CARIFORUM ECOTOURISM INDUSTRY VALUE CHAIN ANALYSIS

PRIVATE SECTOR PROMOTION THROUGH VALUE CHAIN AND CLUSTER STRENGTHENING IN CARIFORUM

Prepared By:
Dr. Shellyanne Wilson
Indera Sagewan-Alli

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Executive Summary

This project sought to identify challenges to the growth of the ecotourism industry in four CARIFORUM countries: The Bahamas, St. Kitts and Nevis, Trinidad and Tobago and Guyana, via the use of a value chain methodology; and to develop recommendations to overcome these challenges.

Using desk research, interviews with industry practitioners, value chain analysis and strategic frameworks, the project objectives were met. The desk research allowed for the adoption of relevant industry definitions and for the establishment of proxies for quantification of the industry. The industry interviews provided the practitioners' insight on the current state of the ecotourism industry. The value chain analysis produced two value chains: a detailed-level chain that outlined all of the activities and actors involved in the industry; and a high-level chain that identified three ecotourism product types. Lastly, the strategic framework allowed for the identification of country-level and regional-level challenges that hamper the growth of the industry.

Six challenges and associated recommendations were identified. Firstly, there is industry ambiguity regarding country-level understanding and commitment to ecotourism industry participation. The associated recommendation is a grading system, where Tier 1 countries can develop ecotourism products that target dedicated and hardcore ecotourists, while countries that are focusing on other tourism types can develop ecotourism products that target casual ecotourists who incidentally partake in ecotourism. Secondly, there is limited industry collaboration among industry players. The establishment of a regional ecotourism association is recommended to overcome this challenge. Thirdly, there is the absence of ecotourism standards that serve as quality assurance and quality control mechanisms. Thus, the adoption or adaptation of an ecotourism certification scheme is needed. Fourthly, there is little evidence of a coordinated product strategy. Proper product planning, through the establishment of a central ecotourism repository will allow for a more coordinated product design and development approach. Fifthly, for a number of CARIFORUM countries, product distribution is limited to the suppliers' own websites, and their ecotourism products are not featured by a number of specialist ecotourism suppliers, who play major roles in informing and influencing the dedicated and hardcore ecotourists. Thus, the recommendation is the engagement of ecotourism specialist distributors and also, the development of a regional online specialist distribution site. Lastly, the industry is hampered by limited financing options, particularly for small and medium-sized suppliers. The development of a centralized fund for industry development will contribute to the alleviation of this challenge.

These recommendations are in keeping with industry best practices, and further they foster country collaboration, involve a number of product, market and functional value chain upgrading strategies and leverage technology to improve the overall productivity of the ecotourism industry.

Abbreviations and Acronyms

ACTUAR	**Costa Rica Association of Rural Community Tourism**
CARICOM	**Caribbean Community**
CARIFORUM	**The Forum of the Caribbean Group of African, Caribbean and Pacific States**
CAST	**Caribbean Alliance for Sustainable Tourism**
CBE	**Community-Based Ecotourism**
CCfC	**Caribbean Centre for Competitiveness**
CGF	**Caribbean Growth Forum**
CHTA	**Caribbean Hotel and Tourism Association**
CI	**Conservation International**
CIDA	**Canadian International Development Agency**
CSME	**Caribbean Single Market and Economy**
CST	**Certification of Sustainable Tourism**
CTO	**Caribbean Tourism Organization**
DFID	**Department for International Development**
EBE	**Entrepreneur-Based Ecotourism**
EPA	**Economic Partnership Agreement**
EU	**European Union**
FAO	**Food and Agriculture Organization of the United Nations**
GDP	**Gross Domestic Product**
GVC	**Global Value Chain**
ICT	**Costa Rica Tourism Board**
IDB	**Inter-American Development Bank**
LAC	**Latin America and the Caribbean**
MOU	**Memorandum of Understanding**
NBE	**NGO-Based Ecotourism**
OECS	**Organisation of Eastern Caribbean States**
PSAR	**Private Sector Assessment Reports**
PSD	**Private Sector Development**
SIDS	**Small Island Developing States**
SINAC	**The National System of Conservation Areas**
SNV	**Netherlands Development Organization**
TIES	**The International Ecotourism Society**
TOR	**Terms of Reference**
UNCTAD	**United Nations Conference on Trade and Development**
UNESCO	**United Nations Educational, Scientific and Cultural Organisation**
UNWTO	**The United Nations World Tourism Organization**
USAID	**United States Agency for International Development**
USD	**United States Dollars**
UWI	**The University of the West Indies**
WEF	**World Economic Forum**
WTTC	**The World Travel & Tourism Council**
WWF	**World Wildlife Fund**

1. Introduction

COMPETE CARIBBEAN, in collaboration with the Caribbean Centre for Competitiveness (CCfC) of The University of the West Indies (UWI) and the CARICOM Secretariat, undertook this project titled: *Private Sector Promotion through Value Chain and Cluster Strengthening in CARIFORUM*. The project's main aim was to conduct a needs assessment of selected industries in the region, via the use of a value chain analysis methodology, in order to identify challenges to the growth of these industries, and to propose recommendations to overcome these challenges.

This chapter provides an introduction to the project. Section 1 and Section 2 summarize the project background and project objectives respectively. Section 3 outlines the methodology. Sections 4 presents the project limitations.

1.1 Project Background

CARIFORUM countries[1] have identified a number of priority industries and niche sectors that span manufacturing, agriculture, tourism and other service sectors, which are viewed as having strong potential to contribute to economic growth and development. Despite the heterogeneous makeup of this country grouping by way of size, GDP, economic and social makeup, CARIFORUM countries face a number of similar challenges to private sector growth, inclusive of limited markets, low labour productivity and inadequate skills for market demand, high energy and transport costs, and high debt.

In order to overcome these challenges, best practice suggests that analysis of the private sector environments and the identification of specific barriers to growth are critical steps towards making these sectors more competitive regionally and globally. This project, therefore, aims to contribute in this regard via the use of a value chain and cluster strengthening methodology.

The industry selected for this project was the ecotourism industry, and it was studied in the context of four case countries: The Bahamas, St. Kitts and Nevis, Trinidad and Tobago and Guyana[2]. Ecotourism was explicitly identified as a priority sector by seven of the fifteen CARIFORUM countries, and further, it is advertised, in various forms, as a featured tourism type on the tourism promotion websites of thirteen of the CARIFORUM countries.

Ecotourism is part of the Travel and Tourism industry, which contributed 15.7 billion USD or 4.6% of total GDP to the Caribbean region, and 647,000 jobs or 3.9% of total employment in 2012. Further, the Travel and Tourism industry continues to grow, with the number of international tourists crossing the 1 billion mark in 2012 (UNWTO, 2013). Lastly, the Travel and Tourism industry's use of technology by way of e-commerce and online travel sites, has allowed for productivity improvements, and presents a number of value chain upgrading opportunities.

[1] The COMPETE Caribbean Program supports private sector development in the following 15 independent CARIFORUM countries: Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, the Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Lucia, St. Kitts and Nevis, St. Vincent and the Grenadines, Suriname and Trinidad and Tobago. Further background on CARIFORUM is given in Appendix 1.

[2] Details on the Industry Selection and Country Selection are given in the Inception Report.

Thus, the ecotourism industry meets all of the selection criteria set out in the project's Terms of Reference, where:

- Ecotourism has been identified as a priority sector by a number of CARIFORUM countries.
- The four selected countries allows for broad geographical coverage throughout CARIFORUM.
- There are product, process and market value chain upgrading opportunities
- E-commerce creates opportunities for increased productivity
- The very nature of the ecotourism industry aims at extra regional market penetration

1.2 Project Objectives

The general project objective was:

- To address the challenges to private sector growth in the CARIFORUM region through the identification of tangible actions and recommendations for industry practitioners and for policy making aimed at enhancing regional coordination.

The specific project objective was:

- To develop a regional assessment, inclusive of challenges to private sector growth and concrete areas of action to overcome these challenges, on selected regional industries and associated value chains in the CARIFORUM region.

1.3 Methodology

The methodology employed was as follows:

i. Desk Review

A review of published articles, value chain mapping exercises, country, industry and market reports, and other documentation was conducted in order to develop working definitions, collect country and industry statistics and produce a preliminary value chain.

ii. Date Collection via Fieldwork

The Lead Consultant and Associate Consultants conducted field work for the value chain mapping exercise. The fieldwork consisted of face-to-face interviews, phone interviews and written correspondence[3]. Secondary data for industry stakeholders was also collected from country, industry and company websites and other documentation. The final value chains were developed.

iii. Analysis and Recommendations

The Needs Assessment was conducted via a number of strategic frameworks that examine the economic, social and institutional environments that impact the competitiveness of the ecotourism

[3] The interview guide and list of interviewees are given in Appendix 2 and Appendix 3 respectively.

industry. The recommendations were developed as actions that lead to increases in the competitiveness and growth of the selected industries.

1.4 Research Limitations

The main research limitation was the absence of reliable data for the ecotourism industry. Globally, industry experts have identified this lack of quantitative evidence and analysis as a main deficiency in moving the ecotourism research forward. To overcome this limitation, proxies based on estimates of the ecotourism's size in relation to the overall tourism industry were used. Even when proxies were used, some of the country-level data was dated by 4 – 6 years, or unreported.

Another key issue was the low response rate of industry stakeholders. A number of the micro and small companies were reluctant to participate in the research undertaking, or unable to participate due to time and work constraints. Similarly, industry specialists from government ministries and state organisations were unavailable, based on work schedules.

2. Introduction to Ecotourism

For the purpose of this study, it is necessary at the outset to provide the definitions of key variables which inform and underlie the value chain analysis. This chapter will therefore provide a general introduction to the ecotourism industry. Section 1 gives an overview of the ecotourism concept and provides the ecotourism definition adopted for this value chain analysis. Section 2 reviews ecotourism industry developments and governance policies and challenges in the industry. Section 3 provides the adopted definition of the ecotourism product and identifies different ecotourism product types.

2.1 Ecotourism Background

A universally accepted definition of the ecotourism concept remains elusive despite at least three decades of interest and research in the area. The term 'ecotourism' is subject to multiple interpretations by tourism stakeholders even within single countries.

While there are many related tourism[4] types by way of similar attractions, activities, and objectives, ecotourism is an embodiment of at least five elements that essentially distinguish this tourism type, which are detailed in the UNWTO's (2002) ecotourism definition. The UNWTO (2002) definition is as follows:

i. *All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas.*
ii. *It contains educational and interpretation features.*
iii. *It is generally, but not exclusively, organised by specialized and small locally-owned tour operators for small groups. Foreign operators of varying sizes also organize, operate and / or market ecotourism tours, generally for small groups.*
iv. *It minimises negative impacts upon the natural and socio-cultural environment.*
v. *It supports the protection of natural areas by:*
   - *Generating economic benefits for host communities, organisations and authorities that are responsible for conserving natural areas*
   - *Creating jobs and income opportunities for local communities; and*
   - *Increasing awareness both among locals and tourists of the need to conserve natural and cultural assets*

In summary then, ecotourism can be summarised as conservation and nature based, containing educational and interpretation features to build local and tourist awareness while minimizing the negative impact on the natural and socio-cultural environment and generating economic benefits for host communities.

The main tourism types in terms of attractions and activities that are related to ecotourism are outlined in Table 2.1.

[4] An overview of the Travel and Tourism Industry and its global economic impact is given in Appendix 4.

Table 2.1: Tourism Types Related to Ecotourism by way of Attractions and Activities

RELATED TOURISM TYPES by way of ATTRACTIONS and ACTIVITIES	
Nature Tourism	– Tourism where the principal attraction is the natural environment
Adventure Tourism	– Tourism where the principal activities are recreational, involve physical skill and endurance, and usually occur outdoors or in natural settings
Outdoor Tourism	– Tourism where the principal activities occur outdoors
Wildlife Tourism	– Tourism where the principal attraction is wildlife and the principal activity is observing animals in their natural habitats
Farm Tourism	– Tourism where the principal attraction is farm landscapes and the principal activity is farming
Cultural Tourism	– Tourism where the principal attraction is the local culture of the destination

Similarly, the main tourism types in terms of principles and practices that are related to ecotourism are outlined in Table 2.2.

Table 2.2: Tourism Types Related to Ecotourism by way of Principles and Practices

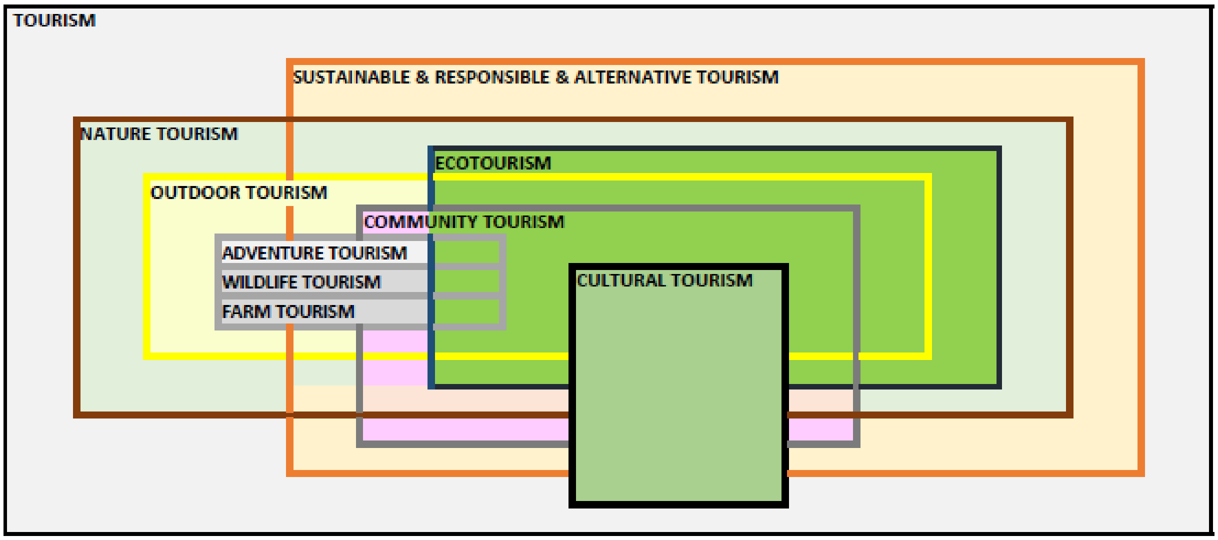
RELATED TOURISM TYPES by way of PRINCIPLES and PRACTICES	
Alternative Tourism	– Tourism that is organised for small or segmented markets (opposite of Mass Tourism)
Responsible Tourism	– Tourism that is based on principles that not only minimises negative social, environmental and economic impacts, but also positively contributes to all stakeholders in the tourism industry
Sustainable Tourism	– Tourism that is based on the principles of sustainable development, which minimises social, economic and environmental negative impacts, and positively contributes to stakeholders in the tourism industry
Community Tourism	– Tourism that is based on the principle of providing sustainable benefits for the local community and includes social, economic and environmental elements

The related tourism terms point to the difficulty in making a clear delineation of the ecotourism segment. On this basis, some researchers and practitioners argue that there is little to differentiate ecotourism from nature and adventure tourism, while on the other hand, some argue that ecotourism distinguishes itself by containing both the nature-based activities and the set of sustainable, educative and conservation principles.

Even further, some dispute the need for precision in distinguishing ecotourism from other tourism types, and have proposed aggregate terms in the same vein as the MICE genre (Meetings, Incentives, Conventions / Conferencing and Events / Exhibitions) such as NEAT – Nature, Ecotourism and Adventure Tourism; and ACE – Adventure, Culture and Ecotourism. And conversely, some argue that there is the need for a precise ecotourism definition for the collection of industry and market data, and for conducting regional and global comparisons.

Figure 2.1, therefore, represents the framework that will be used to investigate ecotourism in the CARIFORUM countries, where, based on the literature review, ecotourism is viewed to adhere to the principles of Sustainable Tourism, Responsible Tourism and Alternative Tourism, and further, ecotourism is part of Nature Tourism. Within the Ecotourism segment, there may be intersections with elements of Outdoor, Adventure, Wildlife, Farm, Community and Cultural Tourism types.

Figure 2.1: Ecotourism and Its Relationship with Related Tourism Types



2.2 Ecotourism Industry Development and Governance Policies and Challenges

As the ecotourism industry evolves, a number of industry success factors as well as industry challenges have emerged.

2.2.1 Ecotourism Industry Policies

In terms of policies, the use of protected areas is ubiquitous throughout the world as a means of identifying and conserving natural and cultural areas of national or regional importance. There are a myriad of categories, conferring a certain degree of protection based on the laws of the respective countries and related regulations of the conservation organisations. Protected areas, thus, form a critical element in the ecotourism industry, as these areas are often the sites of the ecotourism attractions.

The fiscal and non-fiscal policies are generally applied across all tourism investments. In terms of fiscal policies, there is common usage of tax incentives by way of tax holidays, rebates and exclusion for tourism investments, particularly popular for new accommodation investments. To a lesser extent, there are also fiscal policies to encourage sustainable tourism investments, such as installation of alternate energy infrastructure. Non-fiscal incentives such as visas and work permits for non-nationals are also utilized.

Funding from donor agencies and international grants are extensively used in the development of ecotourism projects. The funding is used for activities such as creating and managing protected areas, developing infrastructure, building capacity via the training of industry stakeholders and research and monitoring.

Country and regional ecotourism strategies and plans are also extensively used in the industry, serving as guiding frameworks for industry development. Similarly, ecotourism associations, comprising private sector, public sector, research organisations, local communities and other stakeholders, are very popular, with mandates of industry development, training, promotion, monitoring and advocacy.

Lastly, there are ecotourism certification schemes that are becoming more popular in order to provide quality assurance and quality control; and to combat green-washing[5]. Closely related to the certification schemes are the ecotourism codes of conduct for ecotourism suppliers and service providers, which also serve as quality assurance and quality control tools.

Table 2.3 gives a summary of a number of industry policies and country examples.

Table 2.3: Ecotourism Industry Policies and Country Examples

INDUSTRY POLICIES	EXAMPLES	
Policy: **Protected Areas**	USA: Protected Area, Protected Landscape, Protected Habitat Forest Reserve, Nature Reserve, Game Reserve, Wildlife Reserve Marine Park, National Park, Wildlife Sanctuary, Plant Sanctuary Brazil: Nature Reserve, Extractive Reserve, State Park, National Park Biological Reserve, Indigenous Reserve Kenya: Forest Reserve, National Reserve, Private Reserve National Park, MAB Biosphere Reserve Sweden: Wildlife Management Area, State Natural Area, Nature Reserve Wildlife & Plant Sanctuary Fiji: Recreational Reserve, Faunal Reserve, Nature Reserve, Forest Park Marine Protected Area, National Heritage Park	
Policy: **Fiscal Incentives**	South Africa: Biodiversity Fiscal Incentives – Income Tax Deductions, Property Tax Rebate & Exclusion Costa Rica: Payment for Environmental Services The Philippines: Tourism Development Zone - Income Tax Holiday, Tax Incentive	
Policy: **Non-Fiscal Incentives**	The Philippines: Tourism Development Zone Employment of foreign national, Special investor resident visa	
Funding **Grants & Funds**	FUNBIO – Brazilian Fund for Biodiversity CI - The Critical Ecosystem Partnership Fund (CEPF), Global Conservation Fund, Verde Ventures, Donor Agencies: IDB, DFID, CIDA, SNV, UNDP, USAID, WWF, European Commission, World Bank	
Policy: **Ecotourism Strategic Plan**	Malaysia: National Ecotourism Plan 1997 The Philippines: Ecotourism & National Tourism Development Plan (2011 – 2016) Laos: National Ecotourism Strategy & Action Plan 2005 - 2010 Seychelles: Strategic Plan (2008 – 2013) Queensland, Australia: Queensland Ecotourism Plan 2013 – 2020 Kansas, USA: Ecotourism Strategy 2013	
Ecotourism Industry Association	Honduras Ecotourism Association Costa Rica Association of Rural Community Tourism The Toledo Ecotourism Association - Belize Instituto EcoBrasil Eco Tourism Ireland The Eco-tourism Society of Seychelles (TESS)	Eco Tourism Kenya Ecotourism Association of Ethiopia Swedish Ecotourism Association Fiji Ecotourism Association Malaysian Ecotourism Association Ecotourism Australia Ecotourism NZ Advisory Committee
Certification / Rating System	Costa Rica – Certification of Sustainable Tourism Ecotourism Australia - Ecotourism Certification Eco Tourism Kenya - Eco rating system for tourism accommodation	
Ecotourism Code of Best Practice	Eco Tourism Kenya Ecotourism Australia	

[5] Green-washing is the deceptive marketing of an organisation's environmental practices and philosophies that misleads consumers.

2.2.2 Ecotourism Industry Challenges

Despite the promise of ecological and economic benefits that can be realized through ecotourism, there are several reported examples of ecotourism project failures. Underlying causes of these failures include:

- Green-washing
- Environmental degradation
- Zero conservation activities
- Tourists overcrowding
- Revenue Leakage
- Zero / little local community involvement or benefit

2.3 The Ecotourism Product

The ecotourism product is multi-dimensional, consisting of both tourism elements, and specific practices and philosophies. In defining the ecotourism product for this value chain mapping exercise, both dimensions are considered.

2.3.1 The Tourism Elements of the Ecotourism Product

One approach to tourism product definition is through its sub-division into two levels: the total tourism product and specific tourism component elements; where the former is made up of all of the elements consumed by a visitor during a visit; and the latter consists of individual tourism elements or a combination of these elements that are consumed by a visitor. The individual elements include:

- Transportation to and from the destination country
- Accommodation and Catering
- Excursion Attractions, Activities and Facilities
- Ground Transport
- Entertainment
- Souvenirs
- Other related products and services.

The ecotourism product can be considered in the same way as the general tourism product in terms of separate elements and in terms of the combination of elements as in the case of tour packages. However, for the ecotourism product, stress is placed upon the Excursion element, which can be decomposed into attractions, activities and facilities.

Ecotourism attractions are typically classified as natural resources and cultural resources. For example, in The Philippines National Ecotourism Strategy (NES) (National Ecotourism Strategy, 2002), the Natural Resources are classified as follows:

- Forest, Mountain and Volcano Attractions
- Coastal and Marine Attractions
- Lake, River and Wetland Attractions

- Cave Attractions

Likewise, the NES for the Philippines classify cultural resources as follows:

- Festivals and Events
- Cultural Villages
- Museums and Cultural Repositories
- Handicrafts / Arts and Craft Centres
- Cuisine and Food

Excursion activities include leisure, recreational, sightseeing, and educational categories. Typical ecotourism excursion activities include wildlife spotting, bird watching, hiking, exploring, trekking, kayaking, and diving.

Ecotourism facilities include ecolodges, nature trails and look-out points.

2.3.2 The Practices and Philosophies of the Ecotourism Product

In keeping with the characteristics of the adopted UNWTO definition outlined in Section 2.1, the practices and philosophies of the ecotourism product centre on a nature-based product that is educative, environmentally sustainable, and beneficial to the host community. The realization of these three practices and philosophies is therefore contingent on the motivations of the consumers and suppliers of the product.

For instance, on the demand side, a visitor may visit a rainforest for the sole purpose of hiking to a waterfall; while another visitor may visit that same rainforest, for the purposes of studying a native bird species, use a local tour guide and participate in a reforestation exercise. In the strictest terms, the first visitor should be classified as a nature tourist and not an ecotourist; while the second visitor, based on his motivations, can be classified as an ecotourist, as he has consumed an ecotourism product.

Similarly, on the supply side, a tour operator's package to a rainforest may include hiking and swimming activities, with no provisions made for environmental sustainability or conservation. A second tour operator's package to the same rainforest may include both hiking and swimming activities, uses a local tour guide, ensures that the size of the group is small, makes provisions to prevent the tour group from harming the environment, and contributes a portion of the tour fees towards conservation activities. Just as with the demand side examples, the second tour operator is supplying an ecotourism product; while the first tour operator is in the nature tourism business.

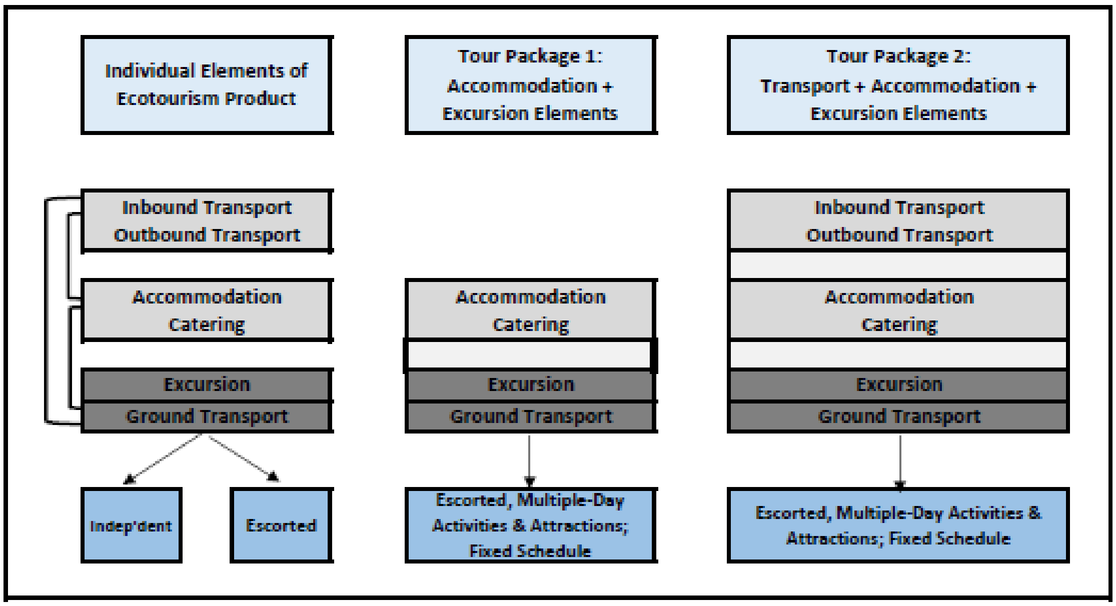
2.3.3 Ecotourism Product Types

For this value chain mapping exercise, the ecotourism product is viewed as three product types. Firstly, there are the distinct ecotourism product elements; with the main element being the Excursion element, and the other two elements being the Transportation, and Accommodation and Catering elements. In this product type, the Excursion element and one or both of the other two elements can be accessed by the visitor and combined as per individual needs. These excursion activities can be independently undertaken by the visitor or the visitor can be escorted by a tour guide. Further, the escorted tours can be a single day tour, lasting between one to eight hours, or multiple day tours, covering excursions to multiple ecotourism attractions.

Secondly, there is the ecotourism package combination of Excursion, and Accommodation and Catering. In this type product type, the excursion activity can be independent or escorted; and the escorted tours can be single day tours or multiple day tours.

Thirdly, there is the ecotourism full package tour, comprising the Excursion element, and the Transportation, and Accommodation and Catering elements. In this product type, the excursion activity is typically escorted, the schedule is fixed, and spread across multiple days. Additionally, these tour packages involve a single country destination or multiple country destinations. Figure 2.2 gives a visual representation of the three product types.

Figure 2.2: Ecotourism Product Types



3. Global Market Demand and Supply for Ecotourism

This chapter provides an assessment of the global market for the ecotourism industry. Section 1 and Section 2 review demand trends and the size of the ecotourism industry respectively, while Section 3 and Section 4 define the ecotourism customer and the supplier of ecotourism products respectively.

