

Local economic development through 'pro-poor' gorilla tourism in Uganda

Research Framework

March 2017

'Local economic development through pro-poor gorilla tourism in Uganda' is a three year project funded by the UK government's Darwin Initiative. The aim of the project is to work with local people and established tour operators to develop and test new 'pro-poor' tourism products and services around Bwindi Impenetrable National Park. This report records the project research framework.



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The project

'[Local economic development through 'pro-poor' gorilla tourism in Uganda](#)' is a three year project funded by the [Darwin Initiative](#). The project will work with local people and established tour operators to develop and test new 'pro-poor' tourism products and services around Bwindi Impenetrable National Park in Uganda. The new initiatives such as guided tours, food experiences, cultural performances and improved handicrafts, will aim to add value to the typical two night gorilla tracking package and increase local revenue from tourism, thereby contributing to poverty alleviation, improving local peoples' attitudes to conservation and reducing threats to gorillas.

The project comprises the following five stages:

1: Scope demand

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



2: Assess supply

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



3: Match supply and demand

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



4: Build capacity to meet demand

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



5. Test, refine and roll-out

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

Research questions and data collection

The project aims to test the following hypothesis: Improving local capacity to produce quality tourism products and services that respond to expressed demand from tourists, tour operators and lodges will increase the number of sales resulting in increased income at the household level and, as a result, improved attitudes towards and support for conservation of Bwindi forest.

To test this hypothesis, the research component seeks to answer three key questions:

1. Do the local tourism capacity development interventions delivered by the pro-poor tourism project to poor people living close to Bwindi Forest result in increased uptake of local tourism products and services by tourists, tour operators and lodges?
2. Do increased sales of local tourism services and products affect household incomes and, if so, what difference does this make to local livelihoods?
3. Does increased household income from park tourism enterprises change local attitudes towards national park conservation?

The table below summarises the data that will need to be collected in order to answer these questions and the methods that will be used to collect and analyse the data. Data generated from the research will also be used to verify the output and outcome indicators in the project's **log frame (Annex I)**.

Table 1: Pro-poor gorilla tourism research framework

Research question	Data to collect	What to measure	How it will be collected	Who will collect it
Do the local tourism capacity development interventions delivered by the Pro-poor Tourism Project to poor people living close to Bwindi Forest result in increased uptake of local tourism products and services by tourists?	Local enterprise accounts before project start (Annex II)	6-12 months of enterprise data before the project starts covering (depending on type of enterprise): <ul style="list-style-type: none"> • Numbers of tourists visiting enterprise • Number of sales • Income earned at enterprise level • Income paid to individual members of enterprise 	Given paucity of written enterprise data, ITFC will try to reconstruct this information based on key informant interviews with enterprise leaders	ITFC
	Local enterprise accounts during the project once training has started	<ul style="list-style-type: none"> • Numbers of tourists visiting enterprise • Number of sales • Income earned at enterprise level • Income paid to individual members of enterprise 	Enterprises to keep basic records (using paper records or ODK / tablets) using the project template that are collected monthly	ITFC
	Tour operator and lodge records of products/services bought before training starts	<ul style="list-style-type: none"> • Products/services featured in tour operator brochures/itineraries • Products/services bought by lodges • Names/gender of local suppliers if possible 	Survey of tour operator brochures/itineraries at start of project Survey of lodges	RTP IGCP
	Tour operator and lodge records of products/services bought during project once training starts	<ul style="list-style-type: none"> • Products/services featured in tour operator brochures/itineraries at end of year 2 and at end of year 3 • Products/services bought by lodges at end of year 2 and end of year 3 	Survey of tour operator brochures/itineraries at end of year 2 and 3	RTP IGCP

