El término Ara significa árbol y gente, entre otras acepciones. Ara es un símbolo de identificación y arraigó al territorio caribeño, y a la vez un símbolo universal con un mensaje y un sentido muy positivos.

El principal objetivo de la revista Ara es ser un medio de comunicación académico y de ciencia aplicada. Mediante la publicación de artículos y estudios enfocados a la investigación científica y práctica, se pretende profundizar, extender y divulgar la comprensión de la red de relaciones existentes entre el fenómeno turístico y el desarrollo sostenible de las sociedades.

Desde la revista Ara se invita a investigadores de todas las disciplinas académicas a nivel mundial a que contribuyan a este fin con sus aportaciones. Para ello son especialmente bienvenidos aquellos estudios que traten al turismo en la zona geográfica del Caribe en su sentido más amplio, es decir, incluyendo las zonas costeras orientales del continente americano limítrofe al Caribe, así como los estudios que se centren en zonas de cualquier otro lugar del mundo con situaciones similares a las del Caribe.

Los artículos pueden ser presentados en español o en inglés, y serán publicados, después de haber pasado la evaluación del anonimato doble, en la lengua original del manuscrito, siempre con un resumen en ambas lenguas. La revista Ara Journal of Tourism Research / Revista de Investigación en Turismo tiene una periodicidad semestral.

Ara invites researchers from all academic disciplines around the world to contribute to this objective. Especially welcome are studies which deal with tourism in the Caribbean in the widest sense of the term, that is to say including the eastern coast of the American continent bordering the Caribbean, as well as those studies which focus on areas of other parts of the world with similar situations to those in the Caribbean.

Articles may be submitted in English or Spanish and will be published in the original language of the manuscript. The abstract will always be published in both languages.

The frequency of publication of Ara Journal of Tourism Research is half-yearly.
The Three Cs of Caribbean Tourism: Contexts, Characteristics, and Consequences*

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Abstract

The metaphor of the “Three Cs” (context, characteristics, and consequences) is employed to derive a framework around which to view the phenomenon of tourism. Each element is closely related to the others, and each is affected by and embedded within the others. As an ensemble, the Three Cs determine the configuration of tourism at particular destinations. It is a simple yet analytically powerful mechanism that brings a multi-disciplinary approach to the analysis of tourism problems, enabling a more nuanced understanding of international tourism issues and challenges. The paper attempts to make two points. First, the tourism style or character in a given destination is a function of a complex interrelated set of macro socio-economic and historical forces -the contexts- that differ from destination to destination (or island to island). Second, the interplay between the contexts and characteristics largely defines the consequences or results that are observed, both positive and negative. To illustrate the Three Cs approach, contrasting analyses were made between the Dominican Republic and the Turks and Caicos, with extensions to Cuba. We suggest the Three Cs model is sufficiently broad to fit a variety of destinations and can result in better regional policy conclusions.

Key words: Multi-disciplinary, Three Cs model, Caribbean tourism, Cuba, Dominican Republic, Turks and Caicos.

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Introduction

Within a generation, tourism has come to occupy a central place in the economies of Caribbean nations. Previously reserved only for sugar, tobacco, and coffee, tourism now accounts for 15% of GDP, 12% of employment, 19% of region-wide exports, and 22% of all capital formation (WTTC, 2009). It is the fastest growing source of foreign currency at each of the 30 or so Caribbean destinations and dominates the economies of the smaller islands contributing routinely over 50% of all activity. In only four countries or destinations is tourism’s GDP contribution less than 10 percent (Curacao, Haiti, Martinique, and Puerto Rico).

Good hotel rooms and satellite TVs are found in all parts of the world. What the Caribbean “sells” is its amazingly fragile and bio-diverse environment: clear and unspoiled beaches, healthy coral reefs, remarkable flora and fauna, all in attractive and safe surroundings for its visitors. The explosion of mass tourism in the Caribbean over the last two decades increasingly threatens these sources of comparative advantage. Tourism development is welcomed by local politicians and decision-makers responsible for shaping the region’s economic and political challenges (e.g., Mycoo, 2006; Johnson, 2006; te Velde & Nair, 2006; Marshall, 2002).

Development strategies for tourism in fragile cultures and bio-diverse ecosystems interface among economic, business, political, societal, and environmental concerns. As a result, tourism in the Caribbean confronts the twin challenges of sustainability and development. The “sustainable” side affects not only the environment, but also the culture and sociology of the region. The “development” side deals with the capacity of low-income countries to achieve higher levels of well being. As a consequence, there is a notable dissonance between policy conclusions of scholarly experts on the one hand and the behaviors and actions of the politicians and other policy-makers with responsibility for tourism in Caribbean destinations on the other. A more comprehensive approach is needed to assist decision-makers responsible for shaping the region’s tourism experience.

Scarcity

This paper represents a beginning toward a multidisciplinary approach to analyze and examine the anatomy of tourism in the Caribbean. It is a conceptualization focusing on interconnections among various elements of the island system. Since such general approaches run the risk of not being entirely suitable for specific situations or locations, the present effort is offered as a beginning toward a more general theory. It allows for the interplay of various approaches that ultimately might lead to a more useful understanding of the threats and opportunities confronting Caribbean tourism. The metaphor of the Three Cs —context, characteristics, and consequences— is employed to derive a general framework around which to view the phenomenon of tourism (See Figure 1). Each of the three aspects is closely related to the others, and each is affected by and embedded within the others. As an ensemble, the three Cs determine the configuration of tourism at a particular destination.

Contexts in this broad framework represent the macro-environment around which tourism takes place; they include economic, political, social, environmental, and historical elements that influence tourism development at a particular destination.

Characteristics define the types of tourism that prevail in, or characterize, a particular destination. Examples would be all-inclusive 3-S resorts, cruise ship tourism, and smaller forms of ecotourism (heritage, cultural, wildlife). Following Weaver (2004), it is assumed for expository purposes here that a destination can be broadly characterized by a single tourism style that either dominates the landscape or generates the most significant economic impact. Consequences summarize the results, both positive and negative, that obtain from the interaction and combination of the first two elements or Cs. In developing this general anatomy, the Dominican Republic and the Turks and Caicos will be used as contrasting illustrations, followed by an extension to the Cuban case, both in the present situation and speculative, in a post-Castro scenario.

Economic factors

The dearth of intermediate inputs -hotel furniture, domestic airlines, bottling plants- to serve the dominant tourism industry has traditionally meant reduced impact through high import leakages (Seward & Spinrad, 1982) and spawned the policy debate over high-volume mass tourism versus lower density, more upscale alternatives (Wilkinson, 1997). Heavy population growth and low per capita incomes create significant pressures on governments to generate opportunities for their citizens. With few alternatives and a dearth of physical and human capital, centralized island governments turn to global resort operators for jobs and visitor tax revenues.

Political and legal elements

Until fairly recently, democracy was rare in developing nations, but now “bare bones” democracies in Europe and Central and South America confront real economic and political challenges (Aron, 2001). Several Caribbean destinations fit this category where citizens enjoy minimal political rights and freedoms, press, travel abroad, and elections but lack a highly developed and widespread culture of governance and locally effective civic institutions. Such fragile democracies struggle to strengthen the middle class, the base of democracy, atop often unstable economies in nations characterized by the combustible combination of high illiteracy, youth unemployment, and income inequality (Richardson, 1992). Limited democratic traditions (including highly centralized decision-making with little input from local communities) and growing corruption (Maingot, 2004), affect tourism in two ways. First, there is a declining capacity to curb rising serious crime rates and second, there is a significantly higher drug-transit trade (Dessau, 2004).

Social and cultural aspects

Nascent governments struggle to control negative socio-cultural influences in the region. Caribbean destinations, given their small size, proximity to North America, and extensive history of metropolitan migration (Richardson, 1983), are vulnerable to the effects of mass tourism as practiced in the region’s “garison” style of tourism (in Cuba, it’s known as “apartheid” tourism since local citizens are not allowed to go to

Figure 1. Macro-environmental contexts

ECONOMIC
- Economy’s growth and variability
- Trading partners
- Two decades
- Stability of prices and exchange rates
- National wealth
- Unemployment levels

POLITICAL / LEGAL
- Local civic self-government
- Levels of corruption
- Political systems and dispersion of governmental authority
- Strength of local culture and national traditions
- Acceptance of tourism

SOCIAL / CULTURAL
- Emerging social and demographic issues
- Strength of culture
- Labor force preparation

ENVIRONMENTAL / GEOGRAPHIC
- Pollution levels
- Water quality and availability
- Public health infrastructure
- Environmental infrastructure
- Environmental fragility
- Topographical characteristics

HISTORICAL
- Patterns of development and colonization
- Traditional economic industries
- Historical patterns of population distribution

Figure 1. Macro-environmental contexts

Contexts

The context reflects the macro-environment within and around which tourism takes place. It includes five important categories: (1) economic forces and conditions; (2) political, legal, and regulatory; (3) social and cultural; (4) environmental, geographic, and topological; and (5) historical. Each of these dimensions can have determinative effects on tourism strategies and possibilities, but most are largely outside the immediate policy control because they either reflect a long history of development or are determined by external forces and events.

Economic forces

The major economic forces that condition tourism performance include the economy’s size, structure and growth rate, the degree of diversification, and the characteristics of the workforce. Of particular significance for small, resource-poor, export-propelled islands are the following four elements:

- health of the international economy
- strength of global tourism
- viability of local sectors (agriculture, handicrafts, food/beverages) with forward linkages to tourism
- effectiveness of local governments and civic institutions

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tourist resorts) currently in vogue may mitigate host-
guest interactions and visitor harassment (de Albuquerque & McElroy, 2001), but they also curtail the amount

Environmental and geographic considerations

Before postwar diversification toward tourism, offshore banking, and light manufacturing, the Caribbean endured three centuries of intense sugar culture, widespread deforestation, erosion, and mangrove destruction. Richardson (1992:30) refers to the early rapid growth of the plantation system fed by West African slaves as “the great clearing,” which in most islands was followed by environmental neglect. As the most visitor-generated insular region in the world, the advent of mass tourism has left its mark: delicate coastlines heavily colonized by capital-intensive facility and infrastructure construction (McElroy & de Albuquerque, 1998). According to Weaver (1998:189), tourism is considered “a primary culprit in the deterioration of the region’s coral reefs, due to the direct effects of diving and the indirect effects of boat activity and hotel effluents.”

Every destination experiences some form of impact, depending on existing governmental standards and the professional infrastructures. Most impacts are significant enough to warrant implementation of major rehabilitation projects (e.g. Osamu River harbor in the Dominican Republic, Havana harbor in Cuba, or Kingston Bay in Jamaica). But nascent democracies typified by highly centralized governments operate with weak regulations and planning guidelines; a situation exacerbated by inadequate legislation, under-funded monitoring systems, and thin institutional capacity and public environmental awareness (Partullo, 1996). For example, the Dominican Republic did not have a Ministry of the Environment until 2000; it operates now with limited resources and high, politically-inspired turnover in its staff. In contrast, some nations, such as Costa Rica and Dominica, have developed expertise in certain kinds of environmental tourism and have a fairly well developed professional expertise that serves as advocates and monitors. Finally, every destination has its own particular history and geomorphology that inform how tourism has developed and grown there. Specifically, this configuration sets parameters on the type of attractions developed, the location of facilities and infrastructure, the extent of land dedication and alteration, and the kinds of touristic investments that are attracted and made.

Historical legacies

Legacies of history are important and highly specific to various Caribbean nations. The Caribbean Sea is home to the world’s largest assembly of small and mid-sized islands and small islands with a wide fusion of languages, religions, ethnic groups, and customs (Thomaz, 1988). The pattern of development reflects the interaction of colonization and settlement: four European empires, as well as the United States and the former Soviet Union, historically have operated in the region. The Caribbean’s economic development, including its traditional industries and its workforce, reflect the import needs of colonial powers as well as the particular resource endowments of the nations. Refined sugar, for example, was highly prized in Europe in the 1600s and 1700s; a spacious sold in Paris for a fortune during the 16th century. Sugar was known as “white gold,” wealthy people stored sugar as a form of savings (Deere, 1950). By the 16th century, a nascent sugar industry dependent on African slave labor had emerged in the Spanish Caribbean. (The extraordinary prominence of the Dominican Republic in the sport of American baseball might be traced to the presence of baseball “leagues,” or day camps, for the children of African-Dominican sugar cane workers). Population patterns and densities are easily explained by historical contours of development, agricultural crop land requirements, and general patterns of economic growth.

Characteristics

Given the macro-environmental contexts prevailing at a given destination, tourism will display different characteristics. (See Figure 2). The characteristics range from a heavy concentration of “all inclusive” tourism, such as exists in the Dominican Republic, to primarily boutique, upscale resorts such as those found in Nevis, Bermuda or in parts of the Turks and Caicos and to some extent Barbados.

The interaction between the contexts and the characteristics is quite real and seldom simple. Both capital scarcity and pressures to create a heavy dependence on large-scale, foreign-owned “all inclusions” in many islands.

Figure 2. Tourism Characteristics

| Type: | “All inclusive” multinational; foreign-owned chain; nationally owned; middle- and low-cost vs. upscale focus |
| Scope: | Widely distributed; heavy local concentration |
| Source of visitors: | Multi-national; regional; local |
| Local impacts: | Extensive; moderate; minimal |
| Extensiveness of outside control: | Extensive; moderate; minimal |

These dependence challenges for host island nations are magnified due to ineffective local governments. Typically, the European all-inclusive operations are heavily vertically integrated with their own management structures, architects, hotels, and airlines. The tour operators from the origin markets are extremely powerful vis-a-vis a small Caribbean destination; tour operators tend to set the rules regarding occupancy and pricing. In fact, just a few conglomerates control nearly 88 percent of the tourism business in Europe, and they have great influence over pricing. Touristick Union Internationale (TUI) from Germany, the largest tourism conglomerate in Europe, included as of 2004 over 3,600 travel agencies, 104 aircraft, and 285 hotels (including brands like Iberostels, Sol y Mar, and RIU) with over 157,000 beds in 25 countries. Around 12,000 business travel professionals in over 70 countries also look after the TUI’s business customers. (See the company’s web site at http://www.tui.com). A small locality in the Caribbean is overwhelmed by the power and influence of such a global force.

The terrorist attacks of September 11, 2001, altered the industry on the supply and demand sides. On the supply side, there has been industry consolidation and a heavy focus on cost controls. Thompson UK, for example, was taken over by TUI; Thomas Cook UK was acquired by C.E. N from Germany; and Apollo in Sweden was taken over by Kuoni of Switzerland. On the demand side, to make matters worse on Caribbean destinations dependent on foreign tourism, consumers have been making more last-minute travel plans. Over half of the bookings in Germany during 2003 were made within two months of the date of travel, compared to more usual six months to a year before. Most of Italy’s travel plans are being made even closer to the date of travel. Bookings on the Internet increase pressure for additional cost savings as consumers shop for the best prices. If hotels want high occupancy rates, the giant conglomerates might demand lower prices or cheaper packages on shorter notice, leaving even less for the local economies that depend on tourism. As prices fall, local maintenance and repair budgets decline, including those for water treatment plants, if they exist, and for aqueducts. These trends have significant impact on the class of tourist attracted and the overall net economic impact.

Figure 3. Positive and Negative Consequences of Tourism Activities

| Economic: | Foreign currency, economy's diversity, infrastructure impacts, labor force development, taxes, real estate impacts |
| Environmental: | Water, air, coastal, forests, marine, pollution/environmental impacts |
| Political: | Local self-government impacts, corruption, government agency professional expertise development, regulations, regional collaborations |
| Social/Cultural: | Local cultural impacts, crime and crime abatement, international recognition |
On the other hand, during the later stages of the resort cycle, many of the negative externalities appear. At this point the trend is for declines in the average visitor stay, per trip real spending, and holiday (versus business) travel accompanied by rising realty inflation (McElroy, 2003). At the ecosystem level, because of the dominant “sunbelt” character of the region’s tourism, the location of large-scale resorts, marinas and access infrastructure on scenic mountain slopes and fragile coastlines damages wetlands, mangroves, beaches, and reef systems (Apostolopoulos & Gayle, 2002). At this stage, the economic and environmental pressures as it moves toward a greater emphasis on mass tourism, but with a greater reservoir of planning experience and more competent “civil” or local governments compared to the Dominican Republic.

### Dominican Republic

Several context elements help explain the Dominican Republic’s emphasis on mass tourism. First, more than most Caribbean nations, the DR on the eastern part of Hispaniola, has suffered a number of postwar macroeconomic shocks that have weakened traditional sectors. These include the declining terms of trade for sugar and tobacco and the wholesale loss of thousands of textile/assembly jobs to Mexico through NAFTA and to China, through globalization. Second, the country suffers from marked income inequality. It is estimated that the top 10 percent of the population enjoys over 40 percent of GNP while the poorest half receives less than a fifth of national income (CIA, 2009). These contrasts have been exacerbated by heavy foreign investment (26 deaths per 1,000 live births) and relatively low adult literacy (87%) for the region (See Table 1). Third, population pressure has been severe by extreme natural increase approaching two percent per annum with decision-makers facing significant momentum in the future since roughly one of every three of the islanders is under 15 years of age. These economic and social challenges were greatly magnified by a major financial scandal resulting in the failure of the nation’s three largest banks in 2003. As a result of declining employment opportunities, rapid demographic growth, and relatively high population density (196/km²), the DR has experienced chronically high unemployment (15.4%) and emigration (2.2/1,000).

The absence of local capital and the attractiveness of Caribbean weather and beaches prompted the DR government to pursue mass tourism by luring large-scale foreign investments with tax holidays, land incentives, and reef systems (Apostolopoulos & Gayle, 2002). As a result of declining employment opportunities, rapid demographic growth, and relatively high population density (196/km²), the DR has experienced chronically high unemployment (15.4%) and emigration (2.2/1,000).

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### Case Applications

- The Dominican Republic and the Turks and Caicos represent rather extreme examples of Caribbean tourism: one with explosive growth, primarily in the all-inclusive mode, an example of one of the “bare bones” democaracies, developing slowly a better understanding of tourism and its effects and how to control them, moving toward less dependency on all-inclusives, and another a British overseas territory, emerging initially in the “boutique” and upscale markets, but now facing economic and environmental pressures as it moves toward a greater emphasis on mass tourism, but with a greater reservoir of planning experience and more competent “civil” or local governments compared to the Dominican Republic.

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Despite these regional disparities, overall the DR remains a mid-level destination in the high-cost Caribbean con- text. Typical of its all-inclusive mass visitation character, visitor spending is less than $1,000 per trip and $100 per day, figures that contrast sharply with the more upscale Turks and Caicos.

The Turks and Caicos (TCI), an “overseas territory” of Britain with a local ministerial government, comprise a 40-island archipelago of low-lying coraline limestone islands 150 miles southeast of the Bahamas. Only eight are inhabited and over 80 percent of the population is concentrated on Grand Turk and Providenciales. In add- ition to their small size—they represent less than one percent of the population and area of the DR—extreme- ly limited rainfall (29 inches/yr) and arable land (less than 5% of the total) hindered intensive development of plantation agriculture. The extensive reef system, shallow salt flats, and prevailing winds (for evapora- tion) provided for a viable fishing industry and salt ex- ports for fish preservation during the colonial era. In the 1960s, however, the salt industry collapsed with the introduction of new canning preservatives and freezing methods (Royle, 2001). The economy remained weak and dependent on two U.S. military bases until they closed in 1970. The modern era began with the deliber- ately small attempt by British overnight (Aldrich & Connett, 1998). Since then the offshore finance industry has rebounded and represents a second major source of foreign exchange for the territory but ahead of fishing, which remains a source of island protein.

The high-end visitor industry was created by a conflu- ence of favorable context factors. First, it was fostered by a relatively enlightened civil service with a long period of stable democratic practice under the British Crown. As a relative tourism newcomer, decision mak- ers may have been aware of the ecosystem dam- age experienced by other nearby destinations that had entered the resort cycle decades earlier. Second, since it is the second largest island in the Caribbean, and geo- graphic proximity to the lucrative North American origin market—which accounts for nine of ten tourists (see Table 1) to its benefit. Third, the TCI has extraordinary environmental assets, including pris- tine white beaches, healthy and easily accessible reef systems, and abundant wildlife: flamingos, iguanas, tur- tles, and dolphins. These resources provide a base for eco-tourism opportunities like birding, whale watching, diving, and sport fishing in a territory that had histori- cally escaped the ravages of plantation monoculture. Fourth, a combination of three interre- lated socio-economic conditions reduced pressure to pursue the high-density, middle-to-low end of the mass market. These included the relatively buoyant alterna- tive export sectors of offshore finance (only 59% of visi- tors arrive for holiday purposes) and fishing (lobster and conch); relatively low population density (24 persons/ km²) and relatively rapid labor-absorbing visitor and construction growth. The pace has been particularly brisk most recently with very sharp increases in tourist arrivals and hotel rooms since 1998 (Table 1). Finally, the islands’ tourism trajectory has been supported by externally subsidized transport infrastructure improve- ments (three international airports) partly the result of its dependent status as a British overseas territory.

