



# LAMPI MARINE NATIONAL PARK ECOTOURISM PLAN 2015-2018



## Preface

In May 2015, Myanmar's Ministries of Hotels and Tourism (MOHT) and Environmental Conservation and Forestry (MOECAF) launched the Myanmar Ecotourism Policy and Management Strategy (2015-2025). This distinctive Policy defines Myanmar Ecotourism as:

*“tourism-related activity in and around its protected areas, that focuses upon management tools, systems and processes to deliver three elements:*

- *biodiversity and ecosystems conservation;*
- *education and learning to enable hosts and visitors to understand and engage with management approaches to protect and conserve the natural and cultural assets of these areas; and,*
- *economic and social benefits to communities in and around protected areas to (a) reduce and eliminate unsustainable practices, and (b) engage them in collaborative approaches to protected area management.”*

Mindful of the global significance of Myanmar's natural capital and its wealth of diverse ecosystems, the Policy's vision recognises multiple stakeholders have an active role and interest in the development Myanmar Ecotourism. It states:

*“We intend to use ecotourism as a driving force to strengthen the management of Myanmar's expanding protected area network. Our aim is to engage all stakeholders to implement ecotourism policies, business models and management approaches that protect the unique ecosystems of our country, and celebrate indigenous groups that have made these special areas their home.”*

Leading on from this vision, a mission statement further clarifies the intent to carefully plan and manage ecotourism in and around Myanmar's protected areas.

*By 2020 Myanmar will establish a diversity of quality ecotourism products and services. Targeted towards domestic and international markets, these experiences will raise an international awareness of Myanmar's extraordinary wealth of diverse ecosystems – from the dense forests and lofty peaks of the Eastern Himalaya to the rich marine life of the Myeik Archipelago. An Ecotourism Partnerships Framework will be developed to determine where and when visitor services are needed in and around protected areas. This framework will guide decisions related to the form, scale and management systems of business services that are appropriate to site conditions, and that simultaneously support and part-finance protected area objectives. To achieve our vision, selected protected areas with special assets and high visitor interest will serve as models to test new approaches and develop good practices that can be replicated throughout the country.*

To help direct its implementation, the Policy sets out ten guiding principles for Myanmar Ecotourism. These guiding principles aim to shape the strategic as well as the day-to-day actions and activities of government departments, the private sector, local communities, Myanmar's development partners, NGOs and visitors to protected areas. They call for tourism-related actions and activities to:

- i. *align with protected area objectives and management plans to ensure resource conservation as the number one priority;*

- ii. *support and respect zoning systems that restrict visitor use of core areas to conserve key species and habitats;*
- iii. *increase awareness among all stakeholders of the value and benefits of protected area networks, especially with regard to climate change mitigation;*
- iv. *form destination management organisations to embed ecotourism plans in district and state/region planning, and develop synergies with the UN 2015 Millennium Development Goals and post-2015 Development Agenda;*
- v. *leverage cultural and spiritual assets and values in interpretation plans to engender respect and responsible use;*
- vi. *promote responsible business models that wherever possible engage and benefit local people, reduce over-harvesting of natural assets and deliver conservation benefits;*
- vii. *provide income sources to sustain and protect Myanmar's protected area network;*
- viii. *use baseline data and monitoring programmes to assess and minimise negative impacts on nature, culture and host communities;*
- ix. *attract world-class investments, promote innovative architecture and infrastructure that harmonise with nature and cultural landscapes, and minimise energy consumption;*
- x. *provide models of good practice to help protect natural and cultural assets outside of national protected areas.*

At the protected area level, the Policy's Management Strategy specifies a need to prepare ecotourism plans that are consistent with the conservation management plans of these special areas.

Lampi Marine National Park is Myanmar's first national protected area to have a four-year general management plan (approved by MOECAF in November 2014) and a supporting ecotourism plan. This ecotourism plan has been prepared through a participatory process with technical assistance from Istituto Oikos and financial support from Italian Development Cooperation. The drafting process was undertaken between January and June 2015 and consisted of four steps.

- i. *A scoping mission in January to meet key stakeholders, visit key sites, identify key issues and set out a work-plan to develop and finalise the Plan.*
- ii. *Stakeholder consultations in March to present and discuss key issues with representatives from the public and private sectors, development partner agencies, local communities and tourists to the Park. In addition to one-to-one meetings, focus group meetings were convened in Yangon, Makyone Galet, Kawthaung, Dawei and Nay Pyi Taw.*
- iii. *Presentations of the draft plan to primary and secondary stakeholders in Kawthaung and Yangon in May to discuss the Plan's content and seek feedback to strengthen the final document.*
- iv. *Finalisation and MOECAF approval of the Plan in June.*

Through the above process more than 100 representatives of government agencies, industry associations, the private sector (tour operators, yachting companies, accommodation providers, tour guides), local communities, NGOs and development partners have been consulted and their views have hel-

ped shape this document. The Plan is divided into two Parts. Part I is a situation analysis that takes the form of an issues report identifying trends and processes that are shaping tourism-related development. It concludes with a series of recommendations to drive the sector forward and achieve conservation objectives. Part II sets out a long-term vision for ecotourism to the Park and four strategic programmes, to engage all key stakeholders in a series of actions and activities to achieve the vision.

## **Acknowledgements**

This Ecotourism Plan for Lampi Marine National Park is the result of a collaboration between the Myanmar Forest Department and Istituto Oikos within the project “Strengthen Local Capacities for Environmental Conservation and Ecotourism Development in Myeik Archipelago”.

The Plan was drafted by Paul Rogers, PhD. Tourism Consultant for Istituto Oikos, with the support of Istituto Oikos project team, following an inclusive and participatory process that engaged all relevant stakeholders.

Significant guidance in terms of the direction and focus of the Plan were provided by Dr Nyi Nyi Kyaw Director General of the Forest Department and U Win Naing Thaw, Director of the Nature and Wildlife Conservation Division of the Ministry of Environmental Conservation and Forestry.

Istituto Oikos would like to acknowledge the contributions made by community members of Makyone Galet and government officials in Nay Pyi Taw, Dawei and Kawthaung from the Ministries of: Environmental Conservation and Forestry; Hotels and Tourism; Livestock and Fisheries; National Planning and Economic Development; Home Affairs; Immigration and Population; Finance and Revenue; Employment, Labour and Social Security; Electric and Power; Communication and Information Technology, and, Social Welfare and Resettlement. Thanks are also extended to the Myanmar Navy, the Taninthary State Government and the General Administration Department in Kawthaung.

Special recognition is also given to the exceptionally high interest and involvement of the private sector, especially from yachting companies, tour operators and accommodation providers focused upon the conservation and promotion of Lampi Marine National Park. This document has been produced with the financial assistance of the Italian Development Cooperation, Stiftung Drittes Millennium and Keidanren Charity and Nature Trust.

## **Oikos Myanmar Office**

35, Shan Kone street  
Sanchaung Township, Yangon  
Office +95 (0) 12304476

## **LMNP Website**

For further information on LMNP please visit the website <http://www.lampipark.org/>.

## *Acronyms*

ASEAN	Association of South East Asian Nations
EIA	Environmental Impact Assessment
IUCN	International Union for Conservation of Nature
LMNP	Lampi Marine National Park
LMNP-EMB	Lampi Marine National Park – Ecotourism Management Board
LMNP-GMP	Lampi Marine National Park General Management Plan
MOECAF	Ministry of Environmental Conservation and Forestry
MG-EG	Makyone Galet – Ecotourism Group
MOHT	Ministry of Hotels and Tourism
MTF	Myanmar Tourism Federation
NGO	non-government organisation
PES	Payment for Environmental Services
UN	United Nations

## Summary

Located in Boke Pyin Township of Tanintharyi Region, Lampi Marine National Park (LMPN) covers an area of some 205km<sup>2</sup> and is recognised as an IUCN Category II national park. The Park was officially gazetted by the Government of Myanmar in 1996, listed as an ASEAN Heritage Park in 2003 and as an Important Bird and Biodiversity Area in 2004. The Park's mandate is to conserve the site's rich diversity of flora and fauna, which are threatened by poorly regulated and destructive commercial fishing practices, in-migration and population growth, and the subsistence livelihoods of the Park's residents.

Tourists have been visiting LMNP for more than a decade. While tourism to the Park is seasonal, it is estimated that in 2014 an average of 3.5 visitors per day entered the Park. Visitor numbers are however growing steadily and likely to increase significantly over the medium term as tourism is a priority sector of the Union Government. Tourism activity is currently conducted almost exclusively through live-aboard boat tours that embrace the Park as part of wider excursions into the Myeik Archipelago. While the Myanmar government earned US\$ 387,462 from archipelago tours in 2014, and roughly 50% of these entered the LMNP, the Park itself does not benefit financially from this activity. Similarly, the Park's 598 households are not engaged in this activity and receive little if any benefit from it.

The aim of this ecotourism plan is to set out a long-term vision and a three-year work-plan to strengthen ecotourism planning and management. The plan has three main goals to:

- i. develop a process to introduce a series of tourism-related user-fees to generate revenues that*
- ii. contribute towards biodiversity conservation and Park management costs;*
- iii. engage local households in the tourism system and economy, and provide alternative sources*
- iv. of income and employment to reduce their dependency upon the Park's natural resources;*
- v. develop educational strategies to raise local, national and international awareness of linkages*
- vi. between ecotourism activity, Park conservation objectives and the role of protected area net*
- vii. works in ecosystems conservation and climate change mitigation.*

Broad stakeholder consultations that engaged public, private, development partner and local community representatives confirm high interest to develop partnerships, work programmes and activities to achieve these goals.

The ecotourism vision is for Lampi Marine National Park to *become a model for protected areas in Myanmar, and be globally recognised for its extraordinary land- and seascapes with rich biodiversity and thriving Moken culture, offering unique visitor experiences based upon community empowerment and strong partnerships between park authorities and the tourism industry.* This Ecotourism Plan sets out four work programmes and 35 activities to achieve this vision.

**Programme 1 will strengthen ecotourism planning and management systems** through the formation of a community-based ecotourism group, a Park Ecotourism Management Board, the design and implementation of a series of ecotourism funding mechanisms and by the introduction of data collection and accounting systems.

**Programme 2 will strengthen and diversify the LMNP product range.** In addition to the construction of the Park's first high-end eco-resort, activities to be carried forward include a tour guide-training programme and the introduction of a series of locally managed excursions including options that engage and work with the Moken (sea-gypsies). The Plan recognises the success of these and other products depends upon close ties and synergies with the private sector, and the possible introduction of new visitor markets including licensed and LMNP approved community-based accommodation in Makyone Galet and day tours to the Park.

**Programme 3 will develop conservation linkages and monitoring protocols** for all ecotourism products, services and excursions operating within the Park. Activities include workshops with the Park community to present and discuss this Ecotourism Plan, and regular meetings to ensure the community are aware of positive and negative changes occurring as a result of ecotourism-related activity. Management systems will also be introduced to determine the demand for ecotourism products and excursions, and regulate and monitor the way they are practiced. Research initiatives will also be launched with a view to establishing turtle conservation and reef restoration projects that engage both visitors and local people in park management issues.

**Programme 4 will develop marketing and interpretation systems** to improve the quality of the visitor experience and attract more tourists to the Park. Stories and messages communicated through a new LMNP visitor centre, website and a range of promotional materials will provide a stronger educational experience. A documentary film will be produced and distributed via various media channels in Myanmar and internationally. All promotional materials will be made available to MOHT and MTF for display and circulation through international tourism events. Market research activities will also be undertaken to explore new visitor markets, and verify existing markets are delivering quantifiable conservation and livelihood benefits to the Park and its resident community.



## Contents

	pag.
I Preface	2
II Acknowledgments	4
III Acronyms	5
IV Summary	6
Part I: Situational Analysis	
1.1 Context	9
1.2 Visitor Numbers and Markets	13
1.3 Products and Services	18
1.4 Stakeholders and Stakeholder Issues	23
1.5 Findings from Visitor Questionnaires	27
1.6 Strengths, Constraints, Opportunities and Risks	27
Part II: The Way Forward	
2.1 Vision Statement	31
2.2 Guiding Principles	31
2.3 Work Programmes	32
Programme 1: Strengthen Ecotourism Planning and Management	32
Programme 2: Strengthen and Diversify the LMNP Product Range	35
Programme 3: Develop Conservation Linkages and Monitoring Protocols	39
Programme 4: Develop Marketing and Interpretation	41
Appendices	
I Implementation Plan (years 1-3)	44
II List of Yacht companies licensed to operate tours within the Myeik Archipelago	
III LMNP Visitor Questionnaire	
IV LMNP Zoning Map	

### 1.1 Context

Located in Boke Pyin Township of Tanintharyi Region, Lampi Marine National Park (LMPN) covers an area of some 205 km<sup>2</sup> and is recognised as an IUCN Category II national park. The Park was officially gazetted by the Government of Myanmar in 1996, listed as an ASEAN Heritage Park in 2003 and as a globally Important Bird and Biodiversity Area in 2004. The Park's mandate is to conserve the site's biodiversity and ecosystems, which embrace evergreen, mangrove, dune and beach forests, sea-grass beds and coral reefs. LMNP is Myanmar's only marine national park and is part of the iconic 300km long and 100km wide Myeik Archipelago, which consists of 804 islands.