Research question	Data to collect	What to measure	How it will be collected	Who will collect it
		<ul style="list-style-type: none"> Names/gender of local suppliers if possible 	Survey of lodges at end of year 2 and 3	
Do increased sales of local tourism services and products affect household incomes and, if so, what difference does this make to local livelihoods?	Baseline household income	Perceptions by individual households on their income from tourism	Household questionnaire at the start of the project	ITFC
	Household income at project end	Perceptions by individual households on changes to their income during the time of the project	Household questionnaire at the end of the project	ITFC
		Perceptions of households on difference to livelihoods (eg what they have been able to do as a result of the increased income)	Household questionnaire at the end of the project combined with "Most Significant Change" interviews	ITFC
	Number of tourists visiting the national park	National park gate entrance fees and/or gorilla permits to standardise the monthly Park tourism income sales recorded by each Enterprise	Direct from Bwindi and/or UWA headquarters	Peter/Pontious
	Socio-economic profiles of individuals receiving the gorilla friendly certification	Basic socio-economic indicators for each household	Household questionnaire at the start and end of the project; certification records	ITFC/IGCP
Does increased household income from Park tourism enterprises change local attitudes towards national park conservation?	Local attitudes towards conservation at the start and end of the project	Attitudes of individual households towards conservation - in relation to wildlife, the national park and the UWA	Household questionnaire at the start and end of the project	ITFC
		<i>Community views of whether increasing Park tourism income improves local attitudes towards conservation and reduces threats to Mt gorillas</i>	<i>Focus group discussion with key community members (if possible)</i>	

Research design considerations

Below are the considerations that underpinned the design of this research. Additions to the original text (November 2016) are in blue text and have been made following a review by Professor EJ Milner-Gulland of Oxford University.

Selecting the poorer households around Bwindi Impenetrable National Park

The project's log frame refers to "targeting the poorest households in close proximity to the park boundary" and to "household survey at start of project targeting the poorest households in close proximity of park boundary". Research for the '[Research to policy: conservation through poverty alleviation](#)' (R2P) project showed that people living within 0.5km from the national park boundary were significantly poorer than people living further away. The poorest people also lived in remote areas far from trading centres or road transportation. Subsequent research by Medard Twinamatsiko on Revenue

Sharing¹ found that households within the radius of 1km from the park boundary were poorer compared to those beyond 1km. We will prioritise households within the 1km from the national park boundary (hereafter referred to as frontline villages) to select those to be involved with this project and to be interviewed for the research (including controls and random households). Where this is not possible, we will prioritise those living remote areas far from trading centres or road transportation. We will also consider whether it is possible to prioritise households within known 'hot spots' of crop and livestock raiding by wild animals. All households will be within one of the five tourist zones around the national park.

Controls

We have approximately 400 households that could be involved with the project, but at this stage do not know who and how many of these households will be. We will interview all of these potential households at the start of the project. We considered whether households that drop out of the project (for example they do not wish to engage) could be interviewed at the end of the project as our 'control' group, together with interviews for households that remain with the project. However, there will be a reason why they dropped out and because this introduces systematic bias, they cannot be treated as controls. Nonetheless, these 'drop out' households will be interviewed at the end of the project to determine whether there are systematic differences between them and the project households in order to make recommendations for future application of the project.

Random Sampling

We will select households at random within the same village as households involved with the project and within the frontline Local Council One (LC1) ie bordering the national park boundary (or in remote areas far from trading centres or road transportation). We will first check whether any of the 'random' households from the R2P research meet these criteria and, if so, they will be included as the random households for this research in order to build on previous data. If none or not in sufficient numbers, we will select households at random using lists supplied by the Local Council chairpersons that were obtained for the R2P research (this approach follows the R2P research methodology). We will survey a minimum of 50 random households, more if time and budget permits (aiming for 100 random households).

The aim of taking a random sample is to assess the impact of the project on households included in the project relative to households within the same village and the frontline LC1, but not involved with the project. Ideally for a BACI design (Before After Control Impact) rather than take a random sample, we would identify all households that could qualify for the project and then randomly assign them to either a treatment or control group, and only offer the project to those who are in the treatment group. However, this is not possible firstly because it raises ethical issues. Secondly, as mentioned above, there are potentially 400 households that could be involved with the project but, at this stage, we do not know which households will be involved until this component of the project starts. Thirdly, with such as BACI research design there is a risk of leakage whereby 'controls' (households that could qualify for the project but were excluded) gain from the project anyway, for example increased wealth of 'treatment' households generate more general economic activity in the village. Or 'controls' are disadvantaged by the project, for example reducing their tourism-related sales because of better quality/service offered by 'treatment' households. Taking controls and treatments at the village rather than household level could overcome these problems, although such an extensive research study is beyond the scope of this project.

Gender

Our log frame makes reference to at least 100 out of the 200 local people involved with the project being women. During the household survey, the field team will establish the individual undertaking the tourism income-generating activity. We can then determine how many are men and how many are women, and prioritise women for the household questionnaire. We will prioritise women at this stage, as

¹ Revenue Sharing is a scheme by the Uganda Wildlife Authority where a percentage of the national park entrance fees, and of the mountain gorilla permits, are allocated to fund local community projects

we do not know which households will be involved with the project. For the randomly selected households, we will aim for 50 per cent of the questionnaires to be with women.