After two decades of rapid growth, the economic axis has shifted from the administrative capital of Grand Turk to the tourism center in Providenciales. Today the TCI is one of the more affluent small island tourist economies in the region, having tripled the level of per resident visitor spending ($17,087 vs. $386) of the DR. As evidence of progress, the territory enjoys high life expectancy (75 yrs.) and literacy (96%) and rela- tively low infant mortality (14/1,000) and has become independent of budgetary aid (not capital grants) from Great Britain since 1989 (Connell, 2001:118). Much of this success has been due to the upscale tourism where some superlative beachfront hotel accommodations and other amenities (spa, cuisine) routinely cost above $500 per night (double occupancy) (West Indies online, 2005). This explains the TCI’s very high rate of repeat visitation (60%), the high average hotel occupancy (73%) as well as its average per trip and per day visi- tors spending more than double the DR values (Table 1). In fact, according to Duval (2004:15), the TCI recorded the highest average per trip tourist spending ($1,879) for 2000 in the Caribbean. The British Virgin Islands ($1,262) and Barbados ($1,205) were distant seconds. However, the pace of development is accelerating be- yond the labor force’s capacity to serve recent growth. For example, net migration approaches ten persons per 1,000 population and fuels population growth close to three percent annually. This exceeds ten times the resident population making the TCI one of the most tourist-penetrated small-island destinations across the world. In fact, according to Parry and McElroy (2009), the average daily visitor density on Turks and Caicos is 174 visitors per 1,000 population, equivalent to a 17 percent increase in the resident population year- round. As tourism dependence increases and as the growing number of travelers threatens the environment and the cultural traditions, pressure will mount to downscale towards the popular all-inclusives enclaves develop to preserve an ever rising stream of foreign exchange. As an indication of this direction, recent plans have surfaced to convert East Caicos into a major cruise ship port to accommodate “up to 600 cruise liner visits per year . . . that would involve nearly half of the island going under the bulldozers” (Royle, 2001:173). Promoting large-scale cruise traffic is considered an ap- peal to the lower end of the market since such one-day visitors spend only an average of eight percent of what stayovers spend (Duval, 2004:15) and principally on liquor, gifts and jewelry which all have very high im- port content (low local value-added). While the current global financial recession will slow such plans, over the longer term the pressure to add more development will remain.

The explosion in tourism and investment has also been associated with increased crime and corruption. A ma- jor influx of illegal and illegal immigrants, primarily from the DR and Haiti, attracted to the TCI by construction work and other economic opportunities, have report- edly been associated with a notable crime wave (Carib- bean NetNews, April 24, 2009. http://www.caribbean- netnews.com/news-15964–37-37--..html). In addition, the British government in August, 2009, suspended for the first time two years the Turks and Caicos local ministerial government amid allegations of corruption to protect the destination’s image and attractiveness abroad. The former minister was forced to resign after a Foreign Of- fice inquiry found “a high probability of systemic cor- ruption . . . [and] clear signs of political amorality and inimacy . . .” (BBC News, 2009).

![Figure 4. Comparison of the Three Cs: DR and Turks and Caicos](image-url)

**Dominican Republic**
- Second largest island in Caribbean, Spanish-speaking
- Amazing bio-diversity, great natural beauty
- High levels of poverty, high unemployment, fast population growth
- Weak infrastructure
- Good international access, airports
- New democracy
- Isolated, small population, hard to reach smaller areas
- Strong concern for environment with several care- fully guarded preserves and sanctuaries
- Increasing encroachment by “all inclusives” and sig- nificant impact on land and home prices
- Mostly English-speaking visitors US, Canada, and England
- Mostly middle-and-up tourism, with significant upscale sector. Recent “all inclusive” (Beaches) has increased tourist traffic to Providenciales
- No cruise ship traffic due to shallow harbors
- Faster population growth, largely associated with in- migration and mass tourism activities
- “Quiet” tourism centered around beautiful beaches and carefully guarded reefs

**Turks and Caicos**
- British dependency
- Isolated, small population, hard to reach smaller islands, weak availability of trained personnel
- Good utilities, civic government is moderately effective
- Relatively low poverty (though some recent immigra- tion causing problems)
- Good investor-friendly environment, stable political system
- Good international access to one island (Providencia- les) but poor elsewhere
- Strong concern for environment with several care- fully guarded preserves and sanctuaries
- Increasing encroachment by “all inclusives” and sig- nificant impact on land and home prices
- Mostly English-speaking visitors US, Canada, and England
- Mostly middle-and-up tourism, with significant upscale sector. Recent “all inclusive” (Beaches) has increased tourist traffic to Providenciales
- No cruise ship traffic due to shallow harbors
- Faster population growth, largely associated with in- migration and mass tourism activities
- “Quiet” tourism centered around beautiful beaches and carefully guarded reefs

**Art Padilla, Jerome L. McElroy. The Three Cs of Caribbean Tourism: Contexts, Characteristics, and Consequences, 78-90 / ISSN: 1997-2520**
• "Turbo" growth in tourism, strong inflow of foreign capital especially
• Decline of Puerto Plata tourist pole in north, with subsequent rise in crime and pollution, followed by deep discounts and lower class of tourists
• Explosive growth of tourism in south and east of the country
• Heavy demands on infrastructure (roads, police protection, crime control, water and sewer, electrical services, schools for workers' children)
• Diminished net receipts from tourism but increasing reliance on tourism receipts to offset declining sectors in agriculture and manufacturing
• External pressures to expand development into protected, fragile coastal areas
• Increased pressures on already weak environmental and planning governmental structures

Extensions to Cuba

Although Cuba was the dominant insular destination in the Caribbean in the late 1950s (Marbiona, 1959), tourism became a "capitalistic vice" under Castro. It virtually disappeared in the early 1960s. In recent years, new context factors have surfaced for Cuban tourism that include Cuba's re-emergence as a "new" destination, its vast and semi-unexplored resources and biodiversity, its relative poverty of income, and a desperate need for capital. In addition, the collapse of the Soviet Union in the early 1990s and the subsequent loss of $6 billion in annual Russian subsidies contracted the economy by one third (Gonzalez, 2002). These factors contributed to the re-emergence of tourism in Cuba. Castro's reluctant but aggressive pursuit of European and Canadian investors to develop large-scale beachside resorts (many all-inclusives) yielded rapid returns. Between 1996 and 2006, the number of visitors rose 230 percent and hotel rooms by 65 percent (WTO, 2008).

As a result, tourism has become the second foreign exchange earner behind remittances from Cuban-Americans. Currently, over two million tourists visit annually and spend approximately $2.5 billion. Cuba ranks second in the Caribbean behind DR in capacity (hotel rooms) and third in arrivals and total expenditure (WTO, 2008). However, the industry has not become the hoped-for solution, for several reasons. First, extreme dependence on vertically integrated foreign hotel chains has resulted in large income leakages estimated at over 80 percent and capital-intensive stresses on local utilities. For example, it is estimated that the average tourist uses ten times more water daily than the average resident (WTTC, 1995; Davies & Cahill, 2000). Strains on the infrastructure are magnified by the lack of funds available to improve it.

In addition, centralized control has reduced cost efficiencies in industry and allied services and limited the growth of local entrepreneurship and management. The government's policy to practice "apartheid" tourism keeps local populations away from visitors to minimize cultural and economic policies to create "Turbo" growth of large-scale resorts on offshore keys and deserted islands further tends to mask local concerns or disagreements arising from mass tourism's impact on the socio-economic structure. All such practices further reduce the local tourism income multiplier. As a result, Cuba typifies a middle-and-down, mass market Caribbean destination. There is heavy dependence on non-US tourists who stay roughly ten days and spend on average of $1,082 per trip and $1,030 per day. Overall, net tourism revenues, even when augmented by remittances from Cuban-American exiles, represent less than one-third of the peak Soviet assistance (Ferrer, 2001).

It is more difficult to discuss the Three Cs model under conditions that might exist after the Castro brothers depart. A great deal depends on how much and how fast the economy and the political systems evolve during the post-Castro era. A rapid transition toward democracy and private property rights under a new or revised constitution would generate the most impact. This outcome, a relatively rapid turn toward democracy and capitalism, seems increasingly unlikely (Padilla & McElroy, 2007). However, even in a transformational political and social reform after the Castro brothers, there would still be need for major improvements in the quality, value, and diversity of the island's tourism product (Sharpley & Knight, 2008). In addition, similar pressures and challenges highlighted above for the Dominican Republic would likely obtain in Cuba, though perhaps with greater force. The

"forbidden" aspects of Cuba travel by US residents are likely to uncap an avalanche of interest in the island, at least for the near term (Padilla & McElroy, 2007). In such a case, a particular emphasis on two aspects might avoid some of the problems plaguing Caribbean destinations today: an international effort to "jumpstart" the development of strong local governments and significant strengthening in the preparation of environmental scientists and regional planners with independence of action and support from government leaders.

Conclusions

The relatively simple but analytically powerful Three Cs framework brings a multi-disciplinary, holistic framework to the analysis of tourism problems, enabling a more sophisticated understanding of the issues and challenges. The model is broad enough to fit the wide variety of destinations and can therefore result in better regional policy conclusions. In summary, the model is a broad-based descriptive attempt to argue two points. First, the specific tourism style or character in a given destination is largely a function of a complex interrelated set of macro-socio-economic and historical forces - the contexts - that differ from island to island. Second, the interplay between the contexts and characteristics largely conditions the consequences, both positive and negative.

In the model's application, contrasting cases were drawn between the Dominican Republic and the Turks and Caicos. The former's propensity to create large-scale, mass-market, environmentally intrusive, all-inclusive resorts reflects several factors: failing non-tourist sectors, widespread demographic and unemployment pressures, weak government planning oversight, and a legacy of ecosystem neglect. The Turks and Caicos prefer for upscale or boutique tourism is predominantly a function of viable non-tourist sectors (fishing, agriculture and fishing, civil servants, military and professionals, and a unique natural patrimony of reefs and wildlife conducive to high-end and high-value-added ecotourism. The sense of local government and local involvement in tourism issues (battered by the oversight and resources of Great Britain) are also more highly visible (or developed) in the Turks and Caicos.

Finally, in the case of Cuba, the Caribbean tourism leader in the pre-Castro era, the key context features in the rapid drive to create foreign exchange and employment through large-scale, all-inclusive, European investment have been the absence of local capital/entrepreneurship, an abundance of unexposed coastal and interior biodiversity assets and, most importantly, the massive loss of assistance after the collapse of the Soviet Union. In conclusion, the success of the model in highlighting the underlying determinants of tourism evolution in the Caribbean suggests these three factors - loss of assistance, remittances from Cuban-American exiles, representation of upscale Bermuda with all-inclusive St. Lucia, and perhaps Nevis with its sister island of St. Kitts - might avoid some of the problems plaguing Caribbean destinations today.


West Indies online 2005 Turks & Caicos Hotel List by Location. chttp://www.wiol.com/turks-caicos/hotel-list.html?ref=google>.


Conceptualizing Caribbean Tourism through Hybridity: The Grenadian Tour Product

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Abstract

From a geographic perspective, hybridity exposes the ways in which different components of nature and culture are entangled, effectively creating a new variant, which blurs artificial distinctions. In this paper, the concept of hybridity is applied to the case study of Grenada. While the principal attraction on this Caribbean island is sun, sea and sand, Grenada’s tourists also have a range of secondary interests away from the beach. Tourists who might be classified as conventional mass “sun-and-sand,” often want to experience more of the island, and many do so through guided tours. Such tours have developed to reflect these varied interests and are therefore difficult to classify within tourism’s typically narrow product labels. This research employs content and semiotic analysis of tourism promotional literature, as well as participant observation on guided tours to illustrate the hybrid variants that have emerged in Grenadian tour products, in which elements of agriculture, culture, nature, and others are blended together almost seamlessly. Moving from dualistic classifications of destinations and tourists, towards more complex and nuanced conceptualizations through hybridity, opens new opportunities for meeting the diverse interests of both conventional tourists as well as more niche market visitors.

Key words: Hybridity, nature-culture dualism, Grenada, guided tours, tourism promotions

Resumen

Desde una perspectiva geográfica, la hibridación expone la forma en que se entrelazan los diferentes componentes de la naturaleza y la cultura, creando una nueva variante, que desdibuja las distinciones artificiales. En este trabajo, el concepto de hibridación se aplica al estudio del caso de Grenada. Si bien el principal atractivo de esta isla del Caribe es sol, mar y arena, los turistas que visitan Grenada tienen una serie de otros intereses lejos de la playa. Los turistas que podrían clasificarse como la masa convencional “de sol y arena”, a menudo quieren experimentar más aspectos de la isla, y muchos lo hacen a través de visitas guiadas. Estos tours se han desarrollado para reflejar los diversos intereses y por lo tanto difíciles de clasificar dentro de las etiquetas de productos turísticos típicamente estrechas. Esta investigación cuenta con el análisis de contenido y la semiótica de la literatura de promoción del turismo, así como la observación participante en las visitas guiadas para ilustrar las variantes híbridas que han surgido en los productos turísticos de Grenada, en la que elementos de la agricultura, cultura, naturaleza, y otros se mezclan casi a la perfección. Pasar de las clasificaciones dualistas de los destinos y los turistas, hacia concepciones más complejas y matizadas a través de la hibridación, abre nuevas oportunidades para satisfacer los diversos intereses de los turistas convencionales, así como los visitantes más nicho de mercado.

Palabras clave: Hibridación, dualismo naturaleza-cultura, Grenada, visitas guiadas, promociones turísticas
Introduction

An archipelago of sunny, tropical islands naturally endowed with exotic flora and fauna, surrounded by blue sea and caressed by gentle breezes, is the general impression of the region in the minds of most visitors (Jawadewena, 2007:6).

“The Caribbean is often universally invoked as a signifier of sun, sand and sea hedonistic holiday experiences” (Daye, 2008: 19).

Romantic images of tranquil azure seas, sandy white beaches and gently swaying palms have occupied the imagination of the Caribbean visitor since 19th century travelers painted vivid portraits of exotic island paradises in their narratives (Nelson, 2007). Although modern scholars take pains to emphasize the cultural, socio-economic and environmental diversity of the islands, “sun-and-sand” remains the pervasive stereotype of the Caribbean as tourism planners capitalize on the legacy of this imagery (Torres, 2005; Jawadewena, 2007; Nelson, 2007; Daye, 2008). Yet, overemphasis on the beach in tourism promotions, and underrepresentation of the other products that appeal to diverse interests, has had the effect of stripping away the unique cultural landscapes and identities within the Caribbean. Even islands that may be less competitive in “sun-and-sand” continue to vie for this market rather than develop a distinct product. As this “sun-and-sand” pattern attracts mass tourists with very limited motivations or desires, it fails to recognize the distinctive nature of the islands in the region. Likewise, they fail to develop strong attachments to places that might foster a desire to return and explore the region further on future holidays. Indeed, with the rapidly changing and more globalized nature of tourism development, “sun-and-sand” continues to lose its ability to highlight the unique diversity of the islands and their different attractions is a lost opportunity for all.

Tourism studies in the Caribbean have also reinforced the “sun-and-sand” stereotype by focusing on mass beach tourism and treating alternative destinations or products as aberrations. While there has been considerable research on tourism diversification in the Caribbean (e.g. Cameron & Gatewood, 2008), discussions often imply a linear trajectory from “sun-and-sand” to repositioning for special interest tourism products. In the context of this paper, the concept of hybridity provides a means of moving past the dualism (De- meritt, 1994; Castree, 2005). Hybridity has also been applied in tourism studies to describe the outcomes of tourism either destroying or recreating local cultures and the trans-local mobile culture of tourism, attraction as a hybrid form of tourism. Hybridity has also been applied in tourism studies to describe the outcomes of tourism either destroying or recreating local cultures and the trans-local mobile culture of tourism (Cameron & Gatewood, 2008)

Conceptual Framework: Dualisms and Hybridity

Dualisms provide a means by which to organize the world into categories that are perceived as separate and distinct. In this separation, the categories come to be understood as positionally opposite with embedded normative assumptions of positive and negative. Such definitions become naturalized and eventually unquestioned in everyday life. Specifically, nature-cultural has long been a fundamental organizing dualism in Western thought and language (Demeritt, 1994; Castree, 2001, 2005; Castree & MacMillan, 2001; Markwell, 2001; Urry, 2006). Geographic literature argues that the division of the world into separate natural and cultural spheres is artificial, that it is not easily divided along clear boundaries. Places and entities are not unconnect-ed, nor are they ever wholly natural or cultural. This means that there is likely to be as many differences that exist within each category as there are between cate-gories (Castree, 2005). Yet, the nature-cultural dualism is so deeply entrenched that it is difficult to transcend entirely. Some researchers involved in this debate have called for a new vocabulary or metaphors that would produce results of moving past the dualism (Demer-itt, 1994; Castree, 2005). Hybridity is one of these new metaphors.

Hybridity describes the process in which different enti-ties or elements come together and interact in ways that produce new forms. The term hybridity has been described above; it offers a new way of seeing the world rather than the ways in which it is divided and encourages associations rather than separations (Castree & MacMillan, 2001). It is one response to the limitations of dichotomies such as the nature-culture dualism described above; it offers a new way of seeing the world in which it does not need to be artificially divided into fixed categories. Such a concept certainly has implications that extend beyond the nature-culture dualism. According to Gold and Revill (2004: 243), “if we are to cope with the contemporary world, we must embrace hybridity.”

The concept of hybridity is not completely new to tour-ism studies, although it has not been used to a great ex-tent. Studies such as Hertzman, Anderson, and Kowley (2004) recognize that tourism is characterized by hetrogeneity and identify “entainment” heritage tourist attractions as a hybrid form of tourism. Hybridity has also been applied in tourism studies to describe the outcomes of tourism either destroying or recreating local cultures and the trans-local mobile culture of tourism, attraction as a hybrid form of tourism. In this hybridity, tourism destination where “sun-and-sand” co-exist with a variety of other products. Similarly, they fail to develop strong attachments to places that might foster a desire to return and explore the region further on future holidays. Indeed, with the rapidly changing and more globalized nature of tourism development, “sun-and-sand” continues to lose its ability to highlight the unique diversity of the islands and their different attractions is a lost opportunity for all.

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with considerable overlap. Perhaps the reason for the continuous adjustment of tourism labels and definitions is that tourism products are often too complicated to fit into such neat packaging. Tourism products are typically made up of a complex mix of components that might be individually categorized in many different ways and not always the way in which the product is labeled. Moreover, the tourists themselves are equally difficult to categorize. They demonstrate a complex interplay of motives and behaviors that vary on an individual basis according to different circumstances, contexts and places (Torres & Nelson, 2008). Therefore, tourists often have a range of primary and secondary interests. As such, "as the international tourism industry expands and develops, it continues to motivate the creation of new forms of tourism and tourist attractions. The desire for innovative, unique, novel, alternative, multimedia and/or multidimensional experiences and attractions has led to processes of hybridization in which new amalgamations of phenomena come into being" (Hertzman et al. 2008: 169).

**The Context of Grenada**

Grenada has historically been a predominantly rural, agrarian based society. However, the decline of agriculture was particularly accelerated over the past two decades as the government began to push for tourism to be a major part of its economic development and diversification strategy (Government of Grenada, 2000; Grenada-European Community, 2001; McDonald & Hopkin, 2003; Grenade, 2008).

Grenada was considered to be an appropriate destination for this study because the island has diverse tourism resources that the government has sought to develop, including a tropical climate, white sand beaches, and a mountainous volcanic interior. In 1997, the government developed a Master Plan for the Tourism Sector identified four primary tourism sub-sectors, including cruise, beach, nature, and culture (Figure 1). Cruise tourism and beach resort tourism, comprising the “sun-and-sand” category, were the principal types of tourism identified. O’Reilly (2006: 266) cites Grenada as one of the islands possessing “beautiful beaches and the ideal sunny climate for leisure tourism,” and Daye (2008: 36) identifies the island as one of the destinations in which the main image construct is paradisiacal, characterized by “the typical recreational sun, sand and sea holidays.” Indeed, these two sub-sectors have typically accounted for nearly all of Grenada’s tourists (Woodfield, 1998). Yet, despite the importance of these categories, government officials argue that Grenada is not a mass tourist destination (McDonald & Hopkin, 2003).

**Methodology**

To obtain a complete perspective of Grenada’s tour products, this article draws upon participant observation of tours and the analysis of promotional literature gathered during fieldwork to examine hybridity in the Grenadian tourism product. Promotional literature gathered both prior to and during fieldwork was analyzed using both content and semiotic analysis.

Participant observation of guided tours provided crucial insights to interpret the promotional literature analyzed in this paper, as well as to apply the notion of hybridity to comprehending Grenada’s tour products. As in other tourism studies such as Markwell (2001), participant observation provided the opportunity to understand the places visited and the experiences provided by actually taking part in the tours under study. In Grenada, a few private tour companies dominate the principal markets for tourists, namely through their presence in tourist areas (Rare, 2004). Observations were made during tours with these companies, and focused on issues such as the representation of place, elements highlighted or excluded, tour guide narratives, and tourists’ reactions and behaviors, among others. All of the tours taken were either “Island” or “Rainforest” tours, the two most common types of tours, offered on a regular basis without special arrangements.

Analysis of destination literature constituted a major component of this project. Twenty-two pieces of print and internet destination literature produced by various tourism stakeholders including the Grenada Board of Tourism, the Grenada Hotel and Tourism Association, and private tour companies. These materials were collected in the ways tourists would obtain such information. As the internet has become an important source of information for tourists prior to the visit (Douglas & Mills, 2004; Miller & Henthorne, 2006), official tourism industry produced tour company websites were located through web searches and included for analysis. In addition, requests were made for print materials, such as pamphlets and magazines, through these websites wherever the option was available. Brochures are also commonly used in the tourism industry particularly to encourage tourists to purchase a product like a guided tour (Jenkins, 2003; Nelson, 2005). Other print materials were obtained at key locations of the destination, including the airport, hotel lobbies, and the Board of Tourism office. These twenty-two sources were comprised of a total of 376 images, all of which were included in analysis.

Content analysis of textual and visual elements of promotional literature was used as a quantitative supplement to the more in-depth qualitative semiotic analysis discussed below. This methodology provided a breakdown of the number and type of both the materials used and the images that were found in the literature, and the destinations and activities promoted. The process was further refined as the brochures produced by tour companies specifically promoting tour products underwent a second round of analysis. These images were divided into themes that correspond with the Board of Tourism’s tourism sub-sectors. Table 1 provides a summary of the promotional medium, image type, and tourism sub-sector theme observed in the sample of travel literature analyzed. Choi, Lehto, and Morrison (2007) and Hunter (2008) provide examples of the use of this methodology in the context of tourism representations.

