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# The Ecotourism Industry in the Caribbean

## A Value Chain Analysis

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## Abstract*

CARIFORUM countries 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. However, these sectors face a number of challenges to realize their potential, including limited markets, low labor productivity and inadequate skills for market demand, high energy and transportation costs, and high levels of debt. In order to overcome challenges to private sector growth, best practice suggests that analyzing the environment for private sector development and identifying specific barriers to growth are critical steps toward making these sectors more competitive regionally and globally. This project aims to make a contribution in this regard via the use of a value chain methodology. The industry selected for this project was the ecotourism industry, and it was studied in the context of four countries: The Bahamas, St. Kitts and Nevis, Trinidad and Tobago, and Guyana. The ecotourism value chain was analyzed. Challenges to the development of the ecotourism industry were identified in the selected countries, and a roadmap was proposed.



**JEL codes:** L52; L83
**Keywords:** Value chain, private sector, ecotourism, tourism, Caribbean



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## 1. Introduction

Compete Caribbean and the Inter-American Development Bank (IDB), in collaboration with the Caribbean Centre for Competitiveness (CCfC) of the University of the West Indies (UWI) and the CARICOM Secretariat, undertook a project entitled 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 Caribbean region, using a value chain analysis methodology, in order to identify challenges to the growth of these industries and to propose recommendations to overcome them.

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 heterogeneity existing among CARIFORUM countries in terms of size, GDP, and economic and social conditions, they face a number of similar challenges to private sector growth, including limited markets, low labor productivity and inadequate skills for market demand, high energy and transportation costs, and high levels of debt.

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

The industry selected for this project was the ecotourism industry, and it was studied in the context of four countries: The Bahamas, Guyana, St. Kitts and Nevis, and Trinidad and Tobago and Ecotourism was selected because it fulfilled a series of criteria set by the project's Steering Committee.[2] The criteria for industry selection were: (i) having been explicitly identified as a priority sector by CARIFORUM countries; (ii) being present in more than two countries in the region and having broad geographical coverage; (iii) being prioritized by countries in the region and being identified as a regional priority by regional organizations and

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[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.

[2] The Steering Committee was formed by representatives of Compete Caribbean, IDB, CARICOM, the Multilateral Investment Fund (MIF), the University of West Indies, and the Caribbean Centre for Competitiveness (CCfC) of the University of West Indies.

the ongoing dialogue within the Caribbean Growth Forum, and the Heads of Government Conference; (iv) being an industry that could benefit from increased regional coordination; (v) having potential to move up the value chain; (vi) having potential for extra-regional market penetration; and (vii) having potential for increased productivity through the use of technology. In order to allow for broad geographical coverage, countries belonging to different geographical sub-regions within the Caribbean were selected: (i) The Bahamas, for North Caribbean; (ii) St. Kitts and Nevis, for the Organization of Eastern Caribbean States (OECS); (iii) Trinidad and Tobago, for South Caribbean; and (iv) Guyana, for the Mainland group. In addition, these countries represented a full range in terms of participation in the tourism industry and promoting ecotourism as a market segment.

Ecotourism is part of the travel and tourism industry, which contributed US$15.7 billion, or 4.6 percent of total GDP, to the Caribbean region, and 647,000 jobs, or 3.9 percent of total employment, in 2012. Moreover, 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 led to productivity improvements, and presents a number of opportunities for further industry strengthening.

The methodology employed to conduct the value chain analysis of the ecotourism sector included:

(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) Primary data collection via fieldwork: Primary data were collected in the four countries for the value chain mapping exercise. The fieldwork consisted of face-to-face interviews, phone interviews, and written correspondence.

(iii) Value chain analysis: The ecotourism value chain was developed based on the global value chain (GVC) methodology, as outlined by Gereffi and Fernandez-Stark (2011).

(iv) Needs assessment: The needs assessment was conducted using a number of strategic frameworks that examine the economic, social, and institutional environments that impact the competitiveness of the ecotourism sector. A roadmap was developed that includes actions aimed at increasing collaboration and growth of the selected sector.

This technical note is organized as follows. Section 2 presents the definition and characteristics of the ecotourism sector and provides an overview of the sector in the Caribbean; Section 3 analyzes the ecotourism value chain in the countries selected; Section 4 provides details on the challenges facing the ecotourism sector in the countries selected; and Section 5 presents a roadmap forward.

## 2. The Ecotourism Sector

Although a universally accepted definition of the ecotourism concept still remains elusive, there are at least five elements that distinguish ecotourism from other types of tourism. The United Nations World Tourism Organization (UNWTO, 2002) definition encompasses all these components, identifying the distinctive components of ecotourism 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, organized 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 minimizes negative impacts upon the natural and socio-cultural environment.

(v) It supports the protection of natural areas by:

- Generating economic benefits for host communities, organizations and authorities that are responsible for conserving natural areas;
- Creating jobs and income opportunities for local communities; and
- Increasing awareness among both locals and tourists of the need to conserve natural and cultural assets.

Based on these elements, ecotourism can be summarized 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.

In terms of attractions and activities, ecotourism is related to other types of tourism, such as those illustrated in Table 1. In addition, in terms of principles and practices, ecotourism is related to other types of tourism, such as those presented in Table 2.

**Table 1: Types of Tourism Related to Ecotourism 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 |

Source: Authors' elaboration.

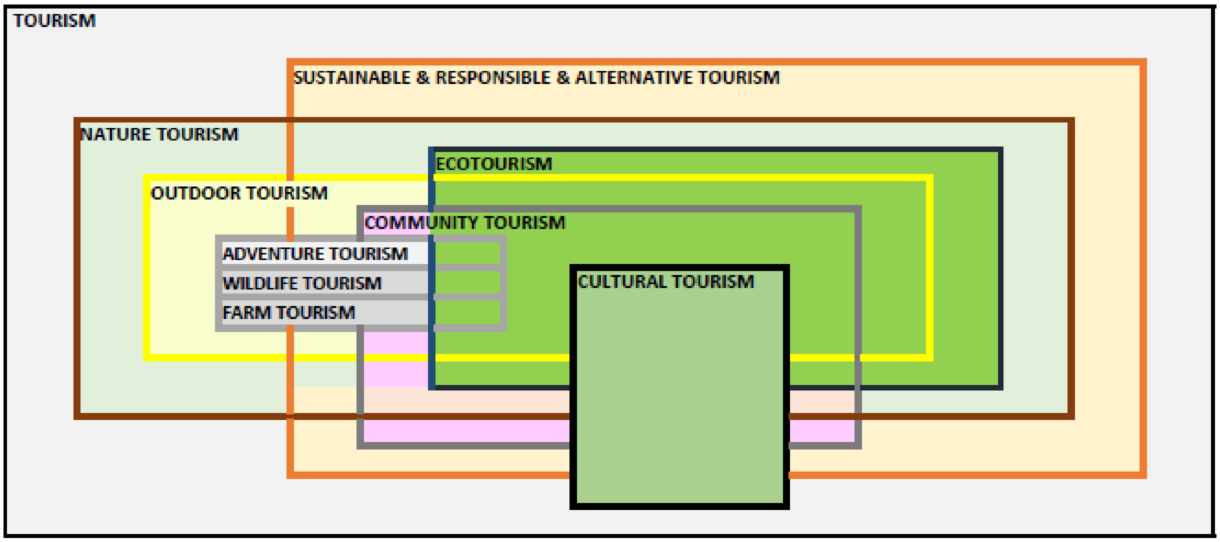
**Table 2: Types of Tourism Related to Ecotourism by way of Principles and Practices**

| | |
|---|---|
| **Alternative tourism** | – Tourism that is organized for small or segmented markets (opposite of mass tourism) |
| **Responsible tourism** | – Tourism that is based on principles that not only minimize negative social, environmental, and economic impacts, but also positively contribute to all stakeholders in the tourism industry |
| **Sustainable tourism** | – Tourism that is based on the principle of sustainable development, which minimizes 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 |

Source: Authors' elaboration.

Given that some of the distinctive elements of ecotourism are shared with other types of tourism, Figure 1 presents the framework that will be used to investigate ecotourism in the CARIFORUM countries. The figure shows that ecotourism is part of nature tourism and that is among the sustainable, responsible, and alternative types of tourism. In terms of attraction and activities, it shows that it may intersect with outdoor tourism, especially adventure, wildlife, and farm tourism.

**Figure 1: Ecotourism and Its Relationship with Related Tourism Types**




Source: Authors' elaboration.

### 2.1 The Ecotourism Product

The ecotourism product is multi-dimensional, consisting of both tourism elements and specific practices and philosophies.

Any tourism product can be defined on two different levels: the total tourism product (made up of all of the elements consumed by a visitor during a visit) and the individual tourism elements (or a combination of these elements) consumed by a visitor. The individual elements include: (i) transportation to and from the destination country; (ii) accommodations and catering; (iii) excursion (attractions, activities and facilities); (iv) ground transportation; (v) entertainment; (vi) souvenirs; and (vii) other related products and services.

Similarly, the ecotourism product can be considered as the general tourism product or in terms of separate elements (or a 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 disaggregated into attractions, activities, and facilities. In ecotourism, attractions are typically natural or cultural attractions. Examples of natural attractions are: forest, mountain, coastal, lake, and cave attractions. Examples of cultural attractions are: festivals, events, cultural villages, museums, cuisine, and food. In general, excursion activities include leisure, recreational, sightseeing, and educational categories. Typical ecotourism excursion activities include wildlife spotting, bird watching, hiking, exploring, trekking, kayaking, and diving.