3.1 Demand Trends in the Ecotourism Industry

The general consensus from both researchers and practitioners is that ecotourism is a growing market sector, in the similarly expanding tourism industry. Reported figures, however, vary. Honey & Krantz, (2007) reported the following demand trend estimates from various sources:

- Worldwatch Institute 2001: Annual growth rate of ecotourism industry in the 1990s was between 20 – 34%
- UNWTO 2004: Ecotourism and nature tourism segments growing at 3 times that of the tourism industry
- The Tourism Network 2005: Annual growth rate of ecotourism industry was estimated at 5%

3.2 Size of the Ecotourism Industry

It has been difficult to ascertain the economic impact of ecotourism. The demand side of ecotourism[6] remains a special challenge in ecotourism research for at least four reasons. Firstly, there are the varying interpretations of the ecotourism concept among countries, and even within the same country. Secondly, and closely related to the first challenge, there are the blurry demarcations among ecotourism; other nature-based tourism market segments and the responsible and sustainable tourism concepts. Thirdly, there is the challenge of determining the actual proportion of all tourists who qualify as ecotourists, who are typically identified based on their motivations to meet the nature-based, sustainable and educative components of the ecotourism concept. Fourthly, there is a lack of information on the niche market in conventional tourism databases as in the case of the data collected by national governments from typical immigration documents.

Over the last two decades, various estimates, ranging from 5% - 40% of the total Travel & Tourism industry have been quoted in the ecotourism literature (Table 3.1).

[6] In practice, a number of country-based ecotourism associations rely on self-reporting by their membership in order to determine the size of their local industries, including Ecotourism Australia (personal communication – Leonie Bowles, Industry Development Manager of Ecotourism Australia (March 24, 2014) and The Association of Ecotourism in Romania (personal communication – Bogdan Papic, Executive Director of The Association of Ecotourism in Romania (March 24, 2014).

Table 3.1: Estimates of Ecotourism Market Size

ECOTOURISM INDUSTRY / MARKET SEGMENT STUDY	SIZE
Ecotourism (Holing, 1991 as reported in Hvenegaard, 1994, p.25-26))	10% of all international tourists
Ecotourism Industry (UNWTO, 1997 as reported in Azimi, 2005)	20% of total Travel & Tourism industry
Ecotourism Industry (The Ecotourism Society, 1998 as reported in (EplerWood International, 2004)	20% - 40% of total Travel & Tourism industry
Ecotourism Market Segment (Ebsco Publishing Inc., 2009)	5% - 7% of total Travel & Tourism industry / USD 77 billion

The inability to accurately quantify the ecotourism industry has led to the use of proxies. For example, one researcher, quoted in Buckley (2009), reported that ecotourism, in the strictest sense of the word, constitutes a mere 1% - 2% of Australia's tourism (Buckley, 2009). In this same report, Buckley (2009) quoted the work of another researcher that estimated that the NEAT market segment in the United States was valued at USD 220 billion per annum or half of the US total tourism industry, and the NEAT market segment in Australia was valued at USD 7 – 15 billion per annum, or one-quarter to one third of the Australian total tourism industry.

For the purposes of this value chain mapping exercise, three estimates of the size ecotourism industry will be used: Low: 1 – 2% (as per Buckley (2009) estimate); Medium: 5 – 10% (as per Ebsco Publishing Inc. (2009) estimate); and High: 20 – 40% (as per The Ecotourism Society (1998) estimate).

3.3 The Ecotourism Customer – The Ecotourist

According to Fennell (2008), the ecotourist was easily identifiable in the 1980s. The ecotourist was typically birdwatchers and scientists, affliated with conservation organisations, well-educated, financially well-off, travelled frequently and engaged in long stays. By the 1990s and 2000s, with the increasing popularity of the concept, the ecotourist became more difficult to distinguish, with the ecotourist definition being deemed too narrow on the one hand or too broad on the other hand.

There are a number of typologies used to categorise ecotourists along a spectrum of the motivation of visitors towards ecotourism. Table 3.2 shows two examples of ecotourist typologies.

Table 3.2: Typologies of Ecotourists

(Lindberg, 1991)		(Boyd & Butler, 1996)	
Casual Ecotourist	Visitor who incidentally partakes in ecotourism, such as in a day trip	**Ecogeneralist**	Visitor travels in larger group, as part of organized tour arranged by specialist ecotourism company
Mainstream Ecotourist	Visitor whose main travel motivation is to take an unusual trip	**Intermediate Ecotourist**	Mainstream nature visitor who travels in small groups
Dedicated Ecotourist	Visitor who takes trip specifically to visit protected areas	**Ecospecialist**	Visitor travels alone or in small groups, and immerses in local, natural and cultural environment
Hardcore Ecotourist	Visitor who engages in scientific research or other educative and conservation activity		

Notwithstanding the above arguments, attempts have been made to study ecotourists, in order to determine the characteristics of ecotourists and to study the composition of the ecotourist markets. Perhaps one of the most significant globally-organised ecotourism market studies was the UNWTO's 2002 market studies[7] of seven ecotourism generating markets: Canada, United States, United Kingdom, Germany, France, Spain and Italy. These WTO market studies, whilst utilising the UNWTO ecotourism definition stated above, appeared to loosely define ecotourists as 'travelers participating in environmental and ecological excursions'. Similarly, individual countries have also conducted ecotourism market studies on key markets. For example, Tourism Queenland (TQ) of Australia published the Destination Australia Market Alliance's (DAMA) surveys, where unlike the WTO market studies, DAMA's studies were highly specific in terms of defining the ecotourist, as shown in Table 3.3. DAMA's definition, while falling definitively in the nature tourism and outdoor tourism categories as given in Table 2.1, does not explicitly meet Characteristics ii – v of the UNWTO's definition, as it does not place weight on the conservation, educative and sustainable and principles of ecotourism. Further it does not include the socio-cultural motivation

Whilst there is not a single ecotourist definition, these types of studies have yielded some insight into the characteristics of visitors from key markets who engage in ecotourism. Figure 3.1 presents annotated findings from the Canada, United States and British ecotourism market studies[8], while Figure 3.2 presents annotated findings from Destination Australia Market Alliance's (DAMA) survey on the United States and United Kingdom ecotourism markets[9].

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[7] No other large scale studies on the ecotourism market were identified. Confirmed by Jessica Blackstock, EplerWood International Project Manager – Personal Communication on March 28, 2014.

[8] Figure 3.1 is based on the three reports: The Canadian Ecotourism Market, The US Ecotourism Market and The British Ecotourism Market, published by the World Tourism Organization, Madrid, Spain.

[9] Figure 3.2 is based on two reports: The US Ecotourism Market (http://www.tq.com.au/fms/tq_corporate/research/fact_sheets/the_united_states_ecotourism_market.pdf) and the UK Ecotourism Market

Table 3.3: DAMA's Ecotourist Definition

Ecotourist Definition
For the purpose of this research, an Ecotourist is defined as someone who did at least one of the following activities on their last long haul holiday
• Saw wildlife in its natural surroundings
• Stayed in the wilderness
• Visited a rainforest/ jungle
• Visited national parks
And agreed that they look for at least one of the following activities:
• Environmental/ ecological sites to visit
• See wildlife in natural surroundings
• Walk in untouched countryside and natural environments
And sometimes plan holidays around at least one of the following activities:
• Bird or animal watching
• Camping
• Nature/ ecological/ environmental/ wilderness activities
• Walking/ hiking/ bush walking/ rainforest walking/ rambling
• See wildlife in natural surrounds

http://www.tq.com.au/fms/tq_corporate/research/fact_sheets/the_united_kingdom_ecotourism_market.pdf) produced by Tourism Queensland (TQ), accessed on January 10, 2014.

Figure 3.1: Annotated Findings from the UNWTO 2002 Ecotourism Market Studies on Canada, United States and United Kingdom

		Canada	United States	United Kingdom
Ecotourist Profile	AGE	Any Age Independent traveller -	42% - 35 - 54 years 34% - 18 - 34 years	Over 35 years
	GENDER	Equal distribution of male & female		Women slightly outnumber men
	INCOME	Higher Income household	Median household income - $79,600	Relatively high social brackets
	LEVEL OF EDUCATION	Highly educated -likely with college training		Relatively high levels of education
Ecotourism Demand	Volume		4% of international travellers participate in environmental or ecological excursions	
Ecotourism Product, Cost and Marketing Description	Destination Preference	1st - Domestic travel; International Travel - US; Europe; Caribbean; South / Central America	1st - Mexico; 2nd - Australia; 3rd - Jamaica; 4th- Costa Rica	
	Motivation	Experiencing wilderness; Interpretive / learning experiences; Discovering local culture & food	Wildlife viewing Being in the wilderness Sighting rare animal species Visiting archaeological sites Visiting indigenous people Bird watching	Being in wilderness Wildlife viewing Visiting indigenous people & seeing their culture
	Activity	Hiking, Camping, Walking		
	Length of Time Abroad	Package tour - 2 weeks Independent - 8 days to over 2 weeks		3 - 14 days - In Europe 8 - 21 days - Beyond Europe
	Time of Year	Preference for Summer		
	Cost of Package Tours	$2000 - $5000		
	Average Spend / Day		$66 per day	
	Marketing Channels			Word of mouth Advertising in specialist magazines Tour operator company brochure

Figure 3.2: Annotated Findings from DAMA's Ecotourism Market Studies on the United States and United Kingdom

		United States	United Kingdom
Ecotourist Profile	AGE	23%: 45 - 54 22%: 55 - 64	22%: 45 - 54 22%: 55 – 64 20%: 25-34
	GENDER	57% - Female 43% - Male	47% - Female 53% - Male
	INCOME	27%: 60,000 – 99,999 USD 25%: 100,000 USD and higher	
Ecotourism Demand	LEVEL OF EDUCATION	26% - College 24% - Post-college	22% - Undergraduate degree 14% - Postgraduate degree
Ecotourism Product, Cost and Marketing Description	Volume	20% of all US tourists visiting Australia	26% of all UK tourists visiting Australia
	Destination Preference	Australia (54%) USA (52%) Italy (50%) Hawaii (48%).	Australia (39%) Canada (25%) New Zealand (22%)
	General Desired Activity	79%: history/ historical sites 74%: nature / ecological / environmental activities / wilderness 62%: sightseeing tours	65%: Walk in untouched countryside and natural environments 62%: See wildlife in natural surroundings 49%: Environmental/ecological sites to visit
	Specific Desired Activity	43%: seeing wildlife in natural surroundings 38%: walking in untouched countryside or natural environments 36%: visiting environmental / ecological sites	21%: Walking / Hiking / Bushwalking / Rainforest Walk /Rambling 22%: Nature / ecological / environmental activities / wilderness 11%: Bird or animal watching 11%: Camping
	Activity Participated in Last Vacation	29%: Nature / ecological / environmental activities / wilderness 20%: Walking / hiking / bushwalking / rainforest walk / rambling 14%: Camping 12%: Bird or animal watching	39%: Saw wildlife in its natural surroundings 28%: Visited National Parks 10%: Stayed in the wilderness 10%: Visited a rainforest/jungle
	Length of Time Abroad	38%: 8 - 14 days 20%: 15 to 20 days	26%: 8 - 14 days 32%: 15 to 20 days
	Choice of Destination	75%: "recommendations from family or friends who have been there" 73%: "whether they can get a good deal to travel there" 70%: "whether they feel the destination would be worth the money"	78%: "recommendations from family or friends who've been there" 74%: "whether they feel the destinations would be worth the money" 69% "the requirements of those they are travelling with"
	Choice of Accomd'tion	27%: 4 -5 Star hotel 37%: 2-3 Star hotel 16%: 0-1 Star hotel	31%: 4 -5 Star hotel 30%: 2-3 Star hotel 15%: 0-1 Star hotel

Both studies reveal similar results; where the ecotourist is a mature consumer, generally over the age of 35, educated to at least a college education, from middle to high income household, with a relatively equally shared gender spread. The length of stay in destination ranges from 8 to 21 days, with the average length being two weeks. There is a demand for accommodation above the 2-star range. The ecotourist is interested in wilderness experiences, seeing wildlife in their natural habitat, visiting archaeological sites, and indigenous peoples[10].

For the purpose of this study, we subscribe to this definition. However, given the traditional tourism focus of the region under study (leisure), the incidence of the casual ecotourism (as described by Lindberg (1991) in Table 3.2) cannot be dismissed.

3.4 The Supplier of Ecotourism Products

Suppliers of ecotourism products can be segmented into two categories (Figure 3.3). The first category is the owners and managers of the ecotourism excursion attractions, and includes Governments, Private Organisations, and Private Voluntary Organisations. The second category is ecotourism agents who facilitate the meeting of ecotourists and the ecotourism excursion element.

Figure 3.3: Categories of Suppliers of Ecotourism Products

<table>
<tr><th colspan="2">CATEGORY</th><th colspan="4">SUB-GROUPING</th></tr>
<tr><td rowspan="2">1</td><td rowspan="2">Owners and / or Managers of Ecotourism Excursion Attractions</td><td rowspan="2">Government Organisations</td><td rowspan="2">Private Organisations</td><td colspan="2">Private Voluntary Organisations</td></tr>
<tr><td>Non-Governmental Organisations (NGO)</td><td>Community-Based Organisations (CBO)</td></tr>
<tr><td rowspan="4">2</td><td rowspan="4">Ecotourism Agents who facilitate the meeting of Ecotourists and the Ecotourism Excursion element</td><td colspan="4">1. Tour Operators supplying at least the excursion element of the ecotourism product.
May provide specialized ecotourism tours or general purpose type tours</td></tr>
<tr><td colspan="4">2. Tour Guides who provide guided tours of ecotourism attraction.
May be independent guides or affiliated with Owner / Manager of ecotourism excursion attraction, Tour Operator or Accommodation Provider.</td></tr>
<tr><td colspan="4">3. Accommodation Providers whose primary function is to provide accommodation.
May provide specialized accommodation in keeping with ecotourism principles (e.g. – ecolodge) or general-purpose accommodation.
May include independent or escorted excursion activities based on proximity to ecotourism attraction
May have formal or informal relationships with Owners / Managers of ecotourism excursion attraction, Tour Operators or Tour Guides.</td></tr>
<tr><td colspan="4">4. Local Transport Providers whose primary function is to provide local ground, sea and air transport.
May have formal or informal relationships with Owners / Managers of ecotourism excursion attraction, Tour Operators, Tour Guides or Accommodation Providers.</td></tr>
</table>

For suppliers of ecotourism products, however, there are at least two caveats. Firstly, suppliers of general tourism product elements may supply ecotourists. In other words, a supplier does not have to be an ecotourism specialist to supply an ecotourist. Secondly, because of green-washing, there may be suppliers who identify themselves as ecotourism specialists who, in fact, do not subscribe to the practices and philosophies of ecotourism[11].

[10] Appendix 5 gives a random sample of reviews from ecotourists, as reported on TripAdvisor (www.tripadvisor.com) which in general, reflect the findings given above.
[11] Appendix 6 gives a random sample of the ecotourism policies of tour operators, as reported on Ecotour Directory (www.ecotourdirectory.com).

4. Introduction to Ecotourism in the Selected CARIFORUM Countries

Because of the difficulty in measuring the size of the ecotourism sub-sector and the common use of estimates of the overall size of the Travel and Tourism industry, this chapter will present the overall size and trends of the tourism industry for each of the four CARIFORUM countries studied in order to establish the background for the proxies that will be used in estimating the size of the countries' ecotourism industry. Following the overview of the tourism industry, a synopsis of ecotourism in each country is presented.

4.1 Overview of the Travel and Tourism Industry in CARIFORUM

Specifically for the Caribbean region[12], the World Travel and Tourism Council (WTTC) reports on the significance of the Travel & Tourism industry. In 2012, in terms of the industry's direct contribution, Travel & Tourism contributed 15.7 billion USD or 4.6% of total GDP, and 647,000 jobs or 3.9% of total employment. When the industry's wider impact is considered, Travel & Tourism's total contribution to GDP was 48.4 billion USD or 14.0%, and 2.028 million jobs or 12.3% of total employment (World Travel & Tourism Council, 2013a)

While none of the countries in the CARIFORUM region featured in the top rankings in absolute terms, in relative terms, a number of CARIFORUM countries appeared in WTTC's 2012 top 10 countries rankings for the Travel & Tourism industry's contribution to both GDP and employment. In relative terms for the industry's direct contribution to GDP, The Bahamas with 22.0% and Antigua and Barbuda with 18.5% were seventh (7th) and eighth (8th) respectively. Similarly, in relative terms for the industry's total contribution to GDP, Antigua and Barbuda with 77.4% and The Bahamas with 48.4% were third (3rd) and fourth (4th) respectively. In terms of the industry's relative direct contribution to total employment, The Bahamas with 30.6% , Antigua and Barbuda with 18.8% and St. Lucia with 18.6% were third (3rd), eighth (8th), and ninth (9th) respectively. Likewise, in terms of the industry's relative total contribution to total employment, Antigua and Barbuda with 71.5%, The Bahamas with 57.4%, and St. Lucia with 42.3% were fourth (4th), seventh (7th) and tenth (10th) respectively (World Travel & Tourism Council, 2013b).

According to the UNWTO, there has been a gradual increase in arrivals to the Caribbean region over the 2010 – 2012 period, with values of 19.5 million in 2010, 20.1 million in 2011 and 20.9 million in 2012. The key markets of international visitors include the United States, Canada and the United Kingdom. For the United States, in 2013, Europe was the most popular region for US international travel, with a total of 11.4 million travellers or 39% of total US international travel; while the Caribbean was the second most popular region, with a total of 6.5 million travellers or 23% of total US international travel (http://travel.trade.gov/view/m-2013-O-001/index.html).

For Canada, in 2012, of the 15 most popular international destinations for Canadians, the United States was the most popular country, with a total of 22.7 million travellers. In terms of the CARIFORUM countries, two countries were in the top 15 international destinations for Canadians: the Dominican Republic was 5th, with 766,000 Canadian travellers, and Jamaica was 11th with 243,000 Canadian travellers (http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/arts37a-eng.htm).

[12] For the WTTC research, the Caribbean region included Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Bermuda, Cayman Islands, Cuba, Former Netherlands Antilles, Dominica, Dominican Republic, Grenada, Guadeloupe, Haiti, Jamaica, Martinique, Puerto Rico, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Trinidad and Tobago, UK Virgin Islands and US Virgin Islands.

For the United Kingdom, in 2013, the outbound destination regions were Europe (73.3%), North America (11.4%), and the Rest of the World (15.3%) (http://www.ons.gov.uk/ons/search/index.html?newquery=Overseas+Travel+and+Tourism+-+Quarterly+Release%2C+Q3+2013)

4.2 Overview of Ecotourism in the Four CARIFORUM Countries

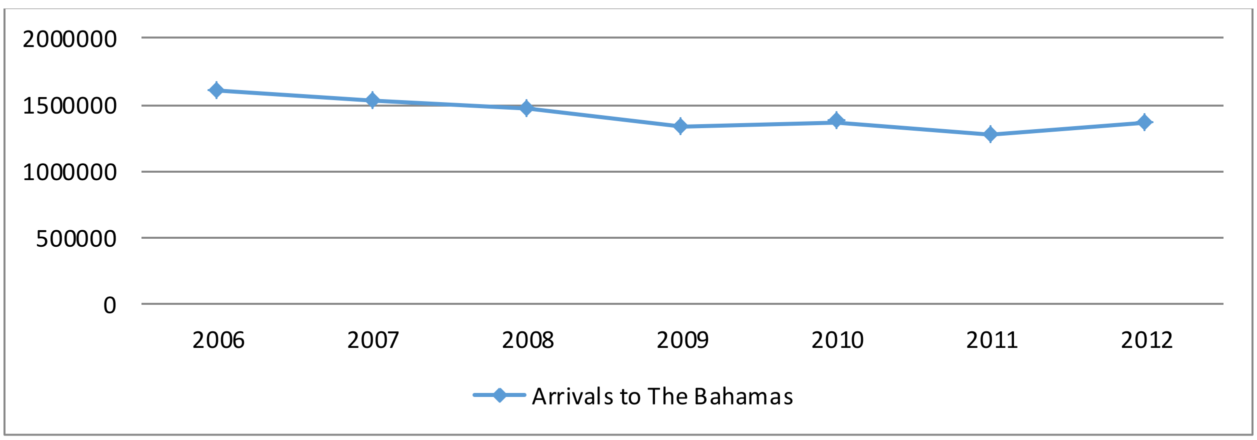
For each country, the economic measures of contribution to GDP and contribution to employment; as well as arrival figures and key international markets are presented. Ecotourism in the four CARIFORUM countries is discussed in terms of the countries' adopted ecotourism definition, the excursion attractions that are advertised on the promotional websites of each country, and the countries' suppliers of ecotourism products.

4.2.1 Tourism in The Bahamas

Tourism in The Bahamas has been a key sector in the economy from since the 1950s (Edwards, 2004), when there was a budgetary allocation for overseas tourism promotion. Government's role in the tourism industry was further formalized when the Ministry of Tourism was established in 1964 (http://www.tourismtoday.com).

Tourism remains the country's key economic activity, where the Travel and Tourism industry made a total contribution of 47.2% to GDP and a total contribution of 55% to employment in 2012. In terms of tourist statistics, arrival figures over the 2006 - 2012 period are shown in Figure 4.1.

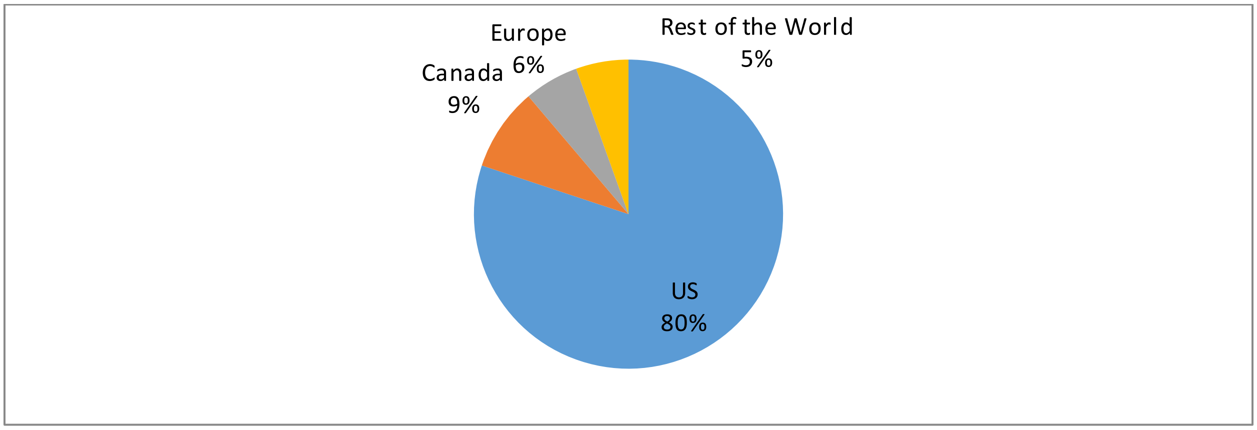
Figure 4.1: Tourist Arrivals to The Bahamas from 2006 - 2012



(Source: Caribbean Tourism Organization; www.tourismtoday.com)

From the 2010 international visitor statistics to The Bahamas, key international markets included the United States (80.1%), Canada (8.7%), Europe (5.7%) and the Rest of the World (5.5%) (Figure 4.2).

Figure 4.2: Tourism Arrivals to The Bahamas by Main Markets



4.2.1.1 *Ecotourism in The Bahamas*

Ecotourism is one of four key market segments that feature on the country's promotional website; with the other three market segments being nature, adventure and sun and sand (http://www.bahamas.com/).

The country's adopted ecotourism definition is outlined in the National Tourism Policy, and is as follows:

> *Eco-tourism is environmentally responsible tourism that perpetuates the natural, historic, and cultural heritage of The Bahamas, and promotes education, conservation, and sustainable development, while involving and providing benefits to the local community. (http://www.tourismtoday.com)*

The advertised ecotourism attractions on the Bahamas tourism promotional website are summarized in Figure 4.3.

Figure 4.3: The Bahamas' Advertised Ecotourism Natural and Cultural Attractions

	NATURAL RESOURCES					NATURE-BASED CULTURAL
	Forest, Mountain, Waterfall, Volcano	**Coastal & Marine**	**Lake, River, Wetland**	**Cave**	**Other**	**Museums & Cultural Repositories**
The Abacos	Abaco National Park	Walker's Cay National Park	Black Sound Cay National Res.		Tilloo Cay Reserve	
		Pelican Cays Land & Sea Park				
		Fowl Cays National Park				
Andros		North & South Marine Parks			Crab Replenishment Reserve	
		Blue Holes National Park				
		West Side National Park				
Long Island					Conception Island National Park	
Acklins & Crooked Island						Hope Great House and Marine Farm
Eleuthera & Harbour Island					Leon Levy Native Plant Preserve	
The Exumas		Exuma Cays Land & Sea Park	Moriah Harbour Cay National Park			
Grand Bahama Island		Peterson Cay National Park		Lucayan National Park	Rand Nature Centre	
Inagua		Union Creek Reserve			Inagua National Park	
					Little Inagua National Park	
Nassau & Paradise Island	Primeval Forest National Park		Bonefish Pond		Harold and Wilson Ponds National Park	

4.2.1.2 Overview of Suppliers of Ecotourism Products in The Bahamas

In terms of Category 1 suppliers, the Ministry of the Environment and The Bahamas Environment, Science and Technology Commission (The BEST Commission) are major actors in the management of the country's natural resources. Additionally, the Bahamas National Trust (BNT), a statutory organisation comprising private, non-profit, scientific and governmental representatives, is a major supplier, through its management of the 27 national parks that protect over 2 million acres of terrestrial areas, inclusive of pine and coppice forest; and marine areas, inclusive of blue holes, coral reefs and tidal creeks.

In terms of Category 2 suppliers, local and international tour operators are major suppliers by way of acting as agents facilitating the ecotourist's visit to the ecotourism excursion attractions.

For land-based excursion activities, nature tours that involves bird watching, hiking, biking and horseback riding are popular ecotourism offerings. Bird watching is deserving of special mention, with BNT being a partner of BirdLife International[13], and further, researchers in the Bahamas have recorded over 300 bird species (Moore & Gape, 2009). A number of local tour operators who offer land-based activities are represented by the Bahamas Sightseeing Tour Operators Association. The local tour operators primarily offer the individual excursion activity product that are typically day tours; with secondary emphasis on the tour package product that includes the excursion and accommodation ecotourism elements. There are also a number of international tour operators that include The Bahamas in their destination listings. The Official UK tourism website for The Bahamas (http://www.bahamas.co.uk/) lists 93 European tour operators, who offer both types of tour packages: the excursion and accommodation elements, and the full package, comprising the excursion, accommodation and transportation elements, and are multiple-day tours that may involve visits to various islands of The Bahamas.

For water-based excursion activities, diving is the most popular activity, with the main attractions being dolphin diving, shark diving, reef diving and wrecks diving. In terms of local tour operators, the Bahamas Diving Association, representing 37 local dive operators, primarily offer the individual excursion activity product, with secondary emphasis on the tour package product that includes the excursion and accommodation ecotourism elements. Similarly, the European tour operators focus on a number of diving tour packages, that either consist of the excursion and accommodation elements, or the full tour package.

Additionally, in Category 2 suppliers, there are a number of accommodation providers[14], particularly located in the Out Islands of The Bahamas[15], that identify themselves as 'eco-lodges' or 'eco-resorts' or 'eco-accommodation'. The Out Islands of the Bahamas, characterized as being sparsely populated, pristine and quiet, are promoted as ideal destinations for 'eco-travel vacations' (http://www.myoutislands.com), with 46 listed resorts and hotels In cases where all-inclusive packages are offered by these 'eco-resorts', accommodation, meals, and land-based and water-based excursion activities are provided. A number of these accommodation providers are represented by the Bahamas Hotel Association.

[13] BirdLife International is said to be the world's largest nature conservation partnership, made up of 120 country partners (www.birdlife.org).

[14] Reported room stock in The Bahamas – 15, 276 (Caribbean Tourism Organization).