Human-wildlife conflict

One indicator in our log frame is:

By end of project at least 200 people (of which at least 100 women) living in close proximity to the park and subject to human wildlife conflict have successfully sold new or improved, local tourism services/products to at least one group of tourists (against a baseline of zero sales at start of project) with positive feedback received.

From ITFC’s research, crop and livestock raiding by wild animals is known to frequently occur within 1km from the national park boundary. It is also known that certain animals raid certain areas more frequently than others, but that crop and livestock raiding occurs all around the national park. For example elephants typically raid southern areas in the dry season and south-western areas in the wet season, whereas mountain gorillas most frequently raid southern and south-western areas (Figure 1). On this basis, we can assume that households within 1km from the national park suffer from crop and livestock raiding by wild animals.

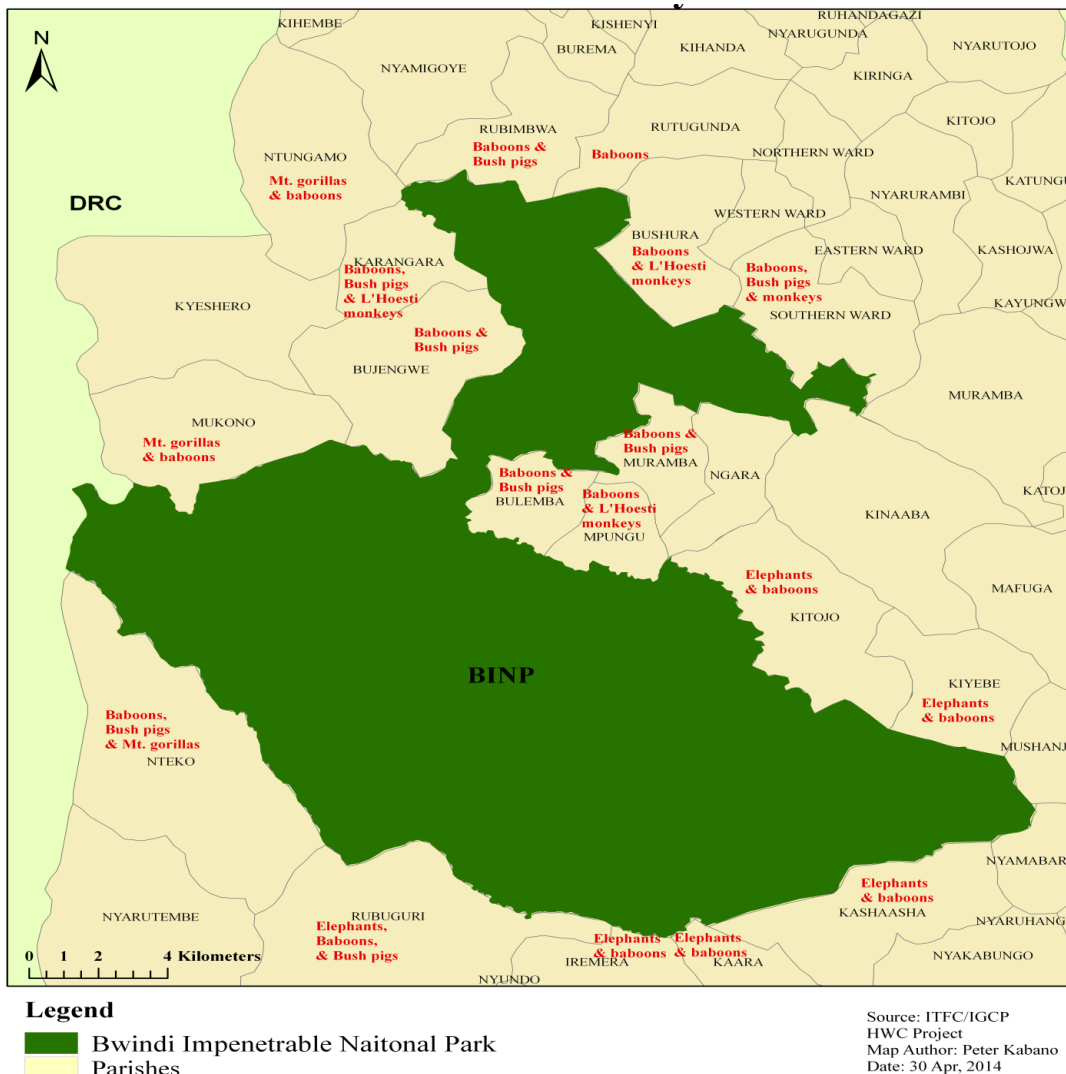


Figure 1. Typical areas of crop and livestock raiding by wild animals around Bwindi Impenetrable National Park