In addition to content analysis, materials were submitted to a deeper analysis through semiotics. Semiotics is the study of signs and is used as an analytical tool for interpretation of cultural creations (Hopkins, 1998; Morgan & Pritchard, 1998). The first layer of signs is denotation, in which something is described. The second layer is connotation, or myth, in which ideas are structured to convey particular messages with ideological meanings (Morgan & Pritchard, 1998; Rose, 2001; Hunter, 2008). Bhattacharyya (1997) and Nelson (2005) provide examples of the use of this methodology in the context of tourism representations. Hopkins (1998) and Jenkins (2003) for example combine the use of content and semiotic analysis as quantitative and qualitative methodological compliments. The two were combined in this study with the theoretical frame of hybridity to provide the means of investigating the overt function of the images in Grenada’s destination literature, in terms of the sites and components of guided tours, as well as the deeper ideological meanings.
sense of unique identity and distinction from the other is the nutmeg. The nutmeg is a key component in the other principal imagery used in logos for Grenada indicative of nature tourism experiences. However, this was also combined with elements such as mountains, wildflowers, or birds that would be more complex, but each of the beach, marine, nature and cultural heritage tourism. The photographs were more complex, but each of the beach, marine, nature and cultural heritage tourism categories were represented.

The graphic logos were relatively simple illustrations that contained multiple pictorial elements. Taken together, logo elements are intended to symbolize the character of the island; taken individually, they may represent a type of tourism experience. As a result, different types of experiences may be combined in one logo. For example, the yellow sun, blue water and green palm trees were frequently used elements that typically correspond with Grenada’s tourism sub-sectors. The elements of graphic logos are used to represent beach, nature and cultural heritage tourism. The photographs were more complex, but each of the beach, marine, nature and cultural heritage tourism categories were represented.

The majority of photographs in the tour brochures fell under the nature and cultural heritage tourism categories. Nature images in tour brochures accounted for 35 percent of photographs, which is a larger proportion than the destination literature as a whole. These scenes included some characteristic features such as mountains, tropical rainforest vegetation, wildflowers, and wildlife, especially birds. Specific scenes focused on the Grand Etang National Park and volcanic crater lake as well as waterfalls such as Concord or the Seven Sisters. In fact, waterfalls were the most frequently recurring site depicted. These sites often serve as the culmination point for many nature oriented tours and provide powerful imagery of an undisturbed tropical paradise.

The cultural heritage category still accounted for the largest single category of photographs, but at 40 percent of images in tour brochures, the overall proportion was smaller. The capital city, St. George’s, was pictured most often and included scenes such as Fort George and the Saturday market. While the urban market serves a function for local populations, it is also promoted to tourists as a unique glimpse into “colorful” island culture and an opportunity to interact with local people. Vendors sell various types of agricultural produce, including tropical fruits, spices, and wildflowers. Also included in this category were historic sites, spice estates, agricultural produce, prepared foods, and alcoholic beverages.

The imagery in many of these photographs is plainly tapping into certain prescribed categories, though it is hardly clear cut. For example, a photograph of a beach obviously falls under the beach tourism category. At the same time, the imagery of these beaches is distinctly natural. In this regard, these photographs could also be placed under the nature tourism category. Similarly, the photographs of marine tourism focus on water sport activities, yet they frequently picture a beach in the background and could be classified as such. Over one-third of nature images included people in addition to natural features; therefore, these photographs could be considered to depict a cultural activity. The cultural heritage photographs included imagery of agricultural products growing against a backdrop of lush tropical vegetation. Were the products not recognizable, the overall image would be considered natural. Conversely, wildflowers are typically classified as natural; however, if those same flowers were specimens in a botanical garden, they would necessarily be considered cultural.

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<th>Table 1: Content Analysis of Destination Literature</th>
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<th>Table 2: Destination Imagery in Tour Brochures</th>
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<td>Tourism Sub-Sectors</td>
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<td>Nature</td>
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Hybridity in the Promotion of Grenadian Tour Products

Guided tours provide an interesting lens through which to examine the hybridity of Grenada’s tourism products. Guides play a key role in organizing the tourist experience by selecting sites and pointing out the “signs” that attract tourists to these destinations and locations. These signs are intended to emphasize Grenada’s unique character, as well as fulfill visitors’ desire to experience elements of place that are distinct from their everyday lives. Prior to the tour experience, expectations have been cultivated by the tour company’s promotional materials and marketing in order to entice tourists to purchase the product. Tour company brochures included in the sample outlined their services and described between six and 11 different pre-packaged tour variations. Two types of tours were offered by all of the companies: an “Island” tour and a “Rainforest” tour. In addition, sailing tours, market day excursions, tours of St. George’s, and garden tours were all listed as options by two or more companies.

Each of the companies offered a slightly different variation of the “Island” tour. Several standard attractions for these tours included St. George’s, a waterfall, the rainforest in the Grand Etang National Park, and the Grand Etang volcano crater lake. Additional attractions often offered included a historic fort, a nutmeg processing station, a rum distillery, and historic site Carib’s Leap. This eclectic hybrid tour clearly suits the needs of the special interest tourism sub-sector, as well as providing a hybrid experience, not a beach-centered outing. Although clearly the emphasis included a visit to a beach, there were fewer variations in the “Rainforest” tour. These were noticeably fewer. The tours are labelled as cultural or trekking tours or treks or for tourists seeking a nature experience. Each “Rainforest” tour included a light to moderate hike through the forest of the Grand Etang National Park and a visit to one or more waterfall sites. Two tours also included a visit to the Grand Etang volcano crater lake and a natural warm water spring with reportedly therapeutic properties. This tour explicitly draws upon ideas of the environment and nature tourism. The tourist is invited to discover the natural beauty of Grenada and to experience it away from the crowds. Such “ecotourist treasures waiting to be discovered” are described as exciting and spectacular – “a naturalist delight” – in the brochures.

The descriptions of these two popular tours appear to take a different approach to self-categorization. In these brochures, the “Island” tour attempts to appeal to a wider tourism market. This type of tour incorporates various elements of both the conventional and special interest tourism sub-sectors and therefore appears to lend itself more readily to hybridity. The “Rainforest” tour, on the other hand, attempts to capitalize on current trends towards nature and ecotourism labels, but it is a rather superficial and brief foray into nature. Contrary to any in-depth exploration of nature, the tour appears to be a more classic example of a neatly packaged, highly structured tour through constructed sites and only one half of the tourists’ overall vacation. Thus, both tours are ultimately hybrid.

In this regard, each attraction may be examined as hybrid. For instance, an example of an historic spice estate is one typical attraction on the “Island” tour. Such sites, frequently dating back to the 18th century, are often referred to as a historic spice estate. Rare 2004). Although the “Rainforest” tour appears to be a straightforward nature tourism product, the experience is nonetheless hybrid. Initially, the majority of plants are agricultural, including bananas, breadfruit, cocoa, and nutmeg. These plants become less dominant farther along the trail; however, the forest is still secondary growth. These are areas that had been cleared at one time for agriculture; therefore, they have clearly been modified by humans. Such sites can serve as primary motivations for tourism, as the paths are cleared and maintained, often by lining them with fragments of nutmeg shells to prevent erosion. Guides provide information about the natural flora and fauna, but this information is culturally conditioned. It is processed into a language that tourists can understand and present in a way that will be interesting to them. In particular, this refers to items tourists would be familiar with, such as agricultural produce, or stories they could relate to the guiding memories of or experiences in a place. While marketed as a rainforest expedition, which tour promoters believe appeal to “ecotourists,” in reality the tourists observed were not particularly concerned with experiencing pristine nature.

Recognizing the hybrid nature of the Caribbean tourism product, as well as the growing desire for diverse experiences (including nature tourism) even among the most conventional mass “sun-and-sand” tourists, is critical to the future of Caribbean tourism. With the rapidly changing and increasingly complex nature of global tourism consumption, it is essential for tourism planners and policy makers to recognize hybridity and to capitalize on this notion in both tourist destination development and place promotion. This may mean offering new products adapted to the time constraints and needs of tourists, rather than a one-size-fits-all approach. These tourists’ desires to experience “local,” “authentic,” or “natural” dimensions of a place. For example, there could be a combined demand in a primarily “sun-and-sand” destination for short expeditions to villages, artisan workshops, nature preserves, agricultural plantations or others; such activities may not be the primary motivation for tourism, but they could have the potential to considerably enhance the tourist experience. In order to leverage and capitalize on the Caribbean’s hybridity, planners and policy makers may need to consider improving infrastructure and working with local communities to make more aspects of destinations accessible, comfortable and convenient, to a wider range of tourists. This process of adjustment must not sacrifice the authenticity, the hybridity or a place for the sake of mass consumption.

While many islands are developing options to diversify their tourist product, this diversity is often not adequately featured in marketing and promotion to a wide range of tourists. With a marketing mentality often focused on segmentation that draws distinct boundaries between different types of tourists and destinations, the inherent diversity and unique character, the sense of place for individual islands, is lost. This is a lost opportunity to capture more hybrid-minded tourists who travel primarily for the beaches but also wish to feel they have experienced some of the local culture, environment, people, and/or history. At the same time, the narrow focus on depictions of beaches in promotional literature represents a lost opportunity to attract tourists who consider themselves to be “travelers” that would reject a purely beach-centered experience. The failure to highlight the distinctiveness of peoples and places both reduces the occurrence of return visits and limits the potential tourist market.

Conclusion

According to Wharton (2002: 2), “Perhaps because geographers have inhabited this ‘nature-society’ settlement more self-consciously than other disciplines, the search for nature products and models that have particular resonance.” As such, a subset of geographers has particularly focused on the ways in which we can move beyond the divisions of nature and culture. Hybridity is one response that has come out of this debate. Certainly the concept of hybridity has been applied in other contexts besides the nature-culture dualism, from ethnicities to agri-biotechnology and, of course, tourism studies. The authors of this article believe the geographic perspective of hybridity was appropriate for this investigation particularly because one of the central divisions in tourism products, as can be seen in the content analysis of Grenada tourist literature, is between nature and cultural heritage tourism.

Tourism product labels may serve to organize tourism, but the resulting categories should not be seen as distinct and definitive. Hybridity rejects these clear cut distinctions and the unique character of individual islands and interactions between the multiple tourism products which have emerged and co-existed, thus creating a far more diverse tourism landscape. The concept of hybridity offers a new way of looking at tourism products and user expectations that can be useful in developing special interest tourism products that more effectively address the diverse interests of both conventional tourists and niche market visitors, to generate more comprehensive tourism experiences.

This case study of Grenada illustrates that tourist products often become hybrid in nature, as a response to the expressed demands of tourists, even those who are superficially portrayed as exclusively interested in “sun-nature preserves, agricultural plantations or others; such activities may not be the primary motivation for tourism, but they could have the potential to considerably enhance the tourist experience. In order to leverage and capitalize on the Caribbean’s hybridity, planners and policy makers may need to consider improving infrastructure and working with local communities to make more aspects of destinations accessible, comfortable and convenient, to a wider range of tourists. This process of adjustment must not sacrifice the authenticity, the hybridity or a place for the sake of mass consumption.
and-sand.” In terms of primary motivations for travel, the majority of Grenada’s tourists would be considered conventional beach resort or “sun-and-sand” tourists; they are not explicitly ecotourists nor cultural tourists with clearly defined expectations of “authentic” nature or culture. However, even within this market, there is considerable hybridity emerging, which can be leveraged to offer a greater diversity and depth of products, attract new types of visitors, and perhaps generate more return visits. Grenada’s visitors have been shown to have a range of secondary interests beyond the beach, including sightseeing, history, culture, water sports, and others (Rare 2004). Most are interested in an activity to supplement their beach vacation and to experience more of the destination. The reality of hybrid tourism provides some insight into tourism products that have developed to effectively address tourist demands.

Given the dearth of analysis examining interactions, interrelationships and blurring of distinctions between the different types of products and tourists, there is often a failure to grasp the true complexity of current and potential Caribbean tourism. The oversimplification, generalization, and stereotyping in the representation of the Caribbean as the “sun-and-sand” playground hides the diversity which places certain islands at a disadvantage. It fails to recognize opportunities presented by new forms of specialized niche market tourism and may contribute to the stagnation of Caribbean tourism growth. Only through a more nuanced understanding is it possible to make the most of existing Caribbean tourism resources and to create synergies between different products and places. This would more widely disperse tourism revenues across the region and assist in planning for sustainable tourism development that is in tune with the shifting and more diversified tastes of 21st century travelers.

References


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Visitor Safety and Security in Barbados: Stakeholder Perceptions

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Abstract

Is information about the nature, location and incidence of crimes against tourists/visitors sufficient to develop meaningful visitor safety and security policy? Are the views of key tourism stakeholder groups useful in informing and enhancing visitor safety and security policy? To answer these questions, this study analyzes 24 years of recorded crime data against tourists to identify patterns that are unique to Barbados. The study seeks to identify patterns that are unique to Barbados. It concludes: 1) that information about the nature, location and incidence of crimes against tourists is necessary but not sufficient to inform visitor safety and security policy; and 2) that the views and input of key stakeholders are essential if destinations are to become more effective in enhancing visitor safety and security.

Key Words: stakeholder, safety, security, crime

Introduction

Sapphire water, white-sand beaches, and an easy-going attitude are just a few of the Caribbean’s attractions. And with so many destinations to choose from, you’re sure to find the spot that’s perfect for you! Expedia.com’s webpage, which carried this advertisement during January 2006, makes no mention of safety and security despite the conventional wisdom that 1) very few tourism destinations are immune to crime and other forms of victimization; and 2) traveler perceptions of safety and security at tourism destinations strongly influence traveler choice. This webpage also insinuates that lax rules conduce to excessive (binge) drinking (Sönmez, Apostolopoulos, Yi, Yang, Matilla, & Yi, 2000) and experimentation with marijuana and other illicit substances.

Indeed, Caribbean destinations have come under international microscope in recent years following a number of incidents involving both stay over and cruise ship visitors. Extensive media coverage has been given to the 2005 disappearance of American teeniger, Natalee Holloway, while on vacation in Aruba, which is considered one of the safest Caribbean destinations. And back on 27 May 2000, New York travel writer, Claudia Kirschhoch, disappeared without a trace while in Jamaica. From both a scholarly and a policy perspective, therefore, understanding this issue of visitor safety and security is important given the increasing prominence role that tourism plays as a development strategy for many tourism destinations, generally, and the Caribbean, in particular. It is also an important area of inquiry given the new reality that tourists/visitors not only expect safety and security but demand it.

Understanding the nature and incidence of tourist/visitor victimization in a way that helps to inform visitor safety and security programs and policies depends in large measure on the availability of reliable statistical data. However, because such data remain largely unavailable (Albuquerque & McBryor, 1999; 2001), there have been few studies on visitor safety and security, in general, and crimes against tourists, in particular, that he can be used for comparative purposes (Schiebler, Crotts, & Hollinger, 1996: 38). Moreover, getting key tourism stakeholders, including governments, tourism development and marketing professionals, and other tourism service providers to discuss the issue of visitor safety and security, remains extremely challenging.

These challenges, notwithstanding, the issue of visitor safety and security will remain a subject of scholarly inquiry given the potential for tourism destinations to become the focal points for political crimes as well as crimes of opportunity. The practical implications make this issue an important one for governments and tourism policy makers as well. Given these factors, two central questions are probed in this analysis: 1) is information about the nature, location and incidence of crimes against tourists/visitors sufficient to develop meaningful policy approaches to improve visitor safety and security at a tourism destination? And 2) to what extent are the views of key stakeholders useful in informing and influencing visitor safety and security policy?

With regard to the first question, the argument is that recorded data on the nature, location and incidence of crimes against tourists/visitors is necessary but not sufficient for policy formulation. Moreover, the literature on crime consistently points out that all crime victims do not usually report that they have been victimized. Consequently, tynd data almost always underestimate crime rates. Furthermore, understanding the types of crime does not necessarily imply an understanding of the reasons for or the perpetrators of these crimes.

Secondly, because certain stakeholders interact more closely with tourists/visitors than most residents in a community, they are in a position to have greater access to information about tourists/visitor victimization than the police. For example, tourists/visitors often mention and stakeholders, including taxi drivers, tour operators, travel agents, hotel and guest house managers, often commiserate with these victims. Therefore, with regard to the second question, many key stakeholders are well positioned to provide policymakers with useful insights into the nature and levels of tourist/visitor victimization. Stakeholder perspectives are useful on another level as well. These individuals and groups operate at different junctures in the tourism/visitor experience and tend to have a narrow, self-interested perspective on the role and importance of each stakeholder group in the entire tourism enterprise. Self-interest may lead one group to criticize the behavior and attitude of another(s) especially if the one suspects that such an attitude will not be undermining its pecuniary interest in the sector.

Fieldwork conducted for this study reveals a high level of ignorance, misconception, mistrust and suspicion among all categories of stakeholders together. Such dissonance is due in part to the absence of a holistic knowledge of the relevance and importance of the industry to the community at large. These characteristics can lead to behaviors that prove injurious to the industry as a whole without the perpetrator group perceiving the broader impact and implication of its infraction. To mitigate this problem, policy makers must institute public education programs that promote comprehensive stakeholder group knowledge of the role that each plays in the tourism sector, and awareness that all form part of a network of actors responsible for developing, sustaining, and securing the sector.

What the foregoing suggests is that an assessment of the level of visitor safety and security in the Caribbean tourism sector is essential to different publics. First, tourists and visitors from 1980-2003; second, to analyze the survey data of tourists/visitors to Barbados over the 24 years since 2000. But destinations across the world, including the Caribbean, tend not to make statistics on tourist/visitor victimization available largely out of concern that publicizing such data can only create negative perceptions of the destination and, thereby, lead to reductions in tourist/visitor arrivals. Consequently, there is a paucity of reliable data on the region. Barbados, however, is one of the few countries in the world that collects and publishes tourist/visitor victimization data, and will be the focus of this analysis.

The purpose of this study, therefore, is threefold. First, to analyze the types and incidence of reported crimes against tourists/visitors to Barbados over the 24 years from 1980-2003; second, to analyze the survey data of tourism stakeholders to ascertain their perspectives on the contribution that stakeholder groups are unwittingly making to the enhancement or undermining
of visitor safety and security in Barbados; and third, to offer some policy recommendations for enhancing visitor safety and security in Barbados. This analysis and its findings will have implications for other Caribbean nations due to their high degree of dependence on tourism.

The Safety and Security Context

The world has witnessed significant levels of increase in the volume of traffic and diversity of destinations that support travel, especially leisure travel, over the past 25 years. Caribbean, which provides a wide range of tourism destinations “that are as interesting and as diverse as another region in the world, complemented by a favorable climate, areas of exceptional beauty, and diverse cultures” (Mather & Todd, 1997), accounts for a significant proportion of this volume of tourism traffic.

Of thirteen regions estimated by the World Travel and Tourism Council (WTTC), the Caribbean ranks 13th globally in absolute size but first in relative contribution to regional economies (As defined in this analysis, the Caribbean comprises the following countries and territories: Antigua, Anguilla and Barbuda, Aruba, Bahamas, Barbados, Bermuda, British Virgin Islands, Cayman Islands, Cuba, Dominican, Dominican Republic, Grenada, Guadeloupe, Haiti, Jamaica, Martinique, Montserrat, Netherlands Antilles, Puerto Rico, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Trinidad and Tobago, Turks and Caicos Islands and US Virgin Islands). Total travel and tourism demand for 2007 is projected is $56.1 billion (6.0 per cent of global demand), which translates into 16.5 per cent of GDP and $2,447,000 jobs (14.8 per cent of total employment). Projected growth for 2007 is 3 per cent and 3.3 per cent in real terms from 2008-2017 (http://www.wttc.org).

But differently, the Caribbean is regarded as the most tourism dependent region in the world where the sector accounts for approximately 25 per cent of all exports and services; contributes 31 per cent to the region’s Gross Domestic Product (GDP); is the region’s primary generator of foreign exchange; provides the largest number of jobs; and has the greatest growth potential (Nune, 2002). In the case of Barbados, specifically, the industry generated $494m in revenues or $1,880.47 per capita in 1990. A decade later, tourism revenues had grown by 46.4 per cent to $723m or $2,633.90 per capita. And by 2003, revenues had grown to $785m or $2,733.50 per capita, representing an increase of 4.8 per cent over 2000 (see Table 1).

Table 1: Barbados Tourists/Visitors and Tourism Revenues

<table>
<thead>
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<th>Year</th>
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* Source: Barbados Ministry of Tourism Annual Tourism Statistical Digest.

Tourism scholars—that everyday someone is victimized and Nevis, St. Lucia, St. Vincent and the Grenadines, Cayman Islands, Cuba, Dominican, Dominican Republic, Grenada, Guadeloupe, Haiti, Jamaica, Martinique, Montserrat, Netherlands Antilles, Puerto Rico, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Trinidad and Tobago, Turks and Caicos Islands and US Virgin Islands). Total travel and tourism demand for 2007 is projected is $56.1 billion (6.0 per cent of global demand), which translates into 16.5 per cent of GDP and $2,447,000 jobs (14.8 per cent of total employment). Projected growth for 2007 is 3 per cent and 3.3 per cent in real terms from 2008-2017 (http://www.wttc.org).

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Understanding Visitor Safety and Security

A significant body investigating the relationship between tourism and crime has emerged over the past 25 years. This body of work can be grouped into six broad areas: 1) tourist areas as areas of high crime; 2) tourists as victims; 3) tourists as offenders; 4) tourism generating higher levels of deviant or illegal activity; 5) tourism and terrorism; and 6) policy responses to tourism and crime (Brunnt et al., 2000: 417-424).

This variety of themes notwithstanding, a major criticism holds that research into this phenomenon of tourism and crime “has not been undertaken in a particularly systematic manner and individual studies vary in their focus, the extent to which they can be replicated, and the sagacity of research methods” (Brunnt et al.). To address these criticisms George (2005), for example, investigated tourists’ perceptions of safety and security while visiting Cape Town, South Africa; Brunnt et al. (2000a) analyzed tourist victimization and the fear of crime and Brunt et al. (2000b) investigated the extent to which British holidaymakers were fearful of crime. With regard to the Caribbean, which will be the focus of this inquiry, Albuquerqu and McEroy (1999) speak to the failure of previous research on tourism and crime in the Caribbean to discriminate between crimes against tourists/visitors and crimes against residents.

