in Bangladesh**

Flood Hazard Research Centre Bangladesh

Revised

12 October 2014

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Technical proposal for

“Baseline survey on Tourism Enterprises in Bangladesh”

To be conducted on behalf of Climate Resilient Ecosystems and Livelihoods Project

The objectives set by CREL for this survey are to:

1. "Find out the types of enterprise benefiting from current nature based tourism and estimate the numbers of each type of enterprise and the numbers of people employed or with a livelihood from this sector in each selected site/zone.
2. Quantify for each type of service and enterprise average annual gross margin/yearly income per enterprise and average income per person; and estimate the proportion of business that is based on the target CREL conservation sites, and recent trends in these enterprises.
3. Estimate from 1 and 2 a baseline for nature based tourism in the selected CREL sites/areas, in terms of employment, market size and yearly return
4. Diagnose areas for synergy and collaboration between nature-based tourism and co-management in these areas.
5. Identify priorities for enhancing nature tourism identified by service providers, and gaps/ areas to improve this sector (e.g. skills, training and other possible interventions to promote tourism supply chain) in specific CREL sites.
6. Document the method such that it can be replicated to quantify changes and impacts of project interventions."

The main challenges of the survey/study are: to identify and quantify the population of enterprises that may get a significant income from visitors and tourists, and to obtain financial information from these businesses.

For each of the study areas we propose to take the following approach:

Population identification

A primary objective of the study is to generate an estimate of the numbers of enterprises of different types benefiting from nature-based tourism in selected protected areas, since there is no existing data set on this. However, to design the study an idea of the possible numbers of such enterprises is needed.

The categories of enterprise we will survey are:

1. accommodation (hotels and guest houses);
2. restaurants and other eating places including tea stalls, etc;
3. transport (vehicles hired to visit the sites (e.g. micros, cars, jeeps, motorized 3-wheelers, boats);
4. other services (guides, tour agencies, shops catering to visitors such as handicrafts, cultural groups, etc.); and
5. additionally in the Sundarbans all inclusive boats operated by tour companies.

From the scope of work we plan to focus on the priority localities and protected areas as follows:

1. Srimangal area - Lawachara NP and Hail Haor: we will focus on Srimangal town plus facilities/ enterprises at or on the routes to the two nature tourism sites. Estimate about 25 hotels and guest houses, at least this number again of restaurants, local vehicles hired by visitors over 100, boats used on haor by visitors - say 15; other services and guides say 30.
2. Cox's Bazar town, Teknaf town and areas in-between (covering Teknaf WS, Himchari NP and Inani forest). Estimated from internet just over 100 hotels in Cox's Bazar plus about 12 others on way and in Teknaf; similar number of restaurants, local vehicles hired by visitors likely several hundreds, boats used by visitors (e.g. Sonadia) probably very few, other services and guides say similar number to hotels.
3. Kaptai (covering Kaptai NP). Estimated up to five hotels/rest-houses; perhaps 10 restaurants/eating places and a similar number of services, local vehicles hired by visitors unknown but likely to be modest, possibly some boats used on lake but not clear if this forms part of the national park.
4. Sundarbans - we will focus on boat based tourism plus visitors based in Khulna and Satkhira-Shyamnagar: companies operating boat based packages estimated at about 10 (mostly Dhaka based), contract boats (hired by private groups) about 5, day trip boats say 20; hotels in Khulna about 18 plus guest houses in Shyamnagar; other services - a few such as cultural groups.

To compile the census we will consult with CREL staff and any local trade associations, if they exist, in case they have lists of different types of businesses. But this is unlikely in most cases/sites.

1. For hotels and restaurants/tea shops members of our team will identify and list these (separately) by physically visiting roads in the respective towns and immediate vicinity of the PA's main entry point(s), and observing them.
2. For transport this approach will not be feasible and key informants and interviewed transport operators in the main locations where visitors hire vehicles will be asked to estimate the number of private transports that may be used by visitors travelling to or inside the protected area and operating from/in that area including boats (where appropriate), micros/ cars/ jeeps hired locally, and motorised three-wheelers of different types, cross-checking this from more than one source.
3. For other services such as visitor guides the protected area authorities and CREL staff will be requested to help by providing lists of authorized/recognized guides, these may be cross checked with guides for any omissions, hotel proprietors identified in 1 above will be asked about other services (shops, cultural groups, tour companies, etc.) so that we can list these.

A sample of each of these categories of business will be interviewed for quantitative and qualitative data.