Individual perceptions on income

The household questionnaire (Annex III) is to establish a baseline of existing household income from park-related tourism. As asking people to give specific figures on past income can be unreliable, we will ask questions to gauge relative levels of income. The questions include:

- What are your three main income sources?
- Compared to these, how important is Park tourism income?
- How do you earn Park tourism income? (details on products/services and earnings from each; who in the household is involved)
- Over the last month, approximately how many tourism products/services have you sold?
- How do these sales compare with other months of the year?
- What month(s) of the year do you sell the most tourism products/services? How many sales on average during this time?
- What month(s) of the year do you sell the fewest tourism products/services? How many sales on average during this time?

The questionnaire includes the question “list 3 items you spend most of your income on”. The results will be analysed carefully with consideration to how people defined ‘item’ (and with feedback from the survey team). For example, whether people list the small items that they frequently buy (ie the highest proportion of expenditure over a year) or their single largest expenditure (which is implied by the question).

As described above, asking people to give specific figures on past income can be unreliable. The approach undertaken is to ask questions to gauge relative levels of income. That said, analysis of the answers will be undertaken carefully, especially answers to “how much income do you earn from national park tourism enterprises on a good and bad day/month”. These answers are likely to be unreliable given different people have different conceptions of what a good and bad day/month means, and because many people are poor at recalling such information. Using daily dairies is more reliable and indeed the method used by this project to estimate past income from park-related tourism (where records exist) and to document income from park-related tourism during the project (see below).

Research instruments

Household Survey

A key element of the data collection framework is the household questionnaire at the start and end of the project. This research is intended to assess change in household income and in attitudes towards conservation as a result of interventions designed to support locally-produced tourism services that can complement gorilla tourism around Bwindi Impenetrable National Park, Uganda. The aims are to determine firstly whether project interventions increased tourism-related household income (and the consequences of this increase on beneficiary livelihoods) and, secondly, whether any increases in tourism-related income changed local attitudes towards national park conservation.

The research builds directly on findings from studies undertaken for the [‘Research to Policy: conservation through poverty alleviation project’](#) (R2P), a previous Darwin-funded project at Bwindi. The [R2P project](#) found that local people considered that conservation of Bwindi Forest is “unfair” because they suffer significant costs from human-wildlife conflict but receive only limited benefits from the national park (and specifically benefits from park-related tourism).

The household questionnaire was designed using the questionnaire developed for the R2P project. ITFC will pilot the questionnaire on a random selection of households, following which it will be refined for the survey to commence during winter 2016.

Enterprise accounts

A simple input- output book keeping approach will be used to record monthly enterprise sales and earnings, as well as individuals to who income from sales is distributed. Records will be kept as paper copies initially and collected by ITFC monthly. As the project progresses, it will be assessed whether keeping records in electronic format via mobile phones (with data entered into a custom built form designed with Open Data Kit software) would be more efficient. This would allow for the data from individual enterprises to be transmitted on a monthly basis to a central spreadsheet where all enterprise data can then be synthesised.

Annex I: Logframe as revised at project inception meeting

Project summary	Measurable Indicators	Means of verification	Who is going to measure what
Impact: (Max 30 words) Gorilla tourism supports local economic development around Bwindi Forest and mitigates the costs for local people of living with wildlife, thus reducing threats and generating long term support for biodiversity conservation			
Outcome: (Max 30 words) Tourism generates increased benefits for poor people living around Bwindi Forest and thus improves local support for the park and for conservation of gorillas and their habitat.	0.1 By end of project at least 200 people (of which at least 100 women) living in close proximity to the park and subject to human wildlife conflict have successfully sold new or improved, local tourism services/products to at least one group of tourists (against a baseline of zero sales at start of project) with positive feedback received. 0.2 By end of the project, tourism-related income to 200 households involved in pilot initiatives has increased by at least 25% against baseline established at start of project 0.3 By end of project, at least 200 households report an improved awareness of, and attitude to, conservation in Bwindi Impenetrable National Park against baseline established at start of project 0.4 By the end of the project, at least 25% of Gorilla Friendly certified individuals are from the poorest households and are generating new/additional income from sales through tour operators and lodges 0.5 By the end of the project, at least 25% of lodges around	0.1 Tour operator and lodge records of products/services bought (number of services and names and gender of people providing them) triangulated against book keeping records of individuals involved in pilots 0.2 Feedback from tour operators, lodges and tourists on quality of products/services and potential for repeat sales 0.3 Household surveys at start and end of project; analysis of accounts books of individuals involved in pilots 0.4 Household surveys at start and end of project; Numbers of individuals recognized by Gorilla Friendly by receiving "Gorilla Friendly" branded certificates 0.5 Analysis of accounts books of individuals involved in pilots triangulated with records of tour operators and lodges	0.1 RTP 0.2 RTP 0.3 ITFC will conduct HH surveys and book keeping analysis 0.4 ITFC will do the HH surveys; IGCP will make sure the surveys capture what is needed for the gorilla friendly part 0.5 RTP TO info, ITFC will have book keeping records, IGCP will liase with the lodges