Collectively, these studies underscore a number of challenges inherent in conducting research into tourist/visitor safety and security, including: being able to generate representative samples; the timing factor—whether the respondents were just beginning their vacation, were in the middle of it, or had already completed it; whether the respondent was the actual victim or another family member; the respondent’s prior experience with crime; the destination’s image as portrayed in the news media about the level of crime; perceptions about police effectiveness at the destination; and the individual tourist’s risk/ fear/ portfolio. While the tourist/visitor perspective on safety and security is important to informing policy, the perspective of key stakeholders is equally important due to the vested interest that these publics necessarily have in the viability of the tourism industry. A number of studies have investigated the attitudes and perspectives of hosts to the social and economic impacts of tourism. King, Pizam, and Milman (1993), for example, analyzed the perceptions of the residents of Nadi, Fiji, on the social impacts of tourism and concluded that residents were able to differentiate between the social and economic costs of tourism expansion. From their analysis of households on the Greek island of Samos, Haralambopoulos and Pizam (1996) concluded that despite a number of the industry’s negatives, including crime, vandalism, drug addiction and sexual harassment, respondents who were economically dependent on tourism evinced more positive attitudes towards the industry than those who were not dependent on it. Lindberg and Johnson (1997) argued that the strength of the value that a community places on economic gain is a stronger predictor of attitudes toward tourism than do values regarding disruption in that community. Economic and congestion impacts affect attitudes more strongly than the perceived impacts of crime and aesthetics.

While the perspective of households is clearly useful in informing tourism policy, especially visitor safety and security programs, the perspective of stakeholders as a category of enquiry is likely to provide even greater insights into the issue of crime against tourists/visitors, specifically, and visitor safety and security, generally. However, this perspective is missing from the literature. It is the goal of this project, therefore, to attempt to fill this gap.

Key Stakeholders

Tourism stakeholders consist of a variety of public, private and nongovernmental groups, who possess a vested (including pecuniary) interest in ensuring that the “right image” of the destination is cultivated and maintained. Key stakeholders are also the individuals who interact very closely with tourists/visitors and, consequently, are strategically positioned within the industry to have an impact on the experience of the
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tourist/visitor in terms of what they do or don’t do, say or don’t say, and the way they behave or misbehave. An understanding of the Barbados’ tourism organizational structure provides insights into who the key stakeholders are and the role they play in the industry.

Barbados’ tourism industry is managed by a combination of public, private and non-governmental organizations. The Barbados Ministry of Tourism (BMOT) is the principal public sector agency and is responsible for policy formulation and plan development, conducting research and facilitating tourism development activities. There is also the Barbados Tourism Authority (BTA), a parastatal, which falls under the BMOT, is responsible for tourism marketing; the Barbados Tourism Advisory Council (BTAC), an advisory body comprising public, private, nongovernmental organizations and individuals, who advises the Minister on any tourism or related matter which it deems fit as well as undertakes specific assignments given by the Minister; and the Barbados Tourism Investment Inc. (BTI), a limited liability company with the Government as its sole shareholder, which is responsible for tourism investment promotion and development in Barbados. Additionally, the following entities complement the management of the industry in Barbados: the Needham’s Point Development Inc.; the Barbados Conference Services Ltd (BCSL); the Barbados Hotel and Tourism Association (BHTA); a trade organization representing the interests of the industry; and the Barbados Tourism Development Corporation (BTDA), a non-profit organization funded entirely by presence companies and sponsors; the Barbados National Trust; and the Barbados Museum and Historical Society. These frontline individuals are among the most important stewards of the industry. Consequently, their perspectives can be informative to our understanding of security challenges confronting the industry and the policies that might be implemented to maintain destination appeal.

Research Design and Methodology

Like other Caribbean countries, the BMOT, which develops and implements tourism policy, works closely with two private sector organizations—the BTIC and the BTA—whose membership includes, among other sectors, environment, tour operators, tour guides, and associations. Because of the strongly supportive and interrelated role that the BMOT plays in the tourism industry, it was also agreed with the BMOT, including making themselves accessible by email. Registering with the BMOT has its rewards because these entities are able to have a voice in tourism policy as well as are regularly invited to participate in various tourism development/enhancement programs, workshops, and seminars. Therefore, played a central role in facilitating the data collection.

This study identified the following personnel/groupings as also among the key stakeholders in the tourism industry uniquely positioned to interact with and impact upon the tourist/visitor experience in Barbados (and at other Caribbean destinations). Included are: airline personnel, customs and immigration officers, sky caps, taxi, shuttle and limousine drivers, hotel desk clerks, concierges and bell hops and porters, travel agents, tour operators, tour guides, bartenders and wait staff at hotels, restaurants and bars, police and private security personnel, hair braiders, craft sellers and other service personnel, representatives of tourism organizations, government personnel, and the general public.

The importance of key stakeholder perspective is essential given that while all stakeholders agree on the pecuniary benefits of tourism, these different publics differ on the level of impact it should have on the locality. For example, while environmentalists, archaeologists and ecologists welcome tourism, they oppose the impact of the waste—human, product and oil—generated and discharged by the huge luxury liners, too many feet and bodies that often degrade and destroy archaeological sites and artifacts; and environmentalists remain concerned about the impact on the ecology at eco-tourism sites. Immigration and customs officers, sky caps, taxi drivers, tour guides, craft sellers, police officers, private security guards, and numerous other service providers often have a narrow and limited understanding of the importance of tourism to the economy, and often misunderstand the role that each plays. The absence of a holistic perspective on the importance and impact of the tourism industry has led to combative and conflictive rather than cooperative, collaborative, and coordinated relationships between and among these stakeholders. These differential attitudes play a critical role in the perception of safety and security at tourism destinations.

A survey instrument was developed and the BMOT was asked and agreed to send an electronic copy to each member organization. Usually, the message was sent to the president of the service provider organization. The statistical department of the BMOT conducted the survey between July 13th 2003 and August 15th 2003. Although delivered electronically, the survey instrument was a self-adaptable filled out form. The respondents were then mailed back to the BMOT, including making themselves accessible by email.

When the data are examined by category, they reveal that burglaries account for almost one-half (48 per cent) of all crimes committed against tourists/visitors. However, rather striking is the fact that 99 per cent of all burglaries occurred against guests in hotels and/or guest houses. The pattern of burglaries against tourists/visitors is almost a mirror image of the overall pattern of crime against tourists/visitors over the 24-year period. The data also indicate that thefts account for 35 per cent of all crimes committed against tourists/visitors over the period 1980-2003. The distribution of this type of crime reflected 26 per cent against the person; 28 per cent theft from beaches; while mixed theft account for the rest. Eleven percent of all crimes were robberies.

The survey consisted of several questions concerning the identity of the respondent group; questions regarding the respondent group’s perspective on whether or not the stakeholder group perceived the country to have a crime problem as well as a problem with harassment of tourists/visitors; questions regarding the level of seriousness of the problems of crime and harassment; questions regarding whether or not tourists/visitors had reported that they had been victims of crime and/or harassment over the past five years and, if so, the number of reports they received; questions regarding the types of crimes and the types of harassment reported; the name of the offending group—tour guide, taxi driver, hair braider, craft seller, etc.; questions regarding any action that the responding group took; questions regarding group’s awareness of any legislation regarding crime and harassment of tourists/visitors; questions regarding group’s perception of the effectiveness of such legislation; 10-point scale questions regarding group’s perception of level of concern exhibited by public officials about crime and harassment in the country; 10-point scale questions regarding group’s perception of level of concern exhibited by the general public officials about crime and harassment in the country; and questions regarding group’s recommendation of action that is likely to reduce the incidence of crime and harassment in the country.

Analysis of Crimes Against Tourists/Visitors To Barbados

The incidence of crime against tourists/visitors to Barbados over the 24 years from 1980-2003 as displayed in Chart 1 reflects a triple-peak distribution involving the years 1990-1991; 1987 and 1990. While the number of reported crimes between 1980-81 registered an increase of approximately 1 per cent from 751-758 incidents, they declined by approximately 32 per cent from 758 incidents to 532 incidences between 1981 and 1983. The number of recorded incidents then jumped 15.3 per cent to 416 in 1984, and continued to increase at an average annual rate of 25 per cent through 1987 when a total of 821 crimes were reported. The number of incidents dropped by 126 (15 per cent) between 1987 and 1988 only to increase to 787 in 1989 and finally peaking at 849 in 1990, thereby reflecting an annual rate of increase of 30.1 per cent during this period. From a peak recording of 821 incidents in 1990, the annual number of recorded incidents declined at an average rate of 7.3 per cent between 1990 and 2003. Except for two brief reversals in 1998-99 and 2000-01, the number of recorded incidents of crimes against tourists/visitors reflected a monotonic decline.

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and assault with intent to rob, with 95.8 per cent being robberies. Less than 1 per cent of all crimes against tourists/visitors from 1980-2003 were sex assaults. Nonetheless, these are crimes of a very violent and personal nature that can cause long-term trauma, and that are highly unlikely to engender positive memories about the country. This means that no matter how few sexual assaults were recorded, they still are too many. Finally, approximately 2 per cent of all crimes against tourists/visitors were considered major crimes, including murder and wounding (major and minor).

In sum, over the period under survey:
- Burglaries from hotels account for about 48 per cent of all crime against tourists/visitors;
- Burglaries from hotels account for approximately 99 per cent of all crimes against tourists/visitors;
- Theft account for 34.7 per cent of all crimes against tourists/visitors;
- Theft from the person account for 28 per cent of all thefts against tourists/visitors;
- Steals from the beaches account for 28 per cent of all thefts against tourists/visitors;
- Miscellaneous thefts account for 41 per cent of all thefts against tourists/visitors;
- Approximately 2 per cent of all crimes against tourists/visitors were major crimes, including murder and wounding (major and minor);
- Less than 1 per cent of all crimes (0.8 per cent) were sex-related crimes.

The data in Table II put the tourist/visitor victimization picture in greater perspective. They indicate that the number of recorded crimes per 100,000 tourists/visitors has been declining from a high of 106.8 in 1990 to 22.4 in 2003, with some small reversals in 2001 and 2002. The data also suggest that the likelihood of a tourist/visitor to Barbados will become a victim of crime on a given day is very low, with the probabilities decreasing significantly since 1990. This indicator was determined by calculating the number of tourist/visitor days spent in the country per year. Cruise ship visitors spent one day per visitor, while the length of time spent by stay over visitors ranged from two days to 182 days reflecting and average length of stay that ranged from 6.6 days to 7.6 days between 1990 and 2003 (See Table 2).

But since recorded data typically underestimate the incidence of crime against tourists/visitors, and since recorded data do not necessarily provide information about the perpetrators of these crimes, policy responses may be less than effective given that policy decisions may be made based on less than complete information. Therefore, the perspectives of key stakeholders may lead to more informed policy decisions.

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**Table 2: Incidence and Likelihood of Tourist/Visitor Victimization in Barbados**

<table>
<thead>
<tr>
<th>Year</th>
<th>Year-to-Year</th>
<th>Crimes Against Tourists/Visitors</th>
<th>Probability of Being Crime Victim</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>April to May</td>
<td>2,552.6 (000)</td>
<td>0.000024</td>
</tr>
<tr>
<td>1995</td>
<td>April to May</td>
<td>3,791.6</td>
<td>0.00010</td>
</tr>
<tr>
<td>2000</td>
<td>April to May</td>
<td>4,509.6</td>
<td>0.00007</td>
</tr>
<tr>
<td>2001</td>
<td>April to May</td>
<td>4,178.7</td>
<td>0.00008</td>
</tr>
<tr>
<td>2002</td>
<td>April to May</td>
<td>3,859.2</td>
<td>0.00008</td>
</tr>
<tr>
<td>2003</td>
<td>April to May</td>
<td>4,398.2</td>
<td>0.00006</td>
</tr>
</tbody>
</table>

* Includes Cruise Tourists. Average length of stay per stay over visitor: 4.6-7.6 days. Source: Barbados Ministry of Tourism and the Caribbean Tourism Organization.

---

**Discussion and Findings of Stakeholder Survey**

The membership database of the Barbados Ministry of Tourism was used to generate a random and representative sample of population of 90 to whom surveys were sent electronically with a cover letter discussing the purposes of the survey. Survey instruments were sent to 30 hotels, 10 travel agencies, 10 tour operators, 10 taxi companies, government representatives, 3 private security services, and 22 “other service” providers, including, among others, restaurants, pubs, museums, parks, duty free and shops. A total of 78 responses were returned reflecting a response rate of 87 per cent. This is an unsurprising response rate given that Barbados operates on the principle that “Barbados is Tourism” and given that the Ministry of Tourism regularly conducts seminars, workshops and other types of training sessions for the stakeholders, who regularly participate.

When asked if they thought that crime against tourists/visitors to Barbados is a problem 74.4 per cent (58) of respondents indicated that crime against tourists/visitors to Barbados is a problem while 24.4 per cent (16) disagreed; and the remaining 1.2 per cent (1) gave no response to this question. As shown in Table 3, the following percentages of stakeholders indicate that they think that crime against tourists/visitors to Barbados is a problem: hoteliers (76.2 per cent); security service personnel (75 per cent); travel agency...
representatives (100 per cent); tour operators (100 per cent); government representatives (100 per cent); miscellaneous other service providers (70.4 per cent); and various unidentified respondents (88.9 per cent). The surprise is that fewer taxi services/operators/drivers think that crime against tourists/visitors is a problem (44.4 per cent) than those who do not think that it is a problem (55.6 per cent).

Regarding the level of seriousness of crime against tourists/visitors to Barbados, different perceptions exist among stakeholders regarding the level of seriousness of the issue of crime against tourists/visitors despite the overwhelming percentage who think that crime against tourists/visitors is a problem. Whereas only 21 per cent of respondents think that the problem is not serious, approximately 75 per cent of respondents expressed, to varying degrees, that crime against tourists/visitors is a problem. Specifically, 15 per cent think that it is very serious; 33 per cent think that it is serious; while 26.9 per cent think that it is somewhat serious. The remaining 2.6 per cent gave no response to this question (See Table 4).

Table 4: Perceptions of Crime Problem Against Tourists/Visitors

<table>
<thead>
<tr>
<th>Stakeholder Groups</th>
<th>Yes (%)</th>
<th>No (%)</th>
<th>No Response (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>76.2</td>
<td>23.8</td>
<td>0.0</td>
</tr>
<tr>
<td>Security Service</td>
<td>75.0</td>
<td>25.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Travel Agency</td>
<td>100.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Tour Operator</td>
<td>100.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Government Representative</td>
<td>100.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Taxi</td>
<td>44.4</td>
<td>55.6</td>
<td>0.0</td>
</tr>
<tr>
<td>Other Service</td>
<td>70.4</td>
<td>25.9</td>
<td>3.7</td>
</tr>
<tr>
<td>Unidentified Respondent</td>
<td>88.9</td>
<td>11.1</td>
<td>0.0</td>
</tr>
</tbody>
</table>

The disaggregated data indicate that the views of most stakeholders fall between the “very serious” and “not serious” range. Approximately 67 per cent of hoteliers, 100 per cent of private security service providers; 100 per cent of travel agency operators; 100 per cent of tour operators; and approximately 63 per cent of “other service providers” think that the problem is either somewhat serious or serious (See Table 5).

Table 5: Perceptions of Seriousness of Crime Against Tourists/Visitors

<table>
<thead>
<tr>
<th>Perceptions of Crime</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Serious</td>
<td>15.0</td>
</tr>
<tr>
<td>Serious</td>
<td>33.2</td>
</tr>
<tr>
<td>Somewhat Serious</td>
<td>26.9</td>
</tr>
<tr>
<td>Not Serious</td>
<td>21.2</td>
</tr>
<tr>
<td>No Response</td>
<td>2.6</td>
</tr>
</tbody>
</table>

As mentioned above, 14.3 per cent of hoteliers think that it is a very serious problem while 52.8 per cent think that it is a serious problem, 14.3 per cent think that it is somewhat serious, and 19 per cent do not think that it is a problem at all. However, when these views are considered in light of the fact that burglaries constitute approximately one-half of all recorded crimes against tourists/visitors from 1980-2003, and that burglaries in hotels and guest houses account 79 per cent of all burglaries against tourists/visitors, it would appear that only about 20 per cent of hotel/guest houses provide their guests with a very high degree of security.

Stakeholders also indicated in their responses that tourists/visitors to Barbados are most frequently victims of the following types of crime: theft of jewelry (33 per cent); theft of money (29.5 per cent); armed assault (10 per cent); armed robbery (9.9 per cent); and miscellaneous other types of crime (10.3). And regarding the general level of concern of public officials about crime against tourists/visitors to Barbados, 57.7 per cent of stakeholders think that they are quite concerned as opposed to 37.2 who think otherwise. The perceptions are similar regarding the general public’s concern about the level of crime in the country: 56.4 per cent think that the public is quite concerned while 35.9 per cent think otherwise.

Conclusion

Rather than focus on the perceptions of tourists/visitors to assess the level of visitor safety and security at a tourism destination, this analysis examined visitor safety and security from the perspective of the stakeholders, who provide the tourism product and who, necessarily, have a vested interest in the sustainability of the sector. To what extent are stakeholder attitudes, behaviors and roles contributing to the enhancement or erosion of visitor safety and security? This stakeholder-specific study has determined that there is wide variability in the perceptions among tourism stakeholders of level of seriousness of crimes against tourists/visitors to Barbados, specifically, and the level of visitor safety and security, generally. This variability in perceptions is due in part to the absence of a holistic understanding of the role, structure and function of the tourism industry. Consequently, rather than seeing themselves as integral parts of a network that come together to create the tourism product, each stakeholder group tends to focus rather narrowly on its own service provision area. In so doing, rather than cooperate to ensure that a sustainable product is developed, each not only competes with the other but also tends to view the other with suspicion born largely by ignorance of the complex functioning of the sector. As a result, some of the activities of particular groups hurt rather than aid in product development. What is called for, therefore, is greater public education, especially among key stakeholders to ensure that a more holistic and interdependent understanding and approach to tourism development is pursued.

References

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Biographical note:

Clifford E. Griffin is Associate Professor of Political Science, researcher on Caribbean political economy and security, and consultant on tourist safety and security. Major publications include Democracy and Neoliberalism: Lessons from the Anglophone Caribbean (Ashgate 1997), and The Race for Fisheries in the Caribbean Basin: The Barbados-Trinidad and Tobago Maritime Dispute (Ian Randle Publishers 2007).

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The Contribution of Tourism on Economic Growth in Central America and in the Caribbean

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Abstract

The main objective of this paper is to analyze the contribution of tourism to economic growth in Central America and selected Caribbean countries (The Bahamas, Dominica, Dominican Republic and Saint Lucia). Following recent methodology presented by Ivanov and Webster (2007), this paper will utilize the rate of growth of real Gross Domestic Product (GDP) per capita as a measure of economic growth. This will then be disaggregated into a growth component attributable to tourism and a second growth component generated by the other industries of the economy. This methodology, which has the characteristic of generating a performance measure of tourism’s past contribution to economic growth, will be applied to the period 1990-2007. The results are compared with those of a group of developed destinations including Spain, France, Italy, UK and USA. The comparison between the two groups shows that the tourism contribution to GDP is higher in general for the developed group but it is not associated necessarily with a greater contribution to the economy’s growth.

Key Words: tourism impacts; growth performance; rate of growth

Introduction

It has long been recognized that the tourism industry can relevantly impact the economic activity and consequently the economic performance of a country. Tourism can increase foreign exchange earnings, stimulate employment and entrepreneurial activity in a given country. Additionally tourism makes an important contribution to a country’s balance of payments. Tourism has become one of the largest and fastest growing world industries and an economic and social phenomenon of major importance. With an average annual growth rate of 6.5%, the number of international arrivals by visitors rose worldwide from 25 million in 1950 to an estimated 800 million in 2005, showing that tourism is one of the fastest growing economic activities globally (UNWTO, 2009a). Furthermore, according to the estimates of the Tourism 2020 Vision, this number is expected to experience continued growth and reach a total of nearly 1.6 billion international arrivals by the year 2020 (UNWTO, 2009a). The World Travel and Tourism Council estimated that the Travel and Tourism industry currently employs nearly 240 million people and creates 10% of the global GDP (WTTC, 2008).

Resumen

El principal objetivo de este trabajo es analizar la contribución del turismo al crecimiento económico en América Central y un grupo de países del Caribe (Bahamas, Dominica, República Dominicana y Santa Lucía). Utilizando una metodología recientemente presentada por Ivanov y Webster (2007), este trabajo utiliza la tasa de crecimiento del Producto Interno Bruto (PIB) por cápita como una medida del crecimiento económico. Esta metodología tiene la característica de generar una medida del desempeño de la contribución pasada del turismo al crecimiento económico se aplica para el periodo 1990-2007. Los resultados se comparan con los de un grupo de destinos desarrollados que incluyen a España, Francia, Italia, Gran Bretaña y Estados Unidos de América. La comparación entre estos dos grupos muestra que la contribución del Turismo al PIB es en general más alta para el grupo de destinos desarrollados pero no está asociada necesariamente con una contribución mayor al crecimiento de la economía.

Palabras clave: impactos del turismo, desempeño de crecimiento, tasa de crecimiento.