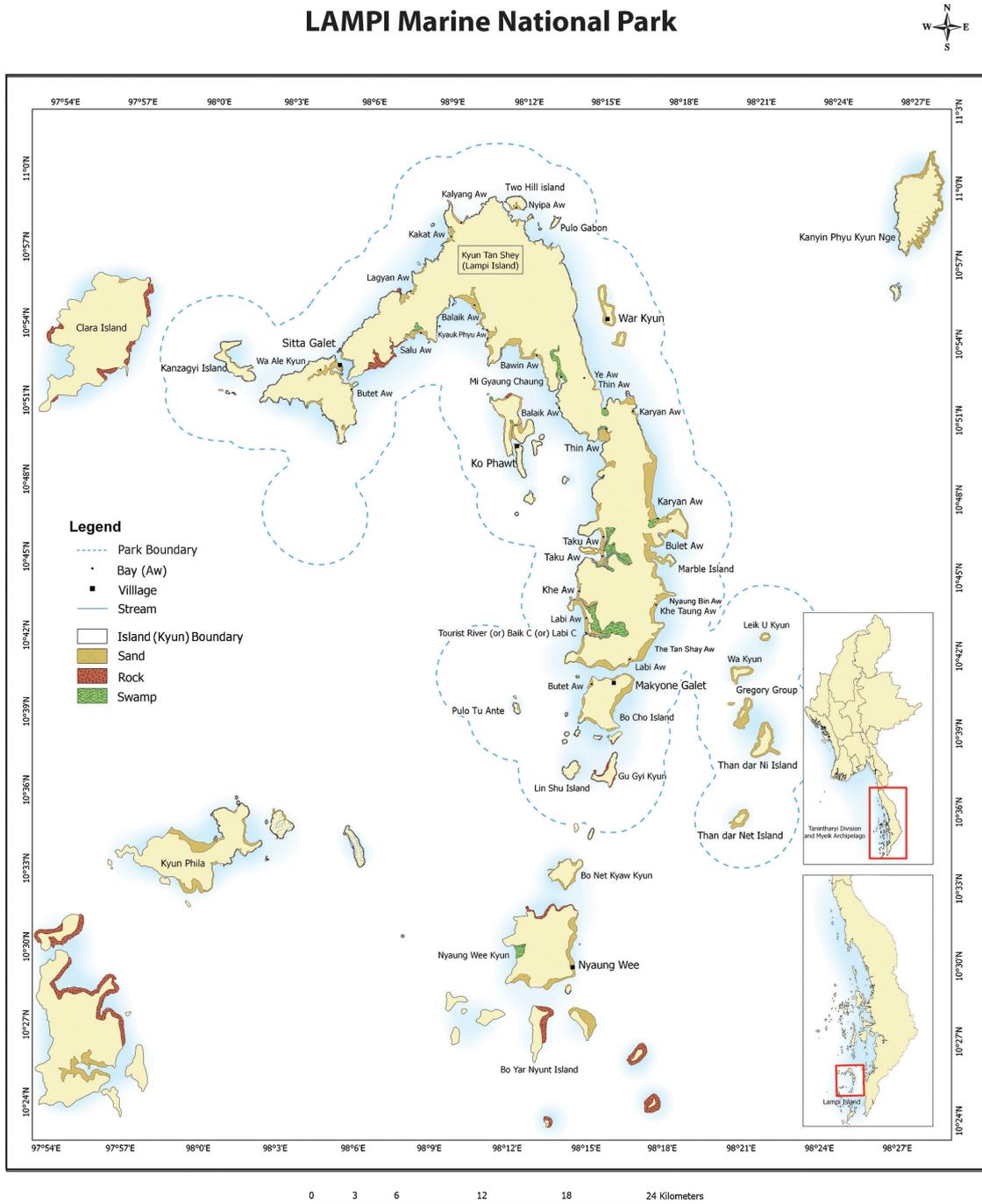
As illustrated in Figure 1, LMNP is composed of the main Lampi Island, around 20 smaller islands and the seas that surround them, which extend two miles from the coastline and the outer islands. The Park is home to a rich diversity of flora and fauna, including: 195 plant species of evergreen forest; 63 species typical of mangrove forest; 23 mammals; 237 birds; 22 reptiles; 10 amphibians; 42 fish; 42 crab; 50 gastropods; 41 bivalves; 35 sea-cucumber; 73 types of seaweed; 11 sea-grasses; and, 333 plankton species. The seas around the Park are an average of 12m deep and nowhere deeper than 24m. Lampi Island itself is hilly, rising steeply from sea level to elevations of 455m. While the majority of the coastline is rocky, a series of pristine sandy beaches, bays and inlets are key features of the Park. Lampi Island has two major perennial rivers and many small seasonal streams. In addition to its natural assets, LMNP is home to around 400 Moken (sea-gypsies) that reside in three villages in and around the Park.

Focusing upon tourism, the Park has received tourists for more than a decade. Visitor numbers are growing steadily as a result of Myanmar's substantive political and economic reforms. Key attractions include:

- the status of Lampi as a marine national park;
- Moken culture and traditions;
- pristine beaches and island seascapes;
- mangrove estuaries and forests;
- diverse birdlife including one of the largest roosting sites of the plain-pouched hornbill in South East Asia;
- sea turtle nesting sites; and,
- tropical waters and diverse sea-life.

Tourism activity to experience these assets is conducted almost exclusively through live-aboard boat tours that embrace LMNP as part of wider excursions into the Myeik Archipelago. All tours start and finish their journey in Kawthaung, and must register with the Directorate of Hotels and Tourism, a division of the Ministry of Hotels and Tourism (MOHT). Visitors arrive in Kawthaung via: live-aboard boats entering from Thailand; the short sea-crossing from Ranong in Thailand; its domestic airport which is serviced by daily flights from Yangon; or, a ferry service from Myeik.

Figure 1: Lampi Marine National Park



Significantly, LMNP does not financially benefit from tourism activity to the Park. Similarly, Park residents are not engaged in the tourism economy and receive little if any benefit from this activity. The Park is home to some 598 households split between five villages – four in the Park and a fifth located in a proposed buffer zone.<sup>1</sup> Makyone Galet with 196 households is the main settlement, and only officially recognised village in the Park. Others villages include: Ko Phawt with 25 households; Sitta Galet with 42 households; War Kyun with 271 households (148 in the dry-season); and, Nyaung Wee in the proposed buffer zone with 89 households. The majority population is Bamar, with main livelihood activities that include fishing, trading (including retail), farming, logging and hunting. A significant percentage of households within the Park survive through subsistence livelihood strategies. The Moken, which make up around 100 households in the villages of Makyone Galet, Nyaung Wee and Ko Phawt, face particular hardship. With few development opportunities available, individuals are prone to alcoholism, drug abuse and, due to marginal returns from fishing, loosing boats and marine knowledge. Moken intermarriage with Bamar is also common.

Other important development issues influencing livelihoods in the archipelago include an in-migration of opportunity seekers from the mainland, a growth of fishing vessels and a consequent decline in fishing catches. These wider trends are linked to illegal activities occurring within the Park's boundaries including dynamite and dragnet fishing, commercial fishing, over-harvesting of marine resources (sea cucumber, sea shells, turtle eggs), illegal hunting (of mousedeer, civets, monkeys, wild-pig), logging and the growth of plantation crops (rubber, mango, betel-nut, cashew). To address these and other management issues, and support Park conservation objectives, a four-year General Management Plan (2014-2018) was prepared by the Ministry of Environmental Conservation and Forestry, with financial and technical assistance from Istituto Oikos. The LMNP-GMP sets out a zoning system (see Annex III) comprised of four management zones, including: (i) Key Resource Zone, (ii) Wilderness Zone; (iii) Cultural Zone; and, (iv) Local Use Zone.<sup>2</sup>

The LMNP-GMP also includes four strategic work programmes to strengthen:

- i. park operations;*
- ii. ecosystems management;*
- iii. community outreach;*
- iv. tourism management.*

While the fourth strategic programme is wholly concerned with tourism, other tourism-related actions and activities are also embraced in the first three programmes. While it is noted all activities embraced in the LMNP-GMP are in some way related to the development of tourism, those that are more directly related are summarised in Table 1.

---

1. All household data sourced from LMNP-GMP 2014 & Istituto Oikos surveys 2015.

2. A buffer zone was also proposed at the time of the designation of LMNP, but has yet to be officially recognised.

**Table 1: Summary of Tourism Activities in LMNP General Management Plan 2014-18**

Strategic Programme	Intervention Type	Tourism-related Activity
1. Park Operations	<ul style="list-style-type: none"> <li>• Interpretation</li> <li>• Communications</li>   <li>• Capacity building</li>   <li>• Revenue generation</li> <li>• Partnerships</li> <li>• Partnerships</li> <li>• Monitoring</li> <li>• Culture</li> </ul>	<ul style="list-style-type: none"> <li>• Install species information billboards</li> <li>• Establish Park communications office, website &amp; internet access</li> <li>• Training needs assessment &amp; training delivery</li> <li>• Design &amp; deploy tourism-user fees</li> <li>• Coordination meetings with private sector</li> <li>• Develop university linkages</li> <li>• Establish limits of use for key zones</li> <li>• Prevent thefts from cultural sites</li> </ul>
2. Ecosystems Management	<ul style="list-style-type: none"> <li>• Partnerships</li> <li>• Product development &amp; Monitoring</li> </ul>	<ul style="list-style-type: none"> <li>• Develop Park research plan</li> <li>• Map &amp; protect turtle, hornbill &amp; key species nesting sites</li> </ul>
3. Community Outreach	<ul style="list-style-type: none"> <li>• Interpretation</li> <li>• Partnerships</li>   <li>• Partnerships</li> <li>• Partnerships</li> <li>• Product development</li> <li>• Capacity building</li> <li>• Capacity building</li> <li>• Service development</li> <li>• Service development</li> <li>• Service development</li> <li>• Service development</li> <li>• Capacity building</li> <li>• Capacity building</li> <li>• Product development</li>   <li>• Interpretation</li>   <li>• Product development</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare Park brochure</li> <li>• Convene regular meetings with local communities</li> <li>• Create conservation groups</li> <li>• Organise annual stakeholder meeting</li> <li>• Develop Makyone Galet village plan</li> <li>• Conduct environmental education</li> <li>• Park visits for children &amp; village leaders</li> <li>• Establish water supply</li> <li>• Establish village clinic</li> <li>• Establish toilets</li> <li>• Litter and waste Management</li> <li>• Train local tour guides</li> <li>• Restaurant-related training</li> <li>• Establish community-based ecolodge or campsite</li> <li>• Develop Moken museum, library &amp; signage</li>   <li>• Develop ceremonies / tour products around Moken culture &amp; livelihoods</li> </ul>

4. Tourism Management	<ul style="list-style-type: none"> <li>• Revenue generation</li> <li>• Partnerships</li>   <li>• Product development</li>   <li>• Interpretation</li> <li>• Interpretation</li> <li>• Monitoring</li>   <li>• Monitoring</li> <li>• Product development</li> </ul>	<ul style="list-style-type: none"> <li>• Develop tourism-user fees</li> <li>• Develop tourism guidelines, codes of conduct &amp; standards</li> <li>• Develop zone sensitive tour itineraries, interpretation trails and signposting</li> <li>• Develop LMNP guidebook</li> <li>• Establish Park visitor centre</li> <li>• Systematically record &amp; report Park visitor numbers</li> <li>• Develop visitor questionnaire</li> <li>• Develop booking system for guided tours, itineraries and community-ecolodge/campsite</li> </ul>
-----------------------	--	--

The aim of this ecotourism plan is to review activities proposed in the LMNP-GMP and engage with key stakeholders to set out a long-term vision and a three-year work-plan to strengthen ecotourism planning and management. The Plan seeks to bring all stakeholders together, and develop partnerships and synergies between them. In brief, the plan has three main goals. Firstly, to develop a process to introduce a series of tourism-related user fees to generate revenues to contribute towards biodiversity conservation and LMNP management costs. Secondly, to engage local households in the tourism system and economy, and provide alternative sources of income and employment to reduce their dependency upon the Park’s natural resources. The third is to develop a series of educational strategies to raise local, national and international awareness of the linkages between ecotourism activity, Park conservation objectives and the role of protected area networks in ecosystems conservation and climate change mitigation. These three goals are intended outcomes of the Plan’s vision, strategic programmes and activities.

## 1.2 Visitor Numbers and Markets

### *Visitor arrivals*

As depicted in Figure 2, the number of yachting tours registered with MOHT journeying into the Myeik Archipelago increased from 55 in 1997, to 324 in 2014.<sup>3</sup> Tours have increased steadily over this time although declines have occurred that were likely related to the 2004 Tsunami and cyclone Nargis in 2008. Figure 3 illustrates the number of international tourists joining these tours, which closely mirrors the growth pattern of Figure 2, and shows visitor numbers increased from 391 in 1997 to 2,562 in 2014.

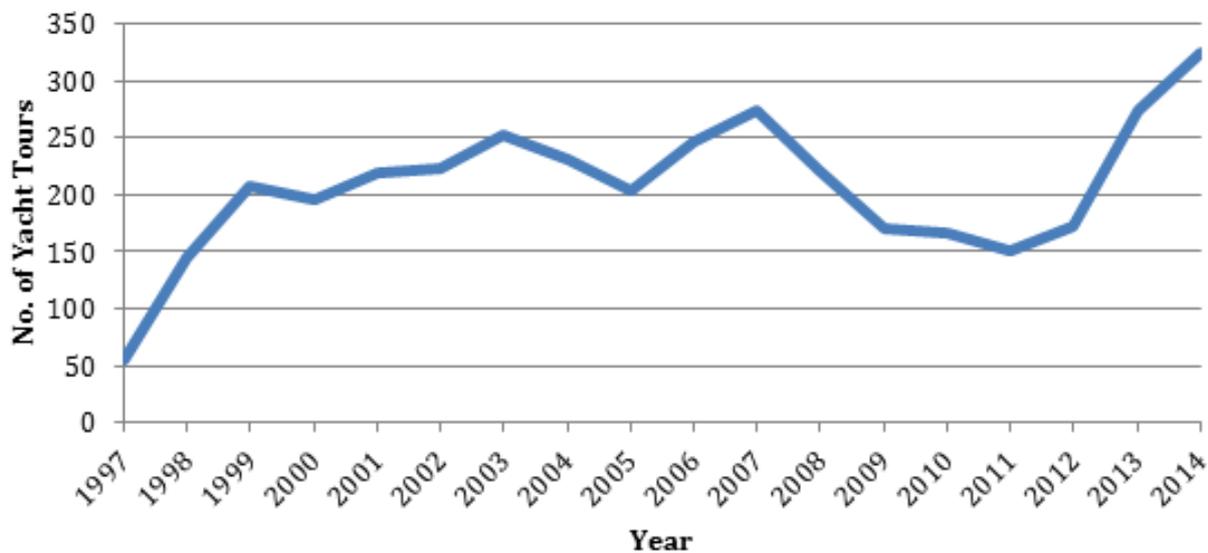
Tours into the Archipelago fall into two categories, namely diving and soft adventure. While few diving trips enter the Park, almost all soft adventure tours visit the Park.