	Bwindi and 25% of tour operators operating in Bwindi are using new products and services from certified individuals from the poorest front-line households		
<p>Outputs:</p> <p>1. Demand and supply for pro-poor tourism services at Bwindi assessed and matched</p>	<p>1.1 By December 2016 at least 20 tour operators have reported information on type, number, and characteristics of local tourism services that they could market to clients as part of a gorilla safari package.</p> <p>1.2 By January 2017, at least 50 tourists in each of the 5 [THREE] tourism zones have reported on types and characteristics of tourism products/services they would be interested to buy</p> <p>1.3 By December 2016 [MARCH 2017], at least 50 households in each of the five tourism zones, have provided details on tourism priorities and capacity to engage [NOTE THIS IS NOW FOCUSED ON EXISTING ENTERPRISES] .</p> <p>1.4 By January [MARCH] 2017 at least 3 new or improved local tourism product/services and product/service providers have been identified and agreed in each tourism zone</p>	<p>1.1 Tour operators survey/consultation internationally and in Uganda</p> <p>1.2 Survey of different types of tourists in lodges in each tourism zone</p> <p>1.3 Household survey at start of project targeting the poorest households in close proximity of park boundary</p> <p>1.4 Narrative report published on project website summarising results of surveys and identifying planned local tourism products/services to be piloted; [PLUS A PRESS RELEASE]written a/greements from at least two tour operators to trial new products/services</p>	<p>1.1 RTP</p> <p>1.2 ITFC and RTP</p> <p>1.3 ITFC</p> <p>1.4 IIED and RTP</p>

<p>1. Capacity to produce and sell market-ready tourism products/services developed for at least 200 individuals (at least 100 women) from poorest households</p>	<p>1.1 By March 2017, at least 200 individuals identified (including at least 100 women) with potential to benefit from training</p> <p>1.2 By June 2017 training for first type of pilot initiative completed and in at least one tourism zone</p> <p>1.3 By September 2017 training for first type of initiative completed in all tourism zones</p> <p>1.4 By March 2018 training completed for all initiatives in all zones</p> <p>1.5 By end of project at least 200 individuals/HH (including at least 100 women) demonstrate improved capacity through delivery of marketable tourism products/services</p>	<p>2.1 Hh survey plus outcomes of village meetings</p> <p>2.2 Number of men and women trained in each type of initiative in each tourist zone</p> <p>2.3 Reports from tour operators [TRAINERS] of trainings delivered, verified by ITFC coordinator and including feedback by local people on the training they received ; ISSUANCE OF GF CERTIFICATES</p> <p>2.4 Existence of new, high quality, marketable, local tourism products and services</p> <p>2.5 Records and feedback from tour operators on local tourism services/products bought with feedback on quality of those services/products</p>	<p>2.1 ALL</p> <p>2.2 TRAINERS TO COLLECT INFO OVERSEEN BY RTP</p> <p>2.3 TRAINERS OVERSEEN BY RTP IGCP RE ISSUANCE OF GF CERTIFICATES</p> <p>2.4 TRAINERS OVERSEEN BY PETER, IGCP RE QUALITY (LABELLED) PRODUCTS</p> <p>2.5 RTP</p>
<p>3. "Gorilla-friendly" ecolabel tested in 5 tourism areas around Bwindi</p>	<p>3.1 By April 2017, poor Gorilla Friendly standards for local tourism service provision and products agreed by stakeholders and translated into at least two local languages</p> <p>3.2 By March 2018, conservation training to meet Gorilla Friendly standards delivered to all project participants</p> <p>3.4 By April 2018, Gorilla Friendly standards tested in all of the pilot initiatives</p> <p>3.5 By end of project, Gorilla Friendly standards submitted to Uganda National Bureau of Standards for endorsement</p>	<p>3.1 Gorilla Friendly standards agreed by stakeholders</p> <p>3.2 Gorilla Friendly standards are officially submitted to Uganda National Bureau of Standards for endorsement</p> <p>3.3 PDFs of local language versions of standards produced, and number printed and distributed</p> <p>3.4 Report on implementation and testing of standard written up as a journal article and submitted</p> <p>3.5 WFEN Gorilla Friendly website listing Gorilla Friendly certified products and operations</p>	<p>3.1 IGCP</p> <p>3.2 IGCP</p> <p>3.3 IGCP</p> <p>3.4 ALL</p> <p>3.5 IGCP/WFEN</p>