Figure 1: Evolution of the number of international tourist arrivals

<table>
<thead>
<tr>
<th>Year</th>
<th>1995</th>
<th>2010 (Million)</th>
<th>2020 (Million)</th>
<th>Market share (%)</th>
<th>Average annual growth rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>563</td>
<td>1086</td>
<td>1561</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Africa</td>
<td>20</td>
<td>47</td>
<td>77</td>
<td>3.6</td>
<td>5.0</td>
</tr>
<tr>
<td>Americas</td>
<td>110</td>
<td>190</td>
<td>282</td>
<td>19.3</td>
<td>18.1</td>
</tr>
<tr>
<td>East Asia &amp; Pacific</td>
<td>81</td>
<td>195</td>
<td>597</td>
<td>14.4</td>
<td>25.4</td>
</tr>
<tr>
<td>Europe</td>
<td>536</td>
<td>827</td>
<td>777</td>
<td>59.8</td>
<td>45.9</td>
</tr>
<tr>
<td>Middle East</td>
<td>36</td>
<td>69</td>
<td>72</td>
<td>2.2</td>
<td>5.5</td>
</tr>
<tr>
<td>South Asia</td>
<td>4</td>
<td>11</td>
<td>19</td>
<td>0.7</td>
<td>1.2</td>
</tr>
</tbody>
</table>

Source: UNWTO, 2009a

There is a wealth of information collected on tourism for a large set of countries. There are details of who visits and how much they spend and do while they are in a destination. The headline figures concentrate on numbers of visitors, the number of nights they stay and how much they spend in total. This information is invaluable to those involved in tourism, but it is not useful to measure the size and make-up of tourism in a region and to evaluate how it contributes to the economy as a whole. In the literature related to tourism, impacts of the impact of tourism on GDP, it can be found that three methodologies have been developed for and are usually applied to estimate the impact of tourism on GDP: Tourism Satellite Account (TSA), Computable General Equilibrium models (CGE) and Input-Output analysis (IOA). The most commonly used is the IOA (Fletcher, 1994), which is also the most used for regional accounts, though its main weakness is that it assumes unrealistic bases that tend to exaggerate the effect of tourism growth on output, income and employment at destination (Groenewold, Hagger, & Madden, 1993; Dwyer & Forsyth, 1996; Dwyer, Forsyth, & Spurr, 2003, among others). Interesting CGE-based studies of tourism contribution to national economies model have been undertaken like e.g. for Hawaii (Zhao, Yanagida, Chakravorty, & Leng, 1997) arguing that tourism can indeed increase a destination’s welfare by turning the terms of trade in its favor. For Blake, Durbarry, Sinclair, and Sup´gurto (2000) CGE models provide an important tool for policy makers and for business people wishing to plan for the future. Comparing with Input-Output models, CGE can show the inter-industry feedback effects and resource constraints (Dwyer, Forsyth, & Spurr, 2006) although Input-Output analysis is the technique most often used to quantify the impacts of tourism (Fletcher, 1994). All such studies, though, seem to agree that tourism contribution is well below any IOA estimates. The main multi-difficulty is that for total economic impact of tourism as the sum
of direct, indirect, and induced effects upon current production and employment, at a region’s level there is generally very little data collected. Moreover, tourism is not an industry in the traditional sense, and therefore its linkages outside the destination can be a relevant feature of the supply chain that is at the same time difficult to track.

In a recent paper, Ivanov and Webster (2007) present a methodology for measuring the contribution of tourism using the rate of growth of real per capita GDP as the measure of economic performance. Therefore, such a rate is approximately factored out into the growth contribution by tourism plus growth generated by other industries. One such methodology has been tested with data for Cyprus, Greece and Spain and compared with alternative methodologies by Ivanov and Webster (2007). It is to be pointed out, however, that this methodology only allows for measuring direct effects of tourism activities on an economy’s GDP, a serious limitation, though the approach points into the right direction for a more balanced assessment of the short and long term effects of tourism development. This paper will apply this methodology to the countries of Central America including Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama and to the Caribbean countries of the Bahamas, Dominica, the Dominican Republic and Saint Lucia. The choice of these countries is due to their awareness of tourism’s potential in Central America and the Caribbean and due to the interest of analyzing a geographical area which is lacking in this kind research. Application of the analyzed methodology has already been tested for countries such as Spain, Greece, Cyprus (Ivanov and Webster, 2007), Argentina, Brazil, Uruguay, Mexico (Brida, Pereyra, & Such, 2008a). Colombia (Brida, Pereyra, Riso, Such, & Zapata, 2009), and the world’s top 5 tourism destinations Spain, France, Italy, U.K. and USA (Brida, Pereyra, Such, & Zapata, 2008b). It will be extremely interesting to analyze and compare Central American and Caribbean countries with each other however it will be even more interesting to discuss any similarities and inconsistencies in the patterns of tourism’s contribution on the economic growth for the countries of which data is already available.

The paper is organized as follows. In section 2 there is a presentation of the data and methodology. Section 3 presents and discusses the empirical results. Concluding remarks are in section 4.

2. Data and methodology

The first problem faced with measuring the contribution of tourism to economic growth is that most countries lack the appropriate data and information. Being an activity defined by consumers at the point of consumption, tourism does not exist as a distinct sector in any system of national accounts. In effect any type of expenditure that tourists make is a contribution to the economy that is generated by tourism. Traditionally a large proportion of tourist expenditure goes into identifiable tourism characteristic sectors such as transport, hotels and recreation but tourists also spend money in other sectors that are not dedicated to tourism. This means that tourism is not an industry in the traditional sense, and therefore generally very little data collected. Moreover, tourism is not an industry in the traditional sense, and therefore its linkages outside the destination can be a relevant feature of the supply chain that is at the same time difficult to track.

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and the first component in this expression:

\[ g_r^T = \left( \frac{\sum_{t=1}^{\tau} v_{t,0} \cdot \sum_{p=1}^{r} v_{t,p} \cdot n_{t,p}}{N_{r,p}} \right) \]

represents the direct contribution of the tourism industry on economic growth in the period \( r \). Note that \( g_r^T \) measures the rate of GDP growth to be imputed to the growth of the tourism sector.

One particularity of this measure is that once the necessary statistical data has been provided, the methodology could also be applied to any other industry or type of tourism. An example of the application of the methodology to the different industries of a country’s economy was presented in an additional paper presented by Ivanov and Webster (2008). The analysis, which was tested specifically for Bulgaria, assesses the contribution of a single industry to economic growth in a way that allows for inter-industry comparison. The methodology could also be applied utilizing the Gross Added Value (GAV) instead of the GDP. As explained by Ivanov and Webster (2008), even though GAV represents a better measure for estimating the economic welfare of the population GDP is a more appropriate variable for measuring the economic growth and welfare because GAV includes net taxes. In an example for calculating the contribution of tourism to the economic growth of Spain, Ivanov and Webster (2007) utilized both data for their research using GAV in hotels and restaurants and GDP for tourism as a whole. The results obtained from the use of these two indicators showed a similar pattern with the results having one remarkable difference, in 2001 the data that utilized GAV estimated a contribution to economic growth equal to 0.15%, while GDP estimated a decrease of the welfare of the population of 0.12%.

3. Empirical results and discussion

The previous methodology was applied to all Central American countries and the following Caribbean countries, the Bahamas, Dominica, the Dominican Republic, and Saint Lucia. To limit the incomparability and inconsistency of the results of this paper, data were collected from the Comisión Económica para América Latina y el Caribe (CEPAL) website (www.cepal.org). The United Nations Economic Commission for Latin America and the Caribbean (which Spanish acronym is CEPAL), is one the United Nations’ five regional commissions, and was originally established with the aim of enhancing the economic development of Latin American countries while at the same time reinforcing economic cooperation between nations around the world.

### Table 1. Share of tourism sector on the economy

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Central America</td>
<td>20.11%</td>
<td>18.11%</td>
<td>19.78%</td>
<td>18.49%</td>
<td></td>
</tr>
<tr>
<td>Belize</td>
<td>18.94%</td>
<td>17.75%</td>
<td>19.22%</td>
<td>19.08%</td>
<td></td>
</tr>
<tr>
<td>Costa Rica</td>
<td>19.83%</td>
<td>19.83%</td>
<td>19.83%</td>
<td>19.83%</td>
<td></td>
</tr>
<tr>
<td>El Salvador</td>
<td>12.93%</td>
<td>12.84%</td>
<td>12.84%</td>
<td>12.84%</td>
<td></td>
</tr>
<tr>
<td>Guatemala</td>
<td>14.69%</td>
<td>14.73%</td>
<td>13.55%</td>
<td>13.64%</td>
<td></td>
</tr>
<tr>
<td>Honduras</td>
<td>15.74%</td>
<td>17.08%</td>
<td>16.10%</td>
<td>16.91%</td>
<td></td>
</tr>
<tr>
<td>Nicaragua</td>
<td>15.67%</td>
<td>17.08%</td>
<td>16.10%</td>
<td>16.91%</td>
<td></td>
</tr>
<tr>
<td>Panama</td>
<td>15.67%</td>
<td>17.08%</td>
<td>16.10%</td>
<td>16.91%</td>
<td></td>
</tr>
</tbody>
</table>
Furthermore, a more diversified economy, such as those factors and therefore an over-reliance on tourism as the tourism is highly sensitive to both internal and external American and Caribbean countries. As discussed before, the importance of tourism in the economies of Central Lucia and the Bahamas). This fact underlines the rising less than the countries with the highest values (Saint Lucia but El Salvador and Dominica display an opposite trend with a positive variation between the first and last available values around 2.2% and 1.9% respectively. Guatemala and Nicaragua are the only countries that present values that are almost constant (12% for Guatemala and 13-14% for Nicaragua) while El Salvador, Panama, the Bahamas and the Dominican Republic record very oscillatory values during the entire analyzed time period.

Table 3 is a compact review of the information in the measures introduced in section 2 concerning the tourism industry contribution to economic growth. From this table both Caribbean and Central American countries display several similarities concerning the results obtained.

<table>
<thead>
<tr>
<th>Table 2. Share of tourism sector on the economy</th>
<th>1990</th>
<th>1995</th>
<th>2000</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caribbean</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dominica</td>
<td>10.78%</td>
<td>11.96%</td>
<td>12.23%</td>
<td>12.65%</td>
</tr>
<tr>
<td>Dominican Republic</td>
<td>14.38%</td>
<td>16.85%</td>
<td>16.51%</td>
<td>15.38%</td>
</tr>
<tr>
<td>Saint Lucia</td>
<td>25.56%</td>
<td>22.29%</td>
<td>21.83%</td>
<td>20.55%</td>
</tr>
</tbody>
</table>

Note that El Salvador and Belize represent the Central American countries with the highest contribution to GDP, accounting for 19.32% and 19.06% respectively. The lowest values are found in Guatemala (12.66%), Nicaragua (14.27%) and Honduras (14.38%). With regard to the analyzed Caribbean countries, the destinations with the lowest percentage of GDP contributed by tourism are Dominica (12.01%) and the Dominican Republic (15.94%). A noteworthy fact is that the country with the lowest percentage of GDP resulting from tourism, in this case Dominica, presents a value that is remarkably higher than the “world top 5” destinations of the U.S., Spain, France, Italy and the U.K. when analyzed in a recent paper by Brida et al. (2008a). Thus, Spain, which according to the study is the destination with the highest percentage of GDP resulting from tourism (%), records a value that is almost half as much as the lowest Central American country analyzed (Dominica) while almost three times less than the countries with the highest values (Saint Lucia and the Bahamas). This fact underlines the rising importance of tourism in the economies of Central American and Caribbean countries. As discussed before, tourism is highly sensitive to both internal and external factors and therefore an over-reliance on tourism as the main source for economic growth, can carry significant risks for the overall economy of these countries. Furthermore, a more diversified economy, such as those displayed by the “world top 5”, with strong agricultural and industrial developments will foster linkages and international relationships in the region, reducing any created leakages.

The data from Tables 1 and 2 can be used to chart the variation and trends of tourism’s share of GDP for each of the analyzed countries in Central America and the Caribbean. During the analyzed time period the percentage of tourism’s share of GDP tends to decrease in the countries of Costa Rica, Honduras and Saint Lucia but El Salvador and Dominica display an opposite trend with a positive variation between the first and last available values around 2.2% and 1.9% respectively. Guatemala and Nicaragua are the only countries that present values that are almost constant (12% for Guatemala and 13-14% for Nicaragua) while Belize, Panama, the Bahamas and the Dominican Republic record very oscillatory values during the entire analyzed time period.

In general, each year is characterized by a strong preva- lence of either negative or positive growth values of the tourism sector which consequently affects tourism’s contribution to the economy. With regard to the Central American countries, it can be noted that during the years 1997, 1998, 2005, 2007 all the countries recorded positive values of \( g_t \). The same can be observed for the Caribbean countries during the years 1994, 1995, 1996, 1999, 2005 and 2006. Although the values did not record a similar negative tendency during the analyzed years, we can note that the years 1999, 2001 and 2002 were characterized by a negative or weak tourism performance among the analyzed countries. As displayed by Table 3, most of the Central American countries in particular Costa Rica, El Salvador, Honduras and Panama present some negative values of \( g_t \), therefore the contribution of tourism to economic growth during those years was negative. Furthermore, during the years 2001 and 2002 three out of four of the analyzed Caribbean countries recorded alarming negative values in the growth of the tourism sector. A noteworthy fact is that although the events of September 11th 2001 had an obvious impact on tourism, destinations such as the Dominican Republic and Saint Lucia presented declining values in indicators such as tourist arrivals and amount of tourism receipts prior to September 11th 2001 (CTO, 2007). Thus, according to the concept of the Tourism Area Life Cycle (TALC) developed by Butler in the 1980s (Brida et al., 2008b), this might be a sign that the destination has reached its stagnation phase. The theory also suggests the need of urgent remedial actions which can be taken in order to avoid a fall into the decline phase. For these reasons, the tourism industry needs to be reinvented and transformed in a way that allows a continuous growth of the sector. The time period from 1991-1992 displays some contrasting results among the different countries. The negative values from the Bahamas and Belize should be noted because these two countries rely on the American market for the majority of their tourists. During 1991-1992 the US was in an economic re- cession and this could be a possible explanation for the decrease in the growth of the tourism sector. In particu- lar during 1991 the growth of Belize’s tourism sector measured a decrease of 4.26% \( (g_t = -0.86\%) \), while the Bahamas recorded a corresponding value of \(-16.58\% \) \( (g_t = -3.99\%) \), which becomes even worse the year af- ter. Since the highest drops in tourism related values are found in countries that rely on only one main market for generating tourists, it can be concluded that a more diversified composition of tourist might be indispens- able in limiting the negative effects of a decline in the sector.

The results summarized in Tables 1 to 3 confirm the fact that tourism’s contribution to the economy cru- cially depends on the way that it is measured. Thus, a high percentage of tourism’s contribution on the economy is measured with so-called “conventional” or “share measures” which do not necessarily reflect high values for its corresponding “performance measure”. In this paper “share measures” estimate the weight of the tourism sector on the economy, while the “perfor-
mance measures" reflect the contribution of tourism to the economy's growth rate. The lack of correlation between the two measures is particularly true in the case of the Bahamas and Saint Lucia, where tourism's contribution to GDP is the highest of all the analyzed countries. The Bahamas however recorded the lowest value concerning tourism's contribution to economic growth, averaging only 0.04% during the analyzed period. Saint Lucia's corresponding value was only slightly higher at 0.20%, however this is still low when compared to the other analyzed countries.

The application of this methodology by other authors allows for the comparison of the obtained results with other nations. When comparing results of this paper with the ones obtained by Ivanov and Webster (2007) and Brida et al. (2008b, 2008b), we can immediately notice that the contribution of tourism to economic growth of Central American and Caribbean countries is generally higher. This is true for both "established" and "emerging" destinations that are analyzed in the paper. In particular the first group comprises countries such as the United States, Spain, France, Italy and the United Kingdom, while the second group is made up by Uruguay, Argentina, Brazil, Mexico and Colombia. Generally the contribution of tourism to economic growth in Central American countries is often higher than in the countries analyzed in the previously mentioned papers. For instance, in 1995 the GDP per capita of Colombia increased by 3.4%, and only 0.09% of this was directly attributable to the tourism industry. On the other hand during the same year Dominica recorded the same increase of 3.4% in the overall economy, but 0.38% was the percentage generated by tourism. Similar comparisons could be done between Guatemala and Colombia in 1992, Honduras and Brazil in the year 2004.

4. Final conclusions

This paper utilizes a methodology proposed by Ivanov and Webster (2007) and applies it to a selection of countries in Central America and the Caribbean. The general aim is to contribute to expand the framework for the assessment of the economic impacts of tourism, from the conventional demand-oriented short run to the supply-conditions conscious long run. In general terms, it is believed that the contribution of tourism if evaluated in terms of economic growth in the conventional way (i.e. GDP growth) is less relevant than it is generally supposed. The more so if such contribution were measured in local terms and not for the economy as a whole as it has been forced to do.

The obtained results confirmed the fact that tourism continues to constitute a vital source of economic growth and development for both Caribbean and Central America. In order for these countries to benefit from the economic benefits of tourism however these destination need to manage and plan their futures.

Central America's and the Caribbean's tourism industry is faced with challenges arising from increasing competition and a rapidly changing global tourism industry. The potential of positive results that characterized the final analyzed years shows that is an ongoing need to explore new tourism niches and to differentiate each country's tourism product in order to stay competitive in the tourism market. In all the countries, with exception of Belize in 2006 and Saint Lucia in 2007, tourism had positive contributions to economic growth during the last three analyzed years. This highlights the importance of tourism as a source of economic growth and development for these destinations. For these reasons Central American and Caribbean countries should plan for the economic long run when developing and implementing policy measures in order to enhance and extend tourism's positive effects.

In order to continue the growth of GDP resulting from tourism, a country's tourism industry must be managed with a plan for the economic long run due to the combined nature of tourism's contributions to GDP. The growth of GDP results from the combined "direct", "indirect", and "induced" effects of tourism in a country and the problem is that the majority of the "indirect" and "induced" contributions to a country's GDP occur in the economic short run. For example, a new tourism destination in developing countries needs to build a tourism infrastructure such as airports, seaports, hotels, shopping centers, beaches, and tourist sites all of which employ local labor and purchase local natural resources. In order for this new industry to operate then a trained labor force is needed which will employ more local labor and require the services of educators but once this labor force is needed which will employ more local labor and require the services of educators but once this tourism infrastructure is completed and operating then the "indirect" and "induced" contributions of tourism to GDP growth decrease dramatically in the following years due to new hotels/building projects not being built every year, workers being content with their jobs, etc. Thus if the growth of GDP resulting from tourism to continue beyond the economic short run then developing tourism destinations need to manage the growth of their tourism industries in order to keep the "indirect" and "induced" effects contributing to GDP beyond the economic short run. Undoubtedly this will involve numerous trade-offs (e.g. sustainable development vs. economic growth) and tourism policy makers and managers should familiarize themselves with sustainable tourism and development that coincides with the goals local community who will be directly affected by developing the tourism industry.

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References


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Integrating Sustainability into Tour Operator business: an innovative approach in sustainable tourism

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Abstract

Tour operators are the key elements in the tourism system; they are the link between the tourist and the destination. As a result, tour operators are in many ways the key to achieving more sustainable forms of tourism. This study aims at examining the actual experience of tour operators who adopted sustainability practices in their business with the purposes of: 1) Identifying the priority implementation areas; 2) Determining the most important motivators which encourage tour operators to adopt more responsible strategies; 3) Exploring the outcomes and benefits as well as the major obstacles and barriers that deter the integration of sustainability strategies in the tour operator business. For this study 32 tour operators have been investigated. In addition, in-depth interviews with stakeholders from destina
tions were conducted to reflect their experience. Results revealed that “Supply Chain Management” has the priority for tour operators during the implementation of sustainable practices. “Building Positive Public Image” is the main reason for implementing sustainability integration in business. The results also outline many benefits for both tour operators and destinations. However, both are encountering a number of barriers that hinder them from applying sustainable principles in the tour operator business on a large scale with more efficiency.

Keywords: Supply Management; CSR; Sustainable Tourism; Tour Operator.

Introduction

Tourism is a rapidly growing phenomenon and has become one of the largest industries in the world (Inskeep, 1999; Hansell, 1994). Although tourism contributes to employment and economic development (Tapper & Font, 2005; United Nations, 2001; Rebollo & Baidal, 2003; Wijk & Persson, 2006), it also leads to negative environmental and social impacts such as resource consumption, pollution, waste generation and disruption or destruction of local cultures (Sigala, 2008; Wijk & Persson, 2006).

According to studies, mass tourism activities are considered responsible for generating the most severe negative impacts of tourism; consequently, large-scale tourism, by its very nature, is unable to fulfill the requirements of sustainability (Mason, 2003). In contrast, small-scale activities (nature tourism, alternative tourism or eco-tourism) are seen as beneficial and more responsible; thus, they are able to incorporate sustainability principles (Mowforth & Munt, 2003, Sigala, 2008). Taking into consideration that mass tourism is a reality of our time that will not disappear but continue to expand, the greatest challenge of sustainable tourism is to find ways of incorporating strong preventative approaches in all tourism activities. (Swarbrooke, 1999)

To address the negative impact of tourism, the industry needs new tools and methods that can prevent harms while developing and managing tourism activities in ways that contribute to sustainable development (Tepelus, 2005). Mason (2003) reported that tour operators are an example of a sector that has a reputation for causing negative impacts and creating problems. However, tour operators – particularly large-scale ones with great economic power – are in an ideal position for facilitating the dissemination of these attitudes into the entire tourism industry (Tepelus, 2005; Wijk & Persson, 2006; Font, Tapper & Kornilaki, 2008).

Sigala (2008) argued that the tour operator is one of the most important connections that play significant roles in changing behaviors and attitudes towards more responsible forms of tourism. This role may appear in: (a) great influence on the volume and direction of tourism flows; (b) integrating and affecting attitudes and practices of numerous tourism suppliers and stakeholders; and (c) development of destination and local communities.

Moreover, in recent years, public awareness of the environmental impact and the consequences of unsustainable exploitation of natural resources has increased dramatically. In terms of tourism, this awareness is expressed in the growing demand for more environmentally and culturally sensitive holiday experiences. Many tourists now expect sustainability consideration to be integrated into their holiday; i.e. tour operators must operate sustainability to remain competitive (Font & Cochrane, 2005a).

Although there are just a few tour operators in Europe that take responsibility for sustainability and protecting the environmental and cultural resources (Sigala, 2008), it has been noted recently that the attitude of tour operators towards the environment in the tourism destinations has been slowly changing (Budeanu, 2005).

The purpose of research was to acquire a better understanding of how tour operators – being the key players in the industry – could strategically help their destination move towards sustainability. This study aims at examining the actual experience of tour operators who adopted sustainability practices in their business with the purposes of:

1) Identifying the priority implementation areas;
2) Determining the most important motivators which encourage tour operators to adopt more responsible strategies;
3) Exploring the outcomes and benefits as well as the major obstacles and barriers that deter the integration of sustainability strategies in the tour operator business.

This paper starts with reviewing the literature of the steps taken towards integrating sustainability into the tour operator business; then moves on to the research framework and methodology as tour operators with past experience as well as stakeholders from destinations are invited to participate in the investigation. Subsequently, we analyze and discuss the results of the study and present the conclusion.