The ecotourism product is different from other types of tourism in its practices and philosophies. In fact, the ecotourism product focuses on a nature-based product that is educational, 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 example, 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 to study 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. It may use a local tour guide, ensure that the size of the group is small, make provisions to prevent the tour group from harming the environment, and contribute a portion of the tour fees toward 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.

For the value chain analysis of the ecotourism sector, three types of ecotourism products will be considered:

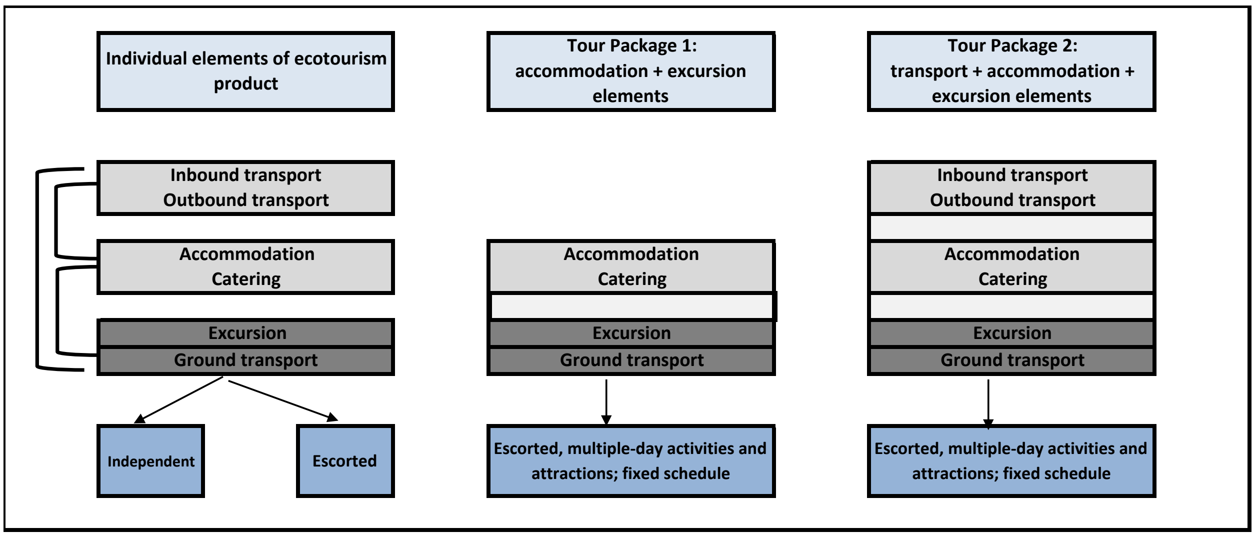
(i) A product related to one of the individual elements of ecotourism, namely: excursion, transportation, or accommodations. In this product type, the excursion element will be the focus, while one or both of the other two elements can be accessed by the visitor and combined as per individual needs. 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.

(ii) An ecotourism package, combining excursion, accommodation, and catering elements. In this product type, the excursion activity may be independent or escorted, and the escorted tours can be single-day tours or multiple-day tours.

(iii) An ecotourism full package tour, comprising the excursion element and the transportation, accommodation, and catering elements. In this product type, the excursion activity is typically escorted, and the schedule is fixed and spread across several days. Additionally, these tour packages involve a single country destination or multiple country destinations.

Figure 2 gives a visual representation of the three product types:

**Figure 2. Ecotourism Product Types**




Source: Authors' elaboration.

## 2.2 The Ecotourism Market

Numerous studies have analyzed the market size of ecotourism on a global scale. As shown in Table 3, estimations of the market size of ecotourism range from 5 to 40 percent of the total travel and tourism industry.

**Table 3. Estimates of Ecotourism Market Size**

| REFEERNCE | ESTIMATED MARKET SIZE |
|---|---|
| Buckley (2009) | 1–2 percent of total travel and tourism industry |
| EBSCO (2009) | 5–7 percent of total travel and tourism industry |
| Holing (1991); Hvenegaard (1994) | 10 percent of all international tourists |
| Azimi (2005) | 20 percent of total travel and tourism industry |
| The Ecotourism Society (1998); EplerWood International (2004) | 20–40 percent of total travel and tourism industry |

Source: Authors' elaboration.

Estimating the demand side of ecotourism remains a special challenge in ecotourism research for at least four reasons. First, there are the varying interpretations of the ecotourism concept among countries, and even within the same country. Second, and closely related to the first challenge, the lines of demarcation are blurred among ecotourism, other nature-based tourism market segments, and responsible and sustainable tourism. Third, 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 educational components of the ecotourism concept. Fourth, there is a lack of information on the niche market in conventional tourism databases, specifically in the data collected by national governments from typical immigration documents.

Given these challenges, for the purposes of this value chain mapping exercise, three estimates of the size ecotourism industry will be used:

(i) Low: 1–2 percent, as per the Buckley (2009) estimate

(ii) Medium: 5–10 percent, as per EBSCO (2009) estimate

(iii) High: 20–40 percent, as per the Ecotourism Society (1998) estimate

With regard to the characteristis of the consumer of the ecotourism product, despite the fact that there is no single definition of an ecotourist, a number of studies on the sector have yielded some insight. Table 4 summarizes the findings from the ecotourism market studies conducted in Canada, the United Kingdom, and the United States.

**Table 4. Findings from the Ecotourism Market Studies in Canada, the United Kingdom, and the United States**

| | | Canada | United States | United Kingdom |
|---|---|---|---|---|
| Ecotourist profile | Age | Any age/ independent traveller | 42%: 35–54 years<br>34%: 18– 34 years | Over 35 years |
| | Gender | Equal distribution of males and females | | Women slightly outnumber men |
| | Income | Higher income household | Median household income: US$79,600 | Relatively high social brackets |
| | Education level | 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 –United States, Europe, Caribbean, South/Central America | 1st - Mexico; 2nd - Australia; 3rd - Jamaica; 4th- Costa Rica | |
| | Motivation | Experiencing wilderness; Interpretive / learning experiences; Discovering local culture and food | Wildlife viewing<br>Being in the wilderness<br>Sighting rare animal species<br>Visiting archaeological sites<br>Visiting indigenous people<br>Bird watching | Being in wilderness<br>Wildlife viewing<br>Visiting indigenous people & seeing their culture |
| | Activity | Hiking, camping, walking | | |
| | Length of time abroad | Package tour – 2 weeks<br>Independent – 8 days to over 2 weeks | | 3–14 days in Europe<br>8–21 days outside of Europe |
| | Time of year | Preference for summer | | |
| | Cost of package tours | US$2,000–US$5000 | | |
| | Average spend / day | | US$66 per day | |
| | Marketing channels | | | Word of mouth<br>Advertising in specialist magazines<br>Tour operator company brochure |

Source: UNWTO (2002).

A review of available studies reveals similar results with respect to the characteristics of the ecotourist: the ecotourist is a mature consumer, generally over the age of 35, educated to at least a college education, from a 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. Accommodations above the 2-star range are demanded. The ecotourist is interested in wilderness experiences, seeing wildlife in their natural habitat, and visiting archaeological sites and indigenous peoples, among others.

Aside from the “pure ecotourist,” there are also “casual ecotourists,” who engage in ecotourism as part of a broader range of touristic activities. In the case of the Caribbean, given the traditional tourism focus of the region under study—leisure—the incidence of casual ecotourism cannot be dismissed.

Finally, regarding the supply of ecotourism products, two categories of suppliers can be identified: (i) owners and managers of ecotourism excursion attractions (including government, private organizations, and private voluntary organizations); and (ii) ecotourism agents, who connect ecotourists to the ecotourism excursion element. Within the latter category, there are a number of actors, as shown in Table 5.

**Table 5. 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 organizations</td><td rowspan="2">Private organizations</td><td colspan="2">Private voluntary organizations</td></tr>
<tr><td>Nongovernmental organizations</td><td>Community-based organizations</td></tr>
<tr><td rowspan="4">2</td><td rowspan="4">Ecotourism agents who connect ecotourists with 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 tours.</td></tr>
<tr><td colspan="4">2. Tour guides, who provide guided tours of ecotourism attractions.<br>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 accommodations. May provide specialized accommodations in keeping with ecotourism principles (e.g., ecolodge) or general-purpose accommodations.<br>May include independent or escorted excursion activities based on proximity to ecotourism attraction.<br>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 transportation providers, whose primary function is to provide local ground, sea, and air transportation. May have formal or informal relationships with owners/managers of ecotourism excursion attractions, tour operators, tour guides, or accommodation providers.</td></tr>
</table>

Source: Authors’ elaboration.

# 3. Value Chain Analysis of the Ecotourism Industry in the Caribbean

## 3.1 The Travel and Tourism Industry in CARIFORUM and Selected Countries

The World Travel and Tourism Council (WTTC, 2012) reports on the significance of the travel and tourism industry specifically for the Caribbean region.[3] In 2012, travel and tourism directly contributed US$15.7 billion, or 4.6 percent of total GDP in the Caribbean, and 647,000 jobs, or 3.9 percent of total employment. When the industry's wider impact is considered, travel and tourism's total contribution to GDP was US$48.4 billion (14.0 percent) and 2.028 million jobs (12.3 percent of total employment).

A number of CARIFORUM countries appeared in WTTC's 2012 top 10 country rankings for the travel and 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 percent, and Antigua and Barbuda, with 18.5 percent, ranked seventh and eighth, respectively. Similarly, in relative terms for the industry's total contribution to GDP, Antigua and Barbuda, with 77.4 percent, and The Bahamas, with 48.4 percent, ranked third and fourth, respectively. In terms of the industry's relative direct contribution to total employment, The Bahamas, with 30.6 percent, Antigua and Barbuda, with 18.8 percent, and St. Lucia, with 18.6 percent, ranked third, eighth, and ninth, respectively. Likewise, in terms of the industry's relative contribution to total employment, Antigua and Barbuda, with 71.5 percent, The Bahamas, with 57.4 percent, and St. Lucia, with 42.3 percent, ranked fourth, seventh, and tenth, respectively.