Sampling design

Without knowing the population of each business type in each of the study areas we can only give a general simple strategy for sampling, designed to be feasible considering the recommended level of effort in the scope of work. For any category of enterprise at one of the four sites where there are up to ten businesses of a given type identified as the population in a study area we will aim to interview all of these (subject to availability of owner/ manager/ operator and their willingness to participate). Where there are between ten and 30 businesses of a category we will interview a sample of 10 businesses; where there are between 30 and 100 businesses of a category we will sample 15, and where there are over 100 we will sample 20. Sampling will be randomised and systematic. For example, for a

population of 20 eating places, in general interview every other business when walking the roads they are located on until 10 are interviewed, and ensure that the sample is spread across all the parts of the town with eating places. Stratification may be needed in the case of hotels if there is a large variation in room rates within a site.

Interview format

A fixed questionnaire(s) will be designed, this is expected to have different modules for transport, hotels, restaurants and other services. Data collected will cover: when the enterprise started, seasons operated, measures of business in the last 12 months (by season), for example person nights of room occupancy, dinners/customers per day, days worked/operated, per day or monthly average sale value or total revenue, average costs, number of staff (if any), wage rate of staff, etc.

Other qualitative information will be collected as part of the interviews, for example on trends in visitors (for comparison with any available data on visitors) and the number of businesses/operators, and views on the constraints, opportunities and needs for tourism development. The questionnaire will also ask the respondents for their opinions on measures that could improve nature based tourism and their businesses such as skills development or publicity; and ways that these stakeholders could support conservation and the co-management concept, which might for example include small payments towards conservation paid by customers or by businesses.

Survey locations

Based on the scope of work our workplan and budget are based on conducting surveys as follows:

1. **Dhaka:** some of the Dhaka based tour companies will be interviewed, particularly to cover packages and their boats operated to Sundarbans, but also to document tours provided (if any) to the other focus sites.
2. **North-east:** surveys in Srimangal town plus businesses in or adjacent to Lawachara NP and Hail Haor. Note information on whether customers visit other PAs in this region will be taken, but those sites will not be visited and business population estimates will only cover the locations surveyed.
3. **Rangamati:** surveys in Kaptai town and businesses within or adjacent to Kaptai NP.
4. **Cox's Bazar:** survey in Cox's Bazar and Teknaf towns, plus businesses in or adjacent to Himchari NP and Teknaf WS. Note information on whether customers visit other PAs in this region will be taken, but those sites will not be visited and business population estimates will only cover the locations surveyed.
5. **South-west (Sundarbans):** surveys in Khulna and Satkhira-Shyamnagar (covering enterprises linked with shorter lower cost visits, and any businesses operating all-inclusive boats not based in Dhaka). Note information on whether customers visit other parts of the Sundarbans will be taken, but those access points will not be visited and business population estimates will only cover the locations surveyed.

Justification: within the limited time given in the scope of work it will not be feasible to conduct surveys for all of the sites listed. The list already identifies priority sites and these will be the focus as above. The main towns where visitors who overnight base themselves when visiting the priority sites will be covered. For individual sites in a region the ones

surveyed will be representative of the others, and also are those with currently the highest numbers of visitors.

Note that all of the details of the survey design, sampling, etc. will be finalised in consultation with the client – CREL.

Data will be entered into computer data bases for quantitative analysis using SPSS. Analysis and reporting will focus on four areas: the population of relevant enterprises, average returns, estimation of the value of tourism to enterprises and employment generated, and feedback on respondent opinions on constraints and suggestions.

Deliverables

The deliverables are set out in the scope of work, here some comments are given and links with the proposed method highlighted:

Report

- This will document in detail the method followed and report any problems encountered, with recommendations for how to repeat or improve.
- The method outlined above will result in a census covering the focus sites/locations giving numbers of tourism related enterprise by each of the types identified above, numbers of people employed will be estimated from the interview survey multiplied up by the census numbers.
- The sample survey will generate average yearly monetary return (total turnover and gross margin/profit) for each category of enterprises in the four locations. Based on the proportion of customers reported by these sample enterprises to be making nature based visits to the CREL sites, and the census, the overall value of returns to businesses attributable to nature based tourism will be estimated for each of the four sites;
- The sample survey and census will generate an estimate of employment (persons and days of work) for these enterprises;
- The surveyed enterprises will estimate trends in nature based tourism from their experience and trends in their own business over recent years;
- Constraints and recommendations will be reported based on responses in the interviews; and
- baseline data bases will be generated.