	3.6 By end of project, recognition by WFEN of at least one pilot products/service that meets Gorilla Friendly standards	3.6 Reports from pilot strategies owners/beneficiaries	
4. Viable and profitable local tourism products and services successfully marketed to tour operators and tourists in tourism zones around Bwindi, and experience shared internationally	<p>4.1 By June [AUG] 2017 at least one pilot initiative in at least one tourism zone used by tourists</p> <p>4.2 By March 2018 at least 200 frontline local people (including at least 100 women) in all tourism areas around Bwindi are earning regular income from provision of tourism</p> <p>4.3 By December 2018 at least two international and two Ugandan tour operators promoting pilot initiatives as part of Bwindi packages (against pre-project baseline of zero)</p> <p>4.4 By end of project results of local tourism pilot initiatives shared with tour operators across Uganda and internationally</p>	<p>4.1 Project reports including feedback from tour operators and tourists</p> <p>4.2 Reports from TOs triangulated against accounts kept by local tourism providers</p> <p>4.3. HH income surveys at beginning and end of project</p> <p>4.4 Inclusion of new products in tour operators brochures</p> <p>4.5 Report of project workshop to disseminate results published on project website.</p> <p>4.6 Presentation at World Travel Market 2018</p>	<p>4.1 RTP to collect TO itineraries to establish start of project baseline (screenshots if not actual brochures etc)</p> <p>4.2 RTP and ITFC</p> <p>4.3 ITFC</p> <p>4.4 RTP</p> <p>4.5 IIED</p> <p>4.6 RTP/IIED</p>
<p>Activities (each activity is numbered according to the output that it will contribute towards, for example 1.1, 1.2 and 1.3 are contributing to Output 1)</p> <p>Cross cutting:</p> <p>0.1 Project Inception meeting</p> <p>Output 1: Demand and supply assessed and matched</p> <p>1.1 Email/telephone survey of Ugandan and international tour operators to capture perspectives of types and characteristics of local tourism services with market potential</p> <p>1.2 Workshop with Uganda tour operators to confirm selection of tourism services and to identify potential providers of training from within existing staff (or external trainers if no existing expertise or available resources internally)</p> <p>1.3 Scoping visit to Bwindi to assess existing supply of local services and meet key stakeholders (community tourism associations, village officials, UWA rangers; lodge owners)</p> <p>1.4 Survey of tourists in lodges in each of the 5 tourism zones</p> <p>1.5 Identification and mapping of households within from the park boundary</p> <p>1.6 Survey of households to determine baseline information on income, benefits from tourism and attitudes to conservation and also to explore potential interest/capacity in developing new pro-poor tourism services.</p>			

Survey will identify any pre-existing data already collected by IGCP, ITFC and others, and fill gaps as needed

- 1.7 Project team meeting to review results of surveys and agree set of four of five initiatives to take forward.

Output 2: Capacity development

- 2.1 Local meetings with villages in the tourism zones to agree short list of pro-poor tourism initiatives to be developed and identify individuals to be trained
- 2.2 Briefings by project team with trainers identified in 1.2
- 2.3 Trainings delivered activity by activity, tourism zone by tourism zone
- 2.4 Regular meetings of project team with tour operators and trainers to review progress and adapt training as required

Output 3: Development and testing of pro-poor "Gorilla Friendly" ecolabel

- 3.1 Meeting with project partners and stakeholders to confirm the adaptation of Wildlife Friendly™ ecolabel standards to be inclusive of pro-poor objectives in the emerging species-specific "Gorilla Friendly" ecolabel standards for community products and services, as well as "Gorilla Friendly" branded certificates for those that received training under this project
- 3.2 Development and printing of locally-relevant outreach materials in at least two local languages.
- 3.3 Conservation training and outreach to pilot strategies including distribution of outreach materials.
- 3.4 Preparation and submission of certification applications, conducting 'audits' of standards as necessary, from each pilot strategies (testing).
- 3.5 Report back the results of the certification testing, adjustments suggested, and reward those receiving the ecolabel with the rights to use the ecolabel to promote their products/ services.
- 3.6 Promotion of certified products/ services.
- 3.7 Submission of ecolabel standards to UNBoS for endorsement.