According to the United Nations World Tourism Organization (UNWTO), there has been a gradual increase in arrivals to the Caribbean region since 2010, 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.

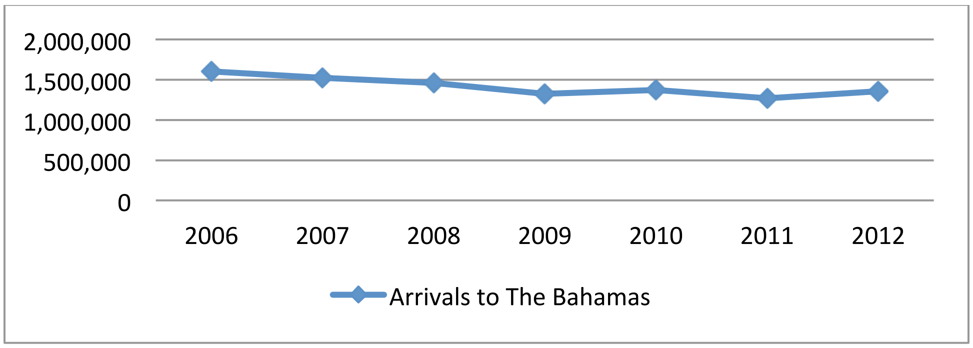
Since the size and characteristics of the travel and tourism industry may differ from country to country, the following pages will provide details on the industry in the four countries selected for this study. Available information on ecotourism will be presented, including a detailed description on the stock of resources possessed by each country.

[3] For the WTTC research, the Caribbean region included Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Bermuda, Cayman Islands, Cuba, Former Netherlands Antilles, Dominica, the 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 U.S. Virgin Islands.

*a. Bahamas*

Tourism remains the key economic activity in The Bahamas, where the travel and tourism industry contributed 47.2 percent to GDP and 55 percent to employment in 2012. In terms of tourist statistics, arrival figures over the 2006–12 period are shown in Figure 3. Key markets for international visitors included the United States (80.1 percent), Canada (8.7 percent), Europe (5.7 percent), and the rest of the world (5.5 percent)

**Figure 3. Tourist Arrivals to The Bahamas (2006–12)**




Source: Authors' elaboration based on Caribbean Tourism Organization: www.tourismtoday.com.

Ecotourism is one of four key market segments featured 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:

> Ecotourism 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 Table 6.

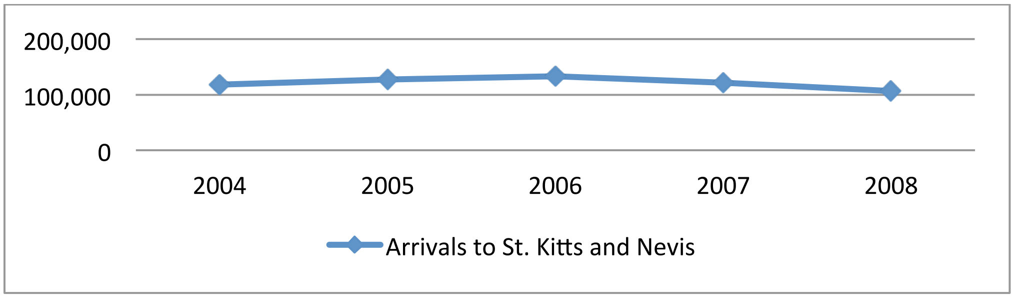
## Table 6. The Bahamas' Ecotourism Natural and Cultural Attractions

| | NATURAL RESOURCES | | | | | NATURE-BASED CULTURAL |
|---|---|---|---|---|---|---|
| | Forest, mountain, waterfall, and volcano | Coastal and marine | Lake, river, and wetland | Cave | Other | Museums and cultural repositories |
| The Abacos | Abaco National Park | Walker's Cay National Park | Black Sound Cay National Reserve | | Tilloo Cay Reserve | |
| | | Pelican Cays Land and Sea Park | | | | |
| | | Fowl Cays National Park | | | | |
| Andros | | North and South Marine Parks | | | Crab Replenishment Reserve | |
| | | Blue Holes National Park | | | | |
| | | West Side National Park | | | | |
| Long Island | | | | | Conception Island National Park | |
| Acklins and Crooked Island | | | | | | Hope Great House and Marine Farm |
| Eleuthera and Harbour Island | | | | | Leon Levy Native Plant Preserve | |
| The Exumas | | Exuma Cays Land and 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 and Paradise Island | Primeval Forest National Park | | Bonefish Pond | | Harold and Wilson Ponds National Park | |

*b. St. Kitts and Nevis*

In 2012, the travel and tourism industry contributed 29.1 percent to GDP and 27.5 percent to employment in St. Kitts and Nevis. In terms of tourist statistics, arrival figures over the 2004–08 period are shown in Figure 4.

**Figure 4. Tourist Arrivals to St. Kitts and Nevis (2004–08)**




Source: Authors based on Caribbean Tourism Organization.

The cruise ship market segment is significant, with a total of 633,244 cruise ship passengers, spread over 284 calls, visiting the country in 2011–12. Key markets for international visitors were the United States (56 percent), the Caribbean (23 percent), the United Kingdom (11 percent), and Canada (6 percent).

Ecotourism is one of five key market segments featured 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, rather than an ecotourism strategy, St. Kitts and Nevis is pursuing a Sustainable Tourism Development Strategy. Within that strategy, ecotourism, also referred to as green tourism, is considered a sector.

> "Ecotourism/green tourism" is and will continue to be a sector for sustainable growth and development of tourism in St. Kitts and 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 Table 7.

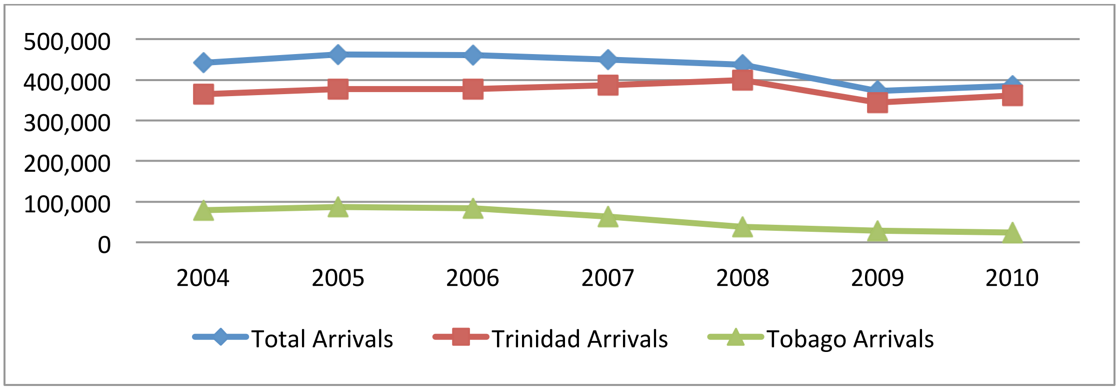
## Table 7. St. Kitts and Nevis' Natural and Cultural Attractions

| | NATURAL RESOURCES | | NATURE-BASED CULTURAL RESOURCES | | |
|---|---|---|---|---|---|
| | **Forest, mountain, waterfall, and volcano** | **Coastal and marine** | **Cultural villages** | **Museums and cultural repositories** | **Other** |
| **St Kitts and 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 | | | |
| | | | | | |

### *c. Trinidad and Tobago*

In Trinidad and Tobago, the travel and tourism industry contributed a total of 7.6 percent to GDP and 9.9 percent to total employment in 2012. Tourist arrival figures over the 2004–10 period are shown in Figure 5.

**Figure 5. Tourist Arrivals to Trinidad and Tobago (2004–10)**




Source: Authors' elaboration based on Central Statistical Office.

Key international markets included the United States (47 percent), Canada (12 percent), the United Kingdom (9 percent), and Germany (1 percent), while the key regional markets were Guyana (5 percent), Barbados (3 percent), Grenada (2 percent), and Venezuela (2 percent). When these statistics are divided at the subnational level, 94 percent of all visitors visit Trinidad.

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 (http://www.gotrinidadandtobago.com/; http://www.visittobago.gov.tt/). The ecotourism definition adopted 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 ecotourism attractions on the Trinidad and Tobago tourism promotional website are summarized in Table 8.

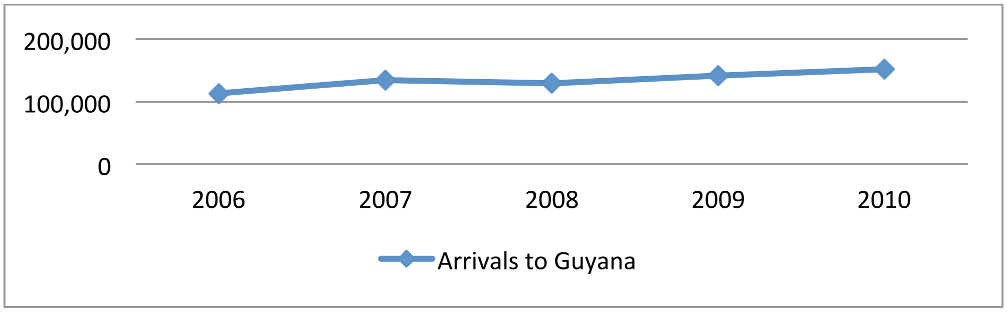
**Table 8. Trinidad and Tobago's Advertised Ecotourism Natural and Cultural Attractions**

| | NATURAL RESOURCES | | | | |
|---|---|---|---|---|---|
| | **Forest, mountain, waterfall, and volcano** | **Coastal and marine** | **Lake, river, and 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 | | | | |

*d. Guyana*

The travel and tourism industry made a total contribution to GDP of 9.2 percent and a total contribution to employment of 3.2 percent in 2012. Tourist arrival figures over the 2004–10 period are shown in Figure 6.