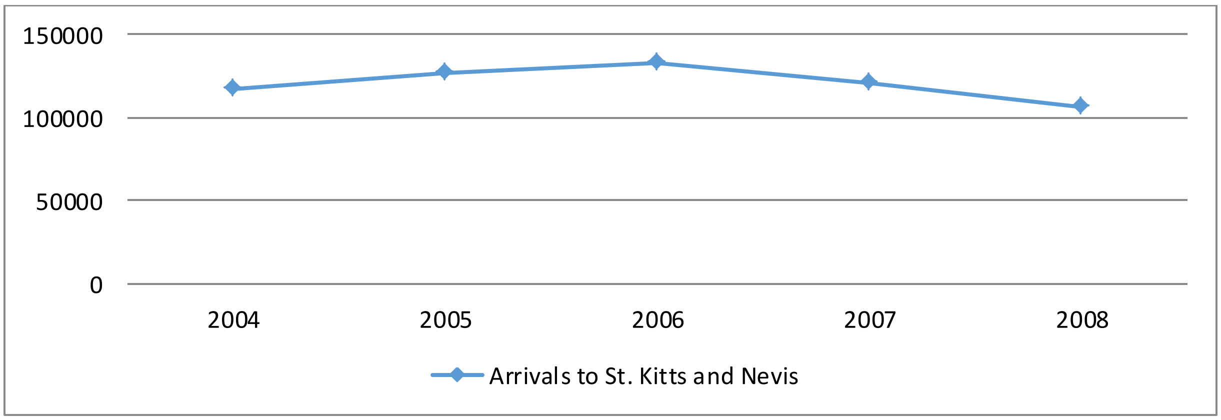
[15] The Out Islands of The Bahamas include Abacos, Acklins, Andros, Berry Islands, Bimini, Cat Island, Crooked Island, Eleuthera, Habour Island, Inagua, Exumas, Long Island, Mayaguana, and San Salvador.

4.2.2 Tourism in St. Kitts and Nevis

The tourism industry has traditionally played an important role in the economy of St. Kitts and Nevis. However, in 2005, when the country ended commercial production of sugar, its mainstay agricultural product, tourism's significance to the national economy grew. Recognition of the industry's significance is evidenced by the 2002 St. Kitts and Nevis Strategic Plan for Tourism Development, and the subsequent official review of the St. Kitts and Nevis Five Year Strategic Plan (O'Marde, 2003).

In 2012, the Travel and Tourism industry made a total contribution of 29.1% to GDP and a total contribution of 27.5% to employment. In terms of tourist statistics, arrival figures over the 2004 – 2008 period are shown in Figure 4.4.

Figure 4.4: Tourist Arrivals to St. Kitts and Nevis from 2004 - 2008

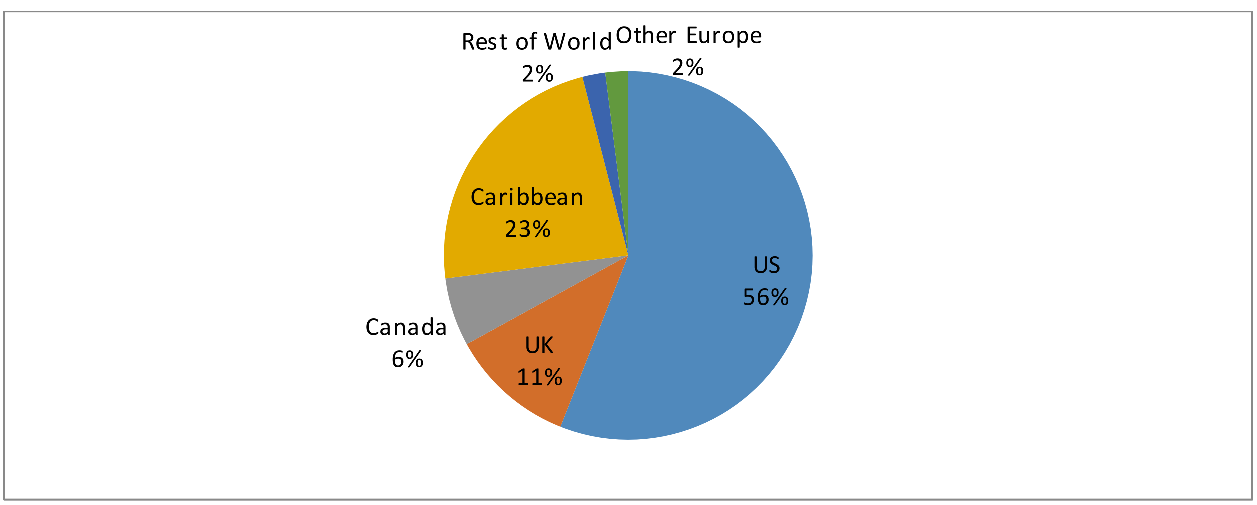


(Source: Caribbean Tourism Organization)

Further, the cruise ship market segment is significant, with a total of 633,244 cruise ship passengers, spread over 284 calls, visiting the country in 2011 – 2012 (http://www.stkittstourism.kn).

From the 2008 statistics, the key tourist markets for St. Kitts and Nevis are the United States (56%), the Caribbean (23%), the United Kingdom (11%) and Canada (6%) (Figure 4.5).

Figure 4.5: Tourist Arrivals to St. Kitts and Nevis by Main Markets



(Source: Caribbean Tourism Organization)

4.2.2.1 *Ecotourism in St. Kitts and Nevis*

Ecotourism is one of five key market segments that feature on the county's promotional website; with the other four market segments being nature, adventure, sun and beach, and business (http://www.stkittstourism.kn; http://www.nevisisland.com).

However, instead of an ecotourism strategy, St. Kitts and Nevis is pursuing a 'Sustainable Tourism Development Strategy'[16]. Within that strategy, however, ecotourism, also referred to as green tourism, is considered a sector.

> *"Eco-tourism/Green tourism" is and will continue to be a sector for sustainable growth and development of tourism in St. Kitts & Nevis. The conservation and protection of our fragile eco-system and biodiversity is of critical importance to the sustainable development of tourism in St. Kitts. Without a sustainable approach to management of the environment/eco-system, the socio-economic growth and development may be challenged significantly."*

The advertised ecotourism attractions on the St. Kitts and Nevis tourism promotional website are summarized in Figure 4.6.

[16] According to Patricia Martin, Permanent Secretary of The Ministry of Tourism and International Transport, St. Kitts and Nevis is a sustainable tourism destination and not an ecotourism destination (Personal Communication – January 9, 2014). A new tourism development plan is currently being reviewed and has not yet been adopted. There is no indication whether there will be an official ecotourism definition outlined in this new tourism plan.

Figure 4.6: St. Kitts and Nevis' Advertised Natural and Cultural Attractions

	NATURAL RESOURCES		NATURE-BASED CULTURAL RESOURCES		
	Forest, Mountain, Waterfall, Volcano	Coastal & Marine	Cultural Villages	Museums & Cultural Repositories	Other
St Kitts & Nevis	Forest Reserve	The Aquarium		Clay Villa Estate	Wreck of River Taw
	Mt. Liamuiga Volcano	Black Coral Reef			Wreck of the Corinthian
	Valley of Giants Rainforest	Brimstone Shallows			Wreck of the M.V. Talata
	Atlantic Coast Rainforest	Coconut Tree Reef			Royal St. Kitts Golf Course
		Devil's Cavern			Mango Orchard Spa
		Friar Bay Reef			Emerald Mist Spa
		Frigate Bay Reef			
		Green Point Reef			Upper Round Road
		Monkey Shoals			
		Nags Head			
		Paradise Reef			
		Sandy Point			
		The Finger Reef			
		The Vents			
		Turtle Nesting Beaches*			

4.2.2.2 Overview of Suppliers of Ecotourism Products in St. Kitts and Nevis

In terms of Category 1 suppliers, the Ministry of Sustainable Development is a major actor in the management of the country's natural resources, Further, the St. Kitts and Nevis National Man and Biosphere (MAB) Committee[17], made up of representatives of government, non-governmental organisations, educational institutions, private sector and community organisations, is a major supplier of the ecotourism excursion attractions.

In terms of Category 2 suppliers, the major suppliers are the local tour guides and tour operators. For land-based activities, the official St. Kitts tourism website (http://www.stkittstourism.kn/) lists one specialist ecotourism company, where hiking and off-road tours to forested areas are featured activities. Similarly, on the official Nevis tourism website (http://www.nevisisland.com), two tour guides are listed, where hiking, nature walks, bird watching and turtle watching are the featured activities. These local tour guides and operators supply the individual excursion activity product.

For water-based excursion activities, diving is the featured activity, and the main attractions are the reefs. Four dive companies are listed as specialist ecotourism companies on the official St. Kitts tourism website. Three of the dive companies supply only the individual excursion activity, while the fourth company offers both the individual excursion activity product and the tour package product that includes the excursion and accommodation ecotourism elements.

Additionally, in Category 2 suppliers, there are accommodation providers[18], who provide accommodation and catering, and by virtue of their locations in natural settings, visitors are able to engage in independent or escorted land-based and water-based excursion activities.

4.2.3 Tourism in Trinidad and Tobago

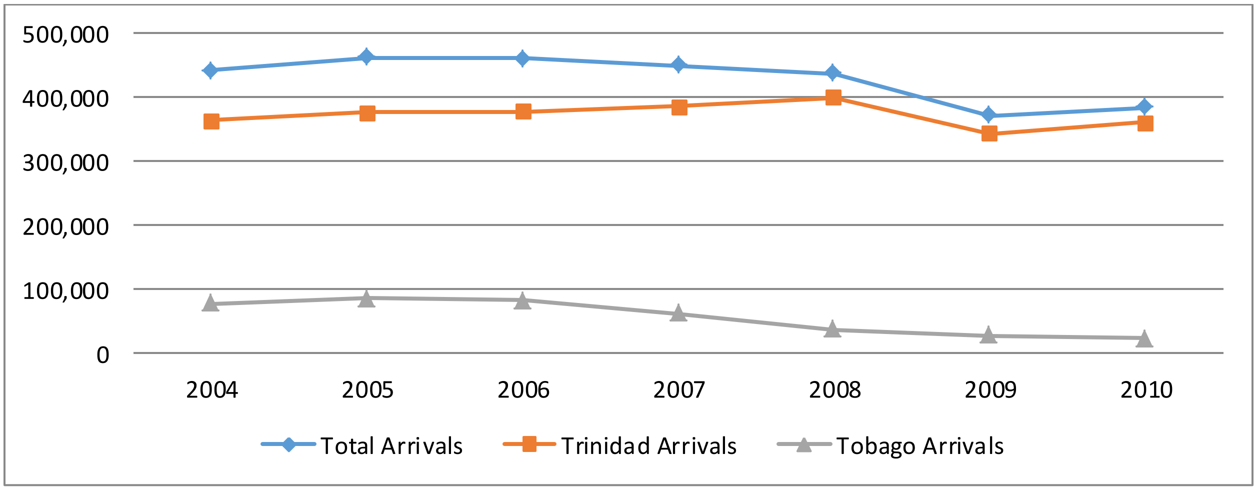
Tourism in Trinidad and Tobago had been identified as a national priority area for economic diversification from at least as far back as in the 1990s, as evidenced by the Medium Term Policy Framework of 1993 – 1995. In this light, the Tourism Master Plan (1995) was developed. Since that time, other strategic initiatives have been undertaken, including draft National Tourism policies completed in 1999 and 2003. Further, there was a 2006 / 2007 Tourism Sub-Committee for the Trinidad and Tobago's Vision 2020 strategic plan. The guiding framework for the tourism industry is now captured in the National Tourism Policy of Trinidad and Tobago, dated October 2010.

The Travel and Tourism industry made a total contribution to GDP of 7.6% and a total contribution to employment of 9.9% in 2012. Tourist arrival figures over the 2004 – 2010 period are shown in Figure 4.7.

[17] The St. Mary's Biosphere Reserve is made up of cloud forests, mangroves and coral reefs, and was certified by the UNESCO General Conference in November 2011. The St. Kitts and Nevis' Man and Biosphere (MAB) Committee was established in April 2012.

[18] Reported room stock in St. Kitts and Nevis – 1,754 (Caribbean Tourism Organization).

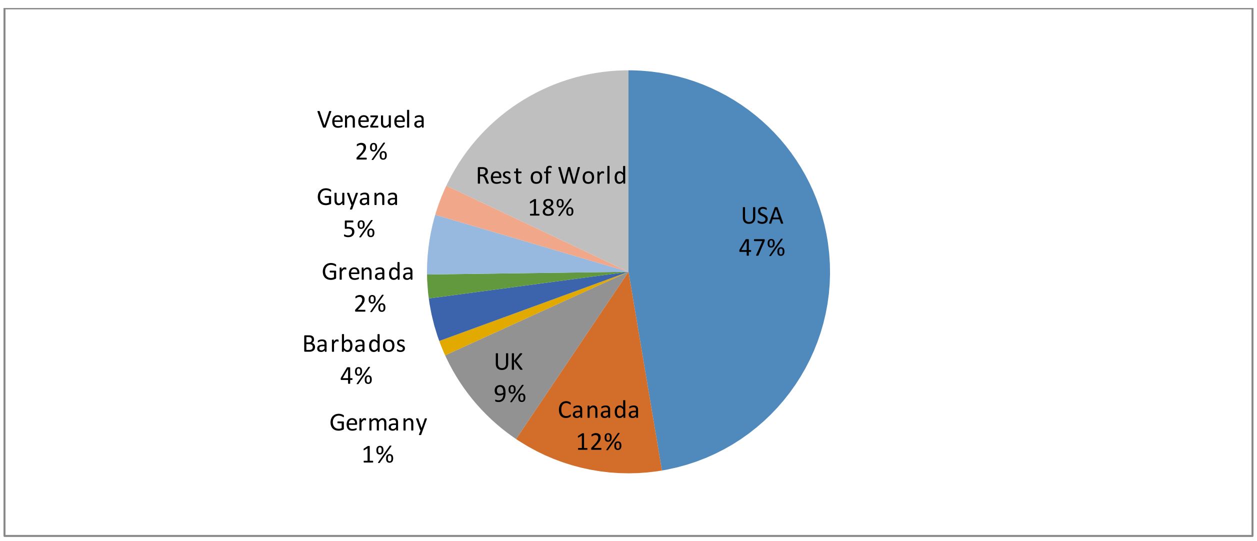
Figure 4.7: Tourist Arrivals to Trinidad and Tobago from 2004 - 2010



(Source: Central Statistical Office)

From the 2010 international visitors statistics to Trinidad and Tobago, key international markets included the United States (47%), Canada (12%), the United Kingdom (9%), Germany (1%), while the key regional markets were Guyana (5%), Barbados (3%), Grenada (2%), and Venezuela (2%) (Figure 4.8). When these statistics are sub-divided by country, 94% of all visitors visit Trinidad, with the significant markets for Tobago being Germany and the United Kingdom.

Figure 4.8: Tourist Arrivals to Trinidad and Tobago by Main Markets



(Source: Central Statistical Office)

Of the 2010 arrival statistics, the stated purpose of visit was Leisure / Beach Vacation – 45%; Visiting Friends / Family – 25%; Business / Convention – 18%; Wedding / Honeymoon – 1%; Sports – 1%; Study – 1%. Visitors who stated ecotourism as their purpose of visiting was 0.01%.

4.2.3.1 *Ecotourism in Trinidad and Tobago*

Ecotourism is one of six key market segments that feature on the country's promotional website, with the other five market segments being cultural, nature, adventure, sun and sand, and business segments (http://www.gotrinidadandtobago.com/; http://www.visittobago.gov.tt/).

The adopted ecotourism definition in the National Tourism Policy, is as follows:

> *Environmentally and socially responsible travel to natural or near natural areas that promotes conservation, has low visitor impact and provides for beneficially active socioeconomic involvement of local people.*

The advertised ecotourism attractions on the Trinidad and Tobago tourism promotional website are summarized in Figure 4.9.

Figure 4.9: Trinidad and Tobago's Advertised Ecotourism Natural and Cultural Attractions

	NATURAL RESOURCES				
	Forest, Mountain, Waterfall, Volcano	**Coastal & Marine**	**Lake, River, Wetland**	**Cave**	**Other**
TRINIDAD	Trinity Hills		Nariva Swamp	Lopinot Caves	La Brea Pitch Lake
	Rincon Falls		Oropuche Lagoon		La Vache Scenic Area
	Paria Falls		Caroni Plains		La Vega Nursery
	Madamas Falls		Caroni Bird Sanctuary		Asa Wright Nature Centre
	Maracas Falls		P-a-P Wild Fowl Trust		
	Rio Seco Falls				
	Piparo Mud Volcano				
	Palo Seco Mud Volcano				
	Chathan Mud Volcano				
TOBAGO	Craig Hill Falls	Pigeon Point Reef			Hillsborough Dam
	Highland Falls	Arnos Vale Reef			Lowland Wildfowl Sanctuary
	Greenhill Falls	Culloden Reef			Pigeon Point W. Sanctuary
	Pembroke GH Falls				Little Tobago Bird Sanctuary
	Argyle Falls				Marble Island Bird Sanctuary
	Lucy Vale Forest Reserve				

4.2.3.2 Overview of Suppliers of Ecotourism Products in Trinidad and Tobago

In terms of Category 1 suppliers, the Ministry of Housing and the Environment, along with the Environmental Management Agency (EMA) and the Forestry Division, and The Tobago House of Assembly (THA) via The Department of Natural Resources and the Environment are main suppliers of the ecotourism attractions.

In terms of Category 2 suppliers, tour guides and local and international tour operators are major suppliers by way of acting as agents facilitating the ecotourist's visit to the ecotourism excursion attractions. For land-based excursion, bird watching, hiking and nature walks are the main activities. Bird watching requires special mention, where 468 bird species have been reported (White, 2009).

The Trinidad and Tobago Tour Guiding Association (TTTGA) represents a number of tour guides, where there are 10 Trinidad and Tobago Tourism Industry Certification (TTTIC)[19] certified tour guides in Trinidad and 10 TTTIC certified tour guides in Tobago. The tour guides solely offer the individual excursion activity product, and are typically single-day tours, ranging from one hour to eight hours.

There are two tour operators associations: The Trinidad and Tobago Incoming Tour Operators Association representing 16 members, and The Tobago Hospitality and Tour Operators Association representing 19 members. The local tour operators primarily offer the individual excursion activity product. There is secondary emphasis on the tour package product that includes the excursion and accommodation ecotourism elements. There are also a number of international tour operators that include Trinidad and Tobago in their destination listings, which offer both types of tour packages: the excursion and accommodation elements, and the full package, comprising the excursion, accommodation and transportation elements.

For water-based excursion activities, diving is the most popular activity, particularly in Tobago. In terms of local tour operators, the Association of Tobago Dive Operators, representing seven local dive operators, primarily offer the individual excursion activity product, with secondary emphasis on the tour package product that includes the excursion and accommodation ecotourism elements. Similarly, international tour operators focus on a number of diving tour packages, that either consist of the excursion and accommodation elements, or the full tour package.

The tour packages often involve both land-based and water-based excursion activities, and are multiple-day tours involving travel between Trinidad and Tobago. Also, a number of international tour operators offer tour packages that involve multiple destinations, where Trinidad and Tobago is one of two to four country destinations in the tour package.

Additionally, in Category 2 suppliers, there are a number of mainstream and specialist eco-accommodation providers. These accommodation providers[20] provide accommodation and catering, and visitors are able to engage in independent or escorted land-based and water-based excursion activities.

[19] The Trinidad and Tobago Tourism Industry Certification (TTTIC) is a voluntary programme developed to ensure that tourism product suppliers conform to national quality standards, which have been developed by the Trinidad and Tobago Bureau of Standards, and administered by the Tourism Development Company TDC) Limited and the Division of Tourism and Transportation of the Tobago House of Assembly (THA).

[20] Reported room stock in Trinidad and Tobago – 7,000 (Caribbean Tourism Organization).

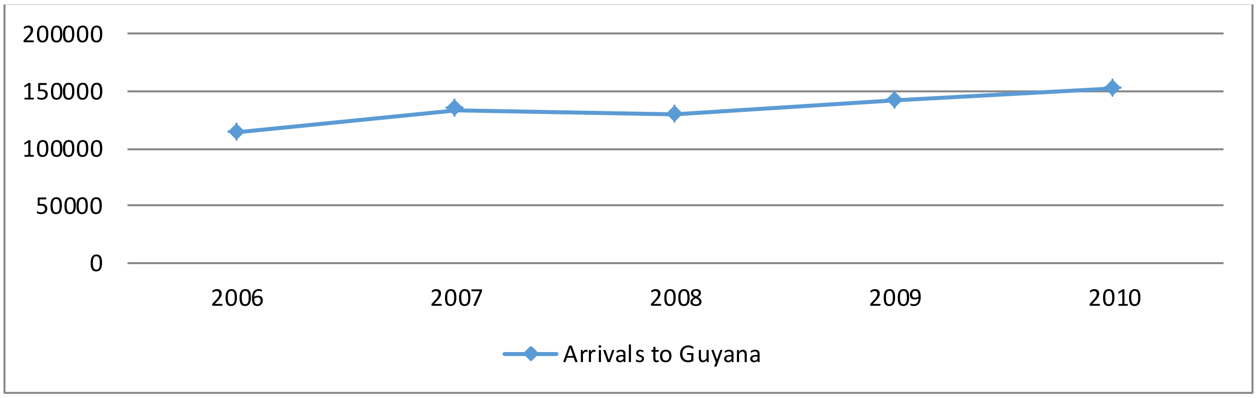
4.2.4 Tourism in Guyana

Guyana's traditional economic sectors include sugarcane, rice, forestry and mining. In order to diversify the economy, a number of non-traditional sectors have been identified; one of which is the tourism sector, which was identified as a key diversification opportunity in Guyana's 2006 National Competitiveness Strategy.

The Travel and Tourism industry made a total contribution to GDP of 9.2% and a total contribution to employment of 3.2% in 2012.

Tourist arrival figures over the 2004 – 2010 period are shown in Figure 4.10.

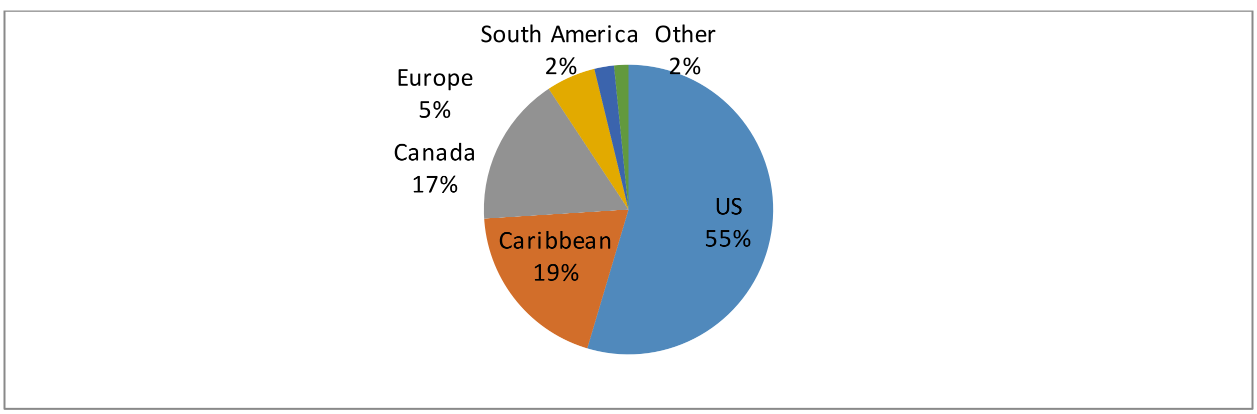
Figure 4.10: Tourist Arrivals to Guyana from 2004 - 2010



(Source: Caribbean Tourism Organization)

From the 2010 international visitor statistics to Guyana, key international markets included the United States (54.6%), the Caribbean (19.4%) and Canada (16.7%) (Figure 4.11).

Figure 4.11: Tourist Arrivals to Guyana by Main Markets



(Source: Caribbean Tourism Organization)

4.2.4.1 *Ecotourism in Guyana*

Ecotourism is one of five key market segments that feature on the country's promotional website, with the other four market segments being cultural, rural, nature, and adventure segments (http://www.guyana-tourism.com/).

In the 1997 national plan for ecotourism development in Guyana, ecotourism was defined as (Fennell, Buckley, & Weaver, 2001):

> *'a form of travel for pleasure that has a low impact on the natural and cultural environment, gives the visitor a better understanding of the unique qualities of the place being visited, contributes to the well-being of local Guyanese, and promotes conservation of Guyana's resources'.*

Whilst ecotourism is featured on the country's promotional website, the Guyana Tourism Authority emphasises sustainable tourism and responsible tourism[21].

The advertised ecotourism attractions on the Guyana tourism promotional website are summarized in Figure 4.12.

[21] Based on interview with Ms. Nadine Oudkerk, Product Design Manager of the Guyana Tourism Authority on March 19, 2014.

Figure 4.12: Guyana's Advertised Ecotourism Natural and Cultural Attractions

	NATURAL RESOURCES				NATURAL-CULTURAL
	Forest, Mountain, Waterfall, Volcano	**Coastal & Marine**	**Lake, River, Wetland**	**Other**	**Cultural Villages**
GUYANA	Guiana Shield	Bartica Beach	North Rupununi Wetland	Rupununi Savannah	Surama
	Mount Roraima	Hamburg Beach on Tiger Island			Santa Mission
	Kanuku Mountains	Saxacalli Beach			
	The Pakaraima Mountains	Shell Beach			
	Amaila Falls	63 Beach Berbice			
	Barrington Brown Falls				
	Cuquenan Falls				
	Drios Falls				
	Kaieteur Falls				
	King Edward VIII Falls				
	King George VI Falls				
	Kumaka Falls				
	Kumarau Falls				
	Great Falls				
	Maopityan Falls				
	Murrays Falls				
	Marina Falls				
	Orinduik Falls				
	Pot Falls				
	Rappu Falls				
	Waraputa Falls				

4.2.4.2 Overview of Suppliers of Ecotourism Products in Guyana

In terms of Category 1 suppliers, the Ministry of National Resources and the Environment[22] and The Environmental Protection Agency (EPA) are major actors in the management and protection of the country's natural resources.

Additionally, there is the North Rupununi District Development Board (NRDDB)[23], representing 16 communities that are involved in community-based tourism initiatives. Therefore, added to the management of the natural and cultural resources, these community groups are also actively involved in the excursion, and accommodation and catering activities.

In terms of Category 2 suppliers, local and international tour operators are major suppliers by way of acting as agents facilitating the ecotourist's visit to the ecotourism excursion attractions. For local tour operators, The Guyana Tourism Authority lists 38 tour operators, many of which are members of the Tourism and Hospitality Association of Guyana (THAG). In terms of international tour operators, there are several generalist and specialist tour operators that include Guyana as a destination in their tour packages.

For land-based excursion, bird watching, hiking and wildlife spotting are the main activities. Bird watching requires special mention, where 864 bird species have been reported (Narine & Narine, 2009). For water-based excursion activities, river tours and fishing are the major advertised activities.

While the single-day tours are typical offerings by the tour operators, multiple-day tour packages are particularly popular offerings for both local and international tour operators, and often involve both land-based and water-based activities. Additionally, these tour packages often are multiple country destinations, where Guyana is one country stop, with the other countries typically being other South American destinations.

Additionally, in Category 2 suppliers, there are a number of mainstream and specialist eco-accommodation providers. These accommodation providers[24] provide accommodation and catering, and visitors are able to engage in independent or escorted land-based and water-based excursion activities.

4.3 Summary of Findings

In summary, the ecotourism definitions for The Bahamas, Trinidad and Tobago and Guyana are comprehensive, meeting four of the five UNWTO principles of ecotourism; nature and socio-cultural, conservation, low impact, economic benefits to local communities; where only the educative principle is not explicitly included. In terms of the inventory of the natural and cultural attractions advertised on the four countries' official promotional websites, the coastal and marine natural resources are the main ecotourism attractions for The Bahamas and St. Kitts and Nevis, while the forest, mountain, volcano, and waterfall natural resources are the main ecotourism attractions for Trinidad and Tobago and Guyana. Lastly, in each of the four countries, there are suppliers who operate in the two categories of suppliers of ecotourism products, where the suppliers may offer specialist ecotourism product elements or general

[22] The Guyana Protected Area System (GPAS) was implemented in 2003 to protect selected ecosystems.
[23] The 16 communities are: Annai, Aranaputa, Apoteri, Crash Water, Fairview, Katoka, Kwaimatta, Kwatamang, Massara, Rupertee, Rewa, Toka, Surama, Woweta, Yakarinta, and Yupukari.
[24] Reported room stock in Guyana – 730 (Caribbean Tourism Organization).

tourism product elements that may be consumed by ecotourists; and there may exist green-washing, where self-labelled ecotourism specialists may not adhere to ecotourism practices.