Literature review

Principles of Sustainability

The main goal of sustainable tourism is to develop and manage tourism-related activities and services in a way that conserves the character of the place being visited, benefits local communities and preserves the cultural and environmental resources and attractions that make tourism destinations desirable places to visit and live in (Tour Operator Initiative (TOI), 2005; United Nations environment program (UNEP), 2002). The idea of sustainability has several dimensions and principles; however, the most important dimensions are environmental, social and cultural (Mowforth & Munt, 2003; Font & Cochrane, 2005a).

Mowforth and Munt (2003) made a distinction between the environmental, social, political and economic sustainability dimensions as follows:

1- Environmental Sustainability: It means the need to avoid or minimize the environmental impact of tourist activities. The calculation of the carrying capacity is an important method for assessing the environmental impact and sustainability.

2- Social Sustainability: It refers to the ability of community to absorb inputs (such as extra people for short or long periods of time) and to continue functioning either without the creation of social disharmony or by adopting useful functions and relationships (Mowforth & Munt, 2003, Ritchie & Crouch, 2003, Vanhove, 2005).

3- Cultural Sustainability: It refers to the ability of people to retain or adopt the elements of their culture which distinguish them from other people (Vanhove, 2005).

4- Economic Sustainability: It refers to the level of economic gain from activities which are sufficient to cover the costs of any special measures taken to cater the tourists and mitigate the effects of tourist presence or to offer an income appropriate to the inconvenience caused to the local community visited without violating any of the other conditions (Mowforth & Munt, 2003).

Vanhove (2005) argued that economic sustainability must aim at meeting the economic needs and aspirations of residents on the long term. On the other hand, Ritchie and Crouch (2003) added other considerations to determining economic sustainability such as: tourism should benefit the many, not just the few,
and the utilization of local labor should be encouraged in addition to any efforts that would enhance job security and improve economic sustainability.

Tour operator & sustainability concept

Mowforth and Munt (2003) explained that the growth of the mass tourism phenomenon has led to a range of problems, which became increasingly evident and well-publicized over recent years. They include environmental, social and cultural degradation. In contrast, small-scale activities are seen as beneficial and responsible.

According to Budeanu (2005) and the Tour Operator Initiatives (2003), most of the impact generated by tourism activities results almost simultaneously with their production and consumption; the fact which divided the responsibility for the generation of impact to the three main groups of actors involved: producers, consumers and the operator being the intermediary who links them.

In the past, tour operators have sometimes neglected their environmental and social responsibilities, arguing that they are simply intermediaries between customers and service providers, and that destination impacts are the responsibility of the sub-contracted suppliers or the local authorities. While these stakeholders clearly share the responsibility, most tour operators now understand that it is precisely their responsibility because they are intermediaries, working closely with both tourists and tourism service suppliers (Budeanu, 2005; Swarbrooke, 1999; Cochrane, 2006; Font & Cochrane, 2005a).

While many studies ensure that tour operators are in many ways the key to achieving more sustainable forms of tourism (Swarbrooke, 1999; Frey & George, 2009; Wijk & Persoon, 2006). Abravanel (2007) argues that tour operators have the responsibility to preserve the local cultural heritage and environment, but the part of their great profit spent for this is not exactly known.

Tour operators recognize their responsibility for the negative impacts of tourism, as they are the ones who determine where many tourists go and which facilities they use (TOI, 2002; Budeanu, 2005). Today a large number of tour operators have taken a more proactive attitude and have started to develop environmental policies and plans. The following table shows the difference between large mass tour operators and small specialists.

Table 1: Perceived Differences between Large Mass Market Tour Operators and Small Specialists

<table>
<thead>
<tr>
<th>Large-scale Mass Market Operators</th>
<th>Small-scale Specialist Operators</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Environmental Impact</strong></td>
<td></td>
</tr>
<tr>
<td>- High</td>
<td>- Low</td>
</tr>
<tr>
<td><strong>Economic Impact</strong></td>
<td></td>
</tr>
<tr>
<td>- Low per head expenditure</td>
<td>- High per head expenditure</td>
</tr>
<tr>
<td>- Benefits relatively few enterprises</td>
<td>- Benefits spread quite widely within the community</td>
</tr>
<tr>
<td>- High leakage from community</td>
<td>- Low leakage from community</td>
</tr>
<tr>
<td><strong>Socio-cultural Impact</strong></td>
<td></td>
</tr>
<tr>
<td>- High</td>
<td>- Low</td>
</tr>
<tr>
<td><strong>Host Community Relations</strong></td>
<td></td>
</tr>
<tr>
<td>- Formal</td>
<td>- Informal</td>
</tr>
<tr>
<td>- Institutionalized</td>
<td>- Personal</td>
</tr>
<tr>
<td><strong>Commitment to Destination</strong></td>
<td></td>
</tr>
<tr>
<td>- Low</td>
<td>- Generally insensitive</td>
</tr>
<tr>
<td>- Generally insensitive</td>
<td>- High</td>
</tr>
<tr>
<td>- Generally sensitive</td>
<td></td>
</tr>
<tr>
<td><strong>Type of Tourist</strong></td>
<td></td>
</tr>
<tr>
<td>- Disinterested in destination specifically</td>
<td>- Interested in destination specifically</td>
</tr>
<tr>
<td>- Source: (Swarbrooke, 1999)</td>
<td></td>
</tr>
</tbody>
</table>

As a result, many international organizations, industry associations and governmental bodies started to investigate the role of tour operators in the industry and screen their current efforts to reduce the impacts of their activities. In response, tour operators took several initiatives to evaluate impacts and improve performance (Budeanu, 2005).

One of the most important tour operator sustainable practices is the Corporate Social Responsibility (CSR). Wijk and Persoon (2006:381) defined CSR as “the private firms’ responsibility for the sustainability of the financial, environmental and social dimensions of firms”. Davidson and Rogers (2006: 257) define CRS as "achieving commercial success in ways that honor ethical values and respect people, communities and the natural environment". For tour operators, CSR means adopting sustainability business practices that positively impact both the country where the tour operator is based as well as the destinations visited (Font & Cochrane, 2005a).

Despite these efforts, a few international initiatives to improve the sustainability of tourism sector have been initiated by non-governmental organizations and tour operators (Wijk & Persoon, 2006). The most prominent is the Tour Operator Initiative (TOI) which was developed with the support of the United Nations Environment Program (UNEP), the United Nations Educational, Scientific and Cultural Organization (UNESCO) and the World Tourism Organization (WTWO) in 2000 (Holden, 2008).

The purpose of this initiative is to encourage tour operators worldwide to make a corporate commitment to sustainable development and to make considerations for the environmental, cultural and social impacts being an integral part of the design and operation of their tours and the conduct of their business activities (WTTC, et al., 2002; Fredrick, Garestea & Monforte, 2008; TOI, 2007a).

But the main question is: How do tour operators design and manage their packages and create awareness among their customers towards the natural, social and cultural environment they visit in order to match with sustainability principles?

The role of tour operators in the package tours industry

Generally speaking, the activities of tour operators consist of buying tourism services in bulk from a direct provider (e.g. hotel, airline) and assembling them in attractive holiday packages which are sold directly to the customer or travel agent (Budeanu, 2005; Budeanu, 2009).

According to Fredericks, et al. (2008), tour operators are key elements in deciding the volume of tourists reaching destination and they also control the tourist choice of products and create demand for a destination through their representation of the destination package. Mason (2003) argued that large tour operators have the reputation for not staying loyal to specific destinations. Hence, when a resort becomes no longer popular, the tour operator shifts allegiance to other locations. Tour operators can have significant impact on the sustainability of tourist destinations through the design of their holiday product (Miller & Twinning-Ward, 2005).

Under the principles of sustainable development, tour operators may often have only indirect control of the environmental and social impacts of their holidays. Despite this, consumers expect the tour operating companies to ensure that the holiday fulfills certain standards such as safeguard environmental and social sustainability, in addition to offering quality and value for money (TOI & Association of British Travel Agents-ABTA, 2002).

The most important role of tour operators is the responsibility design of tour packages which can reduce the chance of negative socio-cultural impact as a result of the improper behavior of the tourists unhealthy interaction with local community. Therefore, the design and management of sustainable holiday packages take a high consideration in the tour operator business. (Font & Cochrane, 2005a)

Budeanu (2009) and ABTA and TOI (2002) added that tour operators should work closely with suppliers to improve sustainability performance in all components of the holiday package.

Importance of sustainability for tour operators

From a financial standpoint, improved sustainability can lower costs through increased operating efficiency and reduced waste generation. Sustainability practices can also lead to increased revenue and shareholder value by generating more repeat business and attracting new business from customers who value good environmental and social performance (ABTA & TOI, 2002).

A strong positive reputation as a company that cares about sustainability issues, coupled with improvements to the quality of the tourism experience provided to clients, can result in increased customer satisfaction and loyalty, strengthened brand and diminished marketing opportunities (TOI, 2007a; Font & Cochrane, 2005a; Thompson, 2000; Kusters, 2009).
Main areas of tour operator contribution

Tour operators are moving towards sustainable tourism by committing themselves to the concepts of sustainable development as the core of their business activity and working together through common activities to promote and disseminate methods and practices compatible with sustainable development (TOI, 2005; Mason, 2003).

Internal management

This includes all the operations and activities that take place at the tour operator headquarters and in its country offices. The day-to-day administrative and operational activities within a tour operator office have the potential to cause a wide range of environmental impact. Implementing practices to reduce consumption of paper, energy, water and other office supplies and to dispose of waste in a sustainable manner can directly reduce the impact of operations, lead to cost saving as a result of more efficient resource use, and help staff to focus on the importance of environmental efficiency. Employment issues, including labor rights, human rights and staff training, are another important part of the responsible Internal Management. Implementing good labor practices and respecting human rights will increase staff morale and allow for greater retention of high-quality staff, while improved working conditions will contribute to high-quality service for clients. In addition, staff training on sustainability issues and how they can make a difference is the key to ensuring employee commitment to sustainability strategies and improving performance throughout the company (Font & Cochrane, 2005a).

Product development & management

According to Miller and Twining-Ward (2005), this area includes actions related to the tour operator choice of the destination and selecting holiday package components that minimize environmental, economic and social impacts. Font and Cochrane (2005a) added that it is important for responsible tour operators to choose destinations that have good environmental management systems. Tour operators should also favor destinations with good quality local labor. Font and Cochrane (2005a) explain the product management as the design and management of sustainable holiday packages including the assessment of various components of a tour, from accommodation to transport services to excursions, in order to determine their potential environmental, social and economic impacts, minimize negative impacts and maximize positive benefits to the environment and local communities and destination economy. They added that choosing local suppliers and locally-owned services can also help ensure that a significant portion of the tour revenues stay in the destination and benefits local people, rather than being lost to leakages.

Supply chain management

Zhang, Song and Huang (2009-345) defined the Tourism Supply Chain as “a network of tourism organizations engaged in different activities ranging from the supply side to the distribution and marketing of the final tourism product; it involves a wide range of participants in both the private and public sectors”. Most elements of a holiday package are delivered by suppliers who are sub-contracted by the tour operator. Thus, the selection of service providers and contracting with them is an important opportunity to influence the sustainability of the products. The main goal of Supply Chain Management is to work on product and service stewardship across the entire life cycle of the holiday package to design packages with lower environmental and social impacts (Font et al., 2008; Miller & Twining-Ward, 2005).

TOI (2007b) suggested that a tour operator can support its suppliers in their efforts to be more sustainable by raising their awareness on sustainability issues and providing feedback on performance so they can learn where and how to make improvements, in addition to offering technical support for sustainability actions and finally creating incentives for high performance and using contractual procedures to enforce requirements.

Customer relations

According to Font and Cochrane (2005a) tourists are often unaware of the impacts they may be causing during their holidays. This may be particularly the case since tourists are, by definition, seeking an escape from the concerns and responsibilities of their everyday lives. Tourists also may not see the impact they are causing, because most of the negative impacts of tourism are the result of the accumulation of many small impacts over time.

Tour operators are ideally positioned to support and influence responsible actions by their customers. They can promote appropriate behavior in pre-departure information through a fair portrayal of the destination and local cultures and can continue raising awareness of sustainability issues throughout the tour and excursion. In any post, holiday information sustainability messages should encourage customers to behave in a more responsible way. A tour operator can reinforce its messages by inviting feedback on the sustainability issues and channeling this feedback to suppliers, destination representatives and local policymakers.

Finally, in addition to expecting appropriate behavior from customers, tour operators have a responsibility to protect their clients’ privacy, health and safety. This is an important component of ensuring the overall sustainability of customer relations.

Co-operation with destinations

According to the Tour Operators Initiative (2005), this area includes partnerships and means to influence the sustainability of destinations, safeguard a destination culture, economy and environment, and increase benefits for the local community.

Tour operators can achieve this by establishing and strengthening links and developing partnerships with stakeholders in destination, private sector, civil society, local authorities and non-governmental organizations in the destination.

In addition to the above area, it is recommended to ensure that activities targeted towards sustainability are comprehensive, credible and leading to long-term positive change, and to monitoring and reporting on performance (Carbone, 2004).

It also includes all activities and decisions related to destinations that tour operators make beyond the production and delivery of their holiday packages. This mainly includes efforts made by tour operators to engage in dialogue with destination operators about the impacts of tour packages and philanthropic activities (WTO, 2004).

Good practices of tour operator sustainability performance

Since the launch of the Tour Operators Initiative in 2000, the TOI Secretariat has been collecting, from the individual members, good examples of how a tour operator can effectively integrate the principles of sustainability in various areas of operations (TOI, 2003). Table 2 concludes a number of examples for good practices that are implemented by large tour operators:
### Table 2: Examples of Good Practices of Integrating Sustainability Principles into Tour Operator Activities

<table>
<thead>
<tr>
<th>Operating Areas</th>
<th>Tour Operator</th>
<th>Good Practice Approach</th>
<th>Benefits from the Tour Operator Perspective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Manage-</td>
<td>Austinkommat-Santours</td>
<td>Staff training on sustainable development</td>
<td>- Staff now taking their own initiatives to improve sustainability performance in office and in destination</td>
</tr>
<tr>
<td>ment</td>
<td>Dynamic Tours</td>
<td>Responsible tourism guidelines for tour guides</td>
<td>- Promote clean-up operations in visited areas</td>
</tr>
<tr>
<td></td>
<td>TUI Nederland</td>
<td>Station Central - The Paperless Experience</td>
<td>- Significant reduction in paper waste</td>
</tr>
<tr>
<td>Product Manage-</td>
<td>British Airways Holiday</td>
<td>Life cycle assessment of a key destination - Offsetting CO2 emission from air travel</td>
<td>- Environmental improvement and better quality holidays for visitors - Number of environmental and social benefits</td>
</tr>
<tr>
<td>ment &amp; Develop-</td>
<td>Discovery Initiatives</td>
<td>Holiday programs that support local development and conservation</td>
<td>- Number of benefits for conservation, local communities, the company and clients</td>
</tr>
<tr>
<td>ment</td>
<td>My Travel Northern Europe</td>
<td>Eco-audits of destination</td>
<td>- Reduce the environmental impacts of tour packages and improve the overall performance</td>
</tr>
<tr>
<td></td>
<td>Studiosus</td>
<td>Environmental-friendly transport services</td>
<td>- Positive publicity and improved image through the program</td>
</tr>
<tr>
<td>Supply Chain</td>
<td>Atlas Voyages</td>
<td>Suppliers’ Hygiene Control Campaign</td>
<td>- It has created benefits at the customer level and the supplier level as well as the official and legal levels</td>
</tr>
<tr>
<td>Management</td>
<td>My Travel Northern Europe</td>
<td>The 50 steps towards a good environment program</td>
<td>- Significant economic saving &amp; having environmentally-certified products</td>
</tr>
<tr>
<td>Customer Rela-</td>
<td>Orizzonti</td>
<td>Green Checklist for Hotels</td>
<td>- Great awareness among stakeholders</td>
</tr>
<tr>
<td>tion</td>
<td>TUI Nordic</td>
<td>Promoting codes of conduct for responsible tourism among suppliers</td>
<td>- Positive effect on the image of the hotel</td>
</tr>
<tr>
<td></td>
<td>Accor</td>
<td>Raising awareness about protecting Marine Ecosystems</td>
<td>- Improved image for Accor in general and particularly with local authorities</td>
</tr>
<tr>
<td></td>
<td>Hapag -Lloyd Kreuz- bahnen</td>
<td>Educational information for customers</td>
<td>- Increased understanding and respect among tourists for environment</td>
</tr>
<tr>
<td></td>
<td>LTU Touristik</td>
<td>Inviting customer feedback on environmental issues</td>
<td>- Valuable insight into what is important to customers</td>
</tr>
<tr>
<td></td>
<td>TUI AG</td>
<td>Interactive Environmental Website</td>
<td>- It gives TUI guests the opportunity to find out more about environment</td>
</tr>
<tr>
<td>Cooperation with</td>
<td>Atlas Voyages</td>
<td>Supporting research for health and hygiene in Morocco</td>
<td>- Raising awareness for clients and partners</td>
</tr>
<tr>
<td>Destination</td>
<td>Hotelplan</td>
<td>An Eco-fund to support sustainability</td>
<td>- Gaining competitive advantages (customer, staff &amp; destination)</td>
</tr>
<tr>
<td></td>
<td>Travel Walpy’s</td>
<td>Contributing to the local economy in the Karakoum region of Pakistan</td>
<td>- Improving the destination economy</td>
</tr>
<tr>
<td></td>
<td>Viaggi del Ventaglio</td>
<td>Supporting local communities in the Dominican Republic</td>
<td>- Added value for their holiday and strong relations with local authorities</td>
</tr>
</tbody>
</table>

### Methodology

- The methodology depends on developing a model for the factors to be investigated and guiding work through the field study (Figure 1 illustrates these factors). The data were collected through qualitative and quantitative methods, and the methods were broken down into three phases:
  - **Phase I:** In this phase, the research depends on exploratory research techniques where in-depth interviews (Qualitative research) are conducted with a representative sample of the stakeholders of tour operators in destination. This preliminary work usually explores the perspective on particular idea (Boyce & Nisela, 2006).

To give a more rounded view of the tour operator role in the destination, a selection of sustainable tourism experts and number of stakeholders were invited to contribute their perspective. These participants were included in the interviews due to their role in sustainable development. They were believed to be more knowledgeable to have a basic understanding of and relationship with these topics of research in order to obtain meaningful data.

In this stage, the planning of interview consisted of identifying the stakeholders who will be involved; such as tourism management experts in Egypt from the Ministry of Tourism (MOT), Tourism Development Authority (TDA), Federation of Tourism Chambers, the Red Sea Sustainable Tourism Initiatives, representatives of hotels, travel agents, syndicated tour guides, non-governmental organizations and suppliers (restaurants, diving centers, transportation, etc.). It also included what type of information is needed from them; then, the development interview protocol which was first tested by experts and modified was used in conducting interviews, preparing data and concluding the final results.

### Phase II:

In this phase, the research depends on descriptive research techniques; a survey (quantitative method) that was developed as an investigation of tour operators with respect to their experience with implementing sustainable policies in their business. The investigation was done using a field study framework that outlines the investigated factors that influence the process of strategy adoption. For this phase, a semi-structured questionnaire was developed.

The questionnaire instrument consisted of two main sections: the first was designed to obtain data about the organization nationality and business type, while the second consisted of five tested variables (See Figure 1). These variables were extracted from the literature review studies of (Wijk & Persson, 2006), (Sigala, 2008), (Tepelus, 2005) and (Fredericks et al., 2008).

The instrument was checked, and then pilot-tested by experts. After making minor changes, it was distributed on 53 large tour operators as a survey sample. This sample consisted of 25 tour operators that are members of the Tour Operators Initiative. They were invited to participate via the TOI Secretary (tois@sarweto.org) and 28 tour operators randomly selected from the list of the eco-

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Synthesized by authors from TOI (2003).
friendly tour operators (http://eco-friendlytourist.com/touroperators.aspx). Those companies were selected for their learning market position and interest in integrating sustainability in their business.

Due to the geographical distribution of the tour operator sample, the questionnaire had to be distributed by e-mail. According to Dejong, Steenkamp, Fox, and Bamgartner (2008), there is no difference in results when using online or pencil & paper questionnaires. Questionnaires were directed to managers holding the responsibility of environmental activities; they were selected as the ones most aware of driven and challenges encountered during the process of adapting and implementing the sustainability strategies. Phase III. In this phase, the research uses secondary data sources, such as tour operator documents, printed contributions and environmental reports. These documents are accessed through the internet, perusal, recorded or published information and websites. This data provided supporting evidence regarding the investigated tour operator experiences in the investigated topic.

These resources were used in order to avoid result errors arising from bias. Since the used methods must have validity, multiple resources and data collection methods should be used to provide results that have reasonable credibility level (Fredericks, et al., 2008).

Data analysis

Data and information found in this study were analyzed and discussed in accordance with the research objectives. The Statistical Package for the Social Sciences (SPSS, v17.0) was used to analyze the data obtained in this study. Descriptive statistics including simple frequencies and mean ratings were computed. Moreover, the chi-square test, a quantitative measure used to determine whether a relation exists between two categorical variables or not (Berman, 2001), was also applied. The analysis of variance (ANOVA) was used to test significance between groups of respondents in order to indicate if there is any difference among the means of two or more groups or not (Decoster, 2006). The used level of significance was (p<0.05).

Findings and discussion

The results are structured into four main areas:

a) Main area of implementation.
b) Main motivators of adopting sustainability practices.
c) Outlining barriers and outcomes of implementing sustainability practices.
d) Performance measures.

A final response rate of 60% (n=32) was achieved. After deleting unusable data (50 responses), these 32 responses were used for data analysis. It should be noted that 31% of the sample are German tour operators while 19% represents Swedish and US operators. The rest of the sample was Finnish, French, Italian and Turkish tour operators.

The analysis of data shows that 90.6% of the sample consisted of outbound tour operators, while 9.4% were inbound tour operators. The main service offered was package tours and guided tours (47%), hotel reservations (40.6%) and flight booking (12%) of the total sample. Investigating the main activities of tour operators, the results show that 62.5% of the sample was involved in “leisure & resorts”, 25% chose adventure tourism, while only 12.5% focused on sightseeing.