**Figure 6. Tourist Arrivals to Guyana (2004–10)**




Source: Authors based on Caribbean Tourism Organization.

From the 2010 international visitor statistics to Guyana, key international markets included the United States (54.6 percent), the Caribbean (19.4 percent), and Canada (16.7 percent). Ecotourism is one of five key market segments featured on the country's promotional website, with the other four market segments being cultural, rural, nature, and adventure (http://www.guyana-tourism.com/).

In the 1997 National Plan for Ecotourism Development in Guyana, ecotourism was defined as (Fennell, Buckley, and 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.

While ecotourism is featured on the country's promotional website, the Guyana Tourism Authority emphasizes sustainable tourism and responsible tourism. The advertised ecotourism attractions on the Guyana tourism promotional website are summarized in Table 9.

Table 9. Guyana's Ecotourism Natural and Cultural Attractions

| | NATURAL RESOURCES | | | | NATURAL-CULTURAL |
|---|---|---|---|---|---|
| | Forest, mountain, waterfall, volcano | Coastal and marine | Lake, river, and 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 | | | | |

From the information presented on the four countries selected for this study, it is clear that the definitions of ecotourism put forth by The Bahamas, Guyana, and Trinidad and Tobago are comprehensive and meet four of the five UNWTO principles of ecotourism (nature and socio-cultural, conservation, low impact, economic benefits to local communities), with only the educational component not explicitly included. In terms of the inventory of natural and cultural attractions advertised on the four countries' official promotional websites, coastal and marine natural resources are the main ecotourism attractions for The Bahamas and St. Kitts and Nevis, while forest, mountain, volcano, and waterfall natural resources are the main ecotourism attractions for Guyana and Trinidad and Tobago.

## 3.2 Value Chain Analysis for the Ecotourism Industry

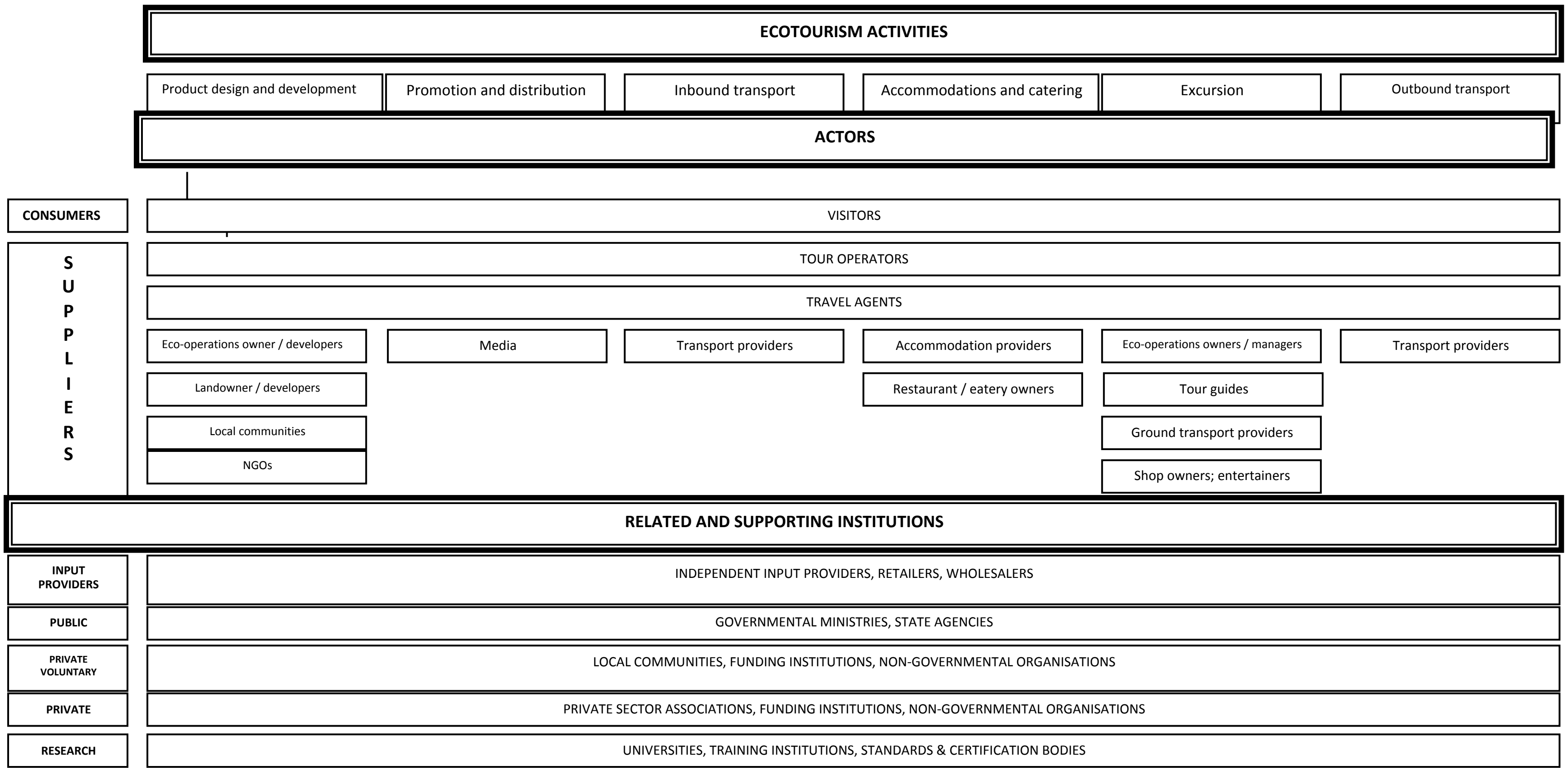
The term *value chain* is used to describe "the full range of activities required to bring a product or service from conception, through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers, and final disposal after use" (Kaplinsky and Morris, 2000). In other words, value chain is "an integrated manufacturing process wherein raw materials are converted into final products, then delivered to customers" (Beamon, 1998). 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 et al., 2012).

The ecotourism value chain in the selected countries will be analyzed on two levels. First, the input-output relations within the value chain, including the activities and actors taking part in it, will be examined. This analysis will follow the GVC methodology outlined by Gereffi and Fernandez-Stark (2011). Second, a detailed analysis will be conducted for the value chains of the three ecotourism products being considered in this study, namely: (i) a product related to one of the individual elements of ecotourism (excursion, transportation, or accommodation); (ii) an ecotourism package; and (iii) an ecotourism full package tour.

### a. *General Characteristics of the Ecotourism Value Chain*

Figure 7 shows the input-output structure of the detailed value chain map for the ecotourism industry, including activities and actors present along the value chain.

**Figure 7. The Input-Output Structure for the Ecotourism Industry**




Source: Authors' elaboration.

Six activities have been identified as being critical for the input-output relations along the ecotourism value chain. Table 10 provides a description of these activities:

**Table 10. Critical Activities in the Ecotourism Value Chain**

| |
|---|
| **1. PRODUCT DESIGN AND DEVELOPMENT** |
| This activity involves conceptualizing 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. |
| **2. 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 purpose of purchasing it. 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. First, there is the single-level distribution channel, where the tourism service provider sells directly to the visitor. Second, there is the two-level distribution channel, where an intermediary, such as a travel agent, is used. Third, 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. In the case of ecotourism, an additional layer may be included when an ecotourism specialist is added to any of the three distribution channels previously discussed. |
| **3. INBOUND TRANSPORTATION** |
| This activity involves moving the visitor to the tourism destination. There is the international transportation element, where the main modes of transportation include airlines and cruise ships. |
| **4. ACCOMMODATION AND CATERING** |
| This activity involves the provision of accommodations for a fee. The accommodation types include hotels, inns, bed and breakfast (B&B) establishments, guesthouses, apartments, resorts, condos and campsites. Accommodations may or may not include food service. The catering activity, however, involves the provision of food for a fee and includes meals and snacks. |
| **5. EXCURSION** |
| This activity involves ground transportation to the tourist attraction, and the accompanying leisure, recreational, sightseeing, and educational activities. |
| **6. OUTBOUND TRANSPORTATION** |
| This activity involves moving the visitor from the tourism destination back to his or her place of origin. |

Source: Authors' elaboration.

In turn, the ecotourism value chain actors can be classified in a number of categories, such as: consumers, suppliers, and related and supporting institutions.[4] These categories are described in Table 11.

[4] Major value chain actors in the four countries are described in the Appendix.