5. Value Chain Analysis for The Ecotourism Industry

Value chain analysis is described as an analytical approach that leads to an understanding of the nature of linkages between local firms and global markets (de Boer, van der Linden, & Tuninga, 2012). This chapter will present both a detailed-level value chain analysis for the ecotourism industry, and a high-level value chain outline to analyse the three categories of ecotourism products being considered, as described in Figure 2.2.

Section 1 presents the detailed level value chain analysis through descriptions of the activities and actors and the Input-Output structure for the ecotourism value chain, analysis of the geographic scope and governance issues for the ecotourism value chain. Section 2 presents the analysis of high-level value chain.

5.1 Detailed-Level Value Chain Analysis

The detailed-level value chain analysis follows three steps of the Global Value Chain (GVC) methodology as outlined by Gereffi & Fernandez-Stark (2011).

5.1.1 Input-Output Structure for the Ecotourism Industry

The Input – Output structure details the value chain activities and the actors along the value chain. The following sub-sections detail the ecotourism value chain activities and ecotourism value chain actors.

5.1.1.1 *Ecotourism Value Chain Activities*

Six main activities have been identified on the ecotourism value chain.

i. **PRODUCT DESIGN AND DEVELOPMENT**

This activity involves the conceptualizing of a new or improved product offering, developing the offering, and testing the new product on the market. There is also a packaging aspect, where various elements of the tourism product are combined. Further, price structures and ranges are determined.

ii. **PROMOTION AND DISTRIBUTION**

This activity involves communicating the tourism product to the target markets, and managing the channels that bring the customer in contact with the product for the purposes of buying the product. Promotion can be done via various promotional methods and promotional materials. The methods include advertisement, direct selling, sponsorship, and sales promotion. The materials include advertisements via radio, television, magazines, cinemas and other media; websites; brochures; and videos. For the tourism industry, the Internet plays a critical promotion and distribution role, particularly in terms of disintermediation.

Tourism distribution is achieved via a number of channels. Firstly, there is the single-level distribution channel, where the tourism service provider sells directly to the visitor. Secondly, there is the two-level distribution channel, where an intermediary, such as a travel agent, is used. Thirdly, there is the three-level distribution channel, where for example, a tour operator or wholesaler sells tour packages to a travel agent, who then, sells the tour package to the tourist. Additionally, as in the case of ecotourism, an additional layer may be added when an ecotourism specialist may be added to any of the three distribution channels previously discussed.

iii. **INBOUND TRANSPORTATION**

This activity involves moving the visitor to the tourism destination. There is the international transport element, where the main modes of transport include airlines and cruise ships.

iv. **ACCOMMODATION AND CATERING**

This activity involves the provision of accommodation for a fee. The accommodation type includes hotels, inns, Bed & Breakfast (B&B) establishments, guesthouses, apartments, resorts, condos and campsites. Accommodation may or may not include food service. The catering activity, however, involves the provision of food services for a fee, and includes meals and snacks.

v. **EXCURSION**

This activity involves the ground transport to the tourism attraction, and the accompanying leisure, recreational, sightseeing, and educational activity.

vi. **OUTBOUND TRANSPORTATION**

This activity involves moving the visitor from the tourism destination back to his or her place of origin.

5.1.1.2 *Ecotourism Value Chain Actors*

The ecotourism value chain actors can be classified into a number of categories: Consumers, Suppliers, and Related and Supporting Institutions[25]

i. **CONSUMERS**

The ecotourism value chain consumers are the visitors or ecotourists. These actors are the people traveling to a place other than his or her usual environment. The visitor can be identified by place of origin: international, regional, and local or home-based. The visitor can be classified by length of stay: same-day visitor or overnight stay visitor.

Further, in terms of the ecotourist, these visitors can be classified by objective: casual (incidental visit to eco-operation), mainstream (visitor who seeks out 'unusual' trips), dedicated (visitor who plans trips specifically to visit a protected area) and hardcore (visitor who is conducting scientific research) or ecogeneralists, intermediate and ecospecialists (See Table 3.2).

ii. **SUPPLIERS**

A number of the value chain actors that are classified as suppliers operate across a number of the value chain activities.

- **Actors involved in Product Design and Development**

  <u>Public Sector</u>

  Government Ministries and Departments

  The central government units typically have overall responsibility for the tourism sector in a country. These units provide central leadership, through the development and

[25] Major value chain actors in the four countries are given in Appendix 7.

coordination of national tourism strategies and policies, and provide and attract investment for the development of the industry.

National Tourism Authorities and Agencies
These statutory agencies are often tasked with the responsibility of developing the tourism product of their respective countries. These agencies also monitor the performance of the industry, via research.

<u>Private Voluntary Organisations</u>
Local Communities in Community-Based Ecotourism (CBE)
These are the local communities where the natural or cultural attractions are located. The local communities are involved in the product design and development activities.

NGOs in NGO-Based Ecotourism (NBE)
These are NGOs that owned and / or manage the locations where the natural and cultural attractions are located.

<u>Private Sector</u>
Eco-operations Owners / Developers / Managers; Land Owners in Entrepreneur-Based Ecotourism (EBE)
These are the entrepreneurs who have invested in the development of an ecotourism site.

Tour Operators
These organisations identify specific elements that comprise the total ecotourism product to develop combinations of these elements to offer as tour packages.

Travel Agents
Like the tour operator, the travel agents identify a specific element of the total ecotourism product and develop a product offering.

- **Actors involved in Promotion and Distribution**

<u>Public Sector</u>
Government Ministries and Departments / National Tourism Authorities and Agencies
These units are involved in the promotion of the tourism product of their respective countries.

<u>Private Voluntary Organisations</u>
Local Communities in CBE and NGOs in NBE
These are the local communities and NGOs, by way of websites and other media, promote the ecotourism product that is on offer.

<u>Private Sector</u>
Tour Operators / Travel Agents
These organisations act as intermediaries, bringing the tourism product to the visitor.

Eco-operations Owners / Developers / Managers; Land Owners in Entrepreneur-Based Ecotourism (EBE)

These entrepreneurs use direct marketing and selling to the visitor.

- **Actors involved in Inbound and Outbound Transportation**
  Airlines, Cruise Lines
  For international visitors to the CARIFORUM region, the mode of transportation is via air and sea.

- **Actors involved in Accommodation and Catering**
  Accommodation Providers; Food Service Owners
  These actors include owners and managers of the accommodation establishments and the food service establishments.

- **Actors involved in Excursions**
  Tour Operators, Travel Agents, Eco-operator Owners / Manager, Tour Guides
  These actors include the eco-operator owners and tour guides who manage the ecotourism activities, food service providers and shop owners who may sell souvenirs and other consumables.

  Ground Transport Providers
  These actors include private taxis and bus owners, car rental companies and bus service companies.

iii. RELATED AND SUPPORTING INSTITUTIONS

These actors include a range of organisations and institutions that supply a range of goods, services, information, training, and financing to the main actors along the value chain.

- **Input Providers**
  The input providers span the entire value chain, and include providers of goods: raw materials, intermediate goods and finished products; and services, that are utilized by the value chain actors classified as suppliers. For example, in Promotion and Distribution, examples of input providers include advertising agencies, printers, photographers and graphic artists. Similarly, in the Catering activity, input providers include farmers, market vendors, supermarkets and bakeries.

- **Public Sector**
  These are government ministries, agencies and units that play a supporting role along the length of the value chain.

- **Private Sector Business Support Organisations (BSOs) and Non-Governmental Organisations (NGOs)[26]**
  These are the industry associations, chambers of commerce, NGOs and other related organisations that offer the industry support and advocacy. Financial institutions are

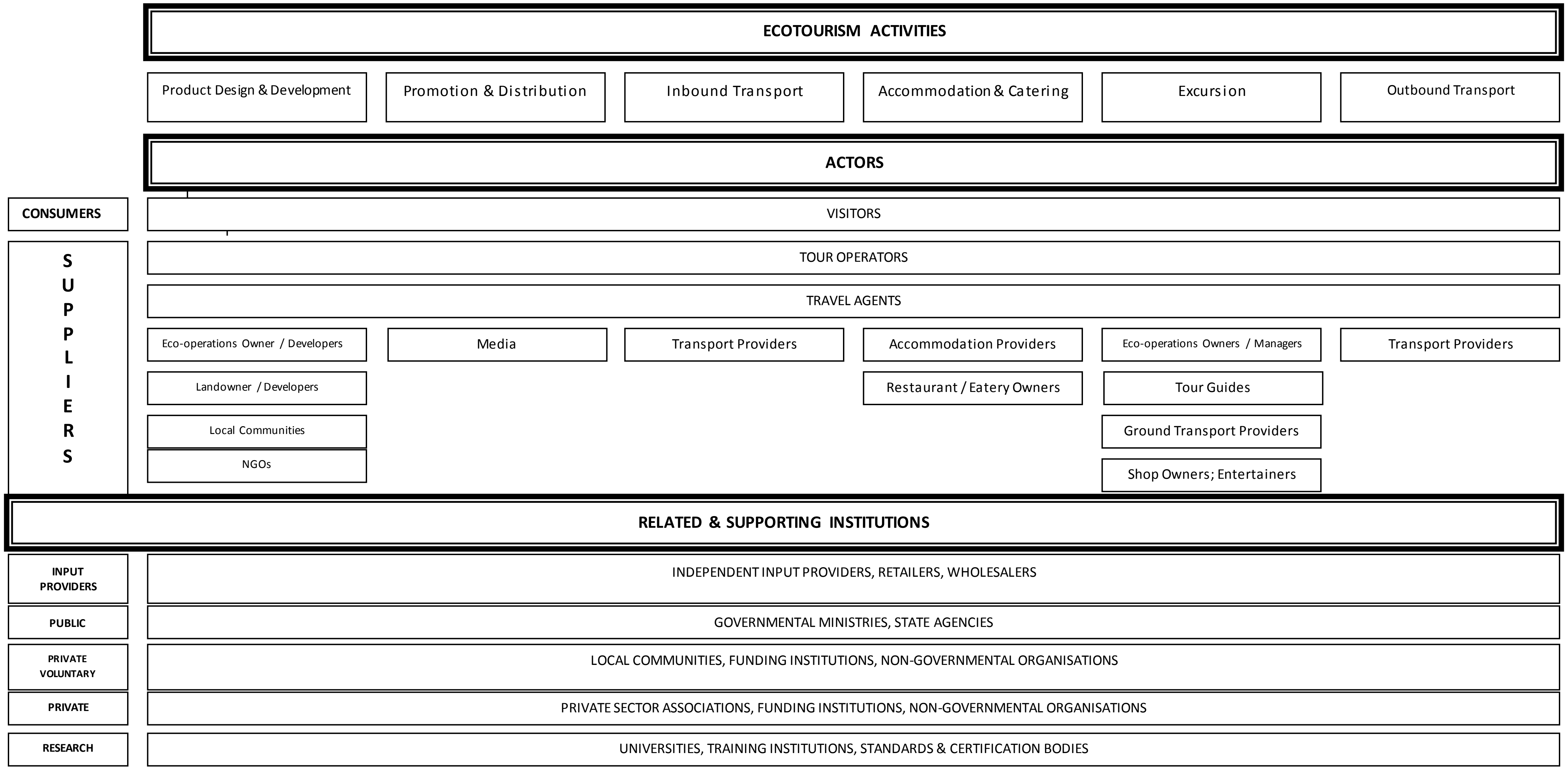
[26] Appendix 8 gives a listing of a number of donor agencies and the ecotourism projects and related programmes that have been initiated and supported by these agencies.

also included in this category, as these institutions provide debt and equity financing for the industry.

- **<u>Research, Training, Standards and Certification Bodies</u>**
  Institutions such as universities, colleges and training institutes provide teaching, training and research services to the industry. There are also laboratories, research labs and certification bodies that provide quality assurance and quality control services to the industry.

Figure 5.1 gives the input – output structure for the detailed value chain map for the ecotourism industry.

Figure 5.1: The Input - Output Structure for the Ecotourism Industry



5.1.2 Analysis of Geographic Scope of Ecotourism Industry

The nature of the tourism industry, and by extension, the ecotourism industry presents a number of issues for the analysis of the geographic scope. One such issue is that there are actors that operate across multiple activities on the value chain. Secondly, because of the inextricable bond between the tourism product and the destination country, the concept of the 'lead firm' has to be modified for the evaluation of specific activities on the value chain. Thirdly, in the ecotourism industry, both mainstream travel and tourism firms and specialist ecotourism travel and tourism firms operate along the value chain. Within this context, the geographic scope of the ecotourism industry is discussed below.

5.1.2.1 *Product Design and Development: Lead Ecotourism Destinations*

For the product design and development value chain activity, because of the nature of the ecotourism product, the concept of 'lead firm' is substituted by 'lead destination', which could be a community, town, country or region.

Consideration for the lead ecotourism destinations was guided by Cater's (2001) comment: '…ecotourism must be set into context, and that context is regional as well as site-specific' (p.88). In terms of the regional context, of the six regions considered in The Encyclopedia of Ecotourism[27]: Africa, Anglo-America, Asia, Oceania, Europe, and Latin America and the Caribbean, the following three regions: Anglo-America, Oceania, and Latin America and the Caribbean were the most relevant.

Anglo-America covered the United States and Canada, and was labeled the region where ecotourism was growing the fastest, both in terms of supply of ecotourism elements such as protected areas for outdoor activties such as birding, hiking and backpacking, and also in terms of domestic and international demand for nature tourism (Fennell, 2001). While there are a number of Not-For-Profit Organisations dedicated to ecotourism and sustainable tourism, such as The International Ecotourism Society (TIES) and Conservation International (CI), which have contributed to the development of policy, there still remains no consistent position on ecotourism among the various states in the United States, while in Canada, there is the overlapping use of nature and adventure tourism.

Oceania covered Australia, Nea Zealand and the South Pacific, and was labeled the region with one of the highest levels of interest in ecotourism (Dowling, 2001). The Oceania region is highly heterogeneous. Australia is characterised as having a well-established ecotourism industry, with a large number of tour operators and full-time staff working in the industry; demonstrated Government support by way of national ecotourism programmes; an ecotourism industry association; well-established infrastructure; and a rich array of natural resources. For New Zealand, while tourism was a well-established industry in the early 2000s, ecotourism was said to be in its embroynic stages, where there was no national ecotourism strategy nor a generally accepted definition The South Pacific is an island grouping with colonial heritage, of varying population sizes and resource structures. The Pacific Islands have a long established reliance on tourism based on natural and cultural resources. In terms of ecotourism, the industry is more well-developed in some islands, and is seen to have different foci: for some islands, the industry is more ecologically-driven than economically-driven (United Nations, 2003)

Latin America and the Caribbean (LAC) was labeled as a 'macro-region', standing out for the high profile of the ecotourism industry (Weaver & Schluter, 2001). The LAC region included Mexico, Central and South America and the Caribbean. This region, with some areas more dependent on tourism than others, is characterised by rich natural biodiversity and a long history in mass tourism, particularly 'Sun-Sand and Sea, and crusie-ship tourism. The region does not share a common definition of ecotourism, and

[27] The Encyclopedia of Ecotourism (2001) Edited by D. Weaver

there are varying degrees of ecotourism focus. The region's noteworthy ecotourism destinations include Costa Rica, Belize and Dominica.

For the purposes of this study, the lead destinations examined were countries in two regions: LAC region, and the Pacific Islands in the Oceania region, as the contexts of these two regions are most relevant to the CARIFORUM region. The rationale for the focus on the LAC region is that this is the geographic location of the CARIFORUM countries, while the rationale for the focus on the Pacific region is that, next to the Caribbean region, the Pacific region has the largest number of small island developing states (SIDS), and hence, this region shares several of the sustainable development challenges as the countries in the CARIFORUM region.

– LEAD ECOTOURISM DESTINATION IN LAC – COSTA RICA

In the LAC region, Costa Rica is said to be one of the lead ecotourism country destinations (Weaver & Schluter, 2001). With a total population of 4.805 million[28] and GDP per capita of 9,386 USD[29], the profile of the economy of Costa Rica is structured with agriculture, industry and services contributing 6%, 25% and 69% respectively[30]. In 2012[31], the Travel and Tourism Industry's direct contribution and total contribution to the GDP of Costa Rica were 4.8% and 12.3% respectively. Likewise, Travel and Tourism's direct and total contribution to employment were 4.5% and 11.4% respectively. In terms of global competitiveness, Costa Rica ranked 47th out of 140 countries in the World Economic Forum (WEF) 2013 survey of The Travel & Tourism Competitiveness Index (Blanke and Chiesa, 2013).

Costa Rica's natural attractions include a range of rainforests, volcanoes and beaches; as well as rich biodiversity, by way of highly diverse flora and fauna.

The Costa Rican Government assumed a formal role in tourism development in 1930. From that point, with the establishment of the National Tourism Board in 1931, Government has played an active role in tourism development, by way of formulating guiding polices, attracting financing, monitoring and evaluating the tourism product, and other tourism facilitating roles. The key state institution involved in the tourism industry is the Costa Rica Tourism Board (ICT), structured by way of one central office and eight regional offices.

Key elements supporting the Costa Rica's ecotourism product include the following:

- **The National System of Conservation Areas (SINAC)**
  This arm of the Ministry of Environment and Energy was established in 1994 to manage the country's natural protected areas. Twenty-six percent (26%) of the total geography of Costa Rica fall under SINAC, and comprise national parks, wildlife reserves, wetlands, biological and forest reserves and other conservation areas.

- **Certification of Sustainable Tourism (CST)**
  CST is a certification programme, developed by the Sustainability Programs Department of the ICT and the Costa Rica National Accreditation Commission. The CST functions relate to the monitoring

[28] Data obtained from The World Bank: http://data.worldbank.org/indicator/SP.POP.TOTL (accessed 15 December 2013)
[29] Data obtained from The World Bank: http://data.worldbank.org/indicator/NY.GDP.PCAP.CD (accessed 15 December 2013)
[30] Data obtained from The World Bank: http://data.worldbank.org/indicator/NY.GDP.PCAP.CD/countries (accessed 10 December 2013)
[31] Data obtained from WTTC - http://www.wttc.org/site_media/uploads/downloads/costa_rica2013.pdf (accessed 10 December 2013)

and evaluation of tourism companies in Costa Rica, and operate to minimize / eliminate the issue of 'green-washing' in Costa Rica. The following four aspects are evaluated:

i. Physical-biological interactions
Evaluates the interaction between the company and its surrounding natural habitat.

ii. Infrastructure and services (Exclusive for Lodging Companies)
Evaluates the management policies and operational systems within the company and its infrastructure.
Service Management (Exclusive for Tour Operator Agencies)
Evaluates the process used by the company in the design of the tourism product regarding the market trends and country characteristics

iii. External clients
Evaluates management actions taken in its invitation to clients to participate in the company's sustainability policy implementation.

iv. Socio-economic environment
Evaluates the company's interaction with local communities and population in general.
(http://www.turismo-sostenible.co.cr/)

On the CST website, there is a directory, which lists companies under the categories of Hotels, Tour Operator Agencies, Theme Parks and Car Rental Companies. Companies listed in the directory are categorized by levels, on a scale from 0 – 5, which indicate the degree of sustainability achievement.

- **Costa Rica Association of Rural Community Tourism (ACTUAR)**
ACTUAR was established in 2001, and is made up of over 40 partners involved in the ecotourism industry. ACTUAR later established its own tour operator company, called ACTUAR Rural Adventures. Its vision is:
Being a tour operator specializing in network and Rural Community Tourism Leader in Latin America, known for offering responsible travel to culture and nature of Costa Rica, helping to conserve the environment and preserve local cultures.

Potential visitors can access the ACTUAR website to select accommodation options that include hotels, inns and lodges; and excursion tours that are categorized by activities such as hiking, diving and bird watching, or by tour packages.

ACTUAR's website lists a number of the organisation's sustainability policies, including its policy on the design of its product, its policy on the promotion of local community development and its policy on buying practices (http://www.actuarcostarica.com/en/).

- **Ecotourism Education**
The foundation for ecotourism education is laid in the primary school systems, where environmental learning is part of the school curriculum, and extends to higher education. Formal training in ecotourism education is evident from as early as in the secondary school system, where even more focus is placed on environmental education. Further, a number of state secondary schools had, by 2003, introduced a technical and vocational qualification in the form of an ecotourism specialization, which focused on five subject areas: Environmental Education, Environmental Management, Ecology, Ecotourism, and English. The intended market destination for these graduates is in the ecotourism industry as nature guides, tour guides and environmental educators (Blum, 2008).

Additionally, Costa Rica is a major study tour destination for a number of foreign universities that have taught programs and study abroad ecotourism programs, including Ohio University, University of Vermont, University of Florida, and University of Otago.

In terms of informal ecotourism education, there are numerous public awareness campaigns in the national media, aimed at informing and educating the general public about ecotourism and environmental related national issues.

– LEAD ECOTOURISM DESTINATION IN THE PACIFIC REGION – FIJI

In the countries classified as SIDS in the Pacific Region, Fiji is said to be one of the lead ecotourism country destinations (Dowling, 2001). With a population of 874,742 and GDP per capita of 4,467 USD, the profile of the economy of Fiji is structured with agriculture, industry and services contributing 13%, 19% and 68% respectively[32]. In 2012[33], the Travel and Tourism Industry's direct contribution and total contribution to the GDP of Fiji were 13% and 35.8% respectively. Likewise, the Travel and Tourism's direct and total contribution to employment were 11.7% and 32.3% respectively.

Fiji is made up of over 300 islands. The natural attractions include marine and coastal attractions; forest, volcano and mountain attractions; and lake, river and wetland attractions; as well as a diverse cross section of flora and fauna.

The Ministry of Tourism and Transport is the main state agency managing the tourism industry. This ministry is supported by the National Tourism Council.

Key elements supporting the Fiji's ecotourism product include the following:

- **Quality Control Guiding Principles Outlined in The Ecotourism Policy**
  Work on Fiji's ecotourism policy started from as far back as 1995 (Economic and Social Commission for Asia and the Pacific, 2003). The resulting 1999 policy was titled: The Ecotourism and Village-Based Tourism Policy. In Fiji's Ecotourism and Village Based Tourism Policy, a number of guiding principles to shape the industry are outlined. Three of these quality control guiding principles are given below (Bricker, 2002):
    - Development of a central register for all ecotourism endeavors
    - Nationwide system of best practices or accreditation
    - Reward system for operators who adopt 'true' ecotourism principles

- **Singular Ecotourism Definition Outlined by the Ministry of Tourism and Transport**
  One of the criticisms of the Ecotourism and Village Based Tourism Policy was the imprecise use of the term 'ecotourism'. To meet with this shortcoming and to ensure consistency in the approach, the Ministry of Tourism and Transport articulated its ecotourism definition as follows (Bricker, 2002):
    A form of nature-based tourism which involves responsible travel to relatively undeveloped areas to foster an appreciation of nature and local cultures, while conserving the physical and social environment, respecting the aspirations and traditions of those who are visited and improving the welfare of local communities

32 All economic data obtained from World Bank statistics as per Costa Rica sources.

33 Data obtained from WTTC - http://www.wttc.org/site_media/uploads/downloads/fiji2013.pdf (accessed 5 January 2014)

- **Governance of the Ecotourism Industry – Fiji Ecotourism Association**
  The Fiji Ecotourism Association, first formed in 1992 and renewed in 1999, is made up of tourism industry players, government representatives, university researchers, NGOs and private individuals. The Association's main activities include promotion and distribution, ecotourism training, conservation and sensitization.

5.1.2.2 *Inbound and Outbound Transportation: Lead Firms in Airline and Cruise Line Industries*

For inbound and outbound transportation, the airline industry is estimated at 636 billion USD in 2012. Delta Airlines, Inc. is the lead firm with a market share of 5.3% (IBISWorld, 2013). Similarly, the size of the cruise line industry is estimated at 36.2 Billion USD. Carnival is a lead firm with 21.2% of the total share of worldwide passengers (http://www.cruisemarketwatch.com/market-share/).

5.1.2.3 *Excursion Activity: Lead Firms in Tour Operator Industry*

In terms of the tour operator market, the US industry was valued at 6 billion USD while the UK industry was valued at 9 billion GBP. The lead firms in the US were Flight Centre and The Mark Travel Corporation, while the lead firms in the UK were Thomas Cook Group plc and Trailfinders Limited (www.ibisworld.com).

In terms of specialist tour operators, one lead firm is Intrepid Travel, a group experiential tour operator that was established in 1989 (http://www.intrepidtravel.com). Intrepid Travel was the winner of the 2011 WTTC Global Tourism Business Award for best practices in sustainable tourism at large company level. Likewise, there is 'responsibletravel.com', a UK-based tour operator that organizes the annual World Responsible Tourism Awards.

5.1.3 Analysis of Governance

Lead firms in the Travel and Tourism industry generally originate from, and are headquartered in developed countries. The lead firms identified in the inbound and outbound transport industry are international airlines and cruise lines, originating out of the United States and the United Kingdom. Similarly, in terms of the mainstream tour operator industry, lead firms are again based in the developed countries.

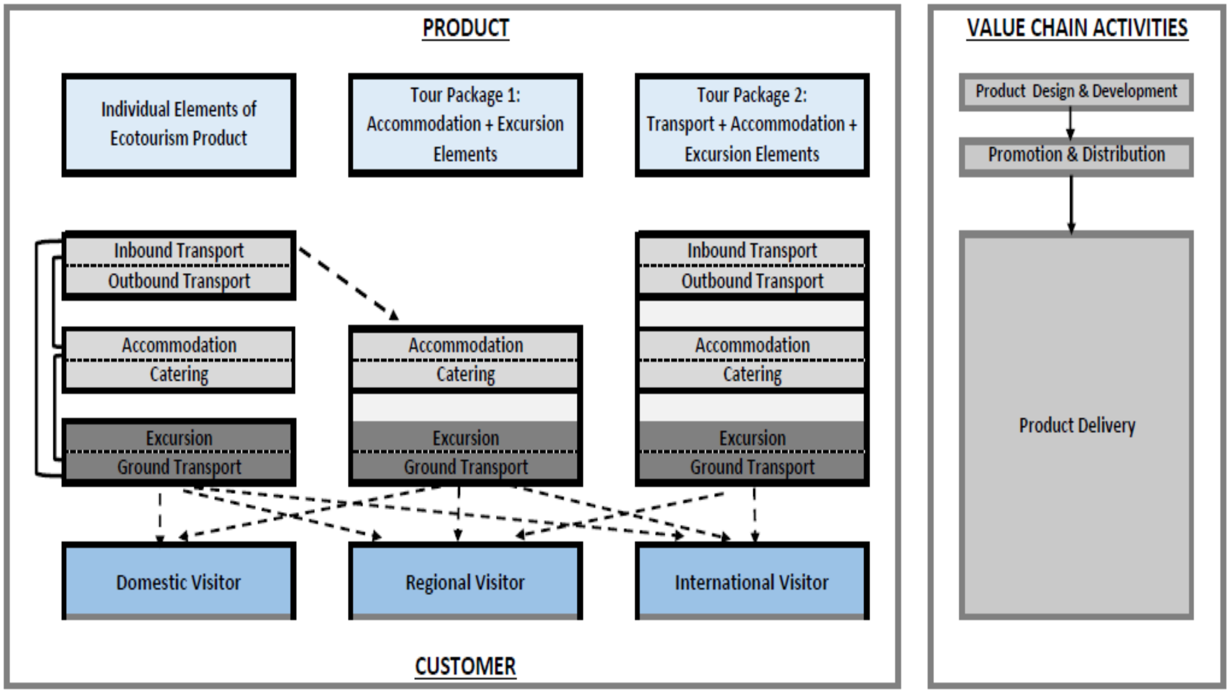
When, however, the activities shift to the country destinations, the local players in the industry: local tour operators, tour guides, accommodation and catering providers, emerge as lead players, based on their intimate knowledge of country customs, industry regulations, ecotourism attractions and other industry elements.