While no data is readily available to depict how many of these tours and visitors entered LMNP, it is estimated roughly 50% of all tours enter the Park. In other words in 2014 LMNP received approximately 160 yachting tours and 1,280 international tourists – an average of 3.5 visitors per day.

No information is readily available to illustrate the nationalities of these visitors.

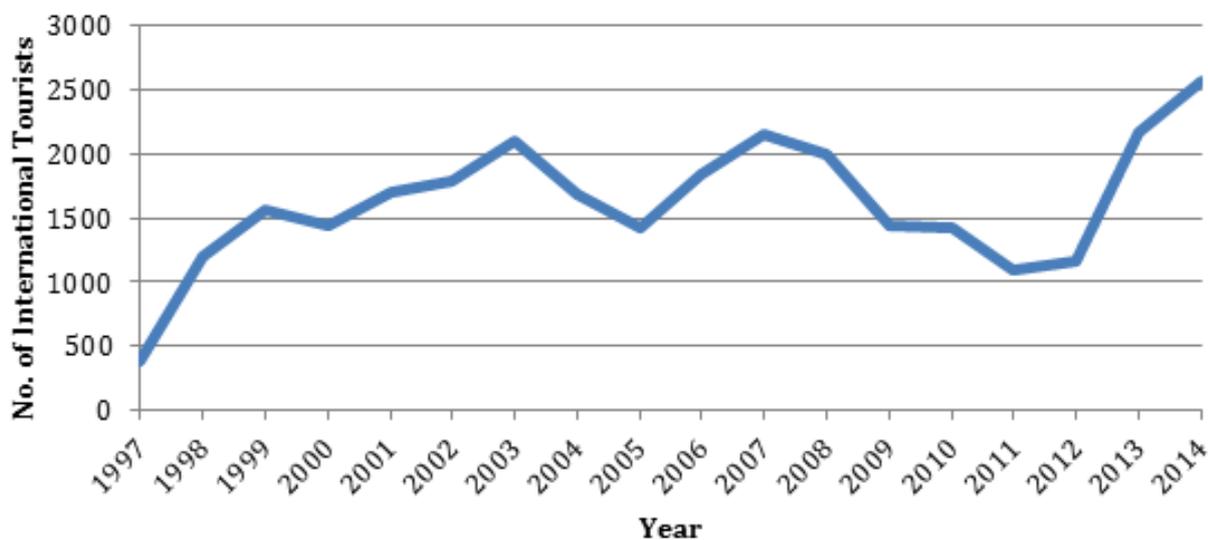
3. All visitor data and income statistics sourced from Ministry of Hotels and Tourism, 2015.

**Figure 2: Number of Yachting Tours Entering the Myeik Archipelago 1997-2014**



Source: Ministry of Hotels and Tourism, 2015

**Figure 3: Number of International Tourists on Yachting Tours 1997-2014**



Source: Ministry of Hotels and Tourism, 2015

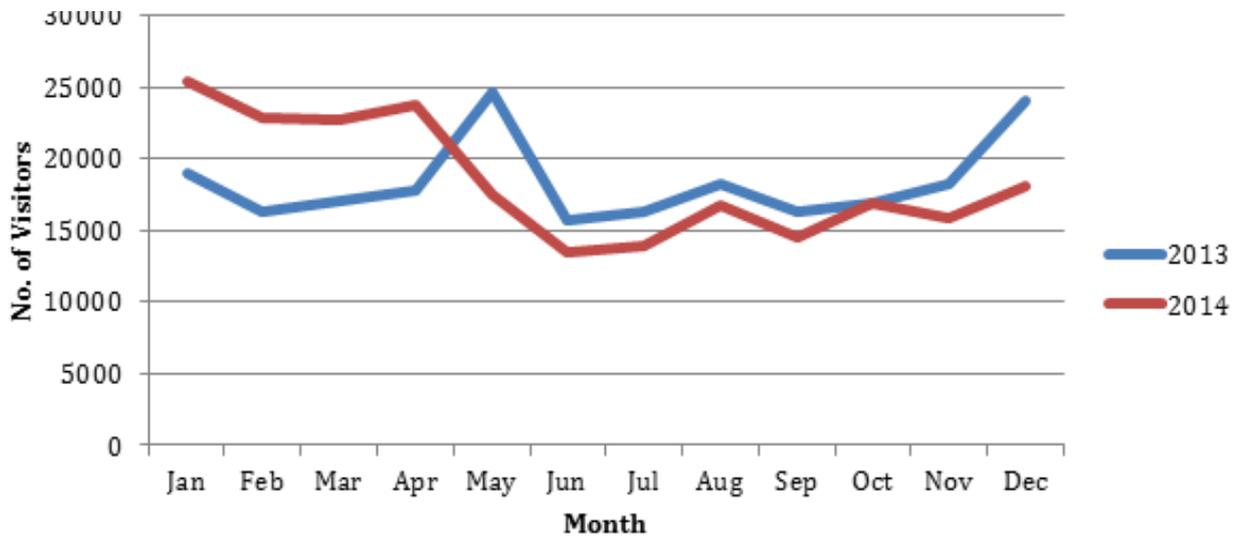
By way of contrast, MOHT also records the numbers of Thai and other international visitors arriving in Kawthaung, a key access point for travel into the archipelago and to LMNP. Table 2 depicts the number of tourists arriving in Kawthaung on temporary border passes, by visa (a service which began in August 2013) and staying on island resorts close to Kawthaung in 2013 and 2014. This data illustrates over 220,000 international visitors annually visit Myanmar's southern most destinations, and approximately 80% of these visitors are Thai nationals. While a significant percentage of these visitors are on visa-runs or casino tourists frequenting larger hotels close to Kawthaung, this data may also suggest there is a market for tours to LMNP other than solely the live-aboard excursions that currently operate: especially if visas issued on arrival become available to tourists entering Kawthaung from Thailand.

**Table 2: International Visitor Arrivals to Kawthaung 2013 and 2014**

	2013	2014
Border Passes		
Thai	15,068	9,710
Other	43,100	26,677
Resort Tourists		
Thai	139,102	168,116
Other	20,169	12,555
Yacht Tourists	2,157	2,562
Arrivals with Visa	877	1,993
Total Arrivals	220,473	221,613

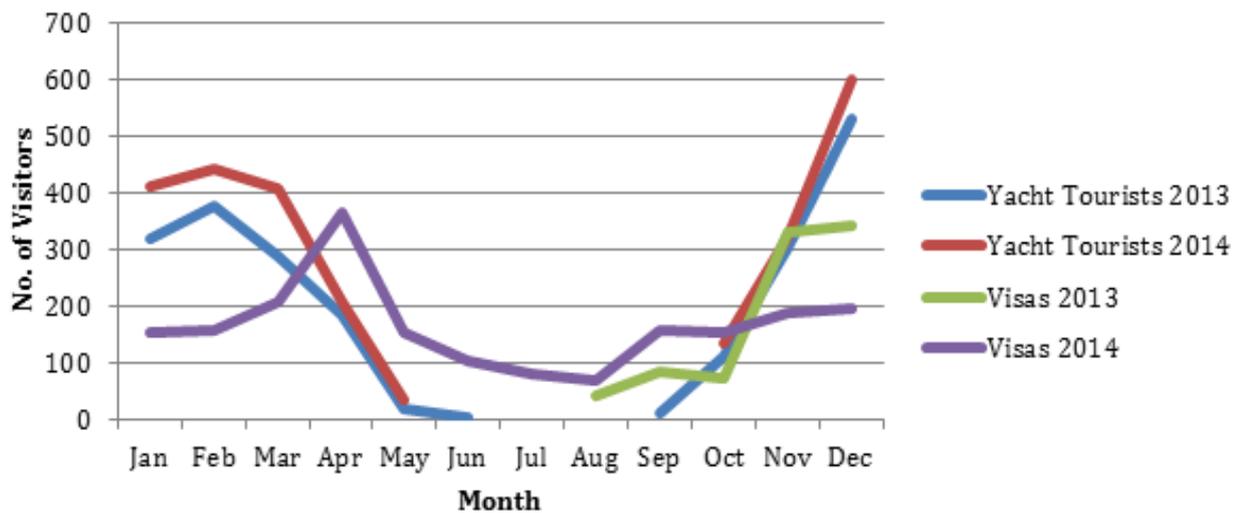
In 2013 MOHT began compiling monthly data. Figure 4 illustrates total arrivals to Kawthaung by month for 2013 and 2014, and Figure 5 illustrates monthly arrivals of yacht tourists and arrivals with visa. Although the data in Figure 4 is somewhat inconclusive, when depicted alongside Figure 5 a seasonal pattern becomes clear indicating a high season from November to March, a shoulder season in April, May and October and a low season from June to September. As depicted in Figure 5, for example, few if any yacht tours operate from June to September, largely due to unpredictable weather and the possibility of high seas. While seasonality is a significant issue clearly influencing tourism development to LMNP, low-season tourism is an option with short trips or stays in the Park during the low season when the weather is settled. Unpredictable weather and safety issues suggest, however, this market will likely remain relatively small.

**Figure 4: International Arrivals to Kawthaung by Month 2013 and 2014**



Source: Ministry of Hotels and Tourism, 2015

**Figure 5: Yacht Tourists and Kawthaung Arrivals with Visa by Month 2013 and 2014**



Source: Ministry of Hotels and Tourism, 2015

### *Markets*

As noted above, there are very few domestic visitors to LMNP, and virtually all-international visitors arrive via live-aboard boat tours. While no data is readily available to depict the nationalities of these visitors, interviews suggest the majority of arrivals are from Europe, North America and Australia. Tours typically spend up to a day and a half of a 6-7 day tour inside the Park, and include activities such as a walking tour of Makyone Galet, observing and meeting the Moken, excursions to a mangrove estuary, walking on deserted beaches, snorkelling and bird-watching. A questionnaire was deployed to understand more about this visitor market, the findings of this survey are reported below in sections 1.3 and 1.5. Based questionnaire responses and interviews with tour operators, LMNP can be described as destination appealing to soft-adventure tourists with a high interest in, and appetite for, nature and culture. Visitors are typically aged between 25 and 55, well travelled internationally, and seeking a remote and personal experiential product away from other tourists.

### *Income*

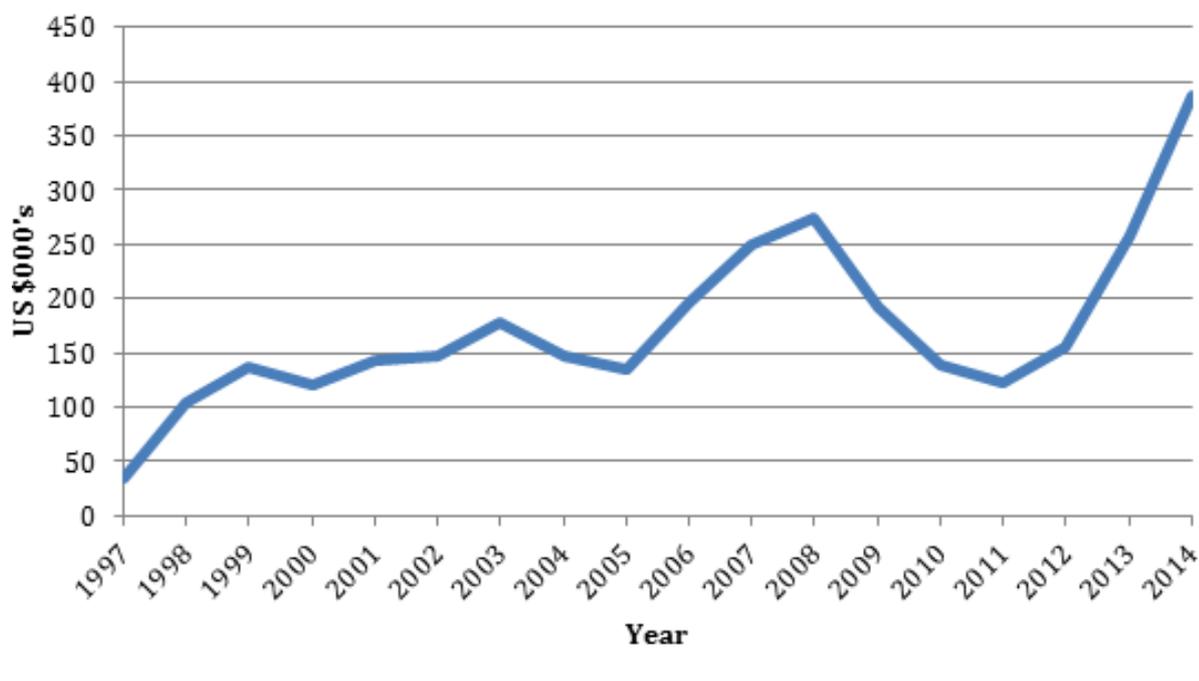
Live-aboard boats entering the Myeik Archipelago pay a number of government-related fees to conduct their tours. These include: an operator's licence; an excursion fee per-person for each journey; a tour guide fee (each tour must be accompanied by an MOHT tour guide); a tour guide salary; and, a royalty fee per tourist day spent in the archipelago. Fees for porting in Kawthaung together with a handling fee to process documentation to proceed into the Archipelago are also applied. As of January 2015, 21 companies are registered with operator licences to undertake tours in the archipelago (see Appendix II). Tours generally last between three and ten nights, and typically average five to seven nights. Five-night boat tours that start and finish in Kawthaung and embrace the LMNP are typically priced between US\$1,300 and US\$2,000 per client, with a single-room occupancy surcharge of around \$800. Boats generally cater for between 8 and 20 guests.<sup>4</sup> Client fees are inclusive of all meals, hence little if any tour-related spending occurs within the Park, not least because there are few purchase items tailored towards tourist needs, and there is no Park entry-fee.