## Table 11. Types of Actors in the Ecotourism Value Chain

| | |
|---|---|
| **CONSUMERS** | Visitors or ecotourists traveling to a place other than their 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.<br>Further, ecotourists 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) ecotourist. |
| **SUPPLIERS** | **1. Product Design and Development** |
| | **Public sector** |
| | **Government ministries and departments**: They typically have overall responsibility for the tourism sector in a country and provide central leadership through the development and coordination of national tourism strategies and policies.<br>**National tourism authorities and agencies:** They are often tasked with the responsibility of developing the tourism product of their respective countries and monitoring the performance of the industry. |
| | **Private voluntary organizations** |
| | **Local communities in community-based ecotourism (CBE):** These are the local communities where the natural or cultural attractions are located. They are involved in the product design and development activities.<br>**NGOs in NGO-based ecotourism (NBE):** These are NGOs that own and/or manage the locations where the natural and cultural attractions are located. |
| | **Private Sector** |
| | **Eco-operations owners/developers/managers; landowners in entrepreneur-based ecotourism (EBE):** These are the entrepreneurs who have invested in the development of an ecotourism site.<br>**Tour operators:** They identify specific elements that comprise the total ecotourism product in order to develop combinations of these elements to offer as tour packages.<br>**Travel agents:** Like tour operators, they identify a specific element of the total ecotourism product and develop a product offering. |
| | **2. Promotion and Distribution** |
| | **Public sector** |
| | **Government ministries and departments/national tourism authorities and agencies:** They are involved in the promotion of the tourism product of their respective countries. |
| | **Private voluntary organizations** |
| | **Local communities in CBE and NGOs in NBE:** These are the local communities and NGOs that promote the ecotourism product through websites and other media. |
| | **Private sector** |
| | **Tour operators/travel agents:** They act as intermediaries, bringing the tourism product to the visitor.<br>**Eco-operations owners/developers/managers; landowners in EBE:** They use direct marketing and selling to the visitor. |
| | **3. Inbound and Outbound Transportation** |
| | **Airlines, cruise lines:** For international visitors to the CARIFORUM region, the modes of transportation are air and sea. |
| | **4. Accommodation and Catering Excursions** |
| | **Accommodation providers; food service owners:** These actors include owners and managers of accommodation establishments and food service establishments. |

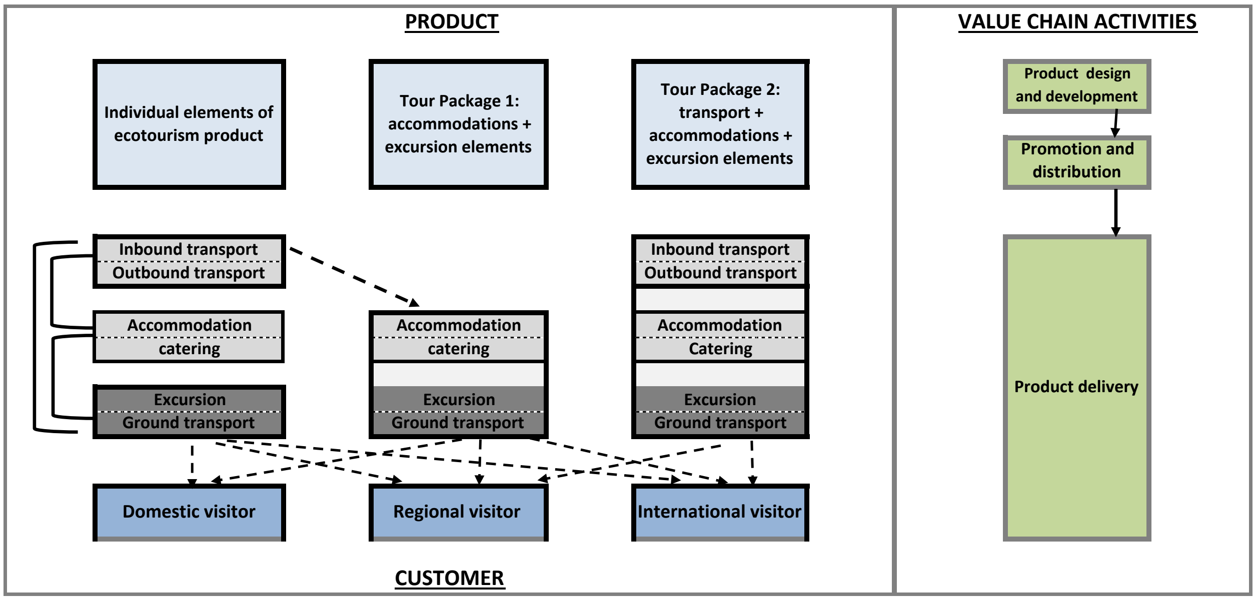
| | |
|---|---|
| | **Tour operators, travel agents, eco-operator owners/manager, tour guides:** These actors include the eco-operator owners and tour guides who manage the ecotourism activities, food service providers, and shop owners who may sell souvenirs and other consumables.<br>**Ground transport providers:** These actors include private taxis and bus owners, car rental companies, and bus service companies. |
| **RELATED AND SUPPORTING INSTITUTIONS** | **Input providers:** These 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, input providers may include advertising agencies, printers, photographers, and graphic artists. Similarly, in catering, input providers may include farmers, market vendors, supermarkets, and bakeries. |
| | **Public sector:** These actors include a range of organizations and institutions that play a supporting role by supplying a range of goods, services, information, training, and financing to the main actors along the value chain. |
| | **Private sector business support organizations and NGOs:** These are the industry associations, chambers of commerce, NGOs and other related organizations that offer the industry support and advocacy. Financial institutions are also included in this category, as they provide debt and equity financing for the industry. |
| | **Research, training, standards, and certification bodies:** Institutions such as universities, colleges, and training institutes provide teaching, training, and research services to the industry. Laboratories, research labs, and certification bodies provide quality assurance and quality control services to the industry. |

Source: Authors' elaboration.

*b. Value Chain Analysis for Specific Ecotourism Products*

The activities and actors described above are combined in different input-output relations to produce the three product types described in Section 2. Figure 8 shows the different activities included in the value chain for each product:

**Figure 8. Activities Involved in the Value Chain of Selected Ecotourism Products**

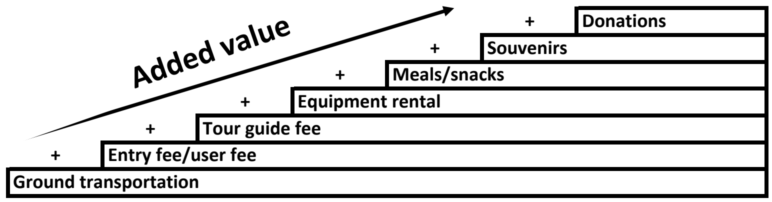



Source: Authors' elaboration.

- **Product Type 1**

In Product Type 1, the visitor accesses the excursion activity and, if needed, the accommodation and catering element, as well as inbound and outbound transportation. The excursion activity varies tremendously in term of 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 types 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 9). These components are usually combined according to the motivations of the visitor, the location of the excursion attraction, and the nature of the excursion.

**Figure 9. Components of the Ecotourism Excursion Activity**




Source: Authors' elaboration.

Table 12 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 12. Components of the Excursion Activity and Relevant Value Chain Actors**

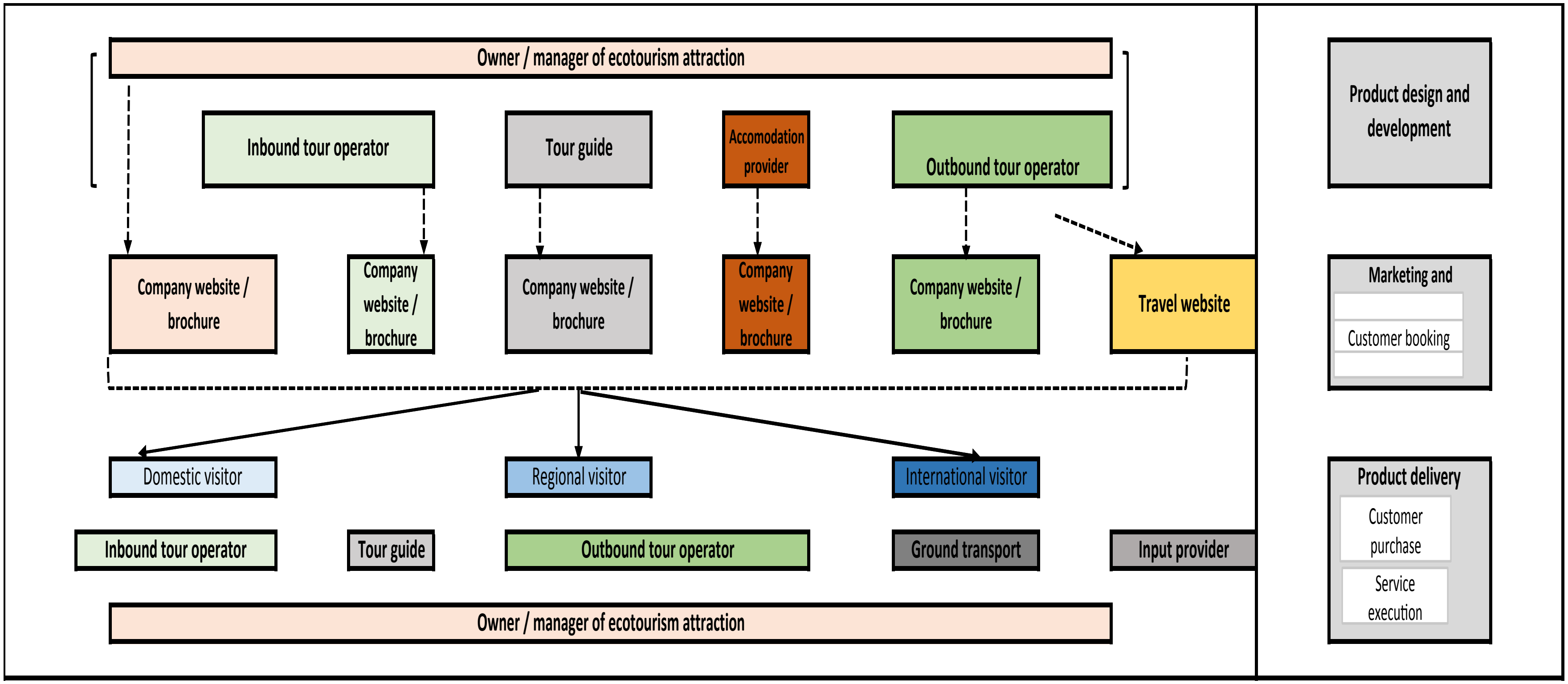
| | Excursion component | Comments | Value chain actors |
|---|---|---|---|
| **1** | **Ground transport to attraction** | Dependent on attraction's location, visitor's point of origin, and visitor's preferences. | Bike or car rental company<br>Taxi/bus/boat/ferry/plane company<br>Private taxi/bus/boat/ferry/plane operator<br>Tour guide<br>Tour operator |
| **2** | **Entry fee/user fee** | It may range from nominal value contributing to operating expenses, to market value contributing to profits. | Owner/manager of excursion attraction |
| **3** | **Tour guide fee** | It may range from hourly rate to standard tour rate. | Tour guide<br>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<br>Tour guide<br>Tour operator<br>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<br>Tour guide<br>Tour operator<br>Input provider (restaurant, concessionaire, food and beverage distributors and manufacturers, raw materials, and packaging material supplier) |
| **6** | **Souvenirs** | May be included in day-tour price or may be optional add-ons. | Owner/manager of excursion attraction<br>Tour guide<br>Tour operator<br>Input provider (manufacturers, raw materials, and packaging material supplier) |
| **7** | **Donations** | Voluntary contribution to support conservation activities and other operating activities. | Owner/manager of excursion attraction |