Further, players in the local industry are able to assume greater control in the industry via the use of company websites and social media, which allow for potential customers to contact them directly to learn about the ecotourism product offerings and packages, negotiate prices, make reservations and confirm travel arrangements.

5.2 The High-Level Ecotourism Value Chain

The three product types described in Section 2.2.3, and the related activities involved in designing and developing the product, marketing and distributing the product, and delivering the product form the basic components of a high-level ecotourism value chain as shown in Figure 5.2.

Figure 5.2: The High-Level Ecotourism Value Chain



5.2.1 Value Chain Analysis of Product Type 1

In Product Type 1, the visitor accesses the excursion activity, and if needed, the accommodation and catering element; and inbound and outbound transportation element.

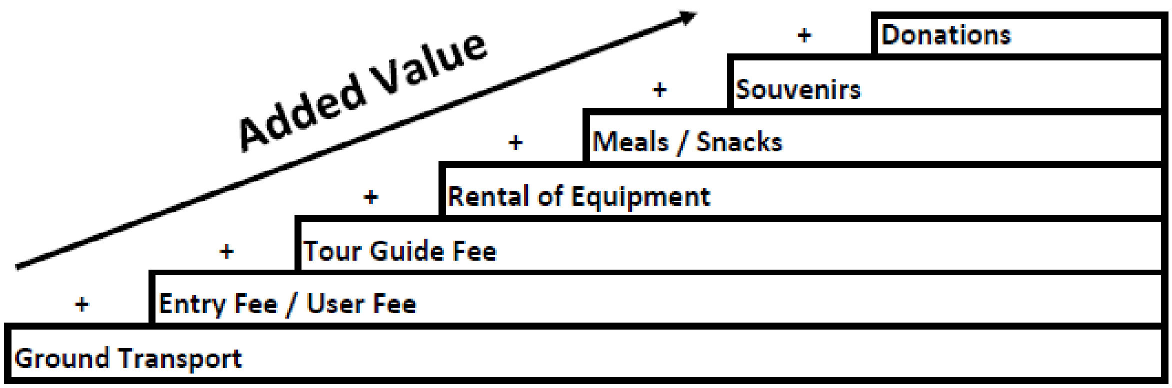
5.2.1.1 *Excursion Activity*

The excursion element of the ecotourism product, typically classified as day tours, varies tremendously, by way of variables such as the length of the excursion, the distance to be covered from the visitor's pick-up point to the excursion site(s), the type of land, water or air transportation provided, the number of attractions to be visited on the excursion, the type of activities included during the excursion, the use of tour guides, the inclusion of site entrance fees, and the provision of snacks, drinks and / or meals.

The excursion activity, therefore, can be sub-divided into a number of components (Figure 5.3). Depending on the motivations of the visitor, the location of the excursion attraction and the nature of the excursion, these components are combined as required.[34]

[34] Appendix 9 gives a random sample of reviews from ecotourists, as reported on Trip Advisor (www.tripadvisor.com) for excursion activities in each of the four countries.

Figure 5.3: Components of the Ecotourism Excursion Activity



With the heterogeneity of this excursion activity, there is the associated variation in prices. Table 5.1 shows a sample of average prices taken from a cross–section of operators doing business in the four CARIFORUM countries[35].

Table 5.1: Average Prices of Ecotourism Excursion Activities in the Four CARIFORUM Countries

		The Bahamas	**St. Kitts and Nevis**	**Trinidad and Tobago**	**Guyana**
ATTRACTION	**ACTIVITY**	**PRICES (USD)**			
Forest, Mountain, Waterfall, Volcano	Birding	79 - 219	64 - 105	50 - 245	30 - 290
	Hiking	79	50 - 105	50 - 245	30 - 290
	Nature Tour	79	20 - 70	50 - 245	30 - 290
	Biking	79 - 139		40 - 50	
	Horseback Riding	130	55 - 70	60 - 84	
Coastal & Marine Lake, River, Wetland	Diving / Scuba	109 - 180	20 - 150	45 - 190	
	Boating	175	61 - 95	45 - 190	
	Swim / Snorkelling	35 - 170	20 - 150	45 - 190	

[35] Similar type excursion activities offered by Green Way Nature Tours in Costa Rica range from 49 USD – 120 USD (http://www.greenwaytours.com//Costa-Rica-Tour/costa-rica-tours.htm).
Similar type excursion activities offered by Aqua Fiji Tours in Fiji range from 79 USD – 154 USD (http://www.aquatoursfiji.com/)

	Turtle Watching		60	100 - 255	

Table 5.2 gives a description of the components, as well as the actors that are involved in the creation and capture of value of these components.

Table 5.2: Components of the Ecotourism Excursion Activity and Relevant Value Chain Actors

	Excursion Element	Comments	Value Chain Actors
1	**Ground Transport to Attraction**	Dependent on attraction's location and visitor's point of origin. At the minimum, the attraction may be walking distance from visitor's accommodation. Visitors on independent tours may walk / hike, or use bike or car rentals, public transport or hotel shuttles. Visitors on escorted tours may use any of the above or chartered transport arranged by tour guide / tour operator / accommodation provider.	Bike or Car Rental Company Taxi / Bus / Boat / Ferry / Plane Company Private Taxi / Bus / Boat / Ferry / Plane Operator Tour Guide Tour Operator
2	**Entry Fee / User Fee**	Entry / User Fee may range from nominal value contributing to operating expenses, to market value contributing to profits.	Owner / Manager of Excursion Attraction
3	**Tour Guide Fee**	Tour Guide Fee may range from hourly rate to standard tour rate. Customised tours at associated rates may also be available.	Tour Guide Tour Operator
4	**Rental or Purchase of Excursion-Related Equipment**	Rental fee may range from hourly rate to standard tour rate.	Owner / Manager of Excursion Attraction Tour Guide Tour Operator Input Provider (Private equipment company)
5	**Meals / Snacks / Drinks**	Meal options may be included in day-tour price or may be optional add-ons.	Owner / Manager of Excursion Attraction Tour Guide Tour Operator Input Provider (Restaurant, Concessionaire, Food & Beverage Distributors & Manufacturers, Raw Material & Packaging Material Supplier)
6	**Souvenirs**	May be included in day-tour price or may be optional add-ons.	Owner / Manager of Excursion Attraction Tour Guide Tour Operator Input Provider (Manufacturers, Raw Material & Packaging Material Supplier)
7	**Donations**	Voluntary contribution to support conservation activities and other operating activities	Owner / Manager of Excursion Attraction

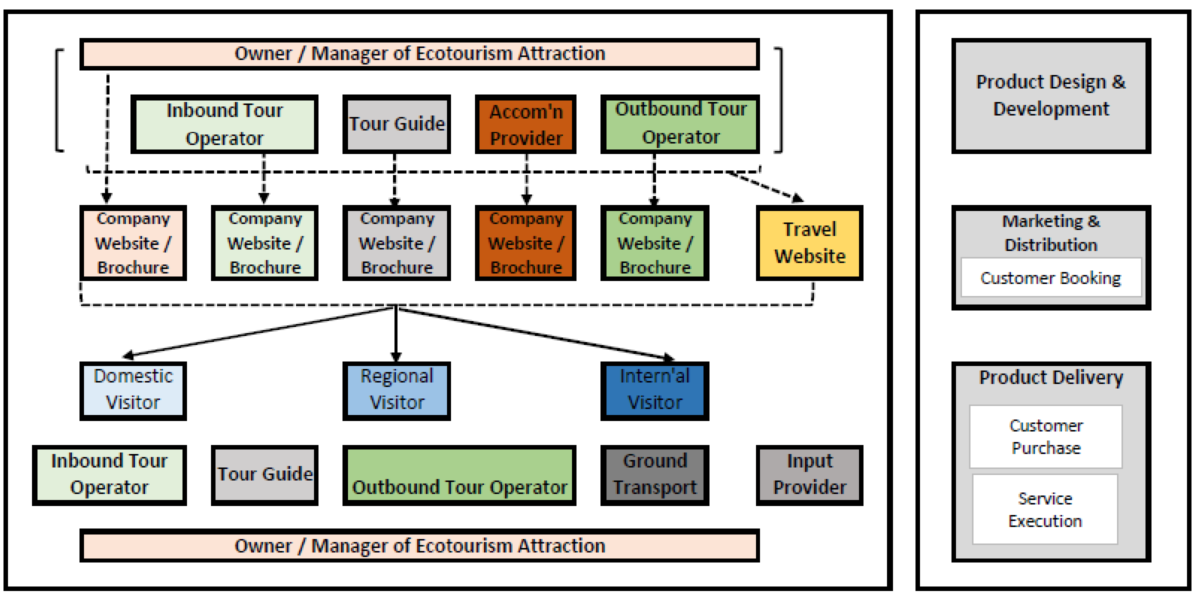
From Table 5.2, the Owner / Manager of the Excursion Attraction, Tour Operator and Tour Guide appear to have the greatest potential for creating and capturing value in this Excursion activity. However, the role of the Tour Guide and the Tour Operator is primarily limited to the visitor's decision to partake in an escorted tour or the mandatory use of tour guides at certain ecotourism attractions, as opposed to the visitor undertaking an independent tour.

Of the three types of visitors, the Domestic Visitor is typically the most familiar with local attractions, which may imply that independent tours may be the preferred choice. In cases when independent tours are taken, the major value chain actor is Owner / Manager of Excursion Attraction. When, however, escorted tours are taken, the major value chain actors are the Inbound Tour Operator and Tour Guide.

For the Regional and International Visitors, escorted tours may be more popular for first-time visitors, and so, the Inbound Tour Operator and Tour Guide are the major actors. Additionally, for these visitors who may have a casual interest in visiting an ecotourism attraction, they may rely on advice received from Accommodation Providers for possible tour options and also recommendations for tour operators and tour guides. For repeat visitors or frequent visitors who are familiar with the destination, independent tours would be more popular.

With the proliferation of company websites, industry association websites, and general travel websites, information regarding the excursion activity is readily available. Further, the visitors have a number of options for making bookings and payments for these tours, via online advanced bookings and payments or in-person at the time of the excursion (Figure 5.4).

Figure 5.4: Major Value Chain Actors Involved in the Ecotourism Excursion Activity

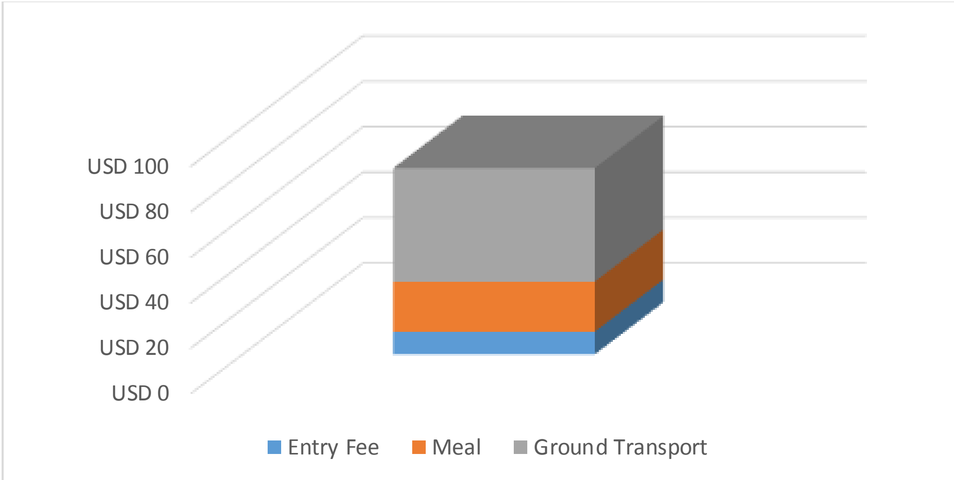


As shown in Table 5.2, the excursion activity can be made up of a single component or a combination of any of the seven components. An illustration of a land-based excursion in Trinidad and Tobago is provided in Figure 5.5, where a single visitor who uses a rented car[36] to go on an independent visit to the

[36] Car rental rates based on Medium Sized Car's Daily Rate at Econo-Car Rentals (http://www.econocarrentalstt.com/trinidad-car-rentals.html)

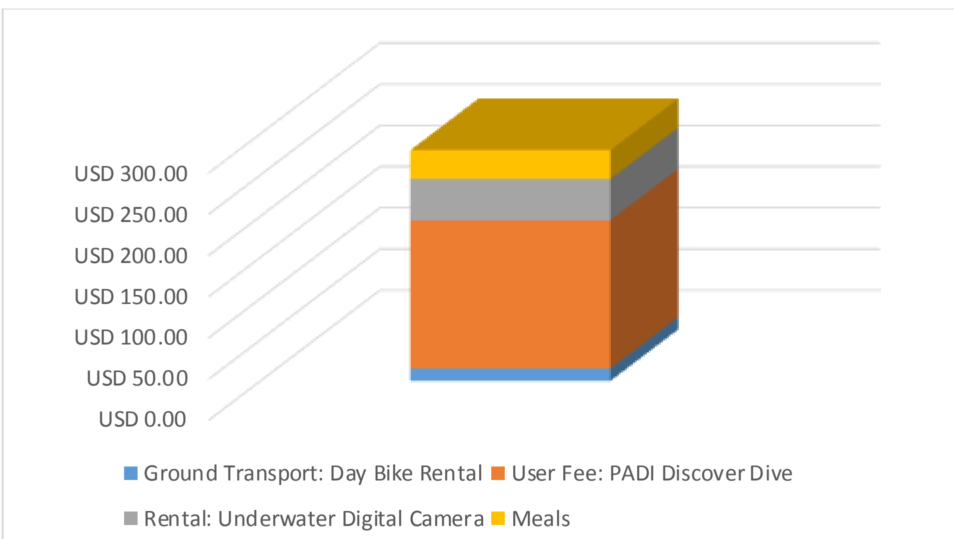
Asa Wright Nature Centre in Arima Trinidad and purchases lunch at the Centre would incur a total cost of USD 82.

Figure 5.5: Price Breakdown for Single Visitor to Asa Wright Nature Centre in Arima, Trinidad



An example of a water-based excursion in The Bahamas is provided in Figure 5.6, where a single visitor who uses a rented bicycle to cycle from a nearby hotel, goes on a Dive Guana full day trip (10 am – 4 pm) PADI Discover scuba trip, rents an underwater digital camera and purchases lunch from an Abacos restaurant, incurs a total cost of USD 280[37].

Figure 5.6: Price Breakdown for Single Visitor on Dive Guana Full Day Scuba Trip in The Bahamas



[37] Prices obtained on http://www.diveguana.com/pricelist.html

5.2.1.2 *Accommodation and Catering Activity*

The accommodation and catering activity in the ecotourism industry spans a spectrum of options, ranging from basic non-serviced accommodation as in some camping sites to full all-inclusive accommodation of some 5-star eco-resorts. Figure 5.7 gives an outline a number of the accommodation and catering options.

Figure 5.7: Accommodation and Catering Options in the Ecotourism Industry

▪ **All Inclusive Accommodation**
▪ **Serviced Sleeping Facility & 1 or More Meal Options**
▪ **Serviced Sleeping Facility & Self Catering Facility**
▪ **Serviced Sleeping Facility**
▪ **Non-Serviced Sleeping Facility & Self Catering Facility**
▪ **Non-Serviced Sleeping Facility**

Generally speaking, as we move from the non-serviced sleeping facility to the all-inclusive accommodation, the value created and captured by the value chain actors increases.

Table 5.3 shows a number of accommodation and catering options, as well as the actors that are involved in the creation and capture of value of these components.

Table 5.3: Accommodation and Catering Options in the Ecotourism Industry and Relevant Value Chain Actors

	Accommodation Type	Comments	Value Chain Actors
1	**Open Air / Tents / Campsites**	Camping may range from minimalist-type accommodation, with limited amenities to accommodation with a number of amenities. Camping equipment may be rented. Because of remote settings, meals are generally provided or visitors may be involved in meal preparation as part of the experience. Accommodation option may be advertised on excursion attraction website or by travel agent, tour operator or tour guide.	Owner / Manager of Excursion Attraction Tour Operator Input Provider (Private company renting equipment, Food and Beverage Supplier)
2	**Host Homes**	Visitors stay in accommodation provided by local community residents. Meals generally provided or visitors may be involved in meal preparation as part of the experience or not included in accommodation fee. Accommodation option may be advertised on excursion attraction website / host community website or by travel agent or tour operator.	Private Host Home Owner Local Community Tour Operator Input Provider (Food and Beverage Supplier)
3	**Specialist Eco-type Communal Accommodation**	Tour group uses shared accommodation, inclusive of sleeping quarters, eating areas and toilet and bathing facilities. Meals generally provided or visitors may be involved in meal preparation as part of the experience. Accommodation option may be advertised on specialist or mainstream travel website, communal accommodation website or by travel agent, tour operator or tour guide.	Owner / Manager Excursion Attraction Accommodation Provider Travel website / Travel Agent / Tour Operator Input Provider (Food and Beverage Supplier)
4	**Specialist Eco-type Private Accommodation**	Private accommodation, inclusive of sleeping quarters, and toilet and bathing facilities. Catering options may range from self-catering to all food and beverage provided. Accommodation option may be advertised on specialist or mainstream travel website, accommodation website or by travel agent, tour operator or tour guide.	Accommodation Provider Travel website / Travel Agent / Tour Operator Input Provider (Food and Beverage Supplier)

Table 5.3 Continued: Components of Accommodation and Catering Activity and Relevant Value Chain Actors

	Accommodation Type	Comments	Value Chain Actors
5	**Mainstream Accommodation**	Private accommodation, inclusive of sleeping quarters, and toilet and bathing facilities. Catering options may range from self-catering to all food and beverage provided. Accommodation option may be advertised on mainstream travel website, accommodation website or by travel agent, tour operator or tour guide.	Accommodation Provider Input Provider (Food and Beverage Supplier) Travel website / Travel Agent / Tour Operator

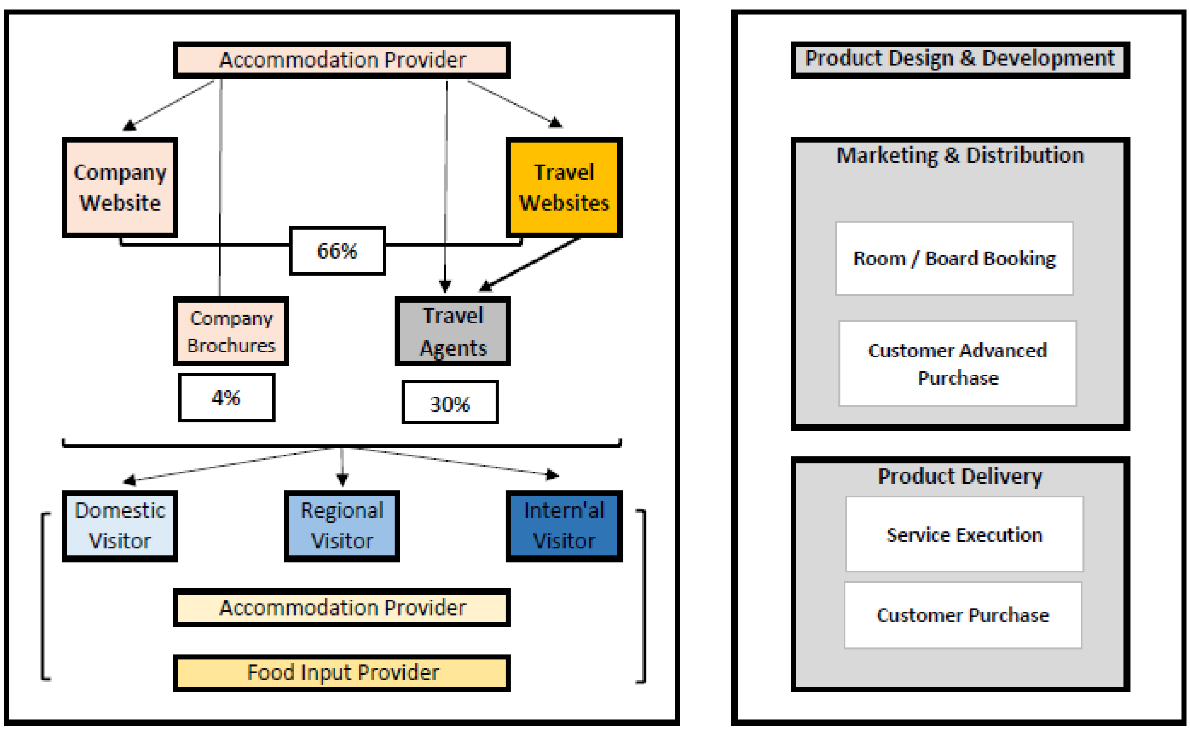
From Table 5.3, the Accommodation Provider is the major value chain actor creating and capturing value in the accommodation and catering activity.

The type of accommodation option available is dependent on a number of factors, inclusive of the type of ecotourism practiced. For example, host home accommodation is mainly a feature of Community-Based Ecotourism (CBE). Likewise, the camping and communal accommodation options are typically available when the accommodation is located in the natural attraction, such as in the forest.

Of the three types of visitors, the demand for accommodation from the Domestic Visitor typically is the lowest. When accommodation is indeed required, the Domestic Visitor typically would require short-term accommodation. Regional and international visitors generally require longer term accommodation ranging from 7 days – 21 days.

Online booking of accommodation is widespread. For example, accommodation has been found to be the second most popular travel product purchased online by American travelers (Park, Wang, & Fesenmaler, 2011), with reported statistics regarding the actual amount of customer online accommodation bookings approximating to 66%, with 30% booking done by travel agents and the remaining 4% done via face-to-face bookings (Figure 5.8).

Figure 5.8: Major Value Chain Actors Involved in the Accommodation and Catering Activity



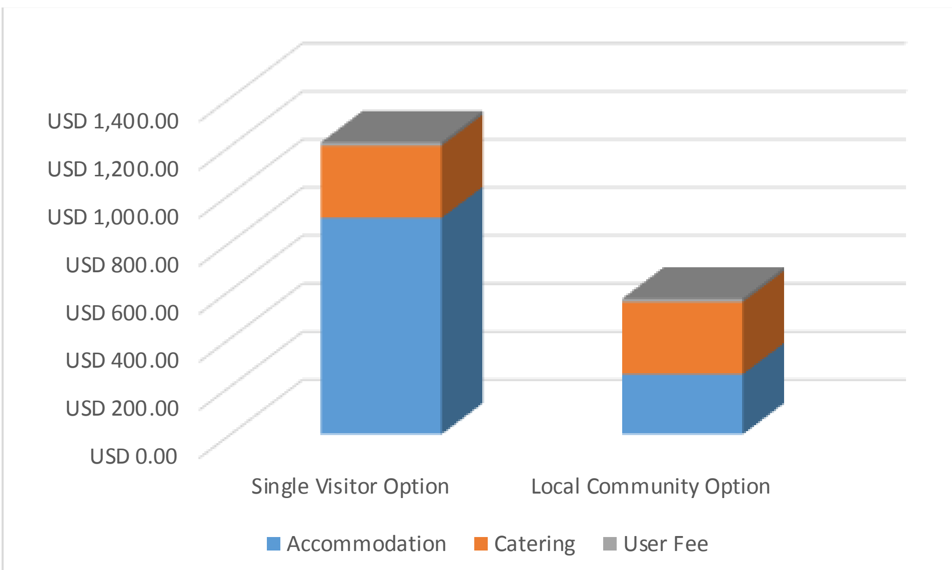
An illustration of the pricing at one of Guyana's popular nature-based accommodation options, Iwokrama Canopy Walkway (http://iwokramacanopywalkway.com/rates/) is given in Table 5.4:

Table 5.4: Accommodation Rates in Iwokrama Canopy Walkway, Guyana

Accommodation Type (USD)		Catering (USD)		User Fee (USD)
Host Home	50	Bed & Breakfast	15	15 (Per Visitor)
Camping - Hammock	60	Lunch	20	
Group Rate per Visitor	170	Dinner	25	
Single Visitor Rate	180			

Therefore, for a single visitor staying six days and five nights, inclusive of all meals (5 breakfast meals, 5 lunches and 5 dinners), would incur a total cost of 1215 USD if he chooses the Single Visitor option or 565 USD if he chooses the Host Home option (Figure 5.9).

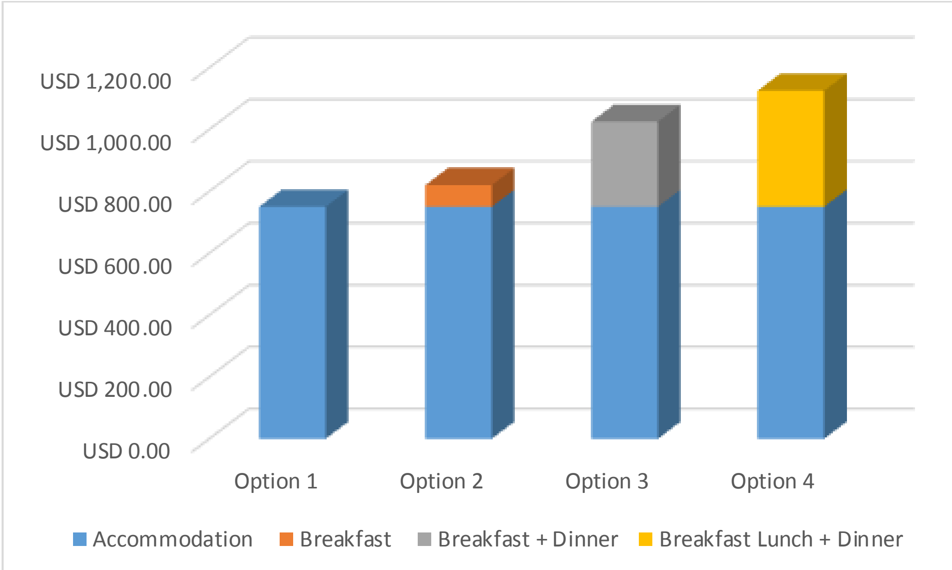
Figure 5.9: Price Breakdown for Two Accommodation Options at Iwokrama Canopy Walkway in Guyana



In another example, a single visitor staying six days and five nights at the Oualie Beach Resort in Nevis[38] has four options: Room only: USD 750; Room and Breakfast: USD 820; Room, Breakfast and Dinner: USD 1025 and Room and All Meals: USD 1125 (Figure 5.10).

[38] Rates obtained from http://www.oualiebeach.com/rates-and-room-types

Figure 5.10: Price Breakdown for Four Accommodation Options at Oualie Beach Resort in Nevis



5.2.1.3 *Inbound and Outbound Transportation Activity*

The inbound and outbound transportation activity in the ecotourism industry for the CARIFORUM countries primarily involve air and sea transportation options[39] for international and regional visitors. However, for mainland countries such as Guyana, Suriname and Belize, land transportation options are also alternatives.

Table 5.5 shows a number of transportation options, as well as the actors that are involved in the creation and capture of value of these options.