Figure 6 illustrates the government income received from processing and approving yachting tours into the Archipelago. The illustration depicts a growth line similar to Figures 2 and 3, and that income increased from US\$35,160 in 1997 to US\$387,462 in 2014.

4. Larger vessels also visit the Park including The World cruise ship, which arrived in January 2015 with some 135 passengers.

Figure 6: Income Received by the Myanmar Government from Yachting Tours, 1997 to 2014



Source: Ministry of Hotels and Tourism, 2015

Although live-aboard boat companies are adamant high government fees are already charged for conducting tours they are open to user fees being applied within an LMNP ecotourism framework, provided there is transparency and money is directed towards conservation and Park management costs. Some companies are also open to contributing towards an LMNP environmental trust fund or foundation dedicated to the conservation of key species and ecosystems.

### 1.3 Products, Services and Excursions

The following sub-sections review the status of current and potential products, services and excursions within the Park. The review is based upon information gathered from site visits, interviews with key informants, focus group meetings and information collated through the visitor survey. It is not exhaustive in terms of potential products.

#### *Wa Ale Eco-Resort*

In March 2015, following an open tender process, MOECAAF approved LMNP's first eco-resort. Construction of the first phase of the proposed low-impact eco-resort is due to commence on Wa Ale Island, which is scheduled for completion and opening in 2016. Phase I includes 28 guest units, housing for employees, restaurants, a spa, common area and nature centre. A second phase construction of 32 guest units is scheduled for 2016.

The project proprietors propose a series of environmental awareness programmes for employees, guests and Park communities, and intend to create an LMNP Foundation to finance a series of conservation initiatives.

MOECAAF has no plans to approve additional eco-resorts in LMNP in the short to medium-term.

### *Yachting tours*

An outline of the dynamics of yachting tours and the number of companies licensed to operate them is provided above. Data presented in Figures 2, 3 and 5 indicate this market is growing strongly but subject to down-turns related to natural disasters and seasonal weather. Figure 6 suggests income from this market is an important and growing source of government revenue. The 21 companies licensed to operate tours in the Archipelago have a total of 80 boats registered with MOHT. The number of tours and live-aboard tourists estimated to be entering the Park is however relatively low and few adverse impacts from this activity are reported. Boat companies agree more needs to be done to work with Park communities to enable them to engage with, and benefit from, this tourism market. Defined mooring points and anchorages are also needed within the Park to avoid unnecessary reef damage.

Conversely, live-aboard tour companies have for many years reported acute frustrations with several aspects of the Myeik Archipelago tourism system. While many of these issues may be considered beyond the scope of an ecotourism plan focused specifically upon LMNP, they relate directly to a wider management system of which tourism to LMNP is a part. In other words, the way in which tours to the Myeik Archipelago are processed and managed, directly influences the scale and form of tourism to LMNP. Tour companies, for example, report acute frustrations with paying substantial government fees: (i) for what they perceive to be a low service return;<sup>5</sup> and (ii) when there is on-going degradation and little if any protection of the marine environment and its resources that tourists and tour companies are paying to see.<sup>6</sup> While acknowledging considerable improvement to reduce the processing time to approve live-aboard tours have recently been made, many complain that further improvements and greater transparency are needed. A shortened processing time would facilitate a growth in boat tours to LMNP and the wider archipelago.

### *Mangrove rivers*

Although numbers are unclear, many tourists to the Park visit one of two mangrove rivers on the south-western side of Lampi Island, known locally as *tourist river* and *crocodile river*. These rivers and their pristine mangroves are celebrated features within Key Resource Zones of the Park, and are explored via kayaking and small-boat excursions. Stakeholder meetings and discussions confirm interest among a small number of parties to develop a guided board walk through a dedicated section of this prized ecosystem, as this would allow greater access for tourists unable to paddle kayaks.

Other stakeholders advocate a “kayaking only” policy to access the two estuaries and minimise threats of water and noise pollution. Some tour companies also advocate training guides from Makyone Galet to embrace local story telling into this product offering. While there is some minor littering along the river, there do not appear to be any discernable negative impacts associated with this popular excursion.

- 
5. Tour companies note a number of safety concerns related to archipelago tours including: a lack of health services for tourists requiring emergency treatment; a lack of availability of speed boats and trained crews to assist with emergency evacuations; and, poor communication networks to communicate with the mainland in the case of emergencies.
  6. Tour companies suggest 9 out of every 10 fish in the archipelago have disappeared as a result of over-fishing, and many reefs have been destroyed by dynamite fishing. They also report clients complain of hearing explosions while diving. Some companies fear repercussions from reporting illegal fishing and logging as they believe such activity is linked to powerful actors with vested interests.



### *Kayaking*

While two kayaks have recently become available within LMNP, some live-aboard boats carry small numbers of their own kayaks, which are used to explore the mangrove-rivers, beaches, estuaries and rock-formations around the Park. Stakeholder discussions indicate interest among tour companies and local communities for kayaks to be made available locally for hire, with trained local guides and excursion routes.

### *Snorkelling & diving*

Diving is not an activity commonly undertaken within the Park due to reef damage and the lack of quality dive sites. Some snorkelling is however undertaken at 2-3 sites on the western-side of the Park. While not an especially high quality experience, this activity is enjoyed by some Park visitors. Stakeholder discussions confirm very strong interest, especially among tour companies, to enhance this experience by introducing a coral restoration project to a dedicated site(s) within the Park. Discussions with the Moken and wider Makyone Galet community also registered high interest in this proposal.



### *Hornbill nesting site*

While visitor numbers are unclear, the plain-pouched hornbill-roosting site near Ko Phawt is visited by some Park visitors. Although visitor numbers appear to be small, awareness as to the significance of the site with some 200 birds is also low and improved interpretation could be expected to lead to greater visitation.



### *Jungle trail walks*

A small number of live-aboard companies operate short jungle walks along trails within the Park. There is little information about these trails, and companies express interest to be consulted in the development of guided trails, of varying degrees of length and difficulty. Tour companies also express interest for well-trained local tour guides to be engaged in the delivery of guided jungle walks. More ambitious projects proposed by some advocates include the development of a forest canopy experience.

### *Pristine beaches & beach bonfires*

Most live-aboard tours visit pristine beaches that are largely absent of human footprints and development. These visits are popular among tourists and, with the exception of small scale littering, few discernable negative impacts, appear to be evident from this activity. Some companies provide bonfires for night entertainment and camping on some beaches has been undertaken in the past. These activities are popular with tourists and demand for them is likely to increase with the growth in live-aboard visitors.

### *Makyone Galet walking tour*

The majority of live-aboard tours include excursions to Makyone Galet, which involve walks along the beach past Moken households, looking at the school, walking down the main street of the village to the temple and returning via the same route. Some groups make donations to the school or temple, or hand gifts to local people. While Makyone Galet has a number of small shops on this route there are few items for sale targeted towards tourists. The extent of interaction with local villagers depends largely on the tour guide accompanying the group, and the degree of interest tourists have to engage with local people. There are few if any organised activities during these excursions. Survey responses suggest this is an activity enjoyed by tourists, yet virtually all visitors are unimpressed with widespread littering and garbage around the village and beach,

and especially with the amount of broken glass covering the beach. Children begging and crowding around visitors asking for sweets is also an issue disliked by visitors and villagers. Makyone Galet villagers are happy to receive tourists in their village, but lack language ability to interact with visitors, as well as hospitality skills and knowledge as to how they might develop tourism-related activities and businesses. There is strong interest among the community to acquire skills and training to develop business opportunities including handicraft products, and high interest to engage with tour companies to move this agenda forward.

#### *Moken interaction*

Seeing and meeting the Moken is an important component of most LMNP tours. Survey responses confirm visitors enjoy this experience, which is frequently quoted as a primary motivational factor for joining the tour. Written feedback from the survey suggests visitors are keen to see this activity developed further to include, for example, observing Moken ceremonies and festivities, hearing folk stories, joining them on fishing trips and watching them dive underwater for extended periods.



Discussions with Moken confirm interest to develop closer ties with the tourism economy, but they suggest this can only be achieved around day-to-day livelihood activities that will take precedent at all times. Given few Moken speak Burmese, additional language barriers must also be addressed to develop product opportunities.

#### *Restaurants*

Makyone Galet has a number of small restaurants selling food and beverages to local people as well as fishermen and traders passing through the village.<sup>7</sup> At least one restaurant has prepared a menu in English but, as with all restaurants, staff lack language and hospitality skills to meet tourist needs. Health and hygiene standards also concern visitors and tour companies (that currently provide three on-board meals a day). Tourist numbers are also relatively low and insubstantial for local people to justify any major investment of time or money in restaurant businesses.

7. There is little if any horticultural production within the Park and virtually all fruit and vegetables are bought in from the mainland. Similarly, fish is not readily available locally as it is caught by bigger fishing boats and immediately sent to Thailand. Local fishermen only catch squid and crabs.

## 1.4 Stakeholders and Stakeholder Issues

Table 3 sets out primary and secondary stakeholders in LMNP's ecotourism economy and, in general terms, summarises their interests in developing this economic activity.

Key benefits and constraints they can expect to experience as the tourism economy grows are also summarised in the Table. The benefits identified are likely to serve as principal or, in some cases, partial motivating factors for engaging in the Park's ecotourism economy. Most but not all stakeholders were engaged in the consultation process to develop this ecotourism plan. Important stakeholder issues emerging from these discussions that have not been covered above are noted below.

- There is broad stakeholder support for developing ecotourism in and around LMNP, largely because of the income and employment opportunities this growth would provide, and the conservation-related benefits it is expected to deliver.
- There is broad awareness of the need to protect and conserve LMNP's biodiversity and ecosystems among most stakeholders, but this is viewed as a substantial challenge beyond the capabilities of individual stakeholders. A clear ecotourism vision that supports the LMNP-GMP, strong leadership and high-level government commitment are needed to address a series of entrenched and complex challenges. Regular stakeholder meetings to jointly plan and coordinate ecotourism-related activities are also needed.
- Communities within the Park are variously engaged in activities that conflict with LMNP conservation objectives. As they receive few if any benefits from live-aboard tours, it is unlikely this market alone and any benefits they may gain from the Wa Ale Eco-resort would provide sufficient returns to engage the communities in activities that deliver net conservation benefits to the Park. Additional market opportunities, including licensed and LMNP approved community-based accommodation, are likely needed to increase the range of income and employment opportunities available to Park communities.
- Regular patrols are needed to prevent illegal fishing within (and beyond) the Park's boundaries. Clear reporting guidelines, procedures and contact points for stakeholders to report illegal fishing are also required.<sup>8</sup> The open and transparent commitment of MOECAF, the Department of Fisheries, the Myanmar Navy, the General Administration Department and the Myanmar Police to this process is critical. Without these systems in place, the commitment of tourism-related businesses to conservation goals will be undermined, and ecotourism to LMNP will have an uncertain and improbable future.
- The majority of households within the Park are unlikely to be able to engage directly in the tourism economy without on-going trainings and mentoring support (including business and financial planning support).
- The growth in live-aboard tours is leading to a shortage of MOHT trained guides to accompany boats around the archipelago.
- MOECAF & MOHT staff would benefit from skills training and mentoring programmes in a number of areas to equip them with skill sets to better manage tourism systems, processes and activity to the Park, and the wider archipelago.

---

8. Some stakeholders currently fear personal and business reprisals if they report illegal activity.

- Once Park communities have developed products, services and excursions for visitors to LMNP, consideration might be given to the possibility of licensed day tours from Aung Bar and other tourist accommodation established within the Archipelago.<sup>9</sup> This activity, managed by licensed and LMNP approved tour operators, would create additional income streams for Park communities and Aung Bar households, and provide greater incentives for both communities to engage in conservation activities.

**Table 3: Stakeholders and Potential Benefits and Constraints of their Involvement in LMNP’s Ecotourism Economy**

<i>Stakeholders</i>	<i>Ecotourism interests</i>	<i>Potential benefits from ecotourism activity</i>	<i>Potential constraints associated with ecotourism activity</i>
<b>PRIMARY</b>			
MOECAAF	Developing and promoting ecotourism products and services that support conservation objectives.  Education and awareness raising of conservation and park management issues.	Revenue generation contributing towards Park management costs; ecotourism activities supporting conservation objectives.  Greater local, district, regional and national support for the Park’s management objectives.	Increased management responsibilities and related costs; managing unforeseen negative impacts.  Complexities of stakeholder engagement processes.
Makyone Galet households	Acquiring tourism-related skills; developing and promoting tourism-related products, services and excursions	Income growth; employment; livelihood improvement; improved social services and environmental conditions.	Uneven distribution of tourism-related benefits creates winners and losers. Uncontrolled in-migration into the park.
Moken community	Acquiring tourism-related skills; developing and promoting tourism products and excursions.	Income; employment; continuation of quasi-traditional livelihoods; livelihood improvement; improved social services and environmental conditions.	Commercialisation of culture; interference with existing livelihoods; uneven distribution of tourism-related benefits creates winners and losers.

9. At the time of writing local media report MIC licenses have been granted to 30 accommodation providers to establish hotels and resorts within the Archipelago and the road to Aung Bar is due to be completed in 2015. By 2019, as access, transport and communication improve, the prospect of (and demand for) day tours to the Park are likely to become increasingly viable and likely.

MOHT	Tourism related income from live-aboard tours.  Developing Myanmar Ecotourism / responsible tourism.	Income and visitor growth.  Greater local, district, regional and national support for Myanmar Ecotourism, and growth of Myanmar's tourism economy.	Increased management responsibilities and related costs.  Complexities of stakeholder engagement processes.
Live-aboard boating companies & Wa Ale Eco-resort	Product development; reliable and responsible business environment; support for LMNP conservation programmes.	Business and income growth; kudos from association with conservation gains.	Market competition; complex and dynamic management systems.
General Administration Department	Business growth; development of public services; supporting conservation efforts and wider government policy and plans.	Potential revenue from business-related taxation; kudos associated with good ecotourism model with improved social services and environmental conditions.	Increased management responsibilities.  Complexities of stakeholder engagement processes.
<b>SECONDARY</b>			
Taninthary Regional Government	Tourism related investment and employment; green growth; income from tourism-related taxation.  To protect and conserve LMNP as a successful and sustainable natural resource and ecotourism destination.	Poverty alleviation; growth in size and diversity of regional economy.  High media profile; good practice tourism models replicated elsewhere in the Myeik Archipelago.	Complexities of stakeholder processes.  Unplanned negative impacts; conflicting interests of resource users.
Department of Fisheries (MOAF)	Protection of marine life within LMNP.	Greater regional and national support for fisheries management.	Increased management costs.
Myanmar Navy	Protection of marine resources within the Myeik Archipelago.	National pride in supporting green economy and new business paradigm.	Increased management costs.