Source: Authors' elaboration.

According to Table 12, 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 the owner/manager of the excursion attraction. When escorted tours are taken, however, the major value chain actors are the inbound tour operator and the 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. 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, including online advanced bookings and payments or in-person at the time of the excursion (Figure 10).

**Figure 10. Major Value Chain Actors Involved in the Ecotourism Excursion Activity**




Source: Authors' elaboration.

Regarding accommodations and catering, in the ecotourism industry this activity spans a spectrum of options, which can be classified according to six categories: (i) non-serviced sleeping facilities; (ii) non-serviced sleeping facilities and self-catering facilities; (iii) serviced sleeping facilities; (iv) serving sleeping facilities and self-catering facilities; (v) serviced sleeping facilities and one or more meal options; and (vi) all-inclusive accommodations. Generally speaking, moving from the non-serviced sleeping facility to the all-inclusive accommodations, the value created and captured by the value chain actors increases. Table 13 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.

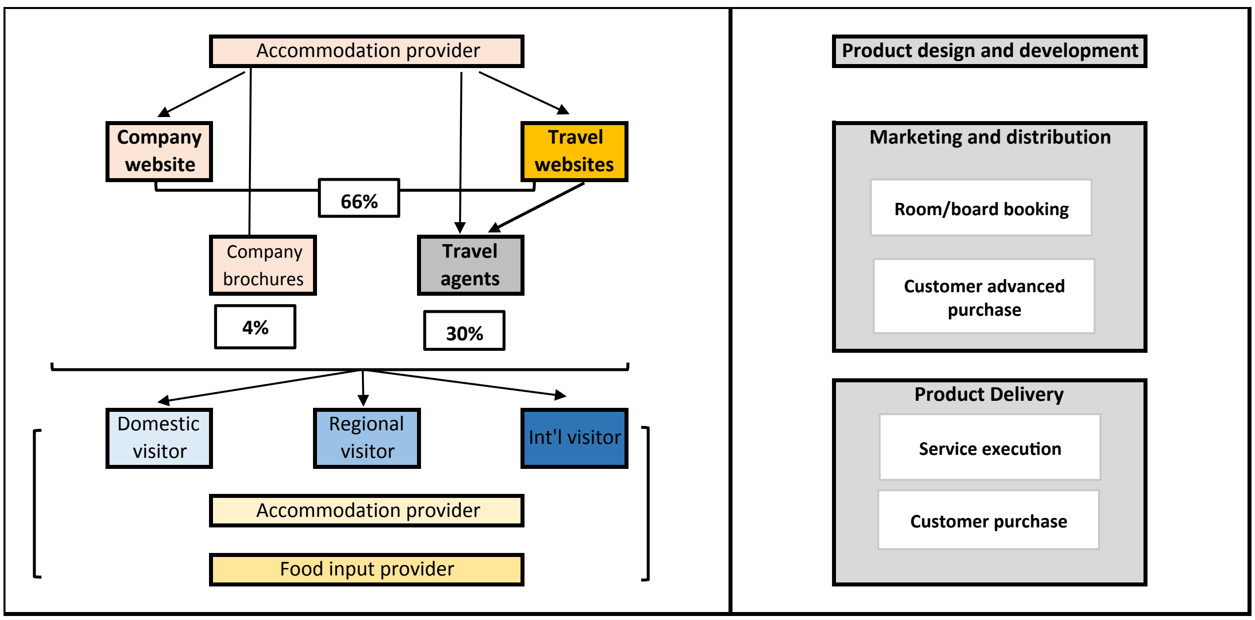
**Table 13. Accommodation and Catering Options and Relevant Value Chain Actors**

| | Accommodation type | Comments | Value chain actors |
|---|---|---|---|
| **1** | **Open air/tents/campsites** | Camping may range from minimalist-type accommodations with limited amenities to accommodations with a number of amenities. Because of remote settings, meals are generally provided or visitors may be involved in meal preparation as part of the experience. | Owner/manager of excursion attraction<br>Tour operator<br>Input provider (private company renting equipment, food and beverage supplier) |
| **2** | **Host homes** | Visitors stay in accommodations provided by local community residents. Meals are generally provided or visitors may be involved in meal preparation as part of the experience, or are not included in accommodation fee. | Private host home owner<br>Local community tour operator<br>Input provider (food and beverage supplier) |
| **3** | **Specialist eco-type communal accommodation** | Tour group uses shared accommodations, inclusive of sleeping quarters, eating areas, and toilet and bathing facilities. Meals are generally provided or visitors may be involved in meal preparation as part of the experience. | Owner/manager excursion attraction<br>Accommodation provider<br>Travel website/travel agent /tour operator<br>Input provider (food and beverage supplier) |
| **4** | **Specialist eco-type private accommodations** | Private accommodations, inclusive of sleeping quarters, and toilet and bathing facilities. Catering options may range from self-catering to all food and beverages provided. | Accommodation provider<br>Travel website/travel agent/tour operator<br>Input provider (food and beverage supplier) |
| **5** | **Mainstream accommodations** | Private accommodations, inclusive of sleeping quarters, and toilet and bathing facilities. Catering options may range from self-catering to all food and beverages provided. | Accommodation provider<br>Input provider (food and beverage supplier)<br>Travel website/travel agent/tour operator |

Source: Authors' elaboration.

According to Table 13, the accommodation provider is the value chain actor creating and capturing the most value in the accommodation and catering activity. The type of accommodation option available depends on a number of factors, including the type of ecotourism practiced. For example, host home accommodations are mainly a feature of community-based ecotourism. Likewise, the camping and communal accommodation options are typically available when the accommodations are 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 required, the domestic visitor typically requires short-term accommodations. Regional and international visitors generally require longer-term accommodations, ranging from 7 to 21 days. Online booking of accommodations is widespread.

**Figure 11. Value Chain Actors Involved in the Accommodation and Catering Activity**




Source: Authors' elaboration.

Finally, the inbound and outbound transportation activity for the CARIFORUM countries primarily involves air and sea transportation options[5] for international and regional visitors. However, for mainland countries such as Belize, Guyana, and Suriname, land transportation options are also alternatives. Table 14 shows a number of transportation options, as well as the actors that are involved in the creation and capture of value of these options.

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

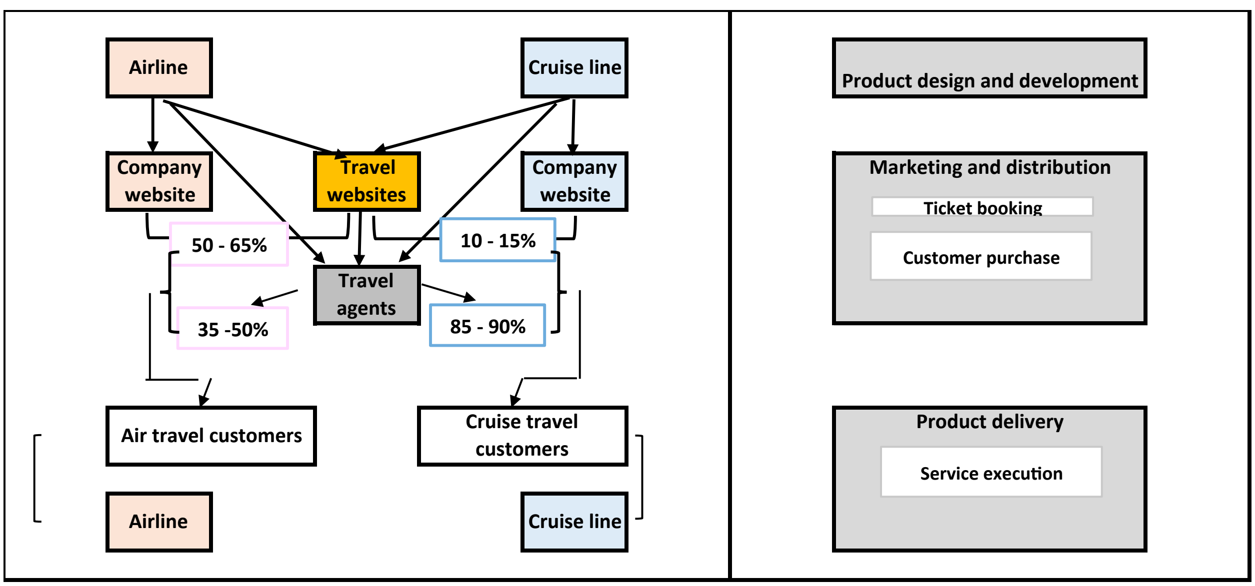
**Table 14. Transportation Options and Relevant Value Chain Actors**

| | 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 transportation, and chartered buses or coaches for regional visitors | Car rental companies/taxi or bus companies/private taxi or bus operators |

Source: Authors' elaboration.