Table 5.5: Transportation Options in the Ecotourism Industry and Relevant Value Chain Actors

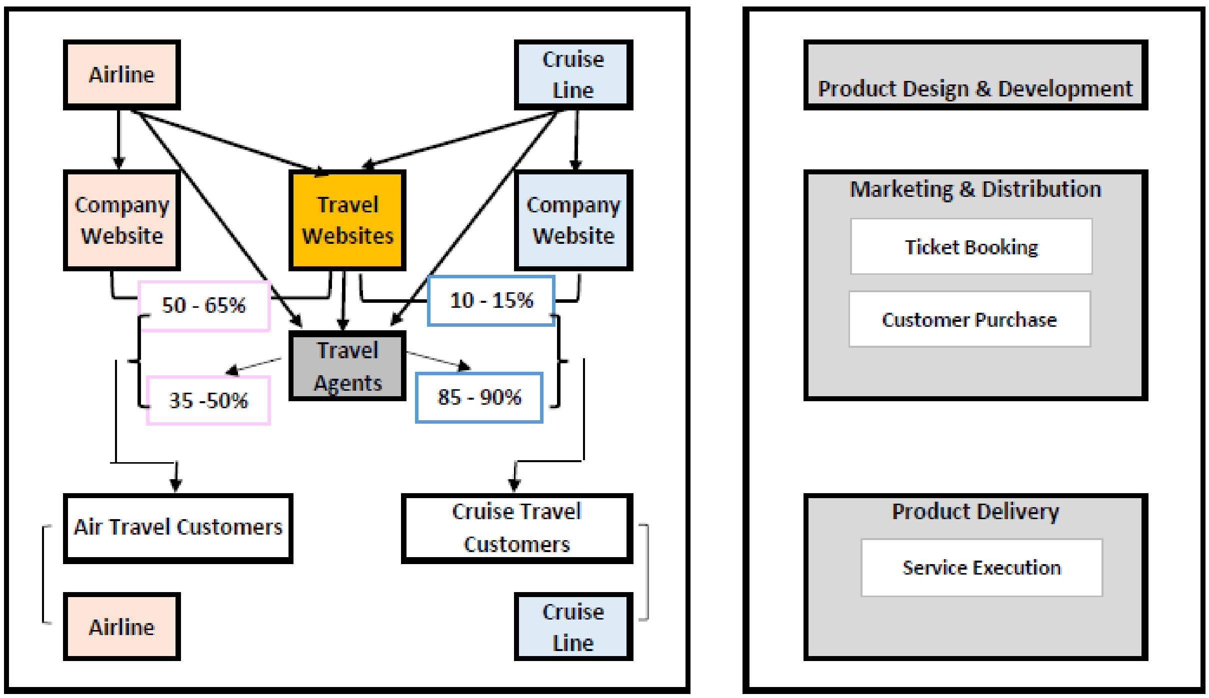
	Transport Type	Comments	Value Chain Actors
1	**Air Travel**	Commercial, chartered and private international, regional and inter-island flights for international, regional and local visitors	Airline Companies Private Plane Companies Travel Website / Travel Agent / Tour Operator
2	**Sea Travel**	International cruises for international visitors Regional and inter-island ferries or boats for regional visitors	Cruise Companies Ferry Companies Private Boat / Ferry Operators Travel Website / Travel Agent / Tour Operator
3	**Land Travel**	Private or rental vehicles, public transport and chartered buses or coaches for regional visitors	Car Rental Companies Taxi or Bus Companies Private Taxi or Bus Operators

[39] A listing of the commercial airlines and cruise lines operating in the four CARIFORUM countries is provided in Appendix 10.

From Table 5.5, the transportation provider: airlines in the case of air inbound and outbound transportation; cruise companies in the case of cruise travel; is the major value chain actor creating and capturing value in the inbound and outbound transportation activity.

Airline tickets are most popular travel product purchased online by American travelers (Park, Wang, & Fesenmaler, 2011), with reported statistics regarding the customer airline online purchases at 50% - 65% and travel agent purchases ranging from 35% - 50%. Similarly, with cruise travel, reported statistics for customer online purchases range from 10% - 15%, and travel agent purchases range from 85% - 90% (Figure 5.11).

Figure 5.11: Major Value Chain Actors Involved in the Inbound and Outbound Transportation Activity



Inbound and outbound transportation costs in terms of airfares cover a range of fees, which may be published or unpublished fares. Table 5.6 gives an example of round-trip airfares for the four CARIFORUM countries from the three most popular markets: United States, Canada and United Kingdom.

Table 5.6: Round-trip Fares for the Four CARIFORUM Countries from the Three Most Popular Visitor Markets

Destination	Visitor Market		
	New York, USA	Ontario, Canada	London, United Kingdom
	Low – High Fares (USD)[40]		
The Bahamas	323 - 553	465 - 586	1247 – 3451
St. Kitts and Nevis	821 - 917	776 - 1050	2323 – 5241
Trinidad and Tobago	425 - 627	412 - 865	1322 – 3463

[40] The airfares obtained from Expedia on 18.04.2014, for a travel period of May 12 – 17, 2014.

Guyana	697 - 707	638	2787 – 3921

5.2.2 Value Chain Analysis of Product Type 2

Product Type 2 is the accommodation and excursion tour package product. With this product type, there are varying tour lengths, the excursion activities are timetabled, and specific accommodation sites are selected. This product type is primarily offered by international tour operators and to a lesser extent, offered by local tour operators.

Product Type 2 varies by the number of scheduled excursion activities, the multiple components associated with the excursion activities (Figure 5.3), the type of accommodation, the length of the stay, the meal and snack options, and other accommodation amenities.

Table 5.7 shows two accommodation and excursion tour package options, as well as the actors that are involved in the creation and capture of value of these options.

Table 5.7: Accommodation and Excursion Tour Package in the Ecotourism Industry and Relevant Value Chain Actors

	Product Type 2 Variants	Comments	Value Chain Actors
1	**Standard Tour Package**	Tour packages are typically part of a specialist tour operator's product catalogue. Tour itinerary is fixed, giving detailed timetable for each day of the tour. Tour operator typically has special arrangement with select accommodation providers, and local tour guides and / or local tour operators.	International Tour Operator Local Tour Operator Tour Guide Accommodation Provider Specialist Travel Website
2	**Customised Tour Package**	Tour operator customises tour package to meet special requirements of individuals or groups.	International Tour Operator Local Tour Operator Tour Guide Accommodation Provider Specialist Travel Website

Two examples of standard accommodation and excursion tour packages are shown in Table 5.8, for 10-day birding tours to Trinidad and Tobago and Guyana, offered by an international tour operator and a local tour operator respectively.

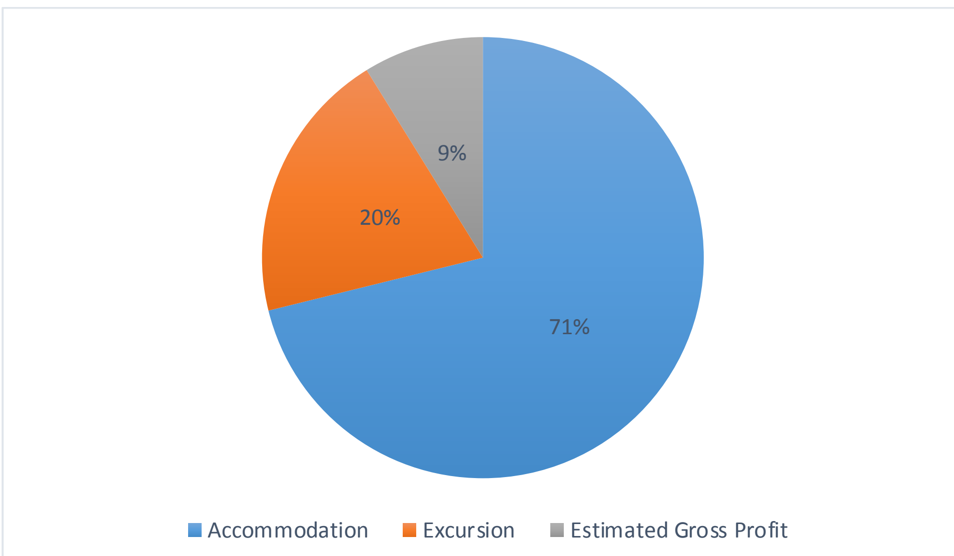
Table 5.8: Examples of Accommodation and Excursion Tour Packages to Trinidad and Tobago and Guyana

Tour Title	Tour Operator	Details	Price USD
Classic 10-Day Trinidad and Tobago Tour	Caligo Ventures Nature Tours and Travel (Based in USA) (http://caligo.com/)	10 day/ 9 night Tour Package Days 1 – 6 spent in Trinidad Days 7 – 10 spent in Tobago Accommodation in Trinidad – Asa Wright Nature Centre Accommodation in Tobago – Cuffie River Nature Retreats / Blue Waters Inn (Price for dates: Oct 11 – 20, 2014)	2195 (DBL)[41] 2495 (SGL)
Guyana Bird Tour	Dagron Tours (Based in Guyana) (Based in Guyana) (http://www.dagron-tours.com)	10 day / 9 night Tour Package Main visits to Georgetown, Iwokrama rainforest Reserve, and Karanambu Ranch	2695

As in the case in Product Type 1, the value of the accommodation element and the excursion element in Product Type 2 varies in terms of the type of accommodation and catering options for the former, and the presence of the various components in the latter.

For example, based on the itinerary of the Classic 10-day Trinidad and Tobago Tour outlined in Table 4.8, the individually priced accommodation and catering element amounts to 71% of the total package using the single occupancy rates. Similarly, as described in the itinerary, the excursion element amounts to 20% of the total package using estimates of individual priced excursion tours (Figure 5.12).

Figure 5.12: Value of Accommodation and Excursion Elements in Product Type 2



Source: Based on Author's Calculations[42]

[41] DBL – Double Occupancy / SGL – Single Occupancy

[42] The Accommodation element was based on advertised rates on the respective accommodation providers in Trinidad and Tobago: Asa Wright Nature Centre (180 USD x 6 nights) and Cuffie River Retreat respectively (232 USD x 3 nights). These prices included all meals. The Excursion element was based on the advertised prices for excursions to the North Coast, Aripo, Nariva and Tobago Island; and the inter-island flight between Trinidad and Tobago).

5.2.3 Value Chain Analysis of Product Type 3

Product Type 3 is the transportation, accommodation and excursion tour package product. Like Product Type 2, this product type is primarily offered by international tour operators and to a much lesser extent, offered by local tour operators.

Table 5.9 shows two accommodation and excursion tour package options, as well as the actors that are involved in the creation and capture of value of these options.

Table 5.9: Transportation, Accommodation and Excursion Tour Package in the Ecotourism Industry and Relevant Value Chain Actors

	Product Type 3 Variants	Comments	Value Chain Actors
1	**Standard Tour Package**	Tour packages are typically part of a specialist tour operator's product catalogue. Tour itinerary is fixed, giving detailed timetable for each day of the tour. Tour operator typically has special arrangement with select accommodation providers, and local tour guides and / or local tour operators.	International Tour Operator Local Tour Operator Tour Guide Accommodation Provider Airline Companies
2	**Customised Tour Package**	Tour operator customises tour to meet special requirements of individuals or groups.	International Tour Operator Local Tour Operator Tour Guide Accommodation Provider Airline Companies

Two examples of standard tour packages are shown in Table 5.10, for birding tours to Trinidad and Tobago and Guyana, offered by an international tour operator and local tour operator respectively.

Table 5.10: Examples of Accommodation and Excursion Tour Packages to Trinidad and Tobago and Guyana

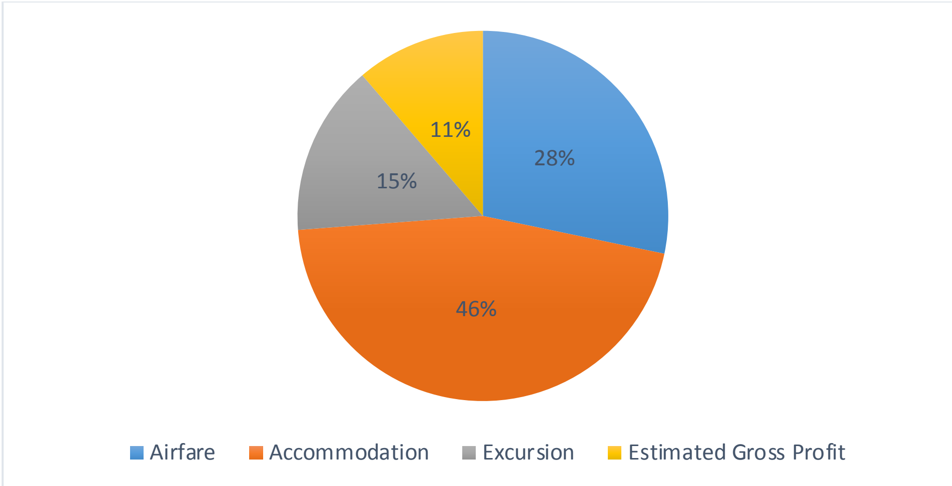
These values may vary based on special tour package contracts between the outbound tour operator, and the accommodation provider, inbound tour operator and / or ground transport provider.

Tour Title	Tour Operator	Details	Price USD
Trinidad and Tobago Bird Watching Holiday	Responsible Travel (Based in UK) (http://www.responsibletravel.com/)	12 day/ 11 night package Departure from London Gatwick Days 1 – 7 spent in Trinidad Days 8 – 11 spent in Tobago Accommodation in Trinidad – Asa Wright Nature Centre Accommodation in Tobago – Blue Waters Inn	3610 - 5004
Guyana Birding Bonanza	Dagron Tours (Based in Guyana) (http://www.dagron-tours.com)	16 day / 15 night package Flights from the UK Main visits to Kaieteur Falls, Iwokrama Atta Lodge, Surama, Rewa, Karanambu, Dadawana Ranch and Sloth Island	5876

As in the case in Product Type 2, the value of the accommodation element and the excursion element in Product Type 3 varies in terms of the type of accommodation and catering options for the former, and the presence of the various components in the latter.

For example, based on the itinerary of the Trinidad and Tobago Bird Watching Tour outlined in Table 5.11, the airfare element accounts for 28% of the tour package, the individually priced accommodation and catering element amounts to 46% of the total package using the single occupancy rates, and the excursion element amounts to 15% of the total package using estimates of individual priced excursion tours (Figure 5.13).

Figure 5.13: Value of Transportation, Accommodation and Excursion Elements in Product Type 3



Source: Based on Author's Calculations[43]

[43] The Accommodation element was based on advertised rates on the respective accommodation providers in Trinidad and Tobago: Asa Wright Nature Centre (180 USD x 7 nights) and Blue Waters Inn respectively (180 USD x 4 nights). These prices included all meals. The Excursion element was based on the advertised prices for excursions to the North Coast, Aripo, Nariva, Caroni Swamp, Tobago Island Tour and Little Tobago Island; and the inter-island flight between Trinidad and Tobago).
These values may vary based on special tour package contracts between the outbound tour operator, and the accommodation provider, inbound tour operator and / or ground transport provider.

6. Market Analysis of Ecotourism Industry

The market analysis of the ecotourism industry considers the demand and supply sides of the industry. The market analysis is predicated on the nature of ecotourism as per the five characteristics outlined in the adopted UNWTO definition.

On the demand side, market size and market trends will be discussed, while on the supply side, a competitive analysis of the industry is outlined.

6.1 Market Analysis of the Demand for Ecotourism

The demand for the ecotourism product is made up of a spectrum of casual ecotourists to hardcore ecotourists.

6.1.1 Market Size

The market size of the ecotourism industry of the four CARIFORUM countries is estimated using tourism industry statistics provided by the WTTC and the UNWTO. As per the international estimates of the value of the ecotourism industry in relation to the overall tourism industry, three estimates are considered: Low (1% - 2%), Medium (5% - 10%) and High (20% - 40%) (as discussed in Section 3.2).

Tables 6.1 – 6.3 show the estimates of the size of the ecotourism industry in relation to three measures: Travel & Tourism Total Contribution to GDP, International Tourist Receipts, and International Tourist Arrivals. Also included are figures for Costa Rica and Fiji, the two lead destinations discussed in Chapter 5.

Table 6.1: Estimates of Ecotourism Industry's Contribution to GDP in Relation to the Travel & Tourism Industry

	Actual 2012 WTTC Travel & Tourism Total Contribution to GDP (USD' million)	Estimates of Ecotourism Industry's Contribution to GDP (USD' million) using Percentages of Travel & Tourism Total Contribution to GDP		
		Low (1%-2%)	Medium (5%-10%)	High (20%-40%)
The Bahamas	3785.4	37.85 – 75.71	189.27 – 378.54	757.08 – 1514.16
St. Kitts & Nevis	185.8	1.86 – 3.72	9.29 – 18.58	37.16 – 74.32
Trinidad and Tobago	2018.2	20.18 – 40.36	100.91 – 201.82	403.64 – 807.28
Guyana	264	2.64 – 5.28	13.2 – 26.4	52.8 – 105.6
Costa Rica	5056.69	50.57 – 101.14	252.83 – 505.69	1011.34 – 2022.68
Fiji	1344.38	13.44 – 26.88	67.22 – 134.44	268.88 – 537.76

Table 6.2: Estimates of Ecotourism Industry's Share of International Tourist Receipts

	Actual 2012 UNWTO Total International Tourist Receipts (USD' million)	Estimates of Ecotourism Industry's International Tourist Receipts (USD' million) using Percentages of Total International Tourist Receipts		
		Low (1%-2%)	Medium (5%-10%)	High (20%-40%)
The Bahamas	2367	23.67 - 47.34	118.35 - 236.7	473.4 - 946.8
St. Kitts & Nevis	94	0.94 - 1.88	4.7 - 9.4	18.8 - 37.6
Trinidad and Tobago[1]	450	4.5 – 9	22.5 - 45	90 – 180
Guyana[1]	80	0.8 - 1.6	4.0 - 8.0	16.0 - 32.0
Costa Rica	2425	24.25 - 48.5	121.25 - 242.5	485 – 970
Fiji	728	7.28 - 14.56	36.4 - 72.8	145.6 - 291.2

[1] UNWTO Total International Tourist Receipts and Arrivals are 2010 statistics

Table 6.3: Estimates of Ecotourism Industry's Share of International Tourist Arrivals

	Actual 2012 UNWTO Total International Tourist Arrivals	Estimates of Ecotourism Industry's International Tourist Arrivals using Percentages of Total International Tourist Arrivals		
		Low (1%-2%)	Medium (5%-10%)	High (20%-40%)
The Bahamas	1419000	14190 – 28380	70950 - 141900	283800 – 567600
St. Kitts & Nevis	102000	1020 – 2040	5100 - 10200	20400 – 40800
Trinidad and Tobago[1]	386000	3860 – 7720	19300 - 38600	77200 – 154400
Guyana[1]	152000	1520 – 3040	7600 - 15200	30400 – 60800
Costa Rica	2343000	23430 – 46860	117150 - 234300	468600 – 937200
Fiji	661000	6610 – 13220	33050 - 66100	132200 – 264400

[1] UNWTO Total International Tourist Receipts and Arrivals are 2010 statistics

As Tables 6.1 – 6.3 show, the economic impact of the ecotourism industry in the four CARIFORUM countries is dependent on the ecotourism industry's true share of the overall tourism industry. Of the four CARIFORUM countries, The Bahamas is followed by Trinidad and Tobago, Guyana and St. Kitts and Nevis in terms of overall size of the travel and tourism industry; and by extension, based on ecotourism industry size estimates of overall tourism industry size, this is the order of potential of the type of contribution made by the ecotourism industry. However, unless the contribution of the other tourism types is known (Figure 6.1), there is the risk of overestimating or underestimating the size of the ecotourism industry.

Figure 6.1: Summary of Target Tourism Market Segments for the Four CARIFORUM Countries

	Business	Cultural	Rural	Nature	Ecotourism	Adventure	Sun & Beach	Fitness & Health
The Bahamas				x	x	x	x	
St. Kitts & Nevis	x	x	x	x	x	x	x	
Trinidad & Tobago	x	x	x	x	x	x	x	
Guyana		x	x	x	x	x		

An understanding of the overall make-up of each country's tourism industry would point to the true profitability of each tourism market segment that make up the entire tourism industry (Figure 6.1). For example, when one considers the total receipt per each international tourist (Table 6.4), The Bahamas surpasses Costa Rica by over 60% and Trinidad and Tobago surpasses Costa Rica by over 12%. Similarly, The Bahamas surpasses Fiji by over 50% and Trinidad and Tobago surpasses Fiji by over 5%.

Table 6.4: Total Tourist Receipts per International Tourist

	Actual 2012 UNWTO Total International Tourist Receipts (USD' million) [1]	Actual 2012 UNWTO Total International Tourist Arrivals [2]	Actual Total International Receipts / Actual Total International Arrivals (USD/Arrival) [1] / [2]
The Bahamas	2367	1419000	1668.08
St. Kitts & Nevis	94	102000	921.57
Trinidad and Tobago[1]	450	386000	1165.80
Guyana[1]	80	152000	526.32
Costa Rica	2425	2343000	1035.00
Fiji	728	661000	1101.36

[1] UNWTO Total International Tourist Receipts and Arrivals are 2010 statistics

6.1.2 Market Trends

Overall, there has been a positive growth rate in international travel. Table 6.5 shows the UNWTO's reported statistics for the overall average growth rate in international tourist arrivals for the World, and for three regions: the Caribbean, South America and Central America.

Table 6.5: Growth Rate of International Tourist Arrivals for Selected Regions

	International Tourist Arrivals Growth Rate (%)		
Region	**Average Annual 2006 – 2012**	**2010 / 2011**	**2011 / 2012**
World	3.6	4.8	4.0
Caribbean	1.5	3.0	3.8
South America	5.5	7.8	4.8
Central America	5.0	4.4	7.5

Statistics for the four CARIFORUM countries are given in Table 6.6.

Table 6.6: Growth Rate of International Tourist Arrivals for the Four CARIFORUM Countries

Country	International Tourist Arrivals Growth Rate (%)		
	2009 / 2010	2010 / 2011	2011 / 2012
The Bahamas	3.3	-1.7	5.4
St. Kitts and Nevis	5.6	3.4	0.1
Trinidad and Tobago	-8.0	No figures given	
Guyana	7.7	3.3	No figure given

6.2 Competitive Analysis of CARIFORUM Ecotourism Industry

The analysis first presents an examination of the competitiveness of the ecotourism industry in the four countries, and then, outlines the competitiveness of the regional ecotourism industry.

6.2.1 SWOT Analysis for the Ecotourism Industry in the Four CARIFORUM Countries

The SWOT analysis for the ecotourism industry will understandably overlap with the overall tourism industry. Figure 6.2 therefore provides a general SWOT analysis for the CARIFORUM tourism industry.

Figure 6.2: SWOT Analysis for the CARIFORUM Tourism Industry

SWOT FOR CARIFORUM TOURISM INDUSTRY	
STRENGTHS	○ Rich stock of natural and cultural attractions ○ Long established tourism industry ○ Regional economic and industry support organisations: CARICOM, CTO, CAST, CHTA ○ Diversified portfolio of tourism products in terms of cost structures ○ Close proximity to large North American market ○ Historical ties with Europe
WEAKNESSES	○ Limited international and regional airlift capacity , with heavy dependence on limited number of airlines out of major markets ○ Underdeveloped infrastructure in the case of seaports, airports and roads in a number of countries ○ Low / insufficient room stock in a number of countries ○ Rising crime levels ○ High leakage of tourism revenues ○ Limited financing opportunities, especially for SMEs in the industry
OPPORTUNITIES	○ Increased interest in CARIFORUM destinations by emerging Asian markets ○ Product development of alternative and non-traditional tourism types ○ Leveraging of the Internet for promotion and distribution activities ○ Collaboration in the development of CARIFORUM brand ○ Multi-destination travel among the CARIFORUM countries ○ Increased local and inter-country travel by domestic and regional visitors ○ Upgrading opportunities along the tourism value chain ○ Multiplier effect on related industries
THREATS	○ Industry highly susceptible to economic shocks ○ Industry highly susceptible to increases in fuel prices ○ Cost disadvantage when compared to a number of popular destinations of North American and European tourists ○ Impact of travel taxes (e.g. – Airport Passenger Duty) ○ Heavy dependence on North American tourist market ○ Proximity of Central and South American destinations ○ Seasonal nature of the industry ○ Environmental and socio-cultural issues related to increased volumes of visitors

Specific SWOT analysis for the ecotourism industry of the four CARIFORUM countries is provided in Figures 6.3 – 6.6.

Figure 6.3: SWOT Analysis for The Bahamas Ecotourism Industry

SWOT FOR ECOTOURISM INDUSTRY IN THE BAHAMAS	
STRENGTHS	o Rich stock of natural attractions, particularly with respect to coastal and marine resources: coral reefs, underwater caves and marine life o The Bahamas consist of multiple islands, which provide multiple ecotourism destination possibilities, with the Out-Islands viewed as ‘ideal’ ecotourism destinations o Established protected areas; and statutory organisation, Bahamas Natural Trust (BNT) to manage programme o Established tourism industry, with formal public and private sectors tourism bodies o Focus on sustainable tourism as per the Sustainable Tourism Department in the Ministry of Tourism o Ready supply of trained personnel, with UWI and College of Bahamas offering tourism and hospitality training, as well as specializations in ecotourism o Established partnerships with international conservation groups such as CORAL Reef Alliance and BirdLife o Close proximity to large North American market allowing for airfare cost advantage
WEAKNESSES	o Strong image of mainstream tourism - ‘Sun & Beach’, ‘Cruise-ship’ & ‘All-inclusive’ resorts, particularly on New Providence and Grand Bahama, which may be incompatible with potential visitor’s ecotourism expectations o Fragmented ecotourism efforts with no coordination by the Ministry of Tourism
OPPORTUNITIES	o Incentives for ecotourism inventors particularly for ecotourism projects focusing on the Out-Islands o Alternative ecotourist markets including European markets
THREATS	o Proximity of Central American destinations, which may be viewed as alternative and more natural ecotourism destinations o Heavy dependence on North American tourist market o Mainstream tourism developments in the Out-Islands that may conflict with ecotourism principles o Physical impact of increased volumes of visitors possibly leading to degradation and alteration of natural areas

Figure 6.4: SWOT Analysis for The St. Kitts and Nevis Ecotourism Industry

SWOT FOR ECOTOURISM INDUSTRY IN ST. KITTS & NEVIS	
STRENGTHS	○ Rich stock of natural attractions ○ Protected areas, with most noteworthy being St. Mary's Biosphere Reserve ○ Two island country, offering two ecotourism destinations ○ Partnerships with international conservation groups such as CORAL Reef Alliance, Philippe Cousteau's EarthEcho ○ Focus on sustainable tourism ○ Ready supply of trained personnel, with UWI and Clarence Fitzroy Bryant College offering tourism and hospitality training, as well as specializations in ecotourism
WEAKNESSES	○ Conflicting ecotourism positions of ecotourism as advertised on official tourism website and country's national tourism policy ○ Advertised ecotourism products appear to be more in keeping with nature, adventure and outdoor tourism
OPPORTUNITIES	○ Collaboration with OECS neighbours, such as Dominica, with established ecotourism thrust, for ecotourism multiple destinations tour packages ○ Development of ecotourism product strategy to increase product offerings
THREATS	○ Limited external recognition of ecotourism potential in areas such as bird-watching activities ○ Physical impact of increased volumes of visitors possibly leading to degradation and alteration of natural areas

Figure 6.5: SWOT Analysis for The Trinidad and Tobago Ecotourism Industry

SWOT FOR ECOTOURISM INDUSTRY IN TRINIDAD AND TOBAGO

STRENGTHS	o Rich stock of natural attractions
	o Established network of protected areas in the form of forest reserves, sanctuaries and wetlands
	o Twin-island country, offering two ecotourism destinations
	o Recognised ecotourism destination
	    o Established bird-watching destination
	    o Tobago, in particular, viewed as ecotourism destination, having won a number of eco-destination awards[44]
	o Focus on quality by way of the TDC's Tourism Quality Cluster and its programmes, inclusive of TTTIC, EarthCheck and Blue Flag
	o Ready supply of trained personnel, with UWI, Trinidad & Tobago Hospitality & Tourism Institute and TDC offering tourism and hospitality training, as well as specializations in ecotourism

WEAKNESSES	o Fragmented industry, lacking consistent ecotourism message o Limited financing options for the ecotourism sector
OPPORTUNITIES	o Expansion of TDC's quality programmes to include ecotourism certification o Incentives for ecotourism inventors o Local tour operators expanding ecotourism product offerings to include Product Types 2 and 3
THREATS	o Urbanisation, poor agricultural practices and uncontrolled quarrying activities that are contributing to degradation of natural resources, particularly in Northern Range o Proximity to South American destinations, which may be viewed as alternative ecotourism destinations o Packaging of multiple South American countries into ecotourism tour package o Physical impact of increased volumes of visitors possibly leading to degradation and alteration of natural areas

[44] Tobago Main Ridge Forest Reserve was named the World Travel Award 'World's Leading Ecotourism Destination' in 2003, 2004, 2005 and 2006; and 'World's Leading Green Destination' in 2007 and 2009.