Myanmar Police	Protection of marine and terrestrial resources within the LMNP.	National pride in supporting green economy and new business paradigm.	Increased management costs.
Households from other LMNP villages	Acquiring tourism-related skills; developing and promoting tourism-related products, services and excursions.	Income growth; employment; livelihood improvement; improved social services and environmental conditions.	Uneven distribution of tourism-related benefits creates winners and losers.
Households from Aung Bar township	Acquiring tourism-related skills; casual labour opportunities; supply of retail products, meats, cereals, vegetables, fruit etc.; provision of transport services; developing and promoting tourism products and services.	Income growth; employment; livelihood improvement; improved social services and environmental conditions.	Uneven distribution of tourism-related benefits creates winners and losers.
Tourism-related businesses in Kawthaung	Wider growth of tourism economy; developing and promoting tourism products and services; provision of transport services; supply of retail products, meats, cereals, vegetables, fruit etc..	Income growth; employment; livelihood improvement.	Uneven distribution of tourism-related benefits creates winners and losers.
Marine Biology Departments, Myeik & Dawei Universities	Supporting LMNP conservation and eco-tourism-related research initiatives.	Increased funding and resources for research programmes.	Increased management responsibilities.
Local and international NGOs	Supporting LMNP conservation and eco-tourism-related research initiatives.	Increased funding and resources for research programmes.	Increased management responsibilities.
Myanmar's wider tourism sector including accommodation providers and tour operators with interests in the archipelago	Product development; reliable and responsible business environment; support for LMNP conservation programmes.	Business and income growth; kudos from association with conservation gains.	Market competition; complex and dynamic management systems.

## 1.5 Findings from Visitor Questionnaires

50 visitor surveys were collected over a two-month period between March and April 2015. Respondents self-completed the survey tool, attached as Annex III. Given the short period over which the survey was undertaken, its results can only be viewed as an informative snapshot of views and opinions. Moreover as respondents self-completed the questionnaire, and frequently neglected to answer a number of the questions, there are limitations as regards the reliability and true market representation of the data. Nevertheless it is noted this form of data collection and analysis is extremely useful and informative and steps should be taken to diligently implement an annual survey, ideally in partnership with a national university.

A total of 15 nationalities were recorded in the survey: 15 were from Germany; seven from the UK; six from France; five from the USA; three from Australia; two from Canada, Italy, Sweden and Thailand; and, one from Denmark, Ireland, Luxembourg, Russia, Singapore and Switzerland. The majority of respondents reported being in the Park for one day. Just over half the respondents were male (54%). 70% were aged between 25 and 44, and 25% between 45 and 54. 12% were over 55, and 4% under 25.

Some 56% of respondents reported they were either satisfied or very satisfied with the activities they had done whilst in the Park. Three respondents noted they were very dissatisfied with meeting the Moken and participating in the Makyone Galet tour. 17 respondents (34%) made written comments expressing an interest for a stronger, more engaging experience with the Moken.

The most popular activities enjoyed by the respondents included: enjoying nature (30%); being away from other tourists in a remote area (26%); enjoying secluded beaches (24%); snorkelling (22%); and, witnessing marine life (20%). Visiting Makyone Galet, relaxing and touring the mangroves also featured as popular activities. Issues and factors most disliked by respondents included rubbish and littering in Makyone Galet (58%), and dynamite and illegal fishing (36%). Two respondents reported having experienced dynamite fishing while diving (most likely away from the Park) and a total of four respondents reported seeing dead fish killed by dynamite fishing.

In terms of improving the product offering, 92% of respondents noted they were interested or very interested to learn more about the Park's wildlife, have a more immersive nature-based experience and be more involved in (supportive of) Park conservation activities. Some 90% of respondents also expressed a strong preference to benefit from activities that involve local people, and provide opportunities to learn more about, and engage with, the Moken.

## 1.6 Strengths, Constraints, Opportunities and Risks

By way of review and conclusion to Part I, Table 4 summarises the strengths and opportunities for developing LMNP ecotourism, together with constraints to overcome and the risks to be managed.

In brief, tourism growth is a high priority of the government of Myanmar. While tourism activity to LMNP is of a relatively low-scale there is high private sector interest and growing demand for the Park's tourism assets. The current lack of product sophistication coupled with the strong interests of a relatively small number of primary stakeholders, confirm good potential for investment, product diversification, and growth. A number of opportuni-

ties also present themselves to engage local households and entrepreneurs in the product development process, and to deploy tourism-related user fees to support conservation objectives. The proposal for an LMNP Foundation to finance conservation interventions is endorsed by the private sector, and in particular the Park's first eco-resort. Using the Foundation to finance, for example, turtle conservation and reef restoration, and to engage local communities and schools in their implementation, will help build trust and conservation partnerships. As the Archipelago, Moken and LMNP are of high national and international media interest, there is considerable potential to generate positive publicity, grow the visitor market and attract new tourists to the Park (as well as Taninthary Region and Myanmar). As Myanmar's first national protected area with an ecotourism plan aligned to its four-year management plan, its implementation will provide important opportunities to learn from this process and apply lessons learned to other protected areas. This is especially significant given the May 2015 approval of the distinctive Myanmar Ecotourism Policy and Management Strategy, which recognises the special status of protected areas and the critical need to apply management controls that ensure green, sustainable and responsible growth.

In contrast to this positive outlook, it is evident a series of complex challenges need to be addressed to deliver the proposed income, employment and conservation benefits. Further, a level of commitment unparalleled in Myanmar, is required to overcome a number of entrenched constraints, and guard against the potential risks summarised in Table 4. In response to these challenges, MOECAAF will work closely with MOHT and other primary and secondary stakeholders to set in place coherent and responsive management systems. Special attention will be given to enforcing Park rules and regulations. Guidelines and focal points will be established to enable ecotourism-stakeholders to report illegal activity, and MOECAAF staff will be trained in best practice approaches to tourism and protected area planning.

As Park communities have few tourism-related skills, innovative and carefully planned interventions will deliver trainings and industry experience on an on-going basis. As part of this process, forecasting techniques will be employed to determine the level of benefits that should be delivered locally to gain full community support for conservation objectives. Seasonality issues will be considered in these forecasts. Based on these conjectures, and the quality of products and excursions developed by locally trained entrepreneurs and guides, consideration will be given to the benefits and constraints of opening the Park to additional visitor markets. In the meantime considerable attention will be directed towards the seemingly insurmountable problem of waste management in Makyone Galet and other Park settlements. Inputs from multiple stakeholders will be sought to overcome this toxic and fundamentally important issue. While little can be done to prevent adverse weather systems, attention will be directed towards efficient communication systems and safety procedures to minimise associated threats. Fundamental to the entire process will be the design of funding mechanisms to ensure a percentage of tourism-related income generation is directed towards conservation programmes and Park management costs.



**Table 4: Strengths, Constraints, Opportunities and Risks for LMNP Ecotourism**

<b><i>Strengths</i></b>	<b><i>Constraints</i></b>
<ul style="list-style-type: none"> <li>• Tourism is a national priority</li> <li>• Unique high quality national park product: pristine beaches, exotic flora and fauna, Moken culture</li> <li>• Strong growth in live-aboard tours and visitors, high interest from other markets</li> <li>• First LMNP eco-resort approved</li> <li>• National park status enables stronger management controls</li> <li>• Very high private sector interest to support LMNP-GMP conservation objectives</li> <li>• High local community interest in ecotourism</li> <li>• Committed and progressive Ministries</li> <li>• Relatively small number of primary stakeholders</li> <li>• Very high media interest in LMNP, Myeik Archipelago and Moken</li> </ul>	<ul style="list-style-type: none"> <li>• Weak regulatory environment: on-going illegal fishing, logging and degradation of Park resources</li> <li>• Households within the Park engaged in activities that undermine conservation objectives</li> <li>• Local community not engaged in tourism, and lack tourism knowledge and skills</li> <li>• Makyone Galet's waste management problem</li> <li>• Marked seasonality</li> <li>• Access issues with safety concerns</li> <li>• LMNP staff lack tourism knowledge</li> <li>• Live-aboard tours and eco-resort unlikely to deliver sufficient benefits to fully engage local community in conservation agenda</li> <li>• Insufficient dialogue between primary stakeholders</li> </ul>
<b><i>Opportunities</i></b>	<b><i>Risks</i></b>
<ul style="list-style-type: none"> <li>• Product development and diversification in partnerships with local women and men</li> <li>• Income and job creation</li> <li>• Improved social services and environmental conditions in Makyone Galet</li> <li>• To link product diversification to LMNP funding mechanisms</li> <li>• Create an LMNP Foundation to finance conservation interventions</li> <li>• Initiate Myanmar's first coral reef restoration project</li> <li>• Engage local communities in conservation management</li> <li>• For LMNP to be a model: replicate good practice in other protected areas and elsewhere in the archipelago</li> <li>• Diversify visitor markets – including day trippers if appropriate</li> <li>• To become a regional showcase for ecotourism and protected area management</li> </ul>	<ul style="list-style-type: none"> <li>• Weak project leadership and cooperation among primary stakeholders</li> <li>• Ineffective regulatory measures and continued depletion of LMNP resources</li> <li>• Negative media publicity linked to continued resource exploitation and failed interventions</li> <li>• Continued local exploitation of Park resources due to insufficient ecotourism-related benefits</li> <li>• Community disharmony related to inequitable distribution of tourism benefits</li> <li>• Localised negative impacts due to weak product or excursion management</li> <li>• Widespread negative impacts due to uncontrolled tourism growth</li> <li>• Occurrence of violent storms and disruptive weather patterns</li> <li>• Tourism-user fees deliver poor returns for conservation and Park management</li> <li>• In-migration seeking tourism-related income opportunities</li> </ul>

## 2.1 Vision Statement

The vision for ecotourism to Lampi Marine National Park conveys a medium- to long-term goal for all stakeholders and indicates a direction that will guide development. It uses terms and phrases that resonate with the Myanmar’s Biodiversity Conservation Investment Vision, Tourism Master Plan and Ecotourism Policy and Management Strategy. The vision states that

**LMNP will become a model for protected areas in Myanmar, and be globally recognised for its extraordinary land- and seascapes with rich biodiversity and unique Moken culture, offering unique visitor experiences based upon community empowerment and strong partnerships between park authorities and the tourism industry.**

## 2.2 Guiding Principles

Myanmar’s Ecotourism Policy and Management Strategy prescribes ten guiding principles to direct all ecotourism projects, plans and business activities in protected areas. These principles are intended to become mantras to guide the actions of all ecotourism stakeholders. They are also wholly applicable to LMNP and their adoption by all Park stakeholders will help deliver net conservation benefits. Table 5 sets out the ten guiding principles along with statements noting their relevance to LMNP, and how they direct ecotourism development in the Park.

**Table 5: Ten Guiding Principles for Myanmar Ecotourism and LMNP**

<i>Guiding Principles</i>	<i>How the Guiding Principles will be Applied to LMNP</i>
i. Align with protected area objectives and management plans to ensure resource conservation is the number one priority.	- The LMNP Ecotourism Plan aligns with the LMNP-GMP.
ii. Support and respect zoning systems that restrict visitor use of core areas to conserve key species and habitats.	- Tourism activity in LMNP’s core zones will be restricted, and where permitted special conditions and regulatory measures will be applied.
iii. Increase awareness among all stakeholders of the value and benefits of protected area networks, especially with regard to climate change mitigation.	- LMNP interpretation materials will reference Myanmar’s protected area network and highlight climate change adaptation and mitigation issues.
iv. Form destination management organisations to embed ecotourism plans in district and state/region planning, and develop synergies with the UN 2015 Millennium Development Goals and post-2015 Development Agenda.	- At least two inclusive destination management organisations will be formed; the 2015 MDG agenda will help shape development priorities especially at the village level.

v. Leverage cultural and spiritual assets and values in interpretation plans to engender respect and responsible use.	- The history and traditions of the Moken will receive special attention in LMNP's interpretation materials, and through product development.
vi. Promote responsible business models that wherever possible engage and benefit local people, reduce over-harvesting of natural assets and deliver conservation benefits.	- A number of products and activities are referenced in this Plan and will align with this principle.
vii. Provide income sources to sustain and protect Myanmar's protected area network.	- The creation of a Park entry fee and foundation will be introduced along with product and excursion user-fees.
viii. Use baseline data and monitoring programmes to assess and minimise negative impacts on nature, culture and host communities.	- Codes of conduct and impact monitoring guidelines will be developed for tourism products and excursions; implementation partnerships will be formed with universities and research organisations.
ix. Attract world-class investments, promote innovative architecture and infrastructure that harmonise with nature and cultural landscapes, and minimise energy consumption.	- The Wa Ale Eco-resort will set a benchmark for future possible accommodation investments, other investments will be considered to diversify the product offering including board- and canopy-walks.
x. Provide models of good practice to help protect natural and cultural assets outside of national protected areas.	- Ecotourism lessons from LMNP will be applied in the wider Myeik Archipelago.

## 2.3 Work Programmes

Four strategic programmes will be carried forward to achieve the LMNP vision and that align with the guiding principles. While each programme is presented separately with key objectives and activities, they are interconnected and must be viewed as an integrated set of actions requiring strong coordination in their timing and implementation. The four programmes aim to:

1. Strengthen Ecotourism Planning and Management
2. Strengthen and Diversify the LMNP Product Range
3. Develop Conservation Linkages and Monitoring Protocols
4. Develop Marketing and Interpretation

The following sections describe the priority issues to be addressed by each strategic programme. A framework with envisaged timeframes for implementation of activities and actions is set out in Appendix I, together with a list of stakeholders to be engaged in each activity.