According to Table 14, airlines (in the case of inbound and outbound air transportation) and cruise companies (in the case of cruise travel) are the major value chain actors creating and capturing value in the inbound and outbound transportation activity.

**Figure 12. Value Chain Actors Involved in Inbound and Outbound Transportation Activity**




Source: Authors' elaboration.

- **Product Type 2**

Product Type 2 is the accommodation and excursion tour package product. With this product type, there are different 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, local tour operators. Product Type 2 varies by the number of scheduled excursion activities, the multiple components associated with the excursion activities (Figure 8), the type of accommodations, the length of stay, the meal and snack options, and other accommodation amenities. Table 15 shows two accommodation and excursion tour package options, as well as the actors involved in the creation and capture of value of these options.

**Table 15. Accommodation and Excursion Tour Package 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.<br>Tour itinerary is fixed, providing a detailed timetable for each day of the tour.<br>Tour operator typically has a special arrangement with select accommodation providers, local tour guides, and/or local tour operators. | International tour operator<br>Local tour operator<br>Tour guide<br>Accommodation provider<br>Specialist travel website |
| 2 | **Customized tour package** | Tour operator customizes tour package to meet special requirements of individuals or groups. | International tour operator<br>Local tour operator<br>Tour guide<br>Accommodation provider<br>Specialist travel website |

Source: Authors' elaboration.

As in the case of 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.

- **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, local tour operators. Table 16 shows two accommodation and excursion tour package options, as well as the actors involved in the creation and capture of value of these options.

**Table 16. Transportation, Accommodation and Excursion Tour 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.<br>Tour itinerary is fixed, giving detailed timetable for each day of the tour.<br>Tour operator typically has special arrangement with select accommodation providers, and local tour guides and / or local tour operators. | International tour operator<br>Local tour operator<br>Tour guide<br>Accommodation provider<br>Airline companies |
| 2 | **Customized tour package** | Tour operator customises tour to meet special requirements of individuals or groups. | International tour operator<br>Local tour operator<br>Tour guide<br>Accommodation provider<br>Airline companies |

Source: Authors' elaboration.

As in the case of 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.

## 4. Needs Assessment

Based on a market analysis of the ecotourism industry in CARIFORUM, which considered the demand and supply sides of the industry, a needs assessment was conducted at both the regional and the country levels. The SWOT methodology was used. Given the close relationship between ecotourism and the more general tourism and travel industry, the SWOT analysis for the ecotourism industry will understandably overlap with that of the overall tourism industry. Table 17 provides a general SWOT analysis for the CARIFORUM tourism industry.

### Table 17. SWOT Analysis for the CARIFORUM Tourism Industry

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

Source: Authors' elaboration.

Specific SWOT analyses of the ecotourism industry of the four selected CARIFORUM countries is provided in Tables 18 through 21.

## Table 18. SWOT Analysis for Ecotourism Industry in The Bahamas

| SWOT FOR ECOTOURISM INDUSTRY IN THE BAHAMAS | |
|---|---|
| **STRENGTHS** | o Rich stock of natural attractions, particularly coastal and marine resources: coral reefs, underwater caves, and marine life<br>o The Bahamas consist of multiple islands, which provide multiple ecotourism destination possibilities, with the Out-Islands viewed as ideal ecotourism destinations<br>o Established protected areas, and a statutory organization, Bahamas Natural Trust (BNT), to manage programs<br>o Established tourism industry, with formal public and private sector tourism bodies<br>o Focus on sustainable tourism by the Sustainable Tourism Department in the Ministry of Tourism<br>o Ready supply of trained personnel, with UWI and College of Bahamas offering tourism and hospitality training, as well as specializations in ecotourism<br>o Established partnerships with international conservation groups such as CORAL Reef Alliance and BirdLife<br>o Close proximity to large North American market allowing for airfare cost advantage |
| **WEAKNESSES** | o Strong image of mainstream tourism - 'sun and beach,' 'cruise-ship,' and 'all-inclusive' resorts, particularly on New Providence and Grand Bahama, which may be incompatible with potential visitors' ecotourism expectations<br>o Fragmented ecotourism efforts with no coordination by the Ministry of Tourism |
| **OPPORTUNITIES** | o Incentives for ecotourism investors, particularly for ecotourism projects focusing on the Out-Islands<br>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<br>o Heavy dependence on North American tourist market<br>o Mainstream tourism developments in the Out-Islands that may conflict with ecotourism principles<br>o Physical impact of increased volumes of visitors, possibly leading to degradation and alteration of natural areas |

Source: Authors' elaboration.

## Table 19. SWOT Analysis for Ecotourism Industry in St. Kitts and Nevis

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

| | |
|---|---|
| | activities<br>o Physical impact of increased volumes of visitors, possibly leading to degradation and alteration of natural areas |

Source: Authors' elaboration.

### Table 20. SWOT Analysis for Ecotourism Industry in Trinidad and Tobago

| SWOT FOR ECOTOURISM INDUSTRY IN TRINIDAD AND TOBAGO | |
|---|---|
| **STRENGTHS** | o Rich stock of natural attractions<br>o Established network of protected areas in the form of forest reserves, sanctuaries, and wetlands<br>o Twin-island country, offering two ecotourism destinations<br>o Recognized ecotourism destination<br>    o Established bird-watching destination<br>    o Tobago, in particular, viewed as ecotourism destination, having won a number of eco-destination awards[6]<br>o Focus on quality by way of the TDC's Tourism Quality Cluster and its programs, including TTTIC, EarthCheck and Blue Flag<br>o Ready supply of trained personnel, with UWI, Trinidad and Tobago Hospitality and Tourism Institute, and TDC offering tourism and hospitality training, as well as specializations in ecotourism |
| **WEAKNESSES** | o Fragmented industry, lacking consistent ecotourism message<br>o Limited financing options for the ecotourism sector |
| **OPPORTUNITIES** | o Expansion of TDC's quality programs to include ecotourism certification<br>o Incentives for ecotourism inventors<br>o Local tour operators expanding ecotourism product offerings to include Product Types 2 and 3 |
| **THREATS** | o Urbanization, poor agricultural practices, and uncontrolled quarrying activities that are contributing to degradation of natural resources, particularly in Northern Range<br>o Proximity to South American destinations, which may be viewed as alternative ecotourism destinations<br>o Physical impact of increased volumes of visitors possibly leading to degradation and alteration of natural areas |

Source: Authors' elaboration.

### Table 21. SWOT Analysis for Ecotourism Industry in Guyana

| SWOT FOR ECOTOURISM INDUSTRY IN GUYANA | |
|---|---|
| **STRENGTHS** | o Rich stock of natural attractions, particularly in the form of its forests and wildlife<br>o Protected areas – Kaieteur National Park and Iwokrama Wilderness Preserve<br>o Only English speaking country in South America<br>o Established bird-watching and wildlife destination<br>o Structured community-tourism program with a number of participating Amerindian communities<br>o Ready supply of trained personnel, with UWI and University of Guyana offering tourism and hospitality training, as well as specializations in ecotourism<br>o Local tour operators offering all three ecotourism product types<br>o Common destination in the product portfolio of a number of specialist outbound tour operators<br>o Local and international partnerships established for conservation of natural resources |
| **WEAKNESSES** | o Inconsistent views among public and private stakeholders as to what constitutes the |

[6] 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.

| | |
|---|---|
| | ecotourism industry<br>o Limited accommodation options (Room stock - 730)<br>o Limited local financing options, with high dependence on external funding agencies |
| **OPPORTUNITIES** | o Expansion of accommodations sector<br>o Incentives for ecotourism investors |
| **THREATS** | o Brazil, Peru, Ecuador, and other South American destinations, which may be viewed as alternative ecotourism destinations<br>o Physical impact of increased volumes of visitors, possibly leading to degradation and alteration of natural areas |

Source: Authors' elaboration.

According to the SWOT analyses conducted, 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 to entrepreneurs within the industry. The major opportunities are the impact that incentives for investors in the ecotourism industry, particularly 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 due to increasing numbers of visitors to the protected areas and the increasing popularity of Central and South American ecotourism destinations.

Following the SWOT analysis, a competitive assessment of the industry across the four countries was conducted based on four indicators: ecotourism product offering, prices, distribution and industry organization. The results are presented in Table 22.

**Table 22. Competitive Assessment of the Ecotourism Industry in the four CARIFORUM Countries**

| Indicators | The Bahamas | | St. Kitts and Nevis | | Trinidad and 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 three product types, offered by local and international tour operators. |
| Prices | ◔ | Cost advantage due to lowest airfares from main markets. Considered a costly 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 specialized website or tour operator offerings. | ◕ | Ecotourism is a one of the main features on country website. Destination offered by a number of specialized operators, particularly for birdwatching activities. | ● | Destination part of specialized tour operator and travel website product listing for Caribbean and South America. |
| Industry organization | ◔ | While there is no central ecotourism coordination, there is a sustainable tourism unit. Industry structure includes private sector associations for tour operators, hotels, and ship-owners. | ◔ | While there is no central ecotourism coordination,the government is committed 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 and operators, accommodation and 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 |

Source: Authors' elaboration.