Output 4: Local "gorilla friendly" tourism successfully marketed and generating conservation and poverty benefits

- 4.1 Tour operators introduce tourists in one tourism zone to pro-poor tourism pilots and collect feedback from tourists
- 4.2 Adjustment of pilot initiatives in all zones in response to feedback
- 4.3 Tour operators introduce tourists to pro-poor tourism pilots across all tourism zones
- 4.4 Promotion via Responsible Travel and tour operators brochures
- 4.5 Presentation at World Travel Market
- 4.6 End of project household survey to assess changes in income and attitudes compared to start of project
- 4.7 Workshop with UTB, UATO and UWA to highlight lessons learned and explore potential for roll out to other national parks in Uganda
- 4.8 Production of final report including results of, and methodology for, determining changes in income and attitudes

Annex II: Historical enterprise income data

The research included collecting 6 to 12 months of enterprise accounts from before this project started (Table A2.1). The aim was to establish a baseline of park tourism income against which park tourism income after the project could be compared. However, during data collection several issues became apparent that meant collecting a comprehensive historical dataset was not possible. The main issue was that some enterprises have historical income data, but some do not have any, or have incomplete, data. For those who do have data, it was uncertain how accurate the data are. This combined with the fact that enterprises record their income differently, meant that comparing historical data between enterprises would be problematic.

The household survey includes gathering individual perceptions on their income from park tourism before this project started. Originally the historical enterprise accounts were to validate these perceptions. Now that is not possible, the analysis will only be based on general trends to ensure individual perceptions are treated cautiously. Instead, greater emphasis will be placed on gathering park income data from households and enterprises at the start of the project, before training is undertaken, to ensure a reasonable level of confidence in this (albeit of a short timeframe) baseline.

For data analysis, households will be categorised according to whether they are a member of an enterprise and, if so, the leader of the enterprise. The aim is to assess whether any change in income from the project is affected by the household being involved with an enterprise.

As the project progresses, if budget allows then Key Informant Interviews with key members of the enterprises will be undertaken to gather additional information on historical park tourism income.

Table A2.1. Original Pro-poor gorilla tourism research framework

Research question	Data to collect	What to measure	How it will be collected	Who will collect it
Do the local tourism capacity development interventions delivered by the Pro-poor Tourism Project to poor people living close to Bwindi Forest result in increased uptake of local tourism products and services by tourists?	Local enterprise accounts before project start	6-12 months of enterprise data before the project starts covering (depending on type of enterprise): <ul style="list-style-type: none"> • Numbers of tourists visiting enterprise • Number of sales • Income earned at enterprise level • Income paid to individual members of enterprise 	ITFC to examine existing enterprise accounts and reconstruct monthly figures	ITFC

Annex III: Household survey form

Date: _____ Interview Ref # _____	GPS Northing _____ Easting _____
Interviewer names: _____	
Describe household location: LC1: _____ Parish: _____	
Nearest village/trading centre (circle) under or over 1 hour walk	
Nearest road for vehicle use (circle) under or over 1 hour walk	

1. Interviewee

1.1 **Name** (optional) _____

1.2 **Gender:** F / M

1.3 **Age:** (circle) **+60** **41-60** **21-40** **Below 20**

1.4 **Ethnicity:** (circle) **Bakiga** **Batwa** **Bafumbira**

Other _____

1.5 **What is your position in this household?** _____

1.6 **What is your position in the community?** _____

2. Homestead information

2.1 **What is your marital status?** (tick)

- | | | |
|--|---|--|
| <input type="checkbox"/> Married | → | If male and married,
Number of wives _____ |
| <input type="checkbox"/> Single (never married) | | Number of households _____ |
| <input type="checkbox"/> Co-habiting | | |
| <input type="checkbox"/> Widow/er | | |
| <input type="checkbox"/> Divorced or separated | | |

2.2 **How many people currently live in your household (including person being interviewed)?**

Age (years)	Number of males in this household	Number of females in this household
+60		
41-60		
21-40		
Below 20		

3. Education

3.1 What is your level of education? (tick)

- No formal education
 Primary school
 Secondary school
 Other (please detail)

4. Livelihood

4.1 List the 3 most important income-generating activities to your household (most important first) eg farming, national park tourism-related activities, forest resources, village market sales etc

Income-generating activity	Who in household does this?
1.	
2.	
3.	