Figure 6.6: SWOT Analysis for The Guyana Ecotourism Industry

SWOT FOR ECOTOURISM INDUSTRY IN GUYANA

STRENGTHS	○ Rich stock of natural attractions, particularly in the form of its forests and wildlife ○ Protected areas – Kaieteur National Park and Iwokrama Wilderness Preserve ○ Single English speaking country in South America ○ Established bird-watching and wildlife destination ○ Structured community-tourism programme with a number of participating Amerindian communities ○ Ready supply of trained personnel, with UWI and University of Guyana offering tourism and hospitality training, as well as specializations in ecotourism ○ Local tour operators offering all three ecotourism product types ○ Guyana is common destination in the product portfolio of a number of specialist outbound tour operators ○ Local and international partnerships established for conservation of natural resources
WEAKNESSES	○ Inconsistent views among public and private stakeholders as to what constitutes the ecotourism industry ○ Limited accommodation options (Room stock - 730) ○ Limited local financing options, with high dependence on external funding agencies
OPPORTUNITIES	○ Expansion of accommodation sector ○ Incentives for ecotourism investors
THREATS	○ Brazil, Peru, Ecuador and other South American destinations, which may be viewed as alternative ecotourism destinations ○ Physical impact of increased volumes of visitors possibly leading to degradation and alteration of natural areas

In summary, the main strengths common to the four countries are the natural attractions and the established system of protected areas, which are fundamental to the ecotourism industry. The common weaknesses are the fragmented and uncoordinated approach to the development of the ecotourism industry and limited financing options available for entrepreneurs within the industry. The major opportunities are the impact that incentives for investors into the ecotourism industry, particularly for SMEs, may have on propelling the industry and the development of ecotourism product strategies that include all three ecotourism product types. The major threats are the potential degradation of the natural attractions that may result due to increased visitors to the protected areas and the increasing popularity of Central and South American ecotourism destinations.

6.2.2 Competitiveness Assessment for the Ecotourism Industry in the Four CARIFORUM Countries

Using four indicators, a competitive assessment of the industry across the four countries is presented in Table 6.7.

Table 6.7: Competitive Assessment of the Ecotourism Industry in the Four CARIFORUM Countries

Indicators	The Bahamas		St. Kitts & Nevis		Trinidad & Tobago		Guyana	
Ecotourism Product Offering	◑	Portfolio primarily consists of Type 1 and Type 2 product types. Limited offers of Type 3 by international tour operators.	◔	Limited portfolio, consisting mainly of Product Type 1.	◕	Full portfolio of 3 product types. Product type 3 mainly offered by international tour operators.	●	Full portfolio of 3 product types, offered by local and international tour operators.
Prices	◔	Cost advantage due to lowest airfares from main markets. Considered a pricey destination by way of accommodation and excursion activities.	◔	Cost disadvantage due to high airfares from main markets. Excursion activities reasonably priced, and there is a range of accommodation options.	◑	Mid-level regarding airfares from main markets. Full range of prices for excursion activities and accommodation options.	◔	Cost disadvantage regarding airfares from main markets. Full range of prices for excursion activities and accommodation options.
Distribution	◑	While ecotourism is a main feature on the country's tourism website, the Bahamas is not a major destination offering by specialist tour operators.	◔	Ecotourism is marketed on country website. Not part of specialist website or tour operator offerings	◕	Ecotourism is a one of the main features on country website. Destination offered by a number of specialist operators, particularly for birdwatching activities.	●	Destination part of specialist tour operator and travel website product listing for Caribbean & South America.
Industry Organisation	◔	While there is no central ecotourism coordination, there is a sustainable tourism unit. Industry structure includes private sector associations for tour operators, hotels, ship-owners	◔	While there is no central ecotourism coordination, there is government's commitment to sustainable tourism principles. Industry structure includes hotel and tourism association.	◑	Ecotourism industry coordinated by Product Specialist in TDC, and a Community Tourism strategy is being reformulated. Private sector associations for tour guides & operators, accomm'n + transport providers	◑	Strong focus on sustainable, community and experiential tourism types. Industry sector includes a number of private sector and community-based associations and NGOs.
	KEY							
	◔	Low competitiveness value	◑	Fair competitiveness value	◕	Medium competitiveness value	●	High competitiveness value

(Author's Assessment based on Primary and Secondary Research)

In terms of competitiveness of the ecotourism industry, Guyana and Trinidad and Tobago are ranked first and second respectively, based primarily on their range of product offerings and distribution channels. The Bahamas ranks third with fair performance regarding the product offering and distribution channels. Lastly, St. Kitts and Nevis, scores on the lowest end of the scale due to low competitiveness across the four indicators.

7. Recommendations and Action Plans

The overarching objective of this value chain analysis of the ecotourism industry was to conduct a regional assessment to identify challenges to industry growth and to recommend concrete areas of actions to overcome these challenges. Based on the analysis presented in Chapters 5 and 6, specific challenges facing the industry are identified. Recommendations and action plans relating to opportunities for growth in the ecotourism industry are then presented.

7.1 Challenges to CARIFORUM Ecotourism Industry Growth

Challenge 1: Industry Ambiguity

Despite the adoption of ecotourism definitions and the inclusion of ecotourism in national tourism strategies and development plans, there are conflicting ecotourism interpretations, with the main conflict being the polar approaches regarding what qualifies as ecotourism, where either:

- All nature-based tourism is labelled as ecotourism, or
- Only nature-based tourism meeting a set of rigid criteria (as demonstrated by practices such as the exclusive use of all-natural building materials and alternative forms of energy) qualifies as ecotourism

The former approach is too relaxed to meet all of ecotourism's practices and philosophies, and essentially results in 'green-washing' which, at minimum, damages the country's and region's brand, and at worst, contributes to negative impacts upon the same natural and socio-cultural environments that ecotourism is meant to conserve and protect. The latter approach is in itself too restrictive to be realistically achieved, and results in the disqualification of activities that meet ecotourism practices and philosophies, which then, may lead to the abandonment of the industry for other nature-based tourism types.

Both approaches serve to frustrate industry stakeholders, and confuse ecotourism suppliers and ecotourists alike. Ultimately, unclear and inconsistent interpretations of the fundamental nature of ecotourism limit the industry's growth and development. This challenge, therefore, underlies and reinforces all of the other challenges that will be discussed below.

Challenge 2: Limited Collaboration among Industry Stakeholders

Ecotourism practices and philosophies dictate the need for industry collaboration. Category 1 Suppliers should collaborate with Category 2 Suppliers to ensure protection and conservation of the natural attractions by way of product design and development, product promotion and product delivery. Suppliers should collaborate with supporting institutions such as research institutions, conservation groups and funding agencies to monitor the impact of visitor activity on the natural resources.

While there is evidence of strong collaborative ties among some industry stakeholders in some countries (as in the case of the NRTP community-based tourism project in Guyana), there is more evidence that there is insufficient collaboration in the industry.

Challenge 3: Lack of Industry Standards

While a number of general tourism certification schemes are being introduced throughout the CARIFORUM region, there are currently no specific ecotourism standards in the four countries studied. While ecotourism certification may not be a main criterion for the casual ecotourist, it is of greater importance for the dedicated and hardcore ecotourists. From a market segment viewpoint, this distinction is important. While the casual ecotourist may represent the 'high-volume, low-value' market segment, particularly in terms of the excursion element for Product Type 1, the dedicated and hardcore ecotourists represent the 'low-medium volume, medium-high value' market segments, particularly in terms of Products Type 2 and Type 3. The dedicated and hardcore ecotourists are more demanding in this regard, and represent the market segments that are most likely to select a destination and ecotourism activities based on certification. The lack of industry standards, therefore, could lead to lost sales in this valuable market segment.

Challenge 4: Uncoordinated Product Strategy

From the four countries studied, there appeared to be little coordination among the two supplier categories in terms of product design and development. The lack of coordination limits the full value potential of the various product types. For example, when excursion activities are planned for a given attraction and the local community is not engaged, there may be lost opportunities in terms of value-added components such as the engagement of knowledgeable local tour guides, rental of equipment or sale of souvenirs.

Further, the lack of coordination limits the development of the ecotourism product portfolio. Better coordination could lead to collaboration among small suppliers within single countries and among different countries, thereby allowing these suppliers the opportunity to develop additional value-added products, especially in the case of the multiple destination tour packages that target the dedicated and hardcore ecotourists.

Challenge 5: Limited Product Distribution

While the ecotourism suppliers have leveraged the Internet to promote their offerings on company websites, online travel agencies and social media, there is limited product distribution on the ecotourism specialist travel websites. Again, while the casual ecotourist may not engage in much pre-planning as ecotourism activities are incidental to their overall vacation plans, the dedicated and hardcore ecotourists are more discerning, and would more likely use specialist websites to help in their vacation planning and purchase decisions.

Challenge 6: Limited Financing Options for Ecotourism

A common theme from the small and medium ecotourism suppliers was the lack of financing options for business development and expansion, where debt financing is typically sought out from commercial banks. Limited access to financing in turn limits these suppliers from becoming more competitive.

7.2 Recommendations and Action Plans for Ecotourism Industry Development

Challenge	**Recommendations (R) & Action Plans (AP)**
Industry Ambiguity	***R1*-Determination of country-level and region-level commitment to ecotourism** ***AP-1A. Development of grading scheme to evaluate country's commitment to ecotourism industry development to identify tiered structure of ecotourism destinations.*** ***AP-1B. Development of Policy Framework to guide the development of the regional industry, using the tiered system.*** ***AP-1C. Development of country-level ecotourism strategies*** ***Recommended Responsible Body:*** • **Regional tourism bodies: CTO, UWI** • **Ecotourism specialist** **Comments:** Based on factor conditions and overall tourism strategy, the degree of commitment to ecotourism by CARIFORUM countries vary, which should influence the country's product design and development and marketing strategy. Tier 1 countries could therefore develop specific products, such as multiple destination Product Type 3 for the hardcore ecotourists, while Tier 3 countries could develop products more suitable for the casual ecotourist. The grading system therefore would allow for product upgrading and market upgrading for Tier 1 countries.

Challenge	**Recommendations (R) & Action Plans (AP)**
Limited Collaboration among Industry Stakeholders	***R*2-Formulation of ecotourism country chapters and regional association, comprising stakeholders from public sector, private sector, academia and research, and NGOs and CBOs, to coordinate the industry at the country levels and the regional level.** ***AP2- Initiate pilot programme with Tier 1 countries (Target 3 – 4 countries)*** ***Recommended Responsible Body:*** **Ecotourism Specialist** **Comments:** Country chapters would coordinate ecotourism activities in their respective countries, and country representative would serve on regional association.

Challenge	Recommendations (R) & Action Plans (AP)
Lack of Industry Standards	***R*3- Development / adoption of ecotourism certification scheme across the region, which would allow for consistent quality standards for product development involving multiple destination packages, and product branding.** ***AP3A- Evaluate existing ecotourism certification schemes*** ***AP3B- Selection / Adaptation of most relevant certification scheme*** ***Recommended Responsible Body:*** • **Regional Tourism Bodies: CTO, UWI** • **Ecotourism Specialist** • **Ecotourism Association**

Challenge	Recommendations (R) & Action Plans (AP)
Uncoordinated Product Strategy	***R*4- Development of regional product strategy** ***AP4*- Development of a regional central repository of ecotourism product offerings, indicating** • **Specialist ecotourism activities such as bird-watching, turtle-watching, shark-observation** • **Grading systems of the product offerings** • **Product offering pipeline in terms of current products, developing products and potential products** ***Recommended Responsible Body:*** • **Regional Tourism Bodies: CTO, UWI** • **Ecotourism Specialist** • **Ecotourism Association** • **Tourism Marketing Specialist** Comments: The product strategy would allow for product upgrading and market upgrading for Tier 1 countries.

Challenge	Recommendations (R) & Action Plans (AP)
Limited Distribution Options	***R*5 - Development of regional promotion and distribution strategy** ***AP5A*- Engage the specialist ecotourism distributors** ***AP5B* - Development of specialized regional promotion and distribution online travel site** ***Recommended Responsible Body:*** • **Ecotourism Association** • **Tourism Marketing Specialist** Comments: The promotion and distribution strategy would allow for functional upgrading and market upgrading for Tier 1 countries.

Challenge	Recommendations (R) & Action Plans (AP)
Limited Financing Options	***R*6 - Development of centralized ecotourism fund** ***AP6A- Build grant proposal writing capacity*** ***AP6B - Review funding bodies and relevant grants available*** ***AP6C – Develop grant proposals*** ***AP6D- Develop membership's business plan writing capacity*** ***Recommended Responsible Body:*** • **Ecotourism Association**

7.3 Conclusion

Based on overall tourism growth trends and continued world-wide interest, it is safe to infer that the ecotourism tourism is also experiencing growth. The industry's main allures are the economic benefits that are well distributed throughout the local economy, as well as the associated environment and social benefits. This makes the ecotourism industry such an attractive sector for CARIFORUM countries. Further, as the industry has evolved, there are now distinct segments: 'active ecotourism' for the dedicated and hardcore ecotourists and 'incidental ecotourism' for the casual ecotourists.

For this reason, the recommendations and action plans centre on the development of a tiered system, allowing for all CARIFORUM countries, based on their factor conditions, overall tourism strategy and motivations, to participate in the industry. The recommendations are in keeping with industry best practices, and focus on the synergies that can be achieved via CARIFORUM collaboration, involves a number of value chain upgrading strategies and leverages technology to more effectively undertake activities on the ecotourism value chain.

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APPENDIX 1: CARIFORUM Background

The CARIFORUM countries that fall under the ambit of the COMPETE Caribbean Program are 15 of 16 participating countries[45] that comprise the Caribbean group of the African, Caribbean and Pacific (ACP) states that seek to promote cooperation and regional integration, primarily on the framework of the Cotonou Agreement between the ACP and the European Union (EU) and the CARIFORUM – European Community Economic Partnership Agreement (EPA) (http://www.caricom.org – accessed on December 20, 2013)

The project involved the 15 independent CARIFORUM countries listed in Chapter 1. While these 15 countries are part of a relatively small geographical space and share a number of similarities, they also display a wide range of economic, social and cultural differences.

In terms of geography, 12 of the 15 countries are island nations (Dominican Republic and Haiti comprise the island of Hispaniola), while the remaining three countries: Belize, Guyana and Suriname are mainland countries.

According to World Bank 2012 statistics[46], the 15 countries have an overall total population of 27.42 million; ranging from a low of St. Kitts & Nevis' 53,584 to a high of the Dominican Republic's 10, 276,621. In terms of economic indicators, the region's average GDP per capita[47] was 9217.98 USD; ranging from 770.95 USD (Haiti) to 21,908.28 USD (The Bahamas). Lastly, the countries share a diverse history of slavery; English, Spanish, French, and Dutch colonization; and indentured labourship. The history of these countries has therefore resulted in a number of official languages: English, Spanish, French and Dutch; and a range of creole and native dialects; varied national cuisines; and multiple religions.

PROFILE OF THE ECONOMIES IN CARIFORUM

The contribution of Agriculture, Industry and Services to the Total GDP of 14[48] of the 15 CARIFORUM countries is displayed in Figure A1.

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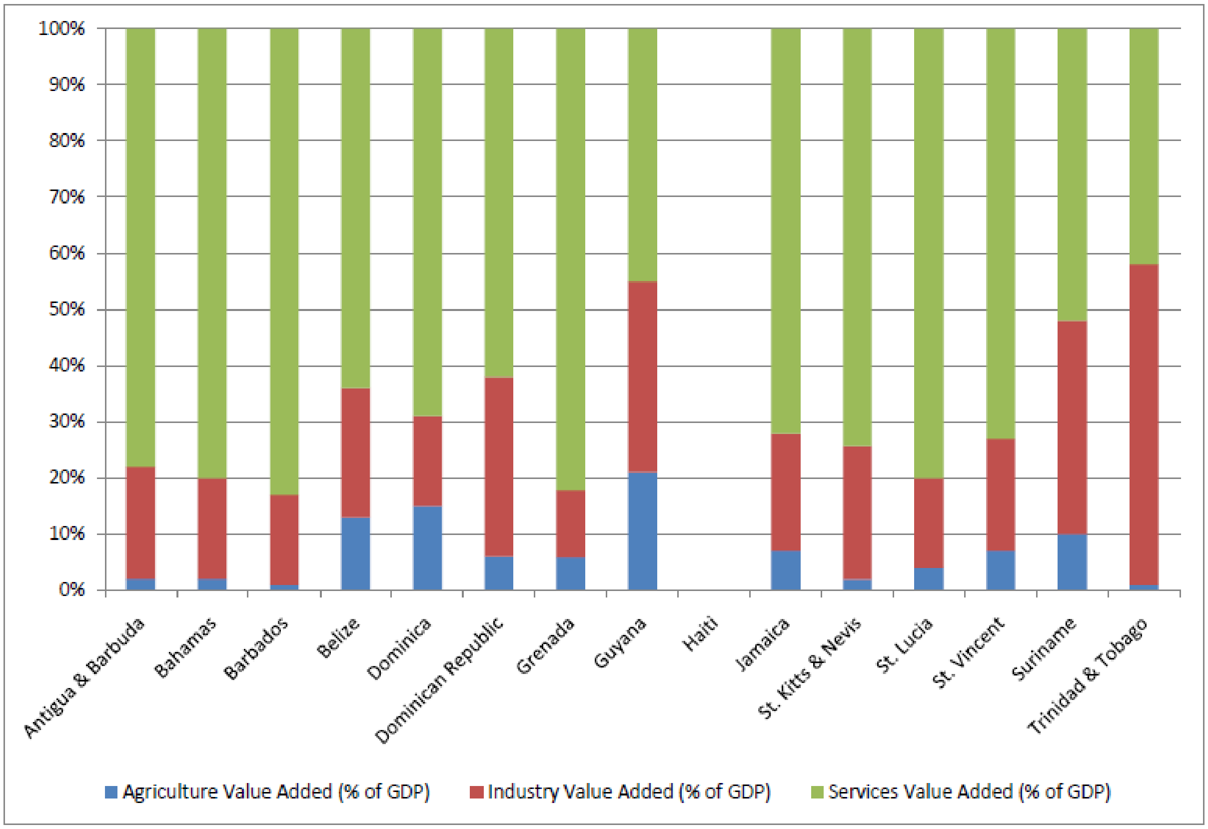
45 Cuba completes the list of the 16 participating countries of CARIFORUM

46 Data obtained from World Bank - http://data.worldbank.org/indicator/SP.POP.TOTL (accessed on January 9, 2014)

47 Data obtained from World Bank - http://data.worldbank.org/indicator/NY.GDP.MKTP.CD (accessed on January 9, 2014). Belize's figures are 2011.

48 No data was available for Haiti. The data for Belize, Jamaica and Suriname were World Bank 2011 figures. The remaining data represent World Bank 2012 figures (http://data.worldbank.org/indicator (accessed on January 9, 2014).

Figure A1: The Contribution of Agriculture, Industry and Services to the Countries' Total GDP



Of the three categories of economic activities, Agriculture makes the lowest contribution, with an average of 7%. On the lower end of the range, Agriculture contributes less than 5% of total GDP for Barbados (1%), Trinidad and Tobago (1%), Antigua and Barbuda (2%), The Bahamas (2%), St. Kitts and Nevis (2%) and St. Lucia (4%). On the other end of the range, Agriculture contributed double digits to total GDP for Suriname (10%), Belize (13%), Dominica (15%) and Guyana (21%).

The Industry sector contributes an average of 25%, ranging from a low of 12% of total GDP for Grenada, and a high of 59% of the total GDP for Trinidad and Tobago. In addition to Grenada, Industry's contribution to total GDP was less than 20% for four countries: Barbados (16%), Dominica (16%), St. Lucia (16%) and The Bahamas (18%). After Trinidad and Tobago, Industry makes the most significant contribution to total GDP for Suriname (38%), Guyana (34%) and Dominican Republic (32%).

Lastly, the Services sector makes the highest contribution to total GDP, with an average of 68%. The Services sector contributes at least 80% of total GDP for The Bahamas (80%), St. Lucia (80%), Barbados (83%) and Grenada (83%). For Trinidad and Tobago and Guyana, the countries at the minimum range, the Services sector contributes 42% and 45% of total GDP respectively.

APPENDIX 2: Interview Guide

GROUP 1: TOURISM GOVERNMENT MINISTRY / STATE AGENCY

A. GOVERNANCE ISSUES

TOURISM

What is the governance structure for tourism at the Regional / National / Local level?

- What is the structure? (e.g. – Council, Committee, Agency, Authority, Ministry)
- What is the composition of governing body? (Government, Private, Public / Private Partnership)
- What are the roles of the governing body & degree of autonomy?
- What is relationship between the governing body and other related bodies?
- Is there a tourism policy (Regional / Country / Community or Town or City)?

ECOTOURISM

How is ecotourism defined?

Is there a distinct unit for ecotourism?

- What is the structure?
- What is the composition of governing body? (Government -- Private -- Public / Private Partnership)
- What are the roles of the governing body & degree of autonomy? (e.g. Strategy formulation, implementation; Design & development of tourism product; Promotion; Implementation; Monitoring)
- What is relationship between the governing body and other related bodies?

Is there a Sustainable Tourism Policy? Is there an Ecotourism Policy?

- Details (Date, Version, Time-frame, Main objectives)
- Method used in developing policy
- Rationale for developing these policies

What funding is dedicated to ecotourism?

What type of fiscal incentives are available for ecotourism?

B. ECOTOURISM PRODUCT DESIGN & DEVELOPMENT

What constitutes the 'ecotourism product'?

- Qualifying criteria (What elements must exist?)
    - i. Location
        1. Classification (Protected Areas / Areas of Unlimited Access)
        2. Ownership (Public; Private)
    - ii. Type of activities
        1. Water-based / Land-based / Air-based
        2. Observation / Educational / Immersive / Conservation
    - iii. Degree of community involvement
    - iv. Accommodation
    - v. Catering / Food Services
        1. *Indigenous food products*

What is the process used for identifying, developing and declaring an ecotourism product?

- Is there a formal process (e.g. – certification, training)?
- Is there some criteria for national recognition? (i.e. – Eco-site listed on official national tourism website)
- Who is responsible for overseeing this process?
- What is the role of: Government / Tourism Body / Tour Operator / Travel Agent / Ecotourism Site Owner & Manager
- Is there an inventory listing of ecotourism products?

C. ECOTOURISM PROMOTION

Which body is responsible for promoting the ecotourism product?

Is the promotion of the ecotourism product distinct from the promotion of the overall country tourism product? (What is the ecotourism message?)

What methods are utilized? (Website / Trade-shows / Specialist magazines / TV Ads)

Who is the target market segment?

- Are specific countries targeted?
- Are specific tour operators targeted? (Generalist / Specialist ecotourism operators)
- What type of tourist is targeted? (Mainstream / Dedicated / Hard-core ecotourist)

D. MONITORING ISSUES

What type of tourism data is collected and what is the method of collection?

Is ecotourism data collected?

- Which body collects data? (National Statistical Office / Tourism Department / Other)
- What is the method of collection?
- What type of data is collected?

E. COMPETITION ISSUES

REGIONAL LEVEL & COUNTRY LEVEL

Which region(s) / country or countries are the main competitors in the ecotourism market for CARIFORUM?

What are the competitors' key products and competitive advantages?

GROUP 2: ENTREPRENEUR BASED ECOTOURISM

Owners and Managers of Ecotourism Related Service-Providers
Company Profile

1. Age of establishment
2. Size
3. History / Motivation for entry into industry

ECOTOURISM ELEMENTS & ACTIVITIES: ACCOMMODATION, CATERING, EXCURSION

Describe the ecotourism activity available

- Accommodation: Type of accommodation utilized by ecotourist
- Catering: Type of catering
- Excursion: Attraction, Tour , Product Sales

Describe the community involvement

MARKET ISSUES

- Who is your customer? (Customer profile – Place of origin / Type of visitor (Specialist – Casual Ecotourist)
- Demand patterns (Volumes / Peak seasons / Low seasons)
- How is product promoted?
- Main competitors

RELATIONSHIP WITH OTHER ECO-TOURISM RELATED BODIES

What is the relationship between the Group and other tourism-related bodies?

- Government Bodies (Ministry / Agency) / International and Local Tour Operators / Industry Associations / University / Research Group / NGO / Other

SOURCE OF FINANCING AND BUSINESS MODEL

What sources of financing are/ have been available (e.g. for construction of visitor facility)?
How is income generated (tour fees / product sales) and utilised?

RECOMMENDATIONS

What is needed to improve company's participation in the ecotourism industry?
Recommendation for improving ecotourism industry (locally / regionally)

GROUP 3 COMMUNITY BASED ECOTOURISM and NGO BASED ECOTOURISM

COMMUNITY GROUPS / NGOs
GROUP PROFILE

1. When was the group established?
2. What is the size of the group?
3. What is the organizational structure (Board of Directors / Advisors / Manager / Treasurer, etc)
4. Profile of group members

ECOTOURISM ELEMENTS & ACTIVITIES: ACCOMMODATION, CATERING, EXCURSION

Describe the ecotourism activity available

- Accommodation: Type of accommodation utilized by ecotourist
- Catering: Type of catering
- Excursion: Attraction, Tour , Product Sales

Describe the community involvement

MARKET ISSUES

- Who is your customer? (Customer profile – Place of origin / Type of visitor (Specialist – Casual Ecotourist)
- Demand patterns (Volumes / Peak seasons / Low seasons)
- How is product promoted?
- Main competitors

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What sources of financing are/ have been available (e.g. for construction of visitor facility)?
How is income generated (tour fees / product sales) and utilised?

RECOMMENDATIONS

What is needed to improve company's participation in the ecotourism industry?
Recommendation for improving ecotourism industry (locally / regionally)

GROUP 4: UNIVERSITIES, TRAINING BODIES, RESEARCH ORGANIZATIONS

TEACHING

What type of tourism-related programmes / courses / training is offered?

Is ecotourism education offered, in the form of a major / minor / course(s)?

a. What is the programme / course content?

Is sustainable tourism education offered?

b. What is the programme / course content?

Is there a practical component or industry-based component of the course?

RESEARCH

Is there a Departmental / University ecotourism research focus and / or sustainable tourism focus?

a. What are the specific areas?

How is ecotourism defined in the country / region?

b. To what extent does the promoted ecotourism product satisfy international ecotourism standards?

SERVICE

Is there any outreach activity in industry?

a. What is the nature of the activity?
b. Which actors (e.g. tour operators, NGOS) are involved?

RECOMMENDATIONS

What is the state of the ecotourism sector in specific country / CARIFORUM region?

a. What are the strengths and weaknesses of the industry?
b. What are opportunities and threats to the industry?

Recommendation for improving ecotourism industry (locally / regionally)

APPENDIX 3: List of Interviewees / Respondents

The Bahamas

Name	Position & Organisation
Lydia Adderley	Sustainable Tourism The Bahamas Ministry of Tourism
Customer Service Representative	Bahamas National Trust
Carolyn Wardle	Bahamas Outdoors

St. Kitts & Nevis

Name	Position & Organisation
Patricia Martin	Permanent Secretary Ministry of Tourism and International Transport
Greg Pereira	Owner and Manager of Greg's Safaris
Maurice Widdowson	Caribelle Batik

Trinidad and Tobago

Name	Position & Organisation
Kelly Fitzjames	Information Officer Brasso Seco Paria Tourism Action Committee
Steve Felgate	Owner Castara Retreats
Michael Frank	Owner Frankie Tours and Rentals
Courtenay Rooks	Owner Paria Springs Eco Community
Andrew Welch	Owner Banwari Experience
Eamon Healy-Singh	Slow Leak Mountain Bike Tours
Gunda Busch-Harewood	Island Experiences
Trevor Akan	Classic Tours and Cambio
Suzan Gail Mohammed	Gail's Exclusive Tour Services, Ltd.
Tanya Clovis	Save Our Sea Turtles (SOS)Tobago

Guyana

Name	Position & Organisation
R. Westmass	Owner / Manager, Adel's Rainforest Resort
Michael Fredericks	Tour Manager, Arrowpoint Nature Resort
Alton Primus	Manager Skyvalley Adventure Tours, Moco Moco Village Eco-tourism project
Alphonso Forde	Coordinator Tourism Project, North Rupununi District Development Board (NRDDB)
Nadine Oudkerk	Product Design Manager Guyana Tourism Authority, Ministry of Tourism, Industry and Commerce
Camille Robertson	Head, Department of Tourism University of Guyana

International

Name	Position & Organisation
Jessica Blackstock	Project Manager EplerWood International
Bogdan Papuc	Executive Director Association of Ecotourism in Romania
Leonie Bowles	Industry Development Manager Ecotourism Australia

APPENDIX 4: Overview of the Travel and Tourism Industry

Tourism is defined as the movement of people to countries or places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited (UNWTO, 1995).