In terms of the 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 in product offering and distribution channels. St. Kitts and Nevis scores the lowest due to low competitiveness across the four indicators.

## 5. Opportunities to Improve Ecotourism in the Four Countries Selected

The value chain and the SWOT analyses of the ecotourism industry in the selected countries have cast light on a number of areas for action to boost ecotourism and overcome current challenges to this industry. These areas, along with some specific opportunities for change, are detailed below.

- **Action Area 1: Definition of the Industry**

Despite the adoption of ecotourism definitions and the inclusion of ecotourism in national tourism strategies and development plans, there are conflicting interpretations of what ecotourism is. The main conflict is the polar approaches to what qualifies as ecotourism, where either all nature-based tourism is labeled as ecotourism, 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 the region's brand, and at worst, contributes to negative impacts upon the very natural and socio-cultural environments that ecotourism is meant to conserve and protect. The latter approach is too restrictive to be realistically achieved, and results in the disqualification of activities that meet ecotourism practices and philosophies. This may lead to the abandonment of the industry for other nature-based types of tourism.

Both approaches 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. Actions to address this challenge could include the development of: (i) grading schemes to evaluate country's commitment to ecotourism industry development, in order to identify a tiered structure of ecotourism destinations; (ii) a policy framework to guide the development of the regional industry, using the tiered system; and (iii) country-level ecotourism strategies.

- **Action Area 2: 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 through 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 natural resources.

While there is evidence of strong collaborative ties among some industry stakeholders in some countries (e.g., the NRTP community-based tourism project in Guyana), there is more evidence of insufficient collaboration in the industry. Actions to address this challenge could include the formulation of ecotourism country chapters and regional associations, comprising stakeholders from the public and private sectors, academia and research, NGOs, and CBOs, to coordinate the industry at the country and the regional levels.

- **Action Area 3: Harmonization 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 more important for 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. 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. To address this challenge, actions could include the development or adoption of an ecotourism certification scheme across the region, which would allow for consistent quality standards for product development involving multiple destination packages, and product branding.

- **Action Area 4: Coordinated 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, equipment rental, 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. The development of a regional product strategy could help overcome this challenge.

- **Action Area 5: 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, dedicated and hardcore ecotourists are more discerning and are more likely to use specialist websites to help in their vacation planning and purchase decisions. The development of a regional promotion and distribution strategy could help overcome this challenge.

- **Action Area 6: Financing Options for Ecotourism**

A common theme among small and medium ecotourism suppliers was the lack of financing options for business development and expansion, where debt financing is typically sought from commercial banks. Limited access to financing prevents these suppliers from becoming more competitive. To address this challenge, actions could include the development of a centralized ecotourism fund and policy actions to mitigate market failures in the financial system that could be limiting access to finance for firms taking part in this industry.

## 6. Conclusions

Based on overall tourism growth trends and continued worldwide interest, it is safe to infer that ecotourism industry 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 environmental and social benefits. This makes the ecotourism industry an attractive sector for CARIFORUM countries. Further, as the industry has evolved, there are now distinct segments: "active ecotourism" for dedicated and hardcore ecotourists and "incidental ecotourism" for casual ecotourists. For this reason, the action areas and the preliminary actions mentioned in

Section 5 focus on the development of a tiered system, which would allow all CARIFORUM countries, based on their factor conditions, overall tourism strategy, and motivations, to participate in the industry. The preliminary actions are in keeping with industry best practices and focus on the synergies that can be achieved via CARIFORUM collaboration. They involve a number of value chain upgrading strategies, and they leverage technology to more effectively undertake activities on the ecotourism value chain.

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## APPENDIX

### Table A1. Main Actors Participating in the Ecotourism Industry in The Bahamas

| SECTOR | ACTOR | |
|---|---|---|
| **PUBLIC SECTOR** | **TRAVEL AND TOURISM PUBLIC SECTOR AGENCIES** | **MAIN RELATED PUBLIC SECTOR AGENCIES** |
| | **Ministry of Tourism**<br>Grand Bahama Island Promotion Board<br>Nassau/Paradise Island Promotion Board<br>Bahamas Out Islands Promotion Board<br>Hotel Licensing<br>**Ministry of Transport and Aviation**<br>Civil Aviation/Airport Authority/Port Authority/<br>Bahamas Maritime Authority | **Ministry of the Environment**<br>BEST Commission<br>**Ministry of Foreign Affairs and Immigration**<br>Department of Immigration<br>**Ministry of Finance**<br>Bahamas Development Bank<br>**Office of the Prime Minister**<br>Bahamas Investment Agency |
| **PRIVATE SECTOR** | Bahamas Sightseeing Tour Operators Association<br>Bahamas Diving Association | Bahamas Hotel Association<br>Bahamas Shipowners Association |
| **PUBLIC–PRIVATE PARTNERSHIPS** | Bahamas National Trust | |
| **VOLUNTARY ORGANIZATIONS** | Local communities | |
| **RESEARCH, RELATED AND SUPPORT ORGANIZATIONS** | **LOCAL BODIES** | **REGIONAL AND INTERNATIONAL BODIES** |
| | College of Bahamas<br>Bahamas Chamber of Commerce<br>Local conservation groups | UWI<br>CARICOM<br>Caribbean Tourism Organization<br>Caribbean Alliance for Sustainable Tourism<br>Caribbean Hotel and Tourism Association<br>World Tourism Organization/World Travel and Tourism Council<br>International conservation groups |

## Table A2. Main Actors Participating in the Ecotourism Industry in St. Kitts and Nevis

| SECTOR | ACTORS | |
|---|---|---|
| **PUBLIC SECTOR** | **TRAVEL AND TOURISM PUBLIC SECTOR AGENCIES** | **MAIN RELATED PUBLIC SECTOR AGENCIES** |
| | **Ministry of Tourism and International Transport**<br>Department of Tourism<br>St. Kitts Tourism Authority<br>St. Christopher Air and Sea Ports Authority<br>**Nevis Island Administration**<br>Nevis Tourism Authority<br>Nevis Air and Sea Ports Authority | **Ministry of Sustainable Development**<br>Department of Physical Planning and the Environment<br>**Ministry of Agriculture, Marine Resources and Constituency Empowerment**<br>Department of Marine Resources<br>Parks and Beaches<br>**Ministry of Foreign Affairs, Homeland Security, Immigration and Labour**<br>Department of Immigration<br>**Ministry of Finance** |
| **PRIVATE SECTOR** | St. Kitts and Nevis Hotel and Tourism Association | |
| **PUBLIC–PRIVATE PARTNERSHIPS** | St. Kitts and Nevis Man and Biosphere Committee | |
| **VOLUNTARY ORGANIZATIONS** | St. Christopher National Trust<br>Nevis Historical / Conservation Society | Local communities |
| **RESEARCH, RELATED AND SUPPORT ORGANIZATIONS** | **LOCAL BODIES** | **REGIONAL AND INTERNATIONAL BODIES** |
| | Clarence Fitzroy Bryant College<br>St. Kitts and Nevis Chamber of Industry and Commerce<br><br><br><br><br>Local conservation groups | UWI<br>Caribbean Development Bank<br>CARICOM<br>Caribbean Tourism Organization<br>Caribbean Alliance for Sustainable Tourism<br>Caribbean Hotel and Tourism Association<br>World Tourism Organization/World Travel and Tourism Council<br>International conservation groups |

### Table A3. Main Actors Participating in the Ecotourism Industry in Trinidad and Tobago

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

## Table A4. Main Actors Participating in the Ecotourism Industry in Guyana

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

## Table A5. Commercial Airlines and Cruise Lines Operating in the Four Selected Countries

| Mode | The Bahamas | St. Kitts and Nevis | Trinidad and Tobago | Guyana |
|---|---|---|---|---|
| **Airlines** | Air Canada<br>Air Gate Aviation<br>Air Tran Airlines<br>American Airlines<br>American Eagle<br>Bahamasair<br>British Airways<br>Copa Airlines<br>Delta<br>IBC Airways<br>JetBlue<br>Regional Air Services<br>Silver Airways<br>Sky Bahamas Airlines<br>United Airlines<br>US Airways<br>West Jet Airways | American Airlines<br>Air Canada<br>British Airways<br>Delta<br>LIAT<br>Seaborne Airlines<br>US Airways<br>Air Sunshine<br>Cape Air<br>LIAT<br>Seaborne Airlines<br>Tradewinds Aviation<br>Winair | American Airlines<br>British Airways<br>Caribbean Airlines Limited<br>COPA Airlines<br>Condor<br>Conviasa Airlines<br>LIAT<br>Monarch<br>Suriname Airways<br>United Airlines<br>West Jet Airlines | Caribbean Airlines Limited<br>LIAT<br>Suriname Airways<br>Fly Jamaica |
| **Cruise lines** | Carnival Cruise Lines<br>Disney Cruise Lines<br>Norwegian Cruise Lines<br>Royal Caribbean | Royal Caribbean<br>P&O Cruises<br>Fred Olsen<br>Carnival Cruise Lines<br>Celebrity Cruises<br>Regent Seven Seas Cruises<br>Princess Cruises | Crown Princess<br>Silversea Cruises<br>Royal Caribbean International<br>Saga Cruises II Ltd<br>Thomson Cruises<br>Pacific Princess | |