These results confirm the previous study of Zhang, et al. (2009) which states that sustainability in tourism depends strongly on the development of better linkage between supply and demand. Applying the ANOVA test, there was a significant difference between tour operators’ nationality with respect to the priority of implementation (F = 23.54, Sig = 0.000). Based on reviewing the environmental reports of a number of German operators and TOI (2003), the German tour operators have a considerably high contribution in the area of “Customer Relations” compared to other nationalities. Carbone (2004); TOI (2007b) and Bramer and Pavlin (2004) explained this variance stating that responses by individual tour operators in each of these areas are influenced by the tour operator size, type of offered holiday package and, hence, type of customer and destination served. For example, the annual Reiseanalyse survey (2002) concluded that German tourists are particularly demanding environmental quality in their destinations (Font & Cochrane, 2005a). This may explain why the German tour operators care for the “Customer Relations” area in their sustainable policies.

According to the above table, the result of X2 test confirms the above explanation. The results reveal a significant relationship between the main activity of tour operator and the priority of implementing sustainability practices in the area of Supply Chain Management (F = 40, Sig = 0.000) and Product Management & Development (F = 40.10, Sig = 0.000).

Although results show that “Responding to Customer Demand” was the most important motivator, Wijk and Persoon (2006) argued that a clear market demand for more sustainable tourism is, still, absent. They give example of the Dutch tour operators in Holland International (part of TUI) which stopped offering sustainable tourism packages because of lack of demand. On the other hand, the results confirm the study of Gilgs and Ford (2005) who found that customers were more likely to purchase responsibly if they perceived that their act of purchase made a difference in the environment of destination.
On the other hand, by applying the chi-square test, the results indicate that there is no significant relation between the motivators of tour operators to adopt sustainability practices and the main service provided (chi-square value = 35.77, Sig = 0.008). But there is a significant relation between the main activity offered by tour operators and their motivations to apply sustainability practices (chi-square value = 41.28, Sig = 0.001).

These results confirm the previous studies of (Wijk & Persson, 2006) and (Hunt, Wood & Chonko, 1999) as they found that the management attitude is influenced by management intention, business performance and business type.

Benefits and barriers

Although the results confirmed – to a great extent – the findings from the literature and secondary data obtained, the research revealed some specific aspects related to the benefits and outcomes of integrating sustainability practices into the tour operator business as well as to obstacles and barriers that face tour operators through the implementation stages. Table 5 outlines the results of questionnaire and interview concerning the benefits and barriers from the tour operator point of view and the destination experts and suppliers point of view:

### Table 5. Benefits and Obstacles of Integrating Sustainability Practices into Business

<table>
<thead>
<tr>
<th>Benefits &amp; Outcomes</th>
<th>Destination</th>
<th>Tour Operator</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Increasing long-term competitiveness</td>
<td>- Customer satisfaction (N=12)</td>
<td>- Cost saving and financial situation improvement (N=3)</td>
</tr>
<tr>
<td>- Increasing tourists demand who are seeking high-quality experience</td>
<td>- Enhanced product quality (N=8)</td>
<td>- Increased operational efficiency &amp; business opportunities (design innovation) (N=18)</td>
</tr>
<tr>
<td>- Increasing customer loyalty</td>
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<td>- Cooperation advantage (N=7)</td>
</tr>
<tr>
<td>- Safeguarding the destination resources</td>
<td>- Improved image of company in general (N=10)</td>
<td>- Competitive advantage (N=16)</td>
</tr>
<tr>
<td>- Encouraging investors interested in long-term sustainability</td>
<td>- Strengthening staff skills and creating new competencies (N=9)</td>
<td></td>
</tr>
<tr>
<td>- Increasing benefits for local communities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Providing source of income for conservation</td>
<td></td>
<td></td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Obstacles &amp; Barriers</th>
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</tr>
</thead>
<tbody>
<tr>
<td>- Level of stakeholder confidence</td>
<td>- Lack of demand for sustainable tourism packages (N=12)</td>
<td>- Cost of staff development (N=5)</td>
</tr>
<tr>
<td>- as a whole - in the importance of sustainable policies for their work.</td>
<td>- Complexity due to numerous parties and partners (N=19)</td>
<td>- Difficulty in co-operation with suppliers to apply their sustainable policies (N=20)</td>
</tr>
<tr>
<td>- Having little regulatory pressure in the tour operators operation</td>
<td>- Weakness of shareholders support (N=22)</td>
<td>- Lack of reliability to measure performance (N=14)</td>
</tr>
<tr>
<td>- Lack of agreed metrics for application or measurement of performance</td>
<td>- Difficulty to gather and report necessary information (N=11)</td>
<td>- Lack of reliable ways to measure performance (N=14)</td>
</tr>
<tr>
<td>- Fragmented structure of tourism sectors</td>
<td>- Long time for making performance evaluation (N=13)</td>
<td>- Facing different regulatory systems in destination countries (N=8)</td>
</tr>
<tr>
<td>- Beliefs that sustainable policies reduce the company profit</td>
<td>- Lack of reliable ways to measure performance (N=14)</td>
<td>- Bad effect on product quality (in some cases) (N=15)</td>
</tr>
<tr>
<td>- Discouraged by competitive market condition</td>
<td>- Setting aside funds for environmental or social activities (N=17)</td>
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</tr>
<tr>
<td>- Tendency of tour operators to put responsibility on host destination</td>
<td>- Costs involved with obtaining certificates such as ISO 14001 (N=2)</td>
<td></td>
</tr>
</tbody>
</table>

The findings in Table 5 may explain why, despite responsible tourism policies and sustainable practices implementation, the tour operator business does not have a satisfactory level as a result of facing many constraints.

### Performance measurement

#### Conclusions

Integrating sustainability nowadays has become an indispensable requirement of demand, and tourism is not an exception. Although large tour operators are already undertaking steps towards this context, they have little real motivation to behave in more sustainable ways.

To achieve the aim of this study, thirty two tour operators were investigated to reflect their experiences with implementing sustainable policies in their business. Moreover, a sample of tour operator stakeholders in destination was invited to illustrate their experiences with tour operator cooperation.

Results concluded that “Supply Chain Management” has the main priority for tour operators during the implementation of sustainable practices. “Building Positive Public Image” is the main reason that encourages tour operators to integrate sustainability in business.

The benefits reported by the majority of tour operators are “Increased Operational Efficiency & Business Opportunities (design innovation)”, “Competitive Advantage” and “Improved Image of Company in General”. While for destination, the main outcomes are “Increasing Long-term Competitiveness”, “Increasing Tourist Demand Seeking High-quality Experience” and “Increasing Customer Loyalty”.

The research concluded that although the principles of sustainable tourism are beneficial, their implementation in tour operator business is a difficult task to achieve as there is still a major gap between strategy and implementation. The results indicated that the main obstacles that face tour operators are “Weakness of Shareholder Support”.

### Table 5. Benefits and Obstacles of Integrating Sustainability Practices into Business

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</tbody>
</table>
This study proposes that future research should be done to get more insight about successful factors critical for implementing sustainability in the tour operator business while focusing on how to overcome the obstacles which face them during adaptation.

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El Turismo Internacional en una Era de Cambio

Augusto Huéscar Martínez, Michel Julian

Resumen

El turismo es una actividad de una importancia económica considerable: exportó en 2009 unos 2.700 millones de dólares diarios. Ese mismo año, el turismo internacional sufrió un decrecimiento de 4.2 por ciento superior a los tres últimos años negativos previamente registrados desde el año 1950: 1982 (-0,1%), 1991 (-0,3%) y 2003 (-1,5%). Es una corrección acertada a la tendencia que el turismo internacional ha experimentado de forma sostenida. El turismo es vulnerable, pero se recupera. No obstante volver a la senda de crecimiento histórico en lo que estaba instalada tomará su tiempo y es cierto que ha de desarrollarse con renovados criterios de gestión. El marco económico y social que se ha ido conformando en los meses pasados crea un nuevo entorno que hace necesaria, más que nunca, una reflexión sobre el rumbo que ha de darse al desarrollo del turismo. El año 2009 presentó un punto de inflexión hacia mediados del año. En sus seis primeros meses el turismo internacional aumentó un 6 por ciento, pero decreció en los meses posteriores. El año 2009 consolidó un retroceso del turismo internacional en todas las regiones, salvo en África; los datos iniciales disponibles muestran un mantenimiento y en muchos casos crecimiento del turismo interno. Los turistas siguieron viajando pero en su propio país o a destinos cercanos, y mantuvieron un comportamiento mucho más conservador en el momento del gasto. Para el año 2010 la Organización Mundial del Turismo (OMT) espera que la demanda internacional crezca un 4% o quizás algo más. El mercado se ha hecho más rígido, mucho más competitivo y más dependiente de los mercados de proximidad y de algunos de los emergentes. El presente artículo aborda las características actuales del turismo y analiza su evolución entre 2000 y 2010, haciendo hincapié en el Caribe.

Palabras clave: crecimiento, resistencia, competencia, cambio, situación económica, factores de influencia

Abstract

Tourism is an activity of major economic importance. In 2009 it exported 2,700 million dollars a day. That same year, international tourism experienced a decline in arrivals of 4.2 per cent. It is the highest decrease recorded since 1950. International tourism has previously decreased only three times: 1982 (-0.1%), 1991 (-0.3%) and 2003 (-1.5%). It is a significant correction to the trend that international tourism has been experiencing in a sustained way. Tourism is vulnerable, but resilient. Going back to the historical growth path in which tourism was placed will take time and will certainly require renewed management criteria. The economic and social framework which has been taken shape in recent months creates a new environment that requires, more than ever, a reflection on the course tourism development should follow. The year 2009 showed a turning point in the mid-year. In its first six months, international tourism grew by 6 percent, but declined in subsequent months. 2009 consolidated the decline of international tourism in all regions except Africa. Preliminary data show the resilience and, in many cases, the growth of domestic tourism. Tourists continued to travel but closer to home and adopted more conservative expenditure behaviour. By 2010 the World Tourism Organization (UNWTO) expects international demand to grow by 4% or even some more. The market has become more rigid, much more competitive and more dependent on local markets as well as on some emerging ones. This article deals with current characteristics of tourism and examines its evolution between 2008 and 2010, with emphasis on the Caribbean.

Key Words: growth, strength, competition, change, status of the economy, factors of influence

Introducción

Una mirada convencional sobre el turismo

Una vista retrospectiva de la evolución del turismo nos define lo que el turismo tal como lo conocemos en la actualidad. El turismo, tanto el internacional como el interno, se ha caracterizado por su permanente tendencia al crecimiento. Entre 1950 y 2008 las llegadas por turismo internacional pasaron de 25 millones a 900 millones, creciendo a una tasa media anual de 6.3 por ciento. Se conviene recordar que las estimaciones de la Organización Mundial del Turismo (OMT) cifran el turismo interno en hasta cinco veces el volumen del turismo internacional.

El paso del tiempo ha impuesto, por un lado, ritmos de crecimiento menor y, por otro, un claro proceso de diversificación de destinos, de motivación y de momento de practicar el turismo. Esto se ha potenciado por la incorporación permanente de nuevos destinios deseosos de contar con el turismo en su estrategia de desarrollo. Una muestra: en 1950 el 97 por ciento del flujo turístico se concentraba en tan solo 15 países; en 2009 los primeros quince países receptores capturaron poco más de la mitad del total mundial (58%). La primera consecuencia es que el turismo se hace más complejo y más competitivo. Se tiende a viajar todo el año gracias al fraccionamiento creciente de las vacaciones y al escalonamiento de las vacaciones escolares y laborales.

Los destinos de alguna manera ya consolidados, como buena parte de los caribeños, tienen que mantenerse en el mercado base a creatividad, innovación, calidad y autenticidad frente a la oferta que plantean los destinos rigurosamente más orientados hacia productos, aunque se benefician del acceso a la experiencia de gestión turística (transferencia tecnológica) y de unos aceptables niveles de calidad.

También las vacaciones son mucho más variadas de las que decenas de años atrás, beneficiando al turismo interno: un crecimiento de 10 por ciento respecto al pasado de unos 25 millones a 900 millones, creciendo a una tasa media anual de 6.3 por ciento. Se conviene recordar que las estimaciones de la Organización Mundial del Turismo (OMT) cifran el turismo interno en hasta cinco veces el volumen del turismo internacional.

... en un entorno de cambio

En un mundo capaz de romper con tradiciones tan largamente asentadas que hacen noticia universal la elección del primer presidente afroamericano en los Estados Unidos de América.

En una crisis económica a la que hay que buscar respuesta ante la pregunta de qué se ha de hacer ante la situación que se ha producido, los destinos turísticos se han visto obligados a buscar nuevas fórmulas para seguir siendo viables económicamente, y en algunos casos, para seguir siendo viables en términos de crecimiento, el turismo tiende a recuperarse con una rapidez que no es usual en una economía tan importante. En el año 2009 sólo el turismo internacional generó 852.000 millones de dólares en el mundo, a los que se ha de añadir unos 161.000 millones por los servicios exportados en el capítulo de transporte internacional.

¿Dónde estamos...?

En 2010 tenemos que plantearnos si todo sigue igual. Estamos instalados irremediablemente en una pendiente de crecimiento? Todas las ciencias indican que nos adentramos en una nueva era. La economía está cambiando, la sociedad mundial también. El turismo no puede prescindir de ese cambio. Se transforma a resultados de la mutación de su entorno.

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En un mundo capaz de romper con tradiciones tan largamente asentadas que hacen noticia universal la elección del primer presidente afroamericano en los Estados Unidos de América.

En una crisis económica a la que hay que buscar parangón en los años treinta del pasado siglo.

En un debate generalizado sobre la velocidad del cambio climático, donde los gobiernos y la sociedad civil se esfuerzan en aplicar medidas para mitigar sus efectos a la vez que se impulsa una economía verde de la que se espera una contribución innovadora a la economía convencional y un nuevo yacimiento de puestos de trabajo.

En un mundo en el que los flujos migratorios se cuentan en millones y se calcula que hasta el año 2050 han de ser bastantes millones más.
En un mundo con una creciente conciencia en la preservación de su patrimonio cultural, social y natural, cada vez es más importante mejorar la gestión de recursos básicos como el agua, el aire o las materias primas. Con ajustes pendientes en los tipos de cambio en países con peso importante en la economía internacional, con unos precios volátiles de los productos energéticos o de alimentación humana que hacen bascular las balanzas de pagos de países proveedores y compradores de forma dramática en poco tiempo.

En el campo estrictamente turístico asistimos a la presencia de mercados emergentes que superan las previsiones más optimistas en cuanto a emisión y también como receptores, lo que no sólo reordena la lista de destinos nacionales sino que potencia la competencia entre destinos de forma significativa. La profundizarse la necesidad de reforzar los destinos, es decir la acción y la gestión a escala local, o se presta cada vez más atención al enorme segmento de oferta que en todos los países necesidad de reforzar los destinos, es decir la acción y la gestión a escala local, o se presta cada vez más atención al enorme segmento de oferta que en todos los países necesidad de reforzar los destinos, es decir la acción y la gestión a escala local, o se presta cada vez más atención al enorme segmento de oferta que en todos los países.

Hay pues una larga lista de factores que señalan al cambio; algunos sólo se han hecho explícitos o, simplemente, ahora son más visibles. La respuesta pendiente sin duda ha de pasar por el conocimiento, la preparación de los profesionales y en una acción mejor coordinada entre los actores públicos, los agentes empresariales y la sociedad civil.

A continuación se presenta un análisis de la evolución del turismo internacional en el periodo comprendido entre 2008 y el primer cuatrimestre del 2010. Se incluye una mención a las previsiones establecidas por la Secretaría de la OMT para todo el año 2010. Para el Caribe se presenta, además, un resumen de los factores que están influyendo de forma positiva y negativa en la evolución del turismo internacional.

2008: el inicio del deterioro económico

El año 2008 estuvo marcado por la situación económica mundial en la que la crisis financiera global irrumpió con fuerza a mediados de año, produciendo la mayor recesión económica desde la Segunda Guerra Mundial. Aunque el turismo resiste mejor a la crisis económica global que muchos otros sectores, no ha permanecido inmune al actual deterioro económico. Tras cuatro años consecutivos de crecimiento sostenido, a mediados del 2008 se produjo un cambio brusco de tendencia con una caída significativa de la demanda turística provocada por una crisis financiera y luego económica que ha afectado a buena parte del mundo, especialmente al mundo desarrollado.

De acuerdo a las cifras divulgadas por la OMT, en 2008 las llegadas de turistas internacionales alcanzaron los 919 millones, en comparación con las 900 millones de llegadas registradas el año anterior. Este crecimiento mundial (+2%) se debe a los buenos resultados de la primera parte del año, justo antes del colapso de los mercados financieros. Globalmente, el crecimiento del 6 por ciento en los seis primeros meses de 2008 dio lugar a una disminución del 1 por ciento durante la segunda mitad del año.

La OMT señala que todas las regiones obtuvieron resultados positivos durante el 2008, excepto el Caribe que sufrió un estancamiento de sus llegadas (+0.4%). El mejor comportamiento se observó en Oriente Medio, donde las llegadas de turistas internacionales alcanzaron los 148 millones (+3%), impulsadas por el buen comportamiento de los destinos de América Central y del Sur (6% y 4% respectivamente) y por la fortaleza del tráfico hacia los Estados Unidos de América durante la primera mitad del año. En cuanto a Las Américas, las llegadas a esta región alcanzaron los 148 millones (+3%), impulsadas por el buen comportamiento de los destinos de América Central y del Sur (6% y 4% respectivamente) y por la fortaleza del tráfico hacia los Estados Unidos de América durante la primera mitad del año. El Caribe registró un modesto crecimiento de las llegadas del 1 por ciento. Algunos destinos como Cuba (+6%) y Aruba (+7%) lograron excelentes resultados, mientras que los inferiores resultados del resto del área caribeña se pueden atribuir en gran medida a los elevados precios de los billetes de avión y a la disminución de la capacidad aérea, así como a las dificultades económicas en los Estados Unidos de América y en Europa.

La OMT estima que los ingresos provenientes del turismo internacional alcanzaron los 941.000 millones de dólares en 2008, lo que supuso un crecimiento de 1.3 por ciento en términos reales (es decir, ajustado al tipo de cambio y a la inflación). En el Caribe el crecimiento fue de 2.56.000 millones de dólares EE.UU., lo que representa un 2.5 por ciento del total mundial. Estos ingresos derivados del turismo representan la primera categoría de exportación en sus sistemas de cuentas deuda del Caribe. En algunas, los ingresos por turismo internacional pueden representar hasta seis veces las exportaciones de bienes. En cuanto a la participación de los ingresos por turismo internacional en las exportaciones de servicios, la mayor parte de las exportaciones de servicios en el Caribe.

2010: el inicio del deterioro económico

La situación turística en el Caribe actual está fuertemente marcada por la de la economía mundial y la de los países emisores a los destinos de esta región. Es cierto que el factor más veleado señalado por el Grupo de Expertos de la OMT. Según estos expertos, el deterioro de la economía se manifiesta por elementos tales como:• el aumento del desempleo,• la pérdida de confianza de los consumidores,• las tasas de cambio desfavorables,• y las previsiones económicas negativas en algunos mercados emisores.

El mercado turístico está haciendo más complejo dado el sensible incremento de la competencia en destino de Europa, Norte de África, Estados Unidos y Canadá. Buena parte de ellos está actuando en base a precios muy agresivos. Se aprecia también una contracción de llegadas en el segmento de negocios e industria de reuniones. Los factores que han influido de forma negativa según el Grupo de Expertos de la OMT se enumeran a continuación:

1. Contracción de la demanda a pesar de las reducciones de precios y tasas de los servicios turísticos. Esta situación se puede atribuir en gran medida a los efectos de la crisis económica que ha generado una clara reducción de los gastos medios por turista recibido.
2. Un mercado más complejo dado el sensible incremento de la competencia en destino de Europa, Norte de África, Estados Unidos y Canadá. Buena parte de ellos está actuando en base a precios muy agresivos.
3. Contracción en la inversión para la ampliación o mejora de la oferta.
4. Reducción de los presupuestos de apoyo a la promoción y sistemas de venta.
5. Inestabilidad del transporte aéreo.
6. La amenaza de buenas oportunidades en la zona como factor estacional.

También se puede sintetizar los factores de influencia que contribuyen a paliar o mejorar la situación de algunos destinos caribeños:

1. Mejorar la relación calidad-precio percibida por los turistas.
2. Incrementar el valor añadido para los turistas.
3. Aumentar y mejorar la inversión promocional.
5. Focalizar en segmentos que han mostrado mejor comportamiento como los turistas repetitivos, los del segmento de viajeros de negocio y la creación de nuevos productos.

Otra preocupación muy vislumbrada es el deterioro de los mercados emisores. Significa mejorar el conocimiento del cliente objetivo y desde luego mucho más sobre todo mejor promoción comercial. En el contexto actual de limitaciones económicas y, por lo tanto preocupantes, hay dos vías que se hacen más evidentes: La eficacia en las campañas promocionales y la cooperación entre el sector público y el privado. Tradicionalmente los tiempos de crisis atienden el trabajo en común, también entre las administraciones públicas.

En tercer lugar, aunque de gran importancia, es el conjunto de factores que tienen que ver con facilitar la accesibilidad a los destinos. En el Caribe esto significa mantener la preocupación por ampliar la oferta de transporte aéreo a tarifas competitivas, además de mejorar la infraestructura portuaria para atraer más cruceros.
Las llegadas a los destinos del Caribe disminuyeron un 2,9 por ciento en 2009, reflejando la debilidad y los cambios de comportamiento de los mercados de ocio de América del Norte y de Europa. De los países con datos de llegadas muy pocos finalizaron en positivo el año, entre ellos Cuba, Jamaica, República Dominicana y San Eustaquio. Los ingresos por turismo internacional, sin considerar los atributos a transporte internacional, ascendieron a 22.200 millones de dólares E.U.U., un 4,4 por ciento menos que el año anterior. Nótese que esa cifra es de un orden de magnitud similar a los ingresos por turismo de América del Sur (18.200 millones de dólares) y de América Central (5.900 millones de dólares) juntos.  