4.2 How many adults (> 20 years) in this household contribute money to household income?

4.3 How many children (< 20 years) in this household contribute money to household income?

4.4 List the 3 items you spend most of your income on (list in order; the item that they spend most money on is first; and give details)

Items
1.
2.
3.

5. Wellbeing

5.1 **For yourself, what does it mean to lead a good life?**

5.2 **How is life for you at this present moment?** (tick)

Good Fair Neither good nor bad Hard Don't know / would rather not say

5.3 **Explain why?** with links to natural resources/park existence if appropriate (for example, they need household building materials or fuel wood, suffer crop raiding, get Park benefits eg MUP)

5.4 **How does your life compare to last year?** (tick)

Better No change Worse Don't know / would rather not say

5.5 **Explain why?**

6. National park tourism enterprise income

6.1 **Does your household currently earn income from national park tourism, or has done in the past?** (circle)

No: has never earned tourism income (*go to question 6.2*)

Yes: has earned tourism income in the past but not currently (*go to question 6.2*)

Yes: currently earns tourism income (*go to question 6.3*)

Yes: earned tourism income in the past and currently earns tourism income (*go to question 6.3*)

6.2 Please explain why you do not currently earn (or never have earned) income from national park tourism (then go to Question 7)

6.3 Please describe how you currently (or used to) earn income from national park tourism:

	Current Income	Past Income
Receive funds from Bwindi Tourism Revenue Sharing Scheme		
Employed by UWA		
Employed by a tourism lodge		
Employed by a tour operator		
Employed by a tourism enterprise (eg bird watching; cultural tours)		
Make handicrafts to sell to tourists		
Grow farming produce to sell to tourists		
Grow farming produce to sell to lodges		
Provide guiding services to tourists (eg bird watching, cultural tours)		
Provide cultural displays / events (eg singing, dancing)		
Other:		

6.4 Please describe how you currently (or used to) earn this income in detail

(eg type of produce sold to lodges fruit, honey, vegetables etc; what handicrafts they make to sell baskets, fabrics, carvings, jewellery; how they access tourism markets; who from the household is involved; if employed what work do they do; if they sell their produce then do they make it locally or buy it elsewhere and sell – as much detail as possible)

6.5 During the high season for tourists, how often do you sell your tourism product/service or are employed? (tick)

- Every day
- Every week
- Every other week
- Every month
- Never

6.6 During the low season for tourists, how often do you sell your tourism product/service or are employed? (tick)

- Every day
- Every week
- Every other week
- Every month
- Never

6.7 On average, how much income do you earn from national park tourism enterprises:

On a good day	
In a good month	
On a bad day	
In a bad month	

Explain reasons why?

6.7 Please describe the importance of park tourism income to your household

6.8 What can help to increase your income from park tourism?

6.9 How do you record your household income and expenditure?

- None
- Memory
- Use of simple exercise book
- Use of advanced books of accounts
- Other:

6.10 How *often* do you record your household income and expenditure?

- None
- Daily
- Weekly
- Every other week
- Monthly
- Annually
- Other:

7. The national park

7.1 What is your current relationship with the national park? (tick)

- Extremely positive Positive Indifferent Negative Extremely negative
- Don't know / would rather not say

7.2 Explain why?

7.3 **Has does your relationship with national park compare with last year? (tick)**

- Better No change Worse Don't know / would rather not say

7.4 **Please explain**

7.5 **How has the national park affected your ability to live a good life? (tick)**

- Very negatively Negatively Neutral Positively
 Very positively Don't know / would rather not say

7.6 **Please explain**

8. Interview close

8.1 **Any comments or questions on anything that we have discussed? _____**

Interviewer notes:

Annex IV: Enterprise accounts monthly input form

Name of the Enterprise.....

Address.....

Name of the Chairperson.....

Name of the Treasurer.....

Date	Beneficiary	Product	Inputs	Cost	Time (hrs)	Sale price	Income

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