Sharing of findings in the four sites will be made at meetings arranged by CREL, and centrally in Dhaka.

Timetable

week	1	design
	2	mobilise assistants, orientation
	3-8	fieldwork, data entry in stages
	9	complete data entry
	10-11	analysis
	12-13	sharing of findings and drafting report
	14	complete report

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Brief summary of three recent relevant projects/activities

Support to Wetland Biodiversity Rehabilitation Project (GIZ, 5 years 2009-13, total value Tk 14,168,334). To address earlier loss of wetland biodiversity associated with flood control and drainage, GIZ (German aid - Deutsche Gesellschaft für Internationale Zusammenarbeit) has taken up a project to extend community based management, habitat restoration and integrated approaches to water and floodplain management in Pabna district. FHRC provided technical advice on the initial design, undertook in 2009 start up support involving surveys and inventories of all waterbodies and communities in the project area, and advice and support to some initial small scale interventions with communities, and also reviewed, profiled and ranked potential sites for a second phase expansion. In 2009-13 FHRC was responsible for baseline and impact monitoring of biodiversity covering in particular regular monitoring of fish catches, as well as annual surveys of waterbirds, and also coordinated surveys of other fauna. In the first phase project detailed surveys of livelihoods and monitoring of fish consumption were undertaken.

Surveys: baseline and impact monitoring in this project involved a census of 9 sites with 18 villages, household surveys and monitoring of 270 households comprising socio-economic baseline and monitoring of fish and other consumption on 6 days per month for two blocks of six months.

Community adjustment of crop-water-fishery management to drought and salinity in Barguna (Danida RFLDC-B, 3 years, 2010-12, total value Tk 6,881,384). This adaptive research project aimed to test an approach for enhancing productivity in drought and salinity prone areas in southwest Bangladesh. In these areas most agricultural land remains fallow in the dry season because groundwater aquifers are too deep to be viable and are brackish, while surface water is very limited and brackish. By working with community based organisations, and with Banchte Shekha as a partner, the project tested and assessed re-excavation of silted up canals to hold freshwater for both irrigation and fish, group irrigation to maximise returns from scarce water, the viability of crops with relatively low water demand, and the potential incremental gains from restoring native fish in these same canals and floodplains. In six sites canals were re-excavated, irrigation pumps and threshers were transferred to CBOs who were connected with quality seed sources, and helped to make small fish sanctuaries. The CBOs and farmers invested time in obtaining approval to re-excavate from government, and made arrangements to open sluices. The project demonstrated that sunflower needs five times less water than rice and maize 3.85 times less water, the yields of the new crops in saline areas were lower than in non-saline sites, but net returns remained at least as good as for rice, cultivation of these locally new crops expanded.

Surveys: sample survey of 156 households for baseline and impact socio-economic surveys, monitoring of fish catch on one day per week for two years in each of six sites, census of cropping pattern in each site and sample monitoring of crop inputs and production.

Role of floodplain community based organisations in coping with risk (The Bill & Melinda Gates Foundation, 3 years, 2010-13, total value US\$ 357,624). This project assessed current practices and coping by CBOs and followed this with action research on good practices with an existing network of CBOs in Bangladesh. Our partners were Nice Foundation, and the Society for Water Resources Management – a federation of 250 existing floodplain CBOs. A total of 338 focus group discussions were held with 191 cases of

collective action or CBOs, purposively selected to represent seven categories of collective action and four risk environments. Most reported worsening climatic hazards (except for floods). Coping actions through social networks and government/NGO support were more important as an immediate, for example informal borrowing and relief. Overall, 51 types of collective actions were reported, many with a direct risk coping benefit, some depend on external resources and voluntary labour (such as canal re-excavation and embankment repair), some improve resilience by diversifying crop-fishery-water management systems. Collective action practices identified by CBOs as successful in improving risk coping include enabling actions such as sustainable funding, savings and building social capital. These complement resilient natural resource management and adaptive learning. Members of CBOs spent considerable time on collective action of which about 25-33% was related to risk coping actions. Based on shared findings, 76 CBOs piloted actions to improve risk coping, most of these involved changes in cropping to cope with drought, salinity or in a few cases floods. The CBOs also cooperated with one another to defend their rights to floodplain resources: about 20 were involved in bringing two cases to the high courts where they obtained injunctions against the government to prevent loss of their access to public waterbodies.

Surveys and data sets: 338 detailed focus group discussions, approximately 250 community based organisations assessed as baseline and impact surveys, participatory monitoring of impacts of pilot interventions by CBOs.