Tourism is described as a highly complex phenomenon (Candela & Figini, 2012), and as such, a number of classification systems have been proposed to capture the elements that make up the industry. One such system identified six sectors: Tourism Marketing, Tourist Carriers, Tourist Accommodation, Tourist Attractions, Miscellaneous Tourism Services, and Tourism Regulation (Cooper & Hall, 2012). In another more comprehensive system, the sectors comprising the Travel and Tourism industry are sub-divided into three categories: Travel and Tourism Direct Sectors, Travel and Tourism Indirect Sectors and Travel and Tourism Induced Sectors (World Travel & Tourism Council and Oxford Economics, 2012). This classification system is shown in Figure A4.

Figure A4: Travel and Tourism Direct, Indirect and Induced Sectors

Travel & Tourism Direct	Travel & Tourism Indirect	Travel & Tourism Induced
• Transportation	• Printing / Publishing	• Food & Beverage Supply
• Accommodation	• Utilities	• Manufacturers
• Catering	• Financial Services	• Retailers
• Entertainment	• Sanitation Services	• Wholesalers
• Recreation	• Furnishing & Equipment Suppliers	• Business Services
• Other related travel services	• Security Services	• Personal Services
	• Rental Car Manufacturing	• Housing
	• Transportation Administration	• Utilities
	• Tourism Promotion	• Computers
	• Ship Building	
	• Aircraft Manufacturing	
	• Resort Development	
	• etc.	

THE ECONOMIC IMPACT OF THE TRAVEL AND TOURISM INDUSTRY

The economic impact of the Travel and Tourism industry cannot be understated. For instance, the UNWTO reported that in 2012, with over 1 billion international tourists, the tourism industry contributed 9% of direct, indirect and induced[49] global GDP, and 1.3 trillion USD in exports (UNWTO, 2013). Similarly, according to the World Travel & Tourism Council (WTTC), the Travel & Tourism industry plays an important economic role in most countries around the world. The WTTC reported that in 2012 the Travel & Tourism industry directly contributed 2,056.6 billion USD or 2.9% of total global GDP, and 101.1 million jobs or 3.4% of total global employment. Moreover, when the industry's total contribution (Direct + Indirect + Induced) to the global economy is considered, the industry was found to have

[49] Direct Impact includes values for accommodation, recreation, transportation and other related sectors. Indirect Impact measures the inter-industry linkages. Induced Impact measures the impact of incomes earned directly or indirectly as spent in the local economy (World Travel & Tourism Council and Oxford Economics, 2012)

contributed 6,630.4 billion USD or 9.3% of total global GDP, and 261.4 million jobs or 8.7% of global employment (World Travel & Tourism Council, 2013c).

With respect to absolute terms, the three countries where the Travel & Tourism industry made the largest direct contribution to GDP in 2012 were the United States (438.5 billion USD), China (215.4 billion USD) and Japan (127.7 billion USD). A similar pattern is seen in terms of the Travel & Tourism industry's total contribution to GDP in 2012, where, in absolute terms, the three top countries were again the United States (1,348.0 billion USD), China (756.5 billion USD), and Japan (399.9 billion USD) (World Travel & Tourism Council, 2013b). Similarly, in terms of absolute direct employment figures for the Travel & Tourism industry, the leading three countries were India (25.041 million jobs), China (22.756 million jobs) and the United States (5.569 million jobs). In terms of absolute total employment figures for the Travel & Tourism industry, the three leading countries were China (63.779 million jobs), India (39.512 million jobs) and the United States (14.261 million jobs) (World Travel & Tourism Council, 2013b).

APPENDIX 5: Sample Reviews of Ecotourists in Brazil, Costa Rica and Mexico

The following is a random sample of reviews of ecotourists, as reported on TripAdvisor, who participated in ecotourism excursion activities in three countries in South America and Central America: Brazil, Costa Rica and Mexico.

Rio Natural Ecotourism - Day Tours, Brazil

<u>"Spectacular hike to the Sugar Loaf"</u>
Reviewed May 27, 2014 via mobile
Go and explore the Pão de Açúcar off the beaten track! Rio Natural Ecotourism took me on an unforgettable hike with fantastic views. Great, experienced guide! Thank you Gui!!

<u>"Sea kayaking in Rio and 2 brothers hill and favela trip"</u>
Reviewed May 13, 2014
The kayak tour was a great way to be outdoors in an amazing city and to see the beautiful mountains from another perspective. Also, extremely interesting trip on a motorbike through the favelas to climb the 2 Brothers Hill. Stunning view! Thanks Daniel!

<u>"Hike Sugarloaf and amaze yourself (and your friends!)"</u>
Reviewed March 23, 2014
I took a day hike with Rio Natural EcoTourism and could not have been happier or more satisfied. I took a trip to Rio de Janeiro as a present to myself for my 50th birthday. It was my first time in Brazil and I had some trepidation about making arrangements before arriving, etc. this company is very professional, from the many emails we exchanged(trying to find the right activity for me), to the hike itself. Daniel was the consummate professional, giving us pointers about the forests we were walking through, the wildlife we saw, and hiking in particular. He brought all the necessary equipment, and taught us how to use it. He was patient, kind, knowledgeable, and fun. I will book a longer hike, or another activity with this company the very next time I'm in Rio. In the meantime, go and test the limits of your ability under the guidance of a safe, smart, and careful guide from Rio Natural ecotourism!!

http://www.tripadvisor.com/Attraction_Review-g303506-d2253925-Reviews-Rio_Natural_Ecotourism_Day_Tours-Rio_de_Janeiro_State_of_Rio_de_Janeiro.html

ATEC - Talamancan Association of Ecotourism and Conservation Day Tours, Costa Rica

<u>‘Trusted source for booking tours in Puerto Viejo area”</u>
Reviewed January 19, 2014
This non-profit works with local guides to book excellent tours and support the community. We did a dolphin watch, an overnight at Casa Caleteas (a nature/eco-tourism lodge in the jungle), and a guided trip to Cahuita National Park. All were excellent experiences. You won't be disappointed.

<u>“fantastic stay with the Yorkín”</u>
Reviewed August 1, 2013
We booked a 2-day stay with the Yorkín, an indigenous tribe. It was really amazing, the family was friendly, the place was beautiful. And the whole trip was for a reasonable price, including transportation by boat.

<u>“Fun and Informative!”</u>
Reviewed August 20, 2012
The BriBri tour and chocolate making demonstration was fun and informative. We learned about all kinds of different herbs and fruits and how they are natural medicines, and got to try different things such as the magic fruit.

http://www.tripadvisor.com/Attraction_Review-g309265-d2209012-Reviews-ATEC_Talamancan_Association_of_Ecotourism_and_Conservation_Day_Tours-Puerto_Viejo.html

Sumidero Ecotourism Park, Mexico

<u>“Nice Park for Nature lovers”</u>
Reviewed April 3, 2014
Visited as a member of a group consisting 30 members from Scandinavia. If you are a typical "Urban Cowboy", this is a "Must" for you. You will most probably see here a crocodile and other animals in nature. Normally you may see them only in Zoo. Anyway, this park is worth visiting if it is on your way around this area...

<u>“Astonishing”</u>
Reviewed December 7, 2013
Out of the many beautiful places we have seen on our trip this may have been the most beautiful. On top of the wide river and 3000 foot canyon we saw crocodiles, spider monkeys in a 60 foot tree, a Christmas Tree shaped waterfall rock formation and more.
The only thing that really needs to be done is make sure that the trash that gathered in some key spots (from rain flows or not) is cleaned up better by both the SEMARNAT (government) and the for profit boat companies in tandem!
Regardless this was amazing

<u>“Nature treasure”</u>
Reviewed August 1, 2013
Beautiful park, with many attractions, a museum, zoo, swim pool mixed with adventure moments that you must try. You can reach there through Sumidero Canyon by boat from Chiapa

http://www.tripadvisor.com/Attraction_Review-g150796-d631200-Reviews-Sumidero_Ecotourism_Park-Central_Mexico_and_Gulf_Coast.html

APPENDIX 6: Sample Ecotourism Policies of Selected Ecotourism Tour Operators

The following is a random sample of ecotourism policies as published by ecotourism tour operators on www.ecotourdirectory.com.

Andean Trails *'All Andean Trails activities are governed by our high respect for the environment and the people who live in it. We aim to make a positive impact both in the UK and in the countries we work in.* *We agree with the principals of sustainable development and specifically promote environmentally aware tourism in the Andean countries, in order to preserve the heritage of the people who live there and to help protect their environment.'*
Explore Worldwide Travel *'Travel can bring many benefits to the traveller and the countries visited – learning about different cultures, creating jobs and bringing economic development. Sometimes though the impact can be negative – overdevelopment can damage the natural environment, local people may be exploited and their culture eroded.* *Explore promotes responsible travel. We believe that:* *- people who work for explore should be treated fairly and paid a fair wage* *- we should learn about and respect the customs and culture of the country we are visiting so that we do not offend local people* *- we should try to ensure that local people benefit economically from tourism by employing them as leaders and guides, eating out in local restaurants and using family-run hotels where possible* *- we must minimise our impact on the environment by travelling in small groups, offsetting our carbon emissions and reducing waste* *We are not perfect, but we are working hard to achieve these aims. In 2005 we were delighted to be awarded highly commended in the responsible tourism awards.'*
Geckos Adventures *'We believe that our adventure holidays should respect and benefit local people and the environment in the countries in which we operate. Whether it's Kenya, Kathmandu or Kota Kinabalu, we aim to minimise our impact on the environment and maximise respectful interaction with the local people and culture.* *We ensure that the local community benefits financially from our tours and that revenue is streamed directly into conserving wilderness and heritage.* *For Gecko's travellers, it's about being culturally and environmentally sensitive in a way that gives you a deeper understanding of a place and its people - and guarantees you'll have a fun and rewarding adventure.* *All our adventures are led by highly-qualified local leaders. Our team of over 230 men and women are passionate about their country's history, heritage and natural beauty and can help you to get 'under the skin' of their country and see it through the eyes of a local. They help ensure that we enjoy our interaction with different cultural groups in a spirit of respect, understanding and mutual benefit.* *We involve local people in all aspects of our operations, providing training and employment opportunities, and ensuring an economic and educational return to the community.*

Source: http://www.ecotourdirectory.com

APPENDIX 7: Main Actors Participating in the Ecotourism Industry of the Four CARIFORUM Countries

The Bahamas

SECTOR	ACTOR	
PUBLIC SECTOR	**TRAVEL & TOURISM PUBLIC SECTOR AGENCIES**	**MAIN RELATED PUBLIC SECTOR AGENCIES**
	Ministry of Tourism Grand Bahama Island Promotion Board Nassau / Paradise Island Promotion Board Bahamas Out Islands Promotion Board Hotel Licensing **Ministry of Transport & Aviation** Civil Aviation / Airport Authority /Port Authority / Bahamas Maritime Authority	**Ministry of the Environment** BEST Commission **Ministry of Foreign Affairs & Immigration** Dep't of Immigration **Ministry of Finance** Bahamas Development Bank **Office of the Prime Minister** Bahamas Investment Agency
PRIVATE SECTOR	Bahamas Sightseeing Tour Operators Association Bahamas Diving Association	Bahamas Hotel Association Bahamas Ship-owners Association
PUBLIC – PRIVATE PARTNERSHIPS	Bahamas National Trust	
VOLUNTARY ORGANISATIONS	Local Communities	
RESEARCH & RELATED & SUPPORT ORGANISATIONS	**LOCAL BODIES**	**REGIONAL & INTERNATIONAL BODIES**
	College of Bahamas	UWI
	Bahamas Chamber of Commerce	CARICOM Caribbean Tourism Organization Caribbean Alliance for Sustainable Tourism Caribbean Hotel and Tourism Association
	Local Conservation Groups	World Tourism Organization / World Travel & Tourism Council
		International Conservation Groups

St. Kitts & Nevis

SECTOR	ACTORS	
PUBLIC SECTOR	**TRAVEL & TOURISM PUBLIC SECTOR AGENCIES**	**MAIN RELATED PUBLIC SECTOR AGENCIES**
	Ministry of Tourism & International Transport Department of Tourism St. Kitts Tourism Authority St. Christopher Air & Sea Ports Authority **Nevis Island Administration** Nevis Tourism Authority Nevis Air & Sea Ports Authority	**Ministry of Sustainable Development** Dep't of Physical Planning & the Environment **Ministry of Agriculture, Marine Resources & Constituency Empowerment** Department of Marine Resources Parks & Beaches **Ministry of Foreign Affairs, Homeland Security, Immigration & Labour** Department of Immigration **Ministry of Finance**
PRIVATE SECTOR	St. Kitts & Nevis Hotel & Tourism Association	
PUBLIC – PRIVATE PARTNERSHIPS	St. Kitts & Nevis Man and Biosphere Committee	
VOLUNTARY ORGANISATIONS	St. Christopher National Trust Nevis Historical / Conservation Society	Local Communities
RESEARCH & RELATED & SUPPORT ORGANISATIONS	**LOCAL BODIES**	**REGIONAL & INTERNATIONAL BODIES**
	Clarence Fitzroy Bryant College	UWI
	St. Kitts & Nevis Chamber of Industry & Commerce	Caribbean Development Bank CARICOM Caribbean Tourism Organization Caribbean Alliance for Sustainable Tourism Caribbean Hotel and Tourism Association
	Local Conservation Groups	World Tourism Organization / World Travel & Tourism Council
		International Conservation Groups

Trinidad and Tobago

SECTOR	ACTORS	
PUBLIC SECTOR	**TRAVEL & TOURISM PUBLIC SECTOR AGENCIES**	**MAIN RELATED PUBLIC SECTOR AGENCIES**
	Ministry of Tourism Tourism Development Company **Tobago House of Assembly** The Division of Tourism & Transportation **Ministry of Transport** Caribbean Airlines Airport Authority / Port Authority	**Ministry of the Environment & Water Resources** Environmental Management Agency, Institute of Marine Affairs, Forestry Division **Tobago House of Assembly** Department of Natural Resources & the Environment **Ministry of Housing & Urban Development** UDECOTT **Ministry of Foreign Affairs** **Ministry of Finance & the Economy** Civil Aviation Authority **Ministry of National Security** Immigration Division **Ministry of Trade, Industry & Investment** invesTT
PRIVATE SECTOR	T&T Incoming Tour Operators Association Small Tourism Accommodation Owners of Trinidad and Tobago T&T Tourist Transport Services Association	T&T Tour Guiding Association Trinidad Hotels, Restaurants & Tourism Association Tobago Hotel & Tourism Association Association of Dive Operators Yacht Services Association of Trinidad and Tobago
PUBLIC – PRIVATE PARTNERSHIPS		
VOLUNTARY ORGANISATIONS	Local Communities	
RESEARCH & RELATED & SUPPORT ORGANISATIONS	**LOCAL BODIES**	**REGIONAL & INTERNATIONAL BODIES**
	Trinidad & Tobago Hospitality & Tourism Institute Tobago Hospitality and Tourism Institute Chambers of Commerce Local Conservation Groups	UWI Caribbean Development Bank CARICOM Caribbean Tourism Organization Caribbean Alliance for Sustainable Tourism Caribbean Hotel and Tourism Association World Tourism Organization / World Travel & Tourism Council International Conservation Groups

Guyana

SECTOR	ACTORS	
PUBLIC SECTOR	**TRAVEL & TOURISM PUBLIC SECTOR AGENCIES**	**MAIN RELATED PUBLIC SECTOR AGENCIES**
	Ministry of Tourism, Industry & Commerce Guyana Tourism Authority **Ministry of Public Works** Guyana Civil Aviation	**Ministry of Natural Resources & the Environment** Environmental Protection Agency, Guyana Forest Commission, Guyana Wildlife, National Parks Commission, Protected Areas Commission **Ministry of Amerindian Affairs** **Ministry of Foreign Affairs** **Office of the President** Go Invest Guyana
PRIVATE SECTOR	Tourism and Hospitality Association of Guyana	
PUBLIC – PRIVATE PARTNERSHIPS		
VOLUNTARY ORGANISATIONS	Amerindian Peoples Association of Guyana	Local Communities
RESEARCH & RELATED & SUPPORT ORGANISATIONS	**LOCAL BODIES**	**REGIONAL & INTERNATIONAL BODIES**
	University of Guyana Chambers of Commerce Local Conservation Groups	UWI Caribbean Development Bank CARICOM Caribbean Tourism Organization Caribbean Alliance for Sustainable Tourism Caribbean Hotel and Tourism Association World Tourism Organization / World Travel & Tourism Council International Conservation Groups

APPENDIX 8: Listing of Donor / Funding Agencies and Related Ecotourism Projects and Related Programmes in CARIFORUM

Donor / Funding Agency	**CARIFORUM Country**	**Nature of Project / Programme**
Inter-American Development Bank	The Bahamas Dominican Republic	Regional Plan for the Sustainable Development of Inagua (2006) Inagua Sustainable Tourism (2005) Model for Sustainable Tourism Management in Bayahibe (2005) Sustainable Family-Based Ecotourism (2005)
Fondo EcoEmpresas, S.A.	Belize	Venture Capital - EcoEnterprises Fund Belize Lodge & Excursions, Ltd.
European Union	Dominica St. Kitts & Nevis	Eco-Tourism Development Programme (ETDP) EURO 6 million project managed by Tourism Intelligence International (2003 – 2007) Pro-People, Pro-Planet Strategy for Sustainable Tourism Development (2013)
U.S. Agency for International Development USAID	Dominican Republic Guyana	Economic Growth Programme Training, technology transfers and facilitation of linkages to financial institutions, input suppliers and markets for businesses including ecotourism businesses
Japanese International Cooperation Agency (JICA),	Dominican Republic	Feasibility Studies on Ecotourism Projects (2006)
The Nature Conservancy	The Bahamas Dominican Republic Dominica St. Vincent Grenada	Funding, training and technical expertise for establishment of protected areas
International Union for Conservation of Nature	Caribbean Region	Biodiversity and Protected Areas Management Programme Capacity building for protected areas management

APPENDIX 9: Sample Reviews of Ecotourists Participating in Ecotourism Excursion Activities in the Four CARIFORUM Countries

The following is a random sample of reviews of ecotourists, as reported on TripAdvisor, who engaged in excursion activities in the four countries.

Dive Guana, The Bahamas

"Must do"

Reviewed June 3, 2014

A snorkeling adventure is definitely a must do while in the Abacos. Aside from seeing some amazing fish you get to explore other islands. The best part is the freshly plucked from the sea conch that is made before your eyes into conch salad at the end of the trip. Yum!!

"Diving and snorkelling doesn't get any better"

Reviewed May 31, 2014

I've done several diving and snorkelling trips with Dive Guana, and they've all been great. The underwater scenery at Fowl Cay Marine Reserve, where he often took us, is about as good as it gets in the Caribbean. Troy's boat is comfortable and stable, and Troy and Maria are excellent hosts. All equipment is provided, and he tailors the trip to the experience of his passengers. if you're a newbie, he'll make sure you're carefully escorted. More experienced divers are (thankfully) treated as such. Having gone out with other dive operators in the Abacos, there is no question that Dive Guana is the best.

"Reef snorkeling , lighthouse tour, Hope Town and Man-O-War Cay"

Reviewed May 21, 2014

We met a fun bunch of people, boarded Dive Guana's boat and were off for a fun adventure. We stopped at a reef to observe some bountiful sea creatures, mostly fish of all descriptions. Troy Albury is a great capt. and guide. Some people on board were experienced divers and snorklers some were not. Troy showed the inexperienced how to properly use the mask and snorkle and in the ocean they went. We stayed until everyone had their fill (no pun intended) then off to find some good eats. Stopper to see an old lighthouse which we climbed to the top. My wife and I took a little too long and Troy sent out a rescue squad (Heather) to find us. We took a bit of ribbing for being up on the lighthouse too long. We just smiled. I'm 74 so we would have to been up there for anything more than a smile .. We enjoyed a nice lunch in Hope Town and then toured a bit of the town. We also stopped at Albury's sail shop at Man-O-War Cay, that was something to see. My wife and I walked up "Lovers Lane" and took a bit more ribbing. All in all the 41/2 to5 hour trip was well worth the price. I also need to mention Colyn the first mate who made the trip fun and safe for all of us.

http://www.tripadvisor.com/Attraction_Review-g147424-d2528057-Reviews-Dive_Guana-Great_Abaco_Island_Abaco_Islands_Out_Islands_Bahamas.html

Nevis Peak Hike, St. Kitts and Nevis

“Damper and tougher than you might think but really exhilarating.”

Reviewed January 13, 2014

It takes approximately 2 hours each way, and some sections are scrambles up a stream or over wet rocks. Some of it is also steep and all of it is wet. You will however see an amazing range of trees, perhaps some vervet monkeys and maybe even be visited by a mongoose during lunch at the top. The crater is enormous and the views between the passing clouds can be beautiful.

“Challenging Journey”

Reviewed January 6, 2014

Was a fantastic journey up and down the mountain, but make no mistake it is not a leisurely hike. It is climbing up rocks, and vines, through jungles and crevasses. And I would not recommend that anyone do it alone. I had many scrapes and bruised from the hike, but I wouldn't trade it for the world! Our guide was so fantastic- he was very knowledgeable about the plants and animals on the island, and gave us a great insight into the Nevisian culture. It is a pretty amazing moment when you reach the peak in the clouds and get to sign the book! I hope that I can go back and sign it again!

“Tough Hike - Top normally in the clouds - Great Challenge and Fun”

Reviewed December 21, 2013

Myself and a buddy completed the hike up the mountain in about 80 minutes. Its pretty challenging and tough, but all in all a great time. We choose to have Reggie from Nevis Adventure Tours be our guide and he was an excellent choice. Very professional, very safe and I would recommend him and his company to anyone thinking about this hike. While you may be able to complete the hike without a guide, its worth the small cash outlay to hire someone like Reggie.

http://www.tripadvisor.com/Attraction_Review-g147377-d148260-Reviews-Nevis_Peak_Hike-Nevis_St_Kitts_and_Nevis.html

Asa Wright Nature Centre, Trinidad and Tobago

"Birding Paradise"

Reviewed May 11, 2014

Beautiful, vibrant, and unique. Our hosts were wonderful and the trip was very memorable. Remember to keep an eye on the ground for venomous snakes in addition to eyes toward the sky for all of the birds.

"Excellent Managed Nature Centre"

Reviewed April 28, 2014

"Brilliant peaceful environment in a Rain Forest"

Apart from the occasional insect bite which one expects in a rain forest, the centre nestles in a quiet restful serene area, with birds in abundance !!! The staff are very friendly and go out of their way to be helpful in accommodating your needs. We stayed for 8 days and our guide Roodal was excellent, showing us over 150 species in 4 days. He was very helpful, patient, and understanding. The Centre provides everything from pick ups at the airport, to half/full day trips, night birding, turtle trips, or walking in the grounds to see the Oil Birds in their natural setting. I would recommend this centre to anyone interested in birding in the West Indies without any hesitation - Brilliant !!

"Such a great healer"

Reviewed April 16, 2014

They say that 'Nature is a great healer', well then this place will definitely do the trick. It worked for me, just being surrounded by the clean air, the lovely greenery, the unique birds and the tour guide made our experience worth while.

We were able to appreciate the many ways in which nature contributes to our lives and I gained a greater appreciation for it.

The drive is a bit rough but once you arrive, you forget the bustling, hectic world!!

http://www.tripadvisor.com/Attraction_Review-g147388-d184435-Reviews-Asa_Wright_Nature_Centre-Trinidad_Trinidad_and_Tobago.html#REVIEWS

Iwokrama Canopy Walkway, Guyana

“Bird's eye view of the forest!”

Reviewed April 29, 2014

I have heard about this walkway many times and was thoroughly excited to finally have the chance to experience it. I went on a class field trip for Transport Economics Course at the University of Guyana. It was a truly remarkable and memorable experience and totally worth the very long bus ride from Georgetown. The staff at Atta Lodge were warm and welcoming. Our tour guide was very friendly and knowledgeable. He shared interesting facts along the way and pointed out various species of trees, flora and fauna in the Iwokrama reserve. We even saw a rare frog. It was a refreshing and cool walk to the canopy walkway and one the walkway the views below, above and at the sides were breathtaking. I felt like I was one with nature. I wish I could have stayed longer and taken in more but we had to continue on our journey. I will definitely return one day to experience the canopy walk at night. I would recommend this for all nature lovers and particularly bird lovers.

“An amazing experience!”

Reviewed December 1, 2013

Guided by Leon we went to watch, listen and feel the pulse of the jungle at it's best! The sight from the top of the walkway is breathtaking and a night at the lodge is well... Unforgettable! The employees are simply fantastic and the Haulier Monkeys a memorable moment, especially at 3 am! Thanks to the whole team of Wilderness explorers for having organized the week of amazing experiences we had in the Guyana jungle!

“memorable”

Reviewed October 26, 2013

As part of my stay at Atta Lodge, I had a very rewarding experience on the Iwokrama Canopy Walkway. This may not be as extensive as those located in Costa Rica but the sensations and sights are very similar. It comprises of four section, the best is the second viewpoint. There are some dramatic vista and some lovely birds to see, especially if you visit in the late afternoon as the wildlife winds down and roosts within the canopy. If you are lucky Leon will guide you, a very experienced birder with a real passion for wildlife. Our moment with the White Winged Potoo at twilight was special. One word of warning for vertigo sufferers. Although is well constructed and safe the actual walkways are constructed from very sturdy metallic mesh so you can see directly beneath you, over 30 metres to the forest floor!!

http://www.tripadvisor.com/Attraction_Review-g1755123-d590057-Reviews-Iwokrama_Canopy_Walkway-Iwokrama_Forest.html

APPENDIX 10: Commercial Airlines and Cruise Lines Operating in the Four CARIFORUM COUNTRIES

Commercial Airlines and Cruise Lines Operating in the Four CARIFORUM Countries

The Bahamas	
AIRLINES	**CRUISE LINES**
Air Canada Air Gate Aviation Air Tran Airlines American Airlines American Eagle Bahamasair British Airways Copa Airlines Delta IBC Airways JetBlue Regional Air Services Silver Airways Sky Bahamas Airlines United Airlines US Airways West Jet Airways	Carnival Cruise Lines Disney Cruise Lines Norwegian Cruise Lines Royal Caribbean

St. Kitts and Nevis	
AIRLINES	**CRUISE LINES**
American Airlines Air Canada British Airways Delta LIAT Seaborne Airlines US Airways Air Sunshine Cape Air LIAT Seaborne Airlines Tradewinds Aviation Winair	Royal Caribbean P&O Cruises Fred Olsen Carnival Cruise Lines Celebrity Cruises Regent Seven Seas Cruises Princess Cruises

Trinidad and Tobago	
AIRLINES	**CRUISE LINES**
American Airlines British Airways Caribbean Airlines Limited COPA Airlines Condor Conviasa Airlines LIAT Monarch Suriname Airways United Airlines West Jet Airlines	Crown Princess Silversea Cruises Royal Caribbean International Saga Cruises II Ltd Thomson Cruises Pacific Princess

Guyana	
AIRLINES	
Caribbean Airlines Limited LIAT Suriname Airways Fly Jamaica	