### **Programme 1 Strengthen Ecotourism Planning and Management**

While ecotourism activity can deliver many benefits to LMNP, this will not happen via market forces alone. The sector also brings a variety of challenges. Strong and proactive management are required

to ensure ecotourism is used as a vehicle to promote conservation and local socio-economic development. Ecotourism planning and management systems will be strengthened in a number of key areas.

### *1.1 Form a community-based ecotourism group in Makyone Galet*

A community-based ecotourism group (a destination management organisation) will be established in Makyone Galet (MG-EC). The MG-EG will be composed of local women and men with a commitment to developing ecotourism products, services and excursions in the Park. The group will be supported by MOECAAF, the Park's administration and Istituto Oikos. They will meet at least every other month and on an ad-hoc basis to: assume responsibility for planning and coordinating the engagement of local people in the tourism economy; deal with pressing matters of fundamental importance to the Park's ecotourism economy; and, for example, coordinate the delivery of trainings. A variety of guest speakers will, from time to time, be invited to speak at these meetings to share ecotourism experiences and knowledge of interest to the group and wider community. This will include MOECAAF and MOHT representatives and live-aboard boat companies that wish to share information about their work, businesses, and current and proposed activities in the Park. The group will seek to ensure Moken representatives join each meeting, and that key information from the meetings is reported to the Moken. The MG-EG will (for fixed periods) elect a chair and vice-chair to assume decision-making and administration responsibilities, and represent the group at LMNP Ecotourism Management Board meetings. A representative of the Park's administration will serve as Secretary to the MG-EG.

### *1.2 Establish an LMNP Ecotourism Management Board (LMNP-EMB)*

An advisory board (a destination management organisation) will be formed to plan, coordinate and monitor the development of ecotourism to LMNP. At the outset, the Board will meet on a monthly or bi-monthly basis to initiate the delivery of actions and activities included in this plan. Six months after the Board's first meeting the Board will collectively determine the frequency of future meetings. Ad-hoc meetings will also be needed to deal with pressing matters of fundamental importance to the Park's image and reputation. The Board will be Chaired by MOECAAF, with a vice Chair from MOHT and representation from the Regional government, MG-EG, the private sector,<sup>1</sup> Oikos and other development partners and experts as appropriate. Appointment of non-government representatives to the Board will be for a fixed term period and subject to review every three years.

### *1.3 Design & deploy funding mechanisms for ecotourism to part-finance LMNP management costs*

As a form of Payment for Environmental Services (PES), a variety of funding mechanisms exist to channel tourism-related revenues towards protected area management costs.<sup>2</sup> Common examples include:

- entry fees;
- user fees (revenues from anchoring, fishing, kayaking, snorkelling, using designated walking-trails, camping, filming etc.);
- concessions and leases (revenues from operating accommodation, restaurant, tour-guiding businesses etc.);

1. Wa Ale Eco-resort and live-aboard boat companies. The latter should embrace at least three persons with significant business interests in Park conservation, and a track-record that demonstrate a proven commitment to responsible tourism and ecosystems conservation.
2. The design and deployment of PES is aligned to the LMNP-GMP and from a wider perspective includes, for example, payment for the collection of fresh water used by the Ice Factory in War Kyun.

- the direct operation of commercial activities (revenues generated by a park from its own operation of commercial activities such as boat tours, cafés, interpretation centres, gift shops etc.); and,
- volunteers and donations (people offering their services for free and making donations to conservation trust funds or foundations).

MOECAAF will review the relevance of these mechanisms to the Park and develop policies and administrative processes to deploy a combination of funding mechanisms to part finance conservation interventions and annual management costs. A review of the legal and regulatory environment governing the implementation of these financing mechanisms will be undertaken alongside this study to ensure legal systems and protocols are enacted to direct tourism-related revenues towards LMNP conservation objectives.

#### *1.4 Improve litter and waste management*

The LMNP-GMP includes actions and activities to address waste management issues in Makyone Galet and other settlements around the Park. This Ecotourism Plan re-emphasises the critical need to address this increasingly serious issue. Action will be taken to follow up with suggestions from live-aboard companies that they may be able to transport re-cycled waste to Kawthaung.

#### *1.5 Strengthen data collection and accounting systems*

MOECAAF will work with MOHT to establish robust data collection and accounting systems. A review of all data collection techniques and processes will be undertaken to ensure robust systems and procedures are in place to record tour group numbers, visitor numbers, their nationalities and duration of stay in the Park. Processing and accounting procedures will also be designed and deployed to ensure all ecotourism-related income streams are properly accounted for across all activity areas. Stakeholder consultations will be convened in the design process to ensure management systems and procedures are practicable and user-friendly. An annual LMNP ecotourism report will be produced and provide a robust cost-benefit evaluation of the Park's ecotourism system.

#### *1.6 Organise study tours to expose park staff & local community to good practice ecotourism and conservation models*

LMNP and its supporters will organise study tours to other parks, projects and businesses to assess and learn from good practice ecotourism and conservation examples. This will embrace presentations by specialists and industry professionals to explain how their parks, projects and businesses have benefitted conservation and / or local communities.

#### *1.7 Build a physical & virtual library of tourism-related resources*

LMNP staff will build a physical and virtual library of tourism-related resources. The existence of this library will be brought to the attention of Park visitors, who will be encouraged to share resources and build the library content. As the language skills of Makyone Galet community develop, Park staff will share these resources with local women and men who will be encouraged to review and study this material. Where possible the material will also be used in language training.



## Programme 2                      Strengthen and Diversify the LMNP Product Range

Although live-aboard tours form the principle tourism product to LMNP and few if any Park residents are engaged in the tourism economy, all primary stakeholders are interested to change this situation and deliver local income and employment opportunities. As proposed in the LMNP-GMP and reviewed in section 1.3 above, stakeholder consultations have proposed a number of opportunities to strengthen and diversify the product range. Interventions to achieve this diversification include the Wa Ale Eco-resort and a series of trainings to impart tourism-related knowledge and skills among Park residents. Activities planned for this latter option are set out below. On-going meetings with the private sector and the LMNP Advisory Board will help ensure a verified demand for, and supply of tourists to, products and excursions Park residents may invest time and effort in. Wherever possible, partnership agreements will be signed between the private sector and Makyone Galet Ecotourism Group to confirm relevance and (i) specify expectations in terms of quality of service and visitor numbers likely to purchase the final product or service; and, (ii) assist where possible with the product development work.<sup>3</sup> In addition to the activities below, MOECAAF welcomes proposals for innovative private sector-led interventions that empower local residents, stimulate community-based tourism businesses, and deliver explicit conservation gains.

### 2.1      *Deliver English language training*

English language is a core skill needed of many Park residents that seek to engage in the tourism industry as, for example, employees of accommodation providers, tour guides, restaurateurs, shop-keepers, activity leaders or transport providers. Language training classes will be delivered to various target groups in Makyone Galet according to ability, vocational interests and participant commitment to training.

3.      Partnerships may take various forms and include, for example, placement of tour guide trainees on short internships with tour companies, private sector sponsorship of capital costs linked to product or excursion development, or companies providing trainers for specific trainings.

## 2.2 *Design and implement a LMNP tour guide-training programme*

Live-aboard companies confirm an interest to engage tour guides from LMNP in the delivery of a number of client excursions and experiences, including: walking tours of Makyone Galet; conversations and interactions with Moken; bonfire evenings; snorkelling trips; kayak tours along the mangrove river; forest walking tours including a board walk into a designated site of the mangrove river; and, trips to turtle nesting sites. The Wa Ale Eco-resort has also expressed interest to employ local guides in the future.

A tour-guide training programme will be designed and implemented with a minimum of 10 local tour-guides trained in the first instance (a balance of women and men). The programme will consist of separate units of study that embrace at least: LMNP history, local flora, fauna and ecosystems management; Moken history and contemporary issues; an introduction to the tourism industry, visitor types and markets, the practice of tour guiding, interpretation techniques, first-aid and emergency response; kayaking and snorkelling skills and, language training. All trainees will complete an agreed number of core units, and have the option to pursue additional units to broaden their knowledge and skill base. Partnerships will be sought with the private sector to deliver specialist and practical units such as the theoretical issues, snorkelling and kayaking.

## 2.3 *Design a Moken ethnicity space*

A consultant will be appointed to draw up plans, a scheme of work and determine financing options for developing a Moken ethnicity space. This initiative will involve a review of similar projects focusing upon the Moken elsewhere in South-East Asia, as well as ethnicity centres elsewhere in the region. The intervention will include the design of 4-6 interpretation panels for positioning within the LMNP visitor centre, and detailed guidance in terms of developing a stand-alone centre or small museum. In the first instance visitor numbers to the Park are unlikely to sustain a stand-alone centre, although this may be an option for the medium-term if day trips to the Park become a reality.

## 2.4 *Develop Moken-focused products*

The high interest of Park visitors and live-aboard companies in the Moken, their history and current lifestyle confirm potential to develop tour products that actively engage the Moken. An experienced product development consultant will liaise with live-aboard companies and Wa Ale Eco-resort, and work with the Moken and LMNP tour guides (see above), to train Moken tour leaders and package half-day excursions. Initial suggestions for developing tour products include:

- visiting wildlife sites significant to Moken hunter-gatherer livelihoods including turtle nesting sites, bat caves, bees nests and collecting food along the sea-shore;
- watching Moken free dive and spear-fish, teaching visitors how to spear-fish, and learning how to row a Moken dugout canoe; and,
- listening to folk stories and Moken history, including long boat trips, around a bonfire, and cooking with the Moken.

## 2.5 *Develop a mangrove river boardwalk*

A review will be undertaken of mangrove boardwalks in comparable destinations and preliminary surveys conducted to determine 2-3 potential sites for an interpreted mangrove boardwalk. Preliminary environmental impact assessments will form part of this process. Private sector representatives will be invited to visit the locations and routes, review estimated construction costs and determine the most suitable site for an interpreted boardwalk. Proposals will also be developed to establish

user-fees for the boardwalk and decisions taken as to the viability of the product to serve different markets (live-aboard, eco-resort, day-trippers). If the boardwalk is approved and considered to be an appropriate development, a reputable construction company with proven relevant experience, will be appointed to build the boardwalk subject to impact considerations, and other relevant issues as determined by the LMNP Ecotourism Management Board.



#### 2.6 *Design soft adventure trips – kayaking and jungle walks*

A product development consultant will be appointed to engage with live-aboard companies to determine locations, and start and finish points for the mangrove kayak trip and jungle walks. The consultant will be responsible for overseeing: the development of small-scale infrastructure (landing points, kayak storage points, footpaths, small bridges, signage etc.); identifying stories to interpret the flora and fauna for the visitors' enjoyment; and, training LMNP tour guides to deliver the trips to a standard acceptable to live-aboard companies.

#### 2.7 *Improve the Makyone Galet walking tour*

A product development consultant will be appointed to engage with live-aboard companies and the Makyone Galet community to bring together a series of stories to bring a Makyone Galet walking tour to life. The tour will include a brief history of the village, the range of livelihoods of local people, the Baptist village on the opposite side of the island, brief introductions to characters around the village (with short anecdotes about who they are, what they do, what they're known for), stories about village development issues (water, electricity supply, the school, the temple, waste management), and issues concerning the community's relationship with the Park, its conservation programmes and engaging with the tourism economy. The one-hour tour will be a compilation of village stories and will conclude with drinks and snacks at a local restaurant (a number of restaurants will be used). The aim is

to develop a wider bank of stories to be used in different ways by the 10 trained LMNP tour guides to show visitors around their village.

#### *2.8 Conduct food production, hygiene and hospitality awareness raising workshops and trainings*

Trainings will be provided for local entrepreneurs in a range of skill areas relevant to restaurant ownership and operation. The primary target group will be restaurateurs from Makyone Galet, who will be selected on the basis of their ability and commitment to expand their restaurant services. The training programme will commence with English language, hygiene and hospitality components. Support will also be given to enable restaurants to design menus in English. The extent to which the programme is developed and expanded will be determined by collaborations with training partners, private sector actors and by any decisions that may be taken regarding opening the Park to additional visitor markets or establishing community-based accommodation in Makyone Galet.

#### *2.9 Assess opportunities and training needs for handicraft production*

An experienced handicraft consultant will be engaged to assess: the quality of local handicrafts; whether handicrafts might be produced from re-cycled materials; and, the extent to which such items may appeal to LMNP and other visitors. If items are verified as having souvenir potential, a programme will be designed to support quality production and impart business management skills among target producers.

#### *2.10 Introduce fam-tours for tour operators*

Starting from year two or three, an annual fam-trip for tour operators will be organised to raise awareness of the products, services and excursions being developed, and measure interest to open these products to new visitor markets. At all times attention will be directed towards quality products and services, and maintaining effective management oversight to ensure ecotourism development continues to support conservation objectives.

#### *2.11 Design a Makyone Galet village development plan*

At present there are too few tourists visiting Makyone Galet to justify inputs needed to design a village development plan. If however visitor numbers increase over the medium-term to embrace day and overnight visitors, consideration will be given to the preparation of a village development plan. The plan will focus upon building controls suited to the Marine Park, and designate land for residential, business, recreational and farming use. The plan would also embrace the supply and management of public services including water, waste, energy, communications, education, health and transport.



### **Programme 3: Develop Conservation Linkages and Monitoring Protocols**

The purpose of developing LMNP ecotourism is to maximise, to the greatest possible extent, linkages between this activity and the conservation objectives of the Park. This is a complex and dynamic process. Management systems are rarely simple or straightforward, and on-going diligence is required to minimise negative impacts and maximise conservation gains. Environmental Impact Assessments that follow emerging national guidelines will be undertaken wherever tourism-related infrastructure, projects or services are to be developed and threats to the integrity of the Park's biodiversity and ecosystems may occur. For LMNP, management solutions will be designed to suit site-specific conditions, and regulations will be amended on an on-going basis to ensure management systems keep pace with changing site conditions. Sub-headings below set out activities to be implemented to raise awareness of conservation challenges and focus attention upon maximising conservation gains.

#### *3.1 Convene workshops to present and discuss LMNP ecotourism plan with local stakeholders*

The LMNP Ecotourism Plan will be translated into Myanmar and a series of local stakeholder meetings convened to discuss the content with local women and men. Bi-annual stakeholder meetings will be convened thereafter to update local communities on ecotourism-related developments and share details of forthcoming work-programmes. Emphasis will be given in all meetings to the ten guiding principles for Myanmar Ecotourism. Attention will also be drawn to positive and negative changes occurring in and around the Park as a result of ecotourism-related development, and activities being implemented to increase positive and reduce negative impacts. Through these meetings Park managers will seek opportunities to encourage local residents to support and engage in ecotourism and conservation-related activities.

### 3.2 *Review zoning system and define LMNP ecotourism activity and excursion plan*

The LMNP-GMP's zoning plan sets out general guidelines specifying the types of ecotourism activity permitted in each of the Park's four management zones. It also briefly describes the limits of recreational use for each zone. Drawing on the zoning system, consultations will be organised with primary stakeholders to set out an ecotourism activity and excursion plan that determines: the demand for ecotourism activities in specific sites around the Park; the conditions under which these activities are suited (or not) to these sites; codes of conduct and regulations for running the activities; and, monitoring protocols to measure their impact upon Park ecosystems. This initiative will be undertaken alongside the funding mechanisms process outlined in Programme 1, and in conjunction with product development activities listed in Programme 2. A management approach will be adopted to ensure potentially disruptive activities are kept away from sensitive ecosystems and important nesting sites (either seasonally or permanently as appropriate). The Plan will include, for example, anchoring points for mooring recreational boats within the Park and guidance for groups observing the roosting sites of the plain-pouched hornbills and flying foxes. The final output will be illustrated on an LMNP ecotourism map, which will include codes of conduct for each activity and the Myanmar Ecotourism Guiding Principles.

### 3.3 *Establish a turtle conservation project*

LMNP is home to a number of turtle species that lay eggs within the Park and that are threatened by hunting and the over-harvesting of eggs. A conservation project will be established as an ecotourism attraction to raise local awareness of: threats to the turtles; management systems needed to ensure their survival; and, income and employment opportunities that can be generated from turtle-tourism.

### 3.4 *Establish a coral reef restoration project*

Coral reefs within and beyond the Park have suffered greatly as a result of dynamite and dragnet fishing. Consultations with accommodation providers, tour operators with interests in LMNP and the wider archipelago, Moken and other Park residents confirm very high interest to pilot a coral restoration project within the Park. Initial consultations with the private sector also confirm strong interest to financially support such a project, especially if Park residents are involved in its planning and execution. The project would: raise awareness within the Park of conservation goals and objectives; provide an opportunity for the local community to partner with, and assume joint-ownership of, a conservation project; extend an opportunity for students from Myeik University's Marine Department to engage in a notable action research project; provide a media story-line of national and international interest; raise awareness of the need for effective patrolling and regulation of the Park's seas; establish an innovative ecotourism attraction for Park visitors; and, provide a model for replication in other reef sites within and beyond the Park. Research will be undertaken to assess the feasibility of establishing a reef restoration project, which would include a site close to Makyone Galet, together with the systems and processes needed to ensure effective project management.

### 3.5 *Develop "Do's & Don'ts" posters and fliers*

"Do's and Don'ts" for tourists and host communities that include simple cartoons and statements pointing out good and bad behaviours, have been widely used to good effect in many locations including nationally in Myanmar. "Do's & Don'ts" posters and fliers (in hard and soft formats) specific to LMNP will be developed and widely distributed among primary and secondary stakeholders. The posters and fliers will be positioned in places where stakeholders gather, including Park notice boards, restaurants, hotels and guesthouses, schools, government offices and on private sector websites. MO-ECAF and the Ecotourism Advisory Board will review examples used elsewhere and approve a set of

“Do’s and Don’ts” specific to the needs of the Park.<sup>4</sup>

### 3.6 *Use ecotourism to promote and expand research partnerships with domestic and international universities & institutes*

LMNP is home to a wide variety of terrestrial and aquatic species – including rare and endangered genus. Protecting and conserving the habitats and ecosystems of these species is: a) critical to the future of the LMNP and its ecotourism potential; and, b) dependent upon on-going research to measure positive and negative changes to the status of these systems. Research is needed in a number of areas related to conservation objectives, including the actual and potential contribution of ecotourism to support Park management. Ecotourism to the Park will be used as a vehicle to advertise, promote and expand research partnerships. Details of research projects will be posted on the Park’s website, positioned in the visitor centre and circulated via newsletters to live-aboard companies and tour operators to: a) encourage visitor interest and, where appropriate, participation in these projects; and, b) solicit proposals for new projects that link with universities and research institutes in Myanmar and beyond.

## **Programme 4: Develop Marketing and Interpretation**

To date there has been little if any collaborative effort to position and promote LMNP as a quality tourism destination. A series of activities are set out below that describe interventions to improve: the supply of information about the Park, its flora, fauna and cultural assets; the way the Park is promoted nationally and internationally; and, the quality of specific products, services and excursions as well as the overall visitor experience to the Park.

### 4.1 *Develop, promote, update and maintain an LMNP website*

An LMNP website ([www.lampipark.org](http://www.lampipark.org)) is in the process of being developed with a variety of pages covering the Park’s history, natural and cultural assets together with contemporary issues influencing Park management. Pages will also be developed that are specific to the promotion of ecotourism activity including products, services and excursions available within the Park, together with any related codes of conduct, regulations and monitoring protocols. The web site will include links to other related government, private sector and development partner sites.

### 4.2 *Produce a documentary about LMNP*

A documentary film about the Park, its history and natural and cultural assets will be produced. The film will be marketed and distributed to various digital and satellite channels within and beyond Myanmar and exerts made available for download from the LMNP website.

### 4.3 *Design promotional materials*

A number of promotional materials including a small guidebook, fliers and Park visitor map will be designed and distributed in hard and soft formats to primary and secondary stakeholders, as well as Park visitors. The materials will focus upon key Park assets and visitor management systems and processes. The materials will be made available to MOHT and MTF for distribution at all tourism fairs and exhibitions their representatives attend. All materials will also be made available for download from the LMNP website.

---

4. see, for example, <https://www.ecotourism.org/dos-and-donts-while-traveling> [http://right-tourism.com/wp-content/uploads/2013/08/RIGHT\\_tourism\\_dos\\_and\\_donts\\_0912\\_A4\\_v2.pdf](http://right-tourism.com/wp-content/uploads/2013/08/RIGHT_tourism_dos_and_donts_0912_A4_v2.pdf) <http://www.dosanddonsfortourists.com> <http://www.ecotourismlaos.com/dosdont.htm> <http://www.responsibletravel.org/resources/documents/reports/TravelGivingDosDonts.pdf>

#### 4.4 *Construct an LMNP visitor centre*

An LMNP visitor centre will be constructed adjacent to the current Park office on Bo Cho Island. The centre will serve as an essential information-rich focal point for all visitors to the Park. The Centre will contain a small library, a variety of interpretation panels as well as merchandise for sale to Park visitors.

#### 4.5 *Develop a “Friends of LMNP” database and distribute six-monthly newsletters*

A simple database will be developed to allow Park visitors and other interested individuals to register to receive six-monthly newsletters about the Park’s work programmes, progress with key activities and up-coming interventions. The database will allow subscribers to enter their names, addresses and nationalities. A two page six-monthly newsletter will be developed and distributed in PDF format to all persons registered in the database. In particular the newsletter will cover information related to the proposed LMNP Foundation.

#### 4.6 *Develop a T-shirt competition*

A design a t-shirt competition will be organised on a bi-annual basis with three categories. The first will be open only to school children with the Park, the second to Park residents and third to members of the “Friends of LMNP” database. Guidelines will be developed to accompany each competition and may follow themes for different categories. The top 2-3 designs for each category will be adopted and developed into T-shirts for sale in the Park visitor centre, from the website and other retail outlets.

#### 4.7 *Refine and deploy an annual visitor questionnaire*

A questionnaire to assess visitor views and opinions of the LMNP, its ecotourism products and services was designed and deployed as part of the process to prepare this plan. The survey instrument maybe revised as appropriate and will be deployed at regular intervals through the year, with a brief annual report compiled to assess and report on survey findings. A partnership with a national university will be sought to implement this activity.

#### 4.8 *Conduct segmented market research*

On-going market research will be initiated to assess the potential for introducing new visitor markets to the Park. This will include: (i) evaluations of community-based tourism models that may be suited to LMNP; (ii) assessments of the wider Kawthaung visitor market to measure possible interest in day visits to the Park, and willingness to pay for this experience; and, (iii) research to measure ecotourism-related benefits enjoyed by the Park’s resident community, and quantify the benefits that ecotourism must deliver to gain full community support for conservation objectives. Findings of the research will be reviewed alongside other achievements of the Plan’s implementation, and wider strategic developments influencing the growth of visitors to southern Myanmar,<sup>5</sup> to determine if, when and how new visitor markets might be introduced to the Park.

---

5. This includes, for example, direct flights to Kawthaung from Yangon or other regional airports, and the inclusion of Kawthaung as a Myanmar entry point for visitors with an E-visa.

4.9 *Invite travel writers, bloggers, journalists and guidebook writers to LMNP*

An annual familiarisation tour for journalists, travel writers, bloggers and guidebook writers to the Park will be organised. These tours will consist of at least three parts: i) a formal briefing to present the history and context of the Park and the substance of the Ecotourism Plan; ii) a guided tour of the Park to showcase its flora and fauna; and, iii) interviews with a variety of local people and primary stakeholders variously engaged in the emerging tourism economy. The aim will be to communicate an information-rich experience that will allow the writers to place a variety of content in travel magazines, websites/blogs, guidebooks and national newspapers.



### Appendix 1 Implementation Plan (years 1-3)

The framework below sets out a proposed timeframe for implementing the activities included in the Ecotourism Plan. Each activity listed under the four work programmes included in the main body of the Plan are embraced in this framework. Where possible each activity is broken down into suggested actions, which may need adjustment according to the ground realities prevalent at the time of implementation. The framework includes a list of key agencies involved in the implementation of each activity, with the lead agency highlighted in bold: with the exception of a small number of cases, Oikos, MOECAAF and the proposed LMNP Ecotourism Management Board will need to lead most activities. A budget column is also included, where possible proposing a ball-park figure needed to implement each activity – these figures should be taken as a rough guide only and will require further research and breaking down into specific budget lines to determine more accurate estimates. The proposed funding source and availability of funds is also indicated.

Activity & Actions	2015				2016				2017				2018				Lead Agencies	Funding Source(s)	
	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q			
	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2			
<b>1. Strengthen Ecotourism Planning and Management</b>																			
1.1 Form and empower a community-based ecotourism group in Makyone Galet (MG-EG) - raise local awareness of the need to form a group; discuss roles, responsibilities and systems to establish and manage the group; - elect / approve members; establish the group; agree priority agenda, group procedures, systems; - conduct regular meetings; keep records of meetings and decisions made; invite guest speakers																		Oikos, MOECAAF, Park Staff, villagers	Oikos
1.2 Establish an LMNP Ecotourism Management Board (LMNP-EMB) - identify individuals and agencies to be appointed to the board; - prepare and approve operational and administrative procedures and protocols; - convene monthly / bi-monthly board meetings; keep records of meetings and decisions made																		MOECAAF, Oikos, MOHT, Local / Regional Gov (GAD, Fisheries, Immigration, Navy), village leaders, private sector	Oikos- additional TA costs required



Activity & Actions	2015		2016				2017				2018				Lead Agencies	Funding Source(s)		
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
1.6 Organise study tours to expose park staff & local community to good practice ecotourism and conservation models - use MG-EG & LMNP-EMB meetings to determine useful and practicable sites for study tours; identify funds needed and budget source; - identify learning points and training materials; undertake study tour																MOECAF, LMNP-EMB, MG-EG, Oikos	Oikos - additional finance required	
1.7 Build a physical & virtual library of tourism-related resources - appoint LMNP staff member to assume responsibility for the library; - identify physical & virtual spaces for the library; - collect resources; develop indexing systems; raise awareness of the library among target audiences																MOECAF, LMNP-EMB, Oikos	No funds currently available (non needed for a virtual library)	
1.8 Form a Private Sector Association for Myeik Archipelago & generate revenue to support Lampi MNP work plans - private sector discuss options to establish an association - form association, agree working agenda; develop & implement work programme																Wa Ale Eco-resort; Hotel Owners, Yachting companies	Private Sector	

Activity & Actions	2015				2016				2017				2018				Lead Agencies	Funding Source(s)	
	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q			
	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2			
<b>2. Strengthen and Diversify the LMNP Product Range</b>																			
2.1 Deliver English language training - identify target audiences and ability classes; - recruit English language trainer(s); - deliver trainings																		Oikos, MG-EG	Oikos
2.2 Design and implement a LMNP tour guide-training programme - identify local tour guide-training needs & opportunities; - review relevant tour guide syllabuses & training systems; prioritise trainings of key relevance to LMNP guides; - review financing options & prioritise trainings; select local tour guides for training; - liaise with tour operators to assess options for in-kind trainings & deliver trainings																		OIKOS, MOECAAF, MOHT, MG-EG, tour operators	Oikos - additional finance required
2.3 Design a Moken ethnicity space - review ethnic / ethnographic museums and interpretation options; develop linkages with like-minded organisations and individuals to develop project synergies; - assess interpretation options; develop detailed plans for displays and story lines including on-going maintenance & management; - secure necessary budgets; develop and install interpretation materials; train management staff																		Oikos, MOECAAF, MG-EG, local community, <a href="http://www.projectmoken.com">www.projectmoken.com</a>	No funds currently available - additional finance required

Activity & Actions	2015			2016			2017			2018			Lead Agencies	Funding Source(s)		
	Q3	Q4		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1			Q2	Q3
<p>2.4 Develop Moken-focused products</p> <ul style="list-style-type: none"> <li>- select priority product(s) to develop in consultation with Moken; verify private sector interest &amp; demand;</li> <li>- engage product consultant; commence training and capacity-building; test products with private sector;</li> <li>- determine pricing structure(s); develop marketing materials;</li> <li>- promote and sell products; seek feedback &amp; refine product offer</li> </ul>																Oikos - additional implementation budget required
<p>2.5 Assess feasibility and develop a mangrove river board walk</p> <ul style="list-style-type: none"> <li>- review board walks in comparable destinations;</li> <li>- undertake preliminary EIA; assess financing options and requirements; invite private sector to review and visit potential site(s);</li> <li>- determine if desirable &amp; viable; if acceptable, develop user-fee and full financing proposals;</li> <li>- construct and market boardwalk</li> </ul>																No funds currently available - additional finance required
<p>2.6 Design soft adventure trips - kayaking and jungle walks</p> <ul style="list-style-type: none"> <li>- consult yachting companies to determine excursion locations, start and finish points, interpretation and small infrastructure needs;</li> <li>- develop story telling and other interpretation mediums; train local guides in product delivery; test and trial run tours;</li> <li>- promote and sell tours</li> </ul>																Oikos - additional implementation budget required

Activity & Actions	2015				2016				2017				2018				Lead Agencies	Funding Source(s)
	Q3	Q4	Q1	Q2														
2.7 Improve the Makyone Galet walking tour - review tour options and opportunities with yachting companies; discuss findings with MK-EG & wider community; - develop proposals for improved tour; verify product demand with yachting companies; train local community; develop interpretation options; - test tours; refine; promote and sell final product																	<b>Oikos, MG-EG, LMNP-EMB, local community, local tour guides</b>	Oikos – additional implementation budget required
2.8 Conduct food production, hygiene and hospitality awareness raising workshops and trainings - identify specific training needs of restaurant providers; identify target groups for trainings; - discuss training & resource needs with MOHT & training providers to identify funding options; - select training providers & commence trainings																	<b>Oikos, MG-EG, restaurateurs,</b>	Oikos – additional implementation budget required
2.9 Assess opportunities and training needs for handicraft production - review options and opportunities for handicraft development; - conduct study tours and field visits by relevant practitioners as appropriate; - design training programme; verify product demand with tourists & yachting companies; undertake capacity building; - develop products; test market place; refine as required																	<b>Oikos, MG-EG, local community, yachting companies</b>	Oikos – additional implementation budget required
2.10 Introduce fam-tours for tour operators - identify tour operators interested to sample LMNP tour products and services; - conduct fam-tours																	<b>Oikos, MOECAP, MOHT, UMTA</b>	No funds currently available

Activity & Actions	2015			2016			2017			2018			Lead Agencies	Funding Source(s)			
	Q3	Q4	Q1	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1			Q2	Q3	Q4
2.11 Design a Makyone Galet village development plan - identify issues to be embraced in the plan; convene MG-EG & wider village meeting to present, discuss and amend issues as required; - draft plan, present & discuss with MG community, LMNP-EMB and Yachting companies; amend as necessary; - finalise plan and commence implementation																Oikos, MOECAAF, MG-EG, local community, GAD	Oikos – additional implementation budget required
2.12 Initiate small scale farming and local food products - assess options for growing local produce and animal husbandry; measure local interest to initiate farming programmes; estimate seasonal & potential output and local demand; determine viability; - identify consultant or practitioner to guide and mentor farming programme; consider study tour; implement programme																Oikos, MOECAAF, MG-EG, WaAle Eco-lodge, local community	No funds currently available

Activity & Actions	2015				2016				2017				2018				Lead Agencies	Funding Source(s)	
	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q			
	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2			
<b>3. Develop Conservation Linkages and Monitoring Protocols</b>																			
3.1 Convene workshops to present and discuss LMNP ecotourism plan with local stakeholders - translate final plan into Myanmar; identify interest groups to present and discuss plan; - present and discuss plan with interest groups; identify topics and issues of high interest; convene follow up discussions as appropriate																		Oikos, MOECAP, MG-EG, Dept. of Fisheries	Oikos
3.2 Review zoning system and define LMNP ecotourism activity and excursion plan - review ecotourism activities in Park & zoning plan; assess impacts: - for each activity, draft (i) codes of conduct for key stakeholders (ii) any regulations that may be required (iii) monitoring protocols; present, discuss & amend as needed with Yachting companies; link to user-fees outlined in Programme 1; - design & distribute ecotourism activity map for the Park; amend every 2 years or as appropriate																		MOECAP, Oikos, MOHT, MG-EG, LMNP-EMB, Dept. of Fisheries, private sector	Oikos - additional implementation budget may be required
3.3 Establish a turtle conservation project - review turtle conservation projects in comparable locations; assess funding options; - engage specialists to design and implement conservation project in partnership with local community; - undertake publicity and education campaign; invite media to report																		Wa Ale Eco-resort, MOECAP, Oikos, MG-EG, Dept. of Fisheries	WaAle Eco-resort, Oikos - additional budget required

Activity & Actions	2015			2016			2017			2018			Lead Agencies	Funding Source(s)				
	Q3	Q4		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1			Q2	Q3	Q4	
<p>3.4 Assess the feasibility and establish a coral reef restoration project</p> <ul style="list-style-type: none"> <li>- invite specialists to review restoration projects in comparable locations; assess funding options;</li> <li>- specialists engage to design and implement conservation project in partnership with local community;</li> <li>- undertake publicity and education campaign; invite media to report</li> </ul>																	To be identified, MOECAF, Dept of Fisheries, MG-EB, local community, Yachting companies	Yachting companies – additional source to be identified
<p>3.5 Develop "Do's &amp; Don'ts" posters and fliers</p> <ul style="list-style-type: none"> <li>- review "do's &amp; don'ts" used by other destinations;</li> <li>- assess "do's &amp; don'ts" needed for LMNP, present ideas to a range of stakeholders &amp; obtain feedback;</li> <li>- appoint illustrator to draw cartoons &amp; develop supporting text; layout, publish and distribute final product</li> </ul>																	Oikos, LMNP-EMB, MOECAF,	Oikos
<p>3.6 Use ecotourism to promote and expand research partnerships with domestic and international universities &amp; institutes</p> <ul style="list-style-type: none"> <li>- include details of research needs &amp; partnerships in LMNP website, visitor information centre and Friends Network newsletter;</li> <li>- identify priority areas for new research projects (eg 3.4 &amp; 3.5 above) &amp; invite interest to develop research partnerships with interested institutions</li> </ul>																	Oikos, MOECAF, Dept. of Fisheries	No substantial funds required

Activity & Actions	2015				2016				2017				2018				Lead Agencies	Funding Source(s)
	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q		
	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2		
<b>4. Develop Marketing and Interpretation</b>																		
4.1 Develop, promote, update and maintain an LMNP website																	Oikos, MOECAAF,	Oikos
4.2 Produce and disseminate a documentary about LMNP																	Oikos, MOECAAF, MOHT, MMC	Oikos
4.3 Design promotional materials - produce content and designs for Park brochure, map, guidebook etc.; develop hard and soft copies; - disseminate through website, and hard copies through visitor information outlets and tourism fares																	Oikos, MOECAAF, MOHT, MOHT, MMC	Oikos
4.4 Construct an LMNP visitor centre with educational panels - design & construct visitor centre; - design interpretation space including educational panels; install and maintain																	Oikos, MOECAAF	Oikos
4.5 Develop a "Friends of LMNP" database and distribute six-monthly newsletters - include an option to join a "Friends of LMNP" group on Facebook and the LMNP website; - produce a 2-4 page six-monthly newsletter to update members on project development and future activities; distribute to tour and yachting companies																	Oikos, MOECAAF, Myanmar Diving club	No funds currently available – encourage volunteer role
4.6 Develop a T-shirt competition - develop competition categories & guidelines including submission dates; appoint panel of judges; publicise competition; - convene competition; award winners; produce t-shirts; promote through media; sell t-shirts																	Oikos, MOECAAF, LMNP-EMB, MG-EG, local community	No funds currently available – additional finance required



## Appendix II List of Yacht companies to operate within the Myeik Archipelago

1. A One Ranong Diving Center
2. Marina Services Co.,Ltd
3. Moby Dick Co.,Ltd
4. Aisa Yachting Co., Ltd
5. Aladdin Dive Safari Co.,LTd
6. Rasselas Limited
7. Nam Jai Ranong Co.,Ltd
8. Phuket KFS Co.,Ltd
9. Uniteam Marine Co.,Ltd
10. Similan Diving Safaris Co.,Ltd
11. Polaris Ranong Co.,Ltd
12. Phuket Superyacht Services Co.,Ltd
13. Teak Pro Co.,Ltd
14. Thai Sailing Co.,Ltd
15. True Wind Co.,Ltd
16. SYS Asia Co.,Ltd
17. The smiling Seahorses Co.,Ltd
18. Allied Ocean Group Co.,Ltd
19. Phuket Freepier Diving Co.,Ltd
20. Kon Tiki Co.,Ltd
21. Aquamarine Asia Co.Ltd

## Appendix III LMNP Questionnaire

### ***Tourist survey to inform and help prepare Lampi Marine National Park Ecotourism Plan - Your cooperation is highly appreciated***



We would like to invite you to participate in this survey, so that we can gather information to help develop and promote sustainable tourism in Lampi Marine National Park. Your responses will help to identify opportunities and gaps that will enable the local community, the private sector and the government to: a) improve their service delivery to you, and to those that deliver the travel experience; and, b) promote conservation and sustainable use of Lampi Marine National Park and its resources.

The survey is part of the 'Conservation and Sustainable Tourism in Lampi Marine National Park' (CO-AST) project implemented by Istituto OIKOS and supported by the Italian Cooperation.

All responses will be totally confidential.

1. With which tour company did you book your tour?  
Name of company \_\_\_\_\_
2. How many nights will you stay in Myanmar on this tour? \_\_\_\_\_ Nights
3. Please indicate how many tourists are on your tour: Number of people \_\_\_\_\_
4. How many nights did you stay in Lampi Marine National Park (if any): \_\_\_\_\_ Nights
5. How many times in total, (including this trip) have you visited Myanmar?  
\_\_\_\_\_ Times
6. What activities have you done in Lampi Marine NP on this visit and how satisfied were you with the activity (please tick all activities undertaken and circle level of satisfaction with that activity)?

Activities	<input type="checkbox"/>	😊		😐		☹️
1. Visit Maykone Galet		1	2	3	4	5
2. Snorkelling						
3. Diving						
4. Kayaking						
5. Mangrove river tour						
6. Meet and engage with sea-gypsies (Moken / Salon)						
7. Watch hornbills returning to nest						
8. Bird-watching						
9. Walk on deserted beach						
10. Have a campfire on a deserted beach						
11. Hiking						
Other (please state)						

7. Do you have any suggestions as to how the above activities might be improved? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

8. What would you have liked to have done in Lampi Marine NP that was not possible/available?  
 1. \_\_\_\_\_  
 2. \_\_\_\_\_  
 3. \_\_\_\_\_

9. Please rate your level of satisfaction with each of the following (please circle)

Products & Services	😊		😐		☹️	NA
1. Choice of different activities/things to do in Lampi Marine NP	1	2	3	4	5	
2. Availability of information about Lampi Marine NP						
3. Quality of information available about Lampi Marine NP						
4. Availability of information about the sea-gypsies / Moken / Salon						
5. Quality of information available about the sea-gypsies / Moken / Salon						
6. The overall quality of tour you have just undertaken						

10. Approximately how much money did you spend in Lampi Marine NP and what did you spend this money on? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

11. What goods/services would you have liked to have purchased that were not available?

1. \_\_\_\_\_ 4. \_\_\_\_\_  
 2. \_\_\_\_\_ 5. \_\_\_\_\_  
 3. \_\_\_\_\_ 6. \_\_\_\_\_

12. Please rate your level of interest in Lampi Marine NP for each of the following (please circle)

	Very Interested	Interested	Not very Interested	Not interested at all	NA
1. Learning More about the Park's nature& wildlife	1	2	3	4	5
2. Tours that provide greater opportunities to experience the Park's nature and wildlife					
3. Opportunities to get more involved in and / or support Lampi Marine NP conservation activities					
4. Opportunities to interact with local people					
5. Opportunities to try local food and eat in local restaurants (if available)					
6. Learning more about the sea-gypsies / Moken / Salon culture& history					
7. Opportunities to join the sea-gypsies / Moken / Salon fishing & diving					

13. Would you be willing to pay a fee to support the conservation of the Park?

- Yes1    No2    Not sure3

14. Would you recommend others to book the tour you have just taken?

- Yes1    No2    Not sure3

15. If yes, why? \_\_\_\_\_

If no, why not? \_\_\_\_\_

16. Did you know anything about Lampi Marine NP before joining your tour?  Yes1  No2

17. How did you receive information about Lampi Marine NP, before arriving in the country? (you can select more than one answer)

- Radio 1                       Television 2                       Newspaper 3                       Magazine 4  
 Internet 5                       Travel brochure 6                       Tour operator 7                       Guidebook8  
 Hotel/guesthouse 9  Word of mouth/other travellers 10                       Other11\_\_\_\_\_

18. What are the 3 things you have enjoyed most about Lampi Marine National Park?

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

19. What are the 3 things you disliked most about your time in Lampi Marine National Park?

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

20. What was your main reason for visiting Lampi Marine National Park?

\_\_\_\_\_

#### Demographics

21. Your approximate age:

- < 25 years1                       between 25 and 34 years2                       between 35 and 44 years3  
 between 45 and 54 years4                       between 55 and 64 years5                       > 65 years6

22. What is your Gender (Please tick one):                       Male 1                       Female 2

23. What is your profession? \_\_\_\_\_

24. Where do you currently reside? Country1\_\_\_\_\_

Post/Zip Code2\_\_\_\_\_

25. What is your Nationality? \_\_\_\_\_



A project of

In collaboration with

Funded by