Aunque las condiciones económicas desfavorables influyeron negativamente en la demanda turística, a lo largo del año se evidenció una moderación en el decrecimiento de los flujos turísticos mundiales. Los factores que más han influido en la elección de destinos han sido distancia, precios, relación calidad/precio, y calidad de recursos y productos.  

Los turistas, por lo general, todavía viajan a un reducido número de destinos. Pesan mucho “los tópicos”. Hay, por consiguiente, muchas oportunidades para generar nuevos productos. Con frecuencia muchos de los recursos turísticos, e incluso algunos países de la región americana, son auténticos desconocidos para el viajero. Hay cuatro asuntos clave que se han de operar eficazmente: a) gestionar convenientemente la marca del destino; b) proporcionar un papel clave al canal de distribución atendiendo debidamente las nuevas formas que adquieren; c) desarrollar una estrategia flexible de precios; y d) considerar la calidad del producto como una decisiva herramienta de marketing.  

2010: recuperación con crecimiento incierto  

En el cuatrimestre enero-abril 2010 hubo una recuperación notable de la demanda: creció un 7 por ciento. Se confirma así la evolución en positivo ya detectada en los últimos meses de 2009. Es una recuperación desigual de forma que es claramente al alza en países emergentes de Asia y Oriente Medio. Los primeros datos hasta mayo 2010 muestran que se mantiene la tendencia a crecer en positivo. Asia y el Pacífico creció un 12 por ciento. La región de las Américas mejoró respecto al primer cuatrimestre de 2009 en un 6 por ciento. Por encima de ese valor medio regional se situaron América Central (8%) y América del Norte (7%). América del Sur (5%) y el Caribe (4%) crecieron ligeramente menos.  

Hay un mensaje de esperanza: Para el año 2010 la OMT espera que el crecimiento en el mundo se sitúe en el entorno del 4 por ciento. Los resultados esperados se verán beneficiándose de la mejora de la situación económica. Como elementos de este crecimiento en positivo, Asia y el Pacífico tienen un grado importante de crecimiento, y se mantienen: la elevada tasa de desempleo, la desaparición paulatina de los estímulos a las economías, los programas de austeridad o el incremento de la presión fiscal.

**Fuente:** Organización Mundial del Turismo (OMT)

* Cifras preliminares
Referencias


Nota de los autores: Las ideas expuestas en el presente artículo corresponden exclusivamente a sus autores.

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Turismo de Naturaleza. Complemento por excelencia de los productos de Sol y playa del Caribe.

Norman Medina, Jorge Santamarina
Inversiones Trafitur, Cocotal, Bávaro, República Dominicana

Introducción
Los productos de Sol y Playa están en plena fase de madurez y, en algunas modalidades y regiones, están mostrando tendencias a la declinación. La experiencia del desarrollo de los productos turísticos indica que una forma de cambiar esa tendencia es rediseñándolos, complementándolos con otros que puedan enriquecerlos y convertirlos en nuevos productos. Por sus características, los productos de Turismo de Naturaleza son los más indicados para jugar ese papel en el Caribe, que posee escenarios naturales variados, espectaculares y únicos.

Resumen
Los productos de Turismo de Sol y playa están en plena fase de madurez y, en algunas modalidades y regiones, están mostrando tendencias a la declinación. La experiencia del desarrollo de los productos turísticos indica que una forma de cambiar esa tendencia es rediseñándolos, complementándolos con otros que puedan enriquecerlos y convertirlos en nuevos productos. Por sus características, los productos de Turismo de Naturaleza son los más indicados para jugar ese papel en el Caribe, que posee escenarios naturales variados, espectaculares y únicos.

Abstract
Sun and Beach tourism products are in full maturity and in some modes and regions are showing declining trends. The experience of developing tourism products indicates that one way to change that trend is to redesign them, supplemented with other factors which may enrich and convert them into new products. Due to their features, Nature Tourism products are best suited to play this role in the Caribbean with its varied, spectacular and unique natural scenery.

Key words:
Tourism product, Sun and Beach, Nature Tourism, Caribbean, ethical and sustainable tourism.

Cada año que pasa se aprecia una proporción menor de viajeros que se mueven buscando sol y playa, correspondiendo los mayores crecimientos a otras modalidades (Maciques, Ayala & Martin, 2003). El turismo de sol y playa se identifica con el turismo maestro y está asociado a ciertas características que han ido restando posición entre los nuevos turistas, como son la propiedad transnacional y el mínimo beneficio económico directo que reciben las comunidades del destino (Chafe, 2005).

Según Fuentes Guerrero (2005), en algunas zonas de la región andaluza, uno de los principales destinos de España, el turismo de sol y playa ha perdido cuota de mercado y ha bajado el grado de ocupación. Este autor considera que dentro de las razones para ello se encuentran la afectación al medio ambiente costero (particularmente sensible en las dunas de playa y en los ecosistemas coralinos que le son asociados); excesivo desarrollo inmobiliario en zonas aledañas o cercanas; deterioro de la calidad de las aguas y las playas; disminución o falta de zonas verdes e inexistencia de atractivos complementarios, entre otras. Recomienda apostar por un modelo sostenible, fortalecer otros segmentos para que complementen el de Sol y playa y, de acuerdo con eso, especializar a los destinos (Fuentes Guerrero, 2005). Esta situación de inestabilidad competitiva hizo que tuvo el turismo a partir de los años cincuenta, y posteriormente se desarrollaron altas tasas de crecimiento, como el motivado por razones culturales, que está creciendo entre 10 y 15 % anual; el ecoturismo, uno de los de mayor dinamismo, que asciende entre 20 y 30 % anual, y el turismo de aventuras, que manifiesta un crecimiento superior a 10 %.

Dentro de los principales retos que tendrá que enfrentar el turismo en el futuro están el de una competencia cada vez mayor entre productos, marcas y destinos, y la creciente sensibilidad y exigencia ambiental, lo que implicará, entre otros aspectos, crear nuevos y diversificados productos, así como la necesidad de realizar inversiones en el medio ambiente (Medina et al., 2009).

Fases en la vida de los productos
Los productos turísticos tienen ciclos de vida, es decir, nacen, se desarrollan, maduran y envejecen, y comienzan a declinar. Es conveniente señalar que a diferencia de otras épocas en las que la duración de las fases se alargaba, en tiempos recientes la aguda competencia ha dado como resultado que dichas fases se hacen cada vez más cortas. Algunos autores como Muñoz Olache (2000), basándose en el proceso de desarrollo de productos, añaden que en ese momento el mercado, fase que, obviamente, solo ocasiona gastos. Este autor considera que, dentro del crecimiento, se producen momentos de saturación por la entrada de competidores, lo que conlleva una tendencia competitiva, y que en la fase de madurez se volverá a repetir el fenómeno de la saturación, lo que, de no reaccionar a tiempo, puede conducir a la decadencia y desvío del producto, lo que, a su vez, produce la desaparición (Medina et al., 2009).

La desaparición de un producto parte de su envejecimiento. ¿Por qué envejece un producto? Engaña en cuenta que el mundo va cambiando y que, con éste, las gentes también van cambiando: tienen nuevas expectativas y necesidades, sin duda relacionadas con las anteriores, pero en el fondo, diferentes. Considerése también que la competencia está presente y muy activa, al tanto de esos cambios y poniendo a disposición del público nuevas ofertas. Además, la tecnología se está desarrollando a velocidades inimaginables, abriendo más y más posibilidades de crear cosas nuevas y mejores, y creándolas.

¿Puede evitar la muerte de un producto procurando que la curva «en descenso» de su ciclo de vida, retome su ritmo ascendente? La muerte de algunos productos, siempre que estos no sean modos o pears aún, modas pasajeras, las que puede evitarlo的认可er, es imposible, ya que suve un producto, es imposible, ya que su de reciclaje, que puede extender su vida continuando su crecimiento hasta alcanzar una segunda madurez y volver a declinar, lo que requiere de un nuevo rediseño, y así sucesivamente. El mantenimiento de su vitalidad va a depender, en gran medida, de que otros productos puedan complementarlo y enriquecerlo.

La constante búsqueda y renovación es ley del desarrollo de los productos, lo que hace de las actividades turísticas, a las que se refiere el título de esta presentación, la necesidad de ser siempre innovadoras, en busca de la más alta calidad y enfoque al mundo actual, y producto de ello, de los consiguientes cambios que se están produciendo en las necesidades y anhelos del hombre, “que busca desesperadamente el toque humano y el turismo será la forma principal mediante la cual trató de alcanzarlo” (OMT, 2001).

In the referred informe, la OMT avizora el auge de algunos productos o modalidades que están experimentando altas tasas de crecimiento, como el motivado por razones culturales, que está creciendo entre 10 y 15 % anual; el ecoturismo, uno de los de mayor dinamismo, que asciende entre 20 y 30 % anual, y el turismo de aventuras, que manifiesta un crecimiento superior a 10 %.

Dentro de los principales retos que tendrá que enfrentar el turismo en el futuro están el de una competencia cada vez mayor entre productos, marcas y destinos, y la creciente sensibilidad y exigencia ambiental, lo que implicará, entre otros aspectos, crear nuevos y diversificados productos, así como la necesidad de realizar inversiones en el medio ambiente (Medina et al., 2009).
los periféricos son los que hacen posible el viaje, y los complementarios son los que le añaden valor al producto principal (Medina et al., 2009).

Algunos productos se categorizan como principales y complementarios.

### Tendencia a complementar

La UNEP ha indicado que la expansión del turismo está ocurriendo en y cerca de las áreas naturales que quedan en el mundo (Christ, 2005). Esto constituye un síntoma de la tendencia a buscar posibilidades de complementar los productos con ofertas más cercanas a la naturaleza.

En la actualidad se está evidenciando una fuerte tendencia a la diversificación de los productos turísticos, lo que está conduciendo a que muchos comiencen a desempeñar un papel doble, el primero como productos principales y el segundo como productos complementarios de aquellos.

Por ejemplo, ese segundo papel se viene haciendo cada vez más evidente en algunos deportes náuticos, comienza a desarrollarse en el ecoturismo y el turismo cultural, y más recientemente en algunas modalidades del turismo de salud, todos complementarios con respecto al producto turístico líder, el de Sol y playa, que motiva alrededor del 80% de los viajes en muchos países, entre ellos los del Caribe insular.

Este turismo, además de ser uno de los más demandados al nivel mundial es también más adaptable y “abierto” que otros, y capaz de interactuar con muchos otros productos, lo que ha dado origen a una cantidad cada vez mayor de ofertas y modalidades diferentes, capaces de adaptarse a las necesidades y exigencias de los segmentos más disímiles. En los nuevos productos de Sol y playa se valoran altamente determinados atributos, como la variedad de entretenimientos, de espectáculos y los programas de animación, tanto diurnos como nocturnos; la cercanía a importantes núcleos urbanos, la posibilidad de colegios, comer fuera, salir por las noches; la variedad de actividades deportivas, principalmente relacionadas con el mar, así como las posibilidades de contactar la cultura y la naturaleza locales.

Sin embargo, no debe desconocerse que también se mantienen numerosos turistas que siguen prefiriendo la playa para sus vacaciones de forma estricta, sin buscar otras formas de recreación. Se pudieran considerar quizás como los más tradicionales o convencionales, sin suponerse con ello que sean los de más edad. El mercado sigue siendo muy diverso, también en los turistas que buscan la playa.

Es innegable que el turismo de sol y playa mantiene mundialmente una posición prominente, practicado en la actualidad por personas que pertenecen a los más amplios segmentos de mercado, con muy diversos niveles de ingresos, ocupaciones y edades. Sus productos está diseñados para el disfrute de todos, desde niños hasta personas de la tercera edad avanzada, elaborándose programas más o menos especializados para acoger, por ejemplo, a parejas de recién casados, grupos juveniles, familias, personas de la tercera edad y otros segmentos, e incluso se desarrollan las condiciones necesarias para atender y satisfacer a clientes con discapacidades. Su adaptabilidad para integrarse operacional y comercialmente con otros productos y atracciones, conformando productos de nuevo tipo, más complejos, es expresión de su vigencia y competitividad, así como de su gran potencialidad (Medina et al., 2009).

La sostenibilidad turística, como tendencia que ya está presente, conllevará a asegurar la permanencia de los ingresos y las utilidades, considerando a la par la conservación del medio ambiente y los valores socioculturales, al tiempo que se respeten y se atiendan las comunidades receptoras, y se les posibilite su creciente participación en la gestión turística, directa e indirecta, y por supuesto en sus beneficios.

El llamado Turismo de Experiencia como el ecoturismo, turismo rural, patrimonial, cultural, de aventura suave, y otros, está entre los sectores previstos a crecer hasta personas de la tercera edad avanzada, elaborándose programas más o menos especializados para acoger, por ejemplo, a parejas de recién casados, grupos juveniles, familias, personas de la tercera edad y otros segmentos, e incluso se desarrollan las condiciones necesarias para atender y satisfacer a clientes con discapacidades. Su adaptabilidad para integrarse operacional y comercialmente con otros productos y atracciones, conformando productos de nuevo tipo, más complejos, es expresión de su vigencia y competitividad, así como de su gran potencialidad (Medina et al., 2009).

La Lenguaje caribeña es un producto que se mantiene muy presente en los nuevos productos turísticos, lo que ha dado origen a una cantidad cada vez mayor de ofertas y modalidades diferentes, capaces de adaptarse a las necesidades y exigencias de los segmentos más disímiles. En los nuevos productos de Sol y playa se valoran altamente determinados atributos, como la variedad de entretenimientos, de espectáculos y los programas de animación, tanto diurnos como nocturnos; la cercanía a importantes núcleos urbanos, la posibilidad de colegios, comer fuera, salir por las noches; la variedad de actividades deportivas, principalmente relacionadas con el mar, así como las posibilidades de contactar la cultura y la naturaleza locales.

Sin embargo, no debe desconocerse que también se mantienen numerosos turistas que siguen prefiriendo la playa para sus vacaciones de forma estricta, sin buscar para determinado segmento, puesto que son capaces de motivar el viaje de un cliente a un destino con una estancia de varios días, mientras que para otro cliente, uno que viaña atraído por otro producto, aquellos los percibirá como complementario.

### Experiencias/Experiences

#### Social y culturalmente aceptable

Social y culturalmente aceptable, y ojalá beneficioso; económicamente viable y equitativo (Budowski, 2001). Los atractivos culturales y naturales, principales componentes del Turismo de Naturaleza, se encuentran en pleno desarrollo, y se identifican como los principales complementos capaces de enriquecer los productos de Sol y playa en el Caribe. El Caribe se ha identificado mundialmente como un macrodestino de Sol y playa, común de todas las islas, que es precisamente la insularidad. Esto diferencia radicalmente a la naturaleza antillana de la naturaleza caribeña continental. Todas las Antillas, además, comparten un clima igual o parecido, desde el moderadamente subtropical de Bahamas, hasta el sub ecuatorial de las Antillas Holandesas.

La Naturaleza Caribeña

El Turismo de Naturaleza como complemento del turismo de Sol y playa en el Caribe

#### La Cultura Caribeña

La Cultura Caribeña está profundamente marcada por ese denominador común de todas las islas. De esa forma, en cada isla o en ciertos grupos de islas, se gestó y desarrolló un proceso histórico de conformación de culturas propias y únicas. Además, en este nuevo escenario insular y tropical, las culturas de las metrópolis experimentaron profundas transformaciones, y en un tiempo relativamente breve los criollos insulares se distanciaron mucho de sus padres y abuelos europeos, a la par que recibieron también la fuerte influencia cultural de las poblaciones esclavas, africanas en primer lugar. Se produjo una colosal mezcla que dio origen al variado tapiz cultural caribeño de hoy en día. Idiomas, músicas, dietas, costumbres, arquitecturas, religiones, biotopos humanos, todo es diferente y múltiple en el mosaico antillano, a la par que curiosamente identificable en su unicidad caribeña.

Exigencia por formas de explotación más responsables.

#### Cada día los turistas se vuelven más exigentes con el turismo y exigen prácticas cada vez más responsables, tendencias que hay que asumir en positivo, como motor de constantes y provechosas transformaciones.

En ese contexto, el Turismo de Naturaleza puede introducir en los productos de Sol y playa nuevos conceptos y formas de explotación, lo suficientemente responsables para encabezar las nuevas demandas de los turistas. Por ejemplo, dos tercios de los viajeros norteamericanos y australianos, y 90% de los ingleses consideran que la protección activa del ambiente y el apoyo a las comunidades locales es una de las responsabilidades del hotel. Encuestas a esos turistas revelaron que 79% de ellos estará dispuesto a pagar hasta 150 euros más por una estancia de dos semanas en un hotel con un desempeño ambiental responsable (Ecotourism Global, 2000). En Alemania, 65% de los viajeros esperan calidad ambiental y 42% piensan que es y será su principal vocación, pero no la única. En sentido general, cualquier playa caribeña está lo suficientemente cercana a atractivos naturales de valor, que pueden ser explotados como productos complementarios de los de Sol y playa.
que es importante encontrar alojamientos que sean ambientalmente amistosos. En cuanto a los turistas europeos, 20-30% son conscientes de los valores del turismo sostenible; 10-20% van en busca de “opciones verdes” y 5-10% exigen vacaciones verdes (EcoTurismo Global, 2006). Por su parte, 53% de los norteamericanos dicen que su experiencia es mejorada cuando aprenden lo más que pueden sobre las costumbres y las culturas locales (Travelbiz, 2002).

Un ecoturismo genuino, concebido y operado de forma calificada y responsable, como industria sensible al medio ambiente, a la cultura y a las comunidades locales, es algo alcanzable, y su gestión, por supuesto, resulta positiva. Debido a sus características y propósitos, el ecoturismo es resultados con un grupo de principios que, por su validez conceptual y práctica han ido ejerciendo una progresiva influencia favorable en el turismo en su conjunto. Sólo que siempre será indispensable estar en capacidad de poder distinguir entre el ecoturismo genuino y el otro. El Turismo de Sol y playa debe aprovechar el prestigio, la aceptación y el crecimiento interno en viajes, y el Turismo de Naturaleza, convirtiéndolo en su principal producto complementario, sumando a su desempeño las buenas prácticas de este.

**EL Turismo de Naturaleza.**

Como tantos otros temas, el Turismo de Naturaleza tampoco ha estado exento de debate, partiendo de su propia conceptualización. El Turismo de Naturaleza no cuenta con una acepción unánimemente aceptada como producto genérico, y es frecuente que el término ecoturismo sea utilizado con esa connotación amplia, aunque en rigor, este es uno de los productos principales de aquel. En la visión de los autores de este artículo, el Turismo de Naturaleza es el que, como producto, se inserta en los escenarios naturales, rurales y sociales que constituyen su motivación turística, su plataforma de gestión; es decir, su capital básico (Medina & Santamarina, 2004).

La Resolución Conjunta MINTUR, CITMA, MINAG, Santamarina, 2004). Aquí cabe reiterar que el Caribe antillano posee escenarios naturales espectaculares y variados y, por supuesto, únicos, lo que ratifica su potencialidad para enriquecer su producto principal, de Sol y playa.

**Modalidades del Turismo de Naturaleza**

El agroturismo se basa en la visita y el disfrute de áreas naturales conservadas el ecoalojamiento, caracterizado por su integración con su entorno y su cultura, forma parte del recurso potencialidad para enriquecer su producto principal, de Sol y playa.

**Ecoturismo**

En la actualidad no existen estadísticas del ecoturismo y del turismo de naturaleza a nivel mundial. Sin embargo, algunos autores han establecido criterios que, a su juicio, pueden ser utilizados con esa connotación amplia, aunque no pocas veces con un sentido mayor, que contribuyeren al ecoturismo en su conjunto. Sólo que siempre será indispensable estar en capacidad de poder distinguir entre el ecoturismo genuino y el otro. El Turismo de Sol y playa debe aprovechar el prestigio, la aceptación y el crecimiento interno en viajes, y el Turismo de Naturaleza, convirtiéndolo en su principal producto complementario, sumando a su desempeño las buenas prácticas de este.

Ceballos la define como “aquella modalidad turística ambientalmente responsable que consiste en visitar o visitar áreas naturales relativamente sin disturbear con el fin de disfrutar, apreciar y estudiar los atractivos naturales de dichas áreas, así como cualquier manifestación cultural que pueda encontrarse ahí, a través de un proceso que promueva la conservación, conserve el entorno natural y proporcione un involucramiento activo y económicamente beneficioso de las poblaciones locales” (Ceballos Lascunair, 1996).

Chafe lo define como “un turismo basado en la naturaleza. Cualquier forma de turismo que depende del ambiente natural para sus atracciones o sitios” (Chafe, 2005). Estas definiciones de ecoturismo han dado lugar a una confusión que ha perdurado, induciendo a pensar que este es sinónimo de sostenibilidad, al extremo de que en varios países de la Comunidad Económica Europea se convoca para un supuesto análisis de la sostenibilidad, el tema abordado resulta el del ecoturismo. En todos los casos, el ecoturismo y el disfrute de la naturaleza estás íntimamente asociado al interés del turista por el contacto y conocimiento de las culturas locales (Medina & Santamarina, 2004).

Sobre la base de la convención, aceptada por los autores, el Turismo de Naturaleza es un producto genérico, decir, una sombrilla de productos y ofertas que tienen a la naturaleza o a partes de ella como atributo motivador del viaje, la estancia, el programa, la excursión o la visita. Es una conceptualización amplia, dentro de la cual se pueden identificar tres productos principales: el ecoturismo, practicado en ambientes naturales más o menos conservados, generalmente incluidos dentro de alguna categoría de área protegida; el agroturismo, cuyo práctico se asienta en zonas campesinas agro-productivas; y el turismo de aventuras para aquellas modalidades que implican un nivel de riesgo, que se practican en el medio natural.

En el turismo de naturaleza está teniendo altas tasas de crecimiento, muy superiores a las que se observan en el de Sol y playa, por lo que, en un futuro cercano, no es aventurado afirmar que podrá participar con una cuota de alrededor del 5% del mercado turístico mundial (Medina & Santamarina, 2004). Aquí cabe reiterar que el Caribe antillano posee escenarios naturales espectaculares y variados y, por supuesto, únicos, lo que ratifica su potencialidad para enriquecer su producto principal, de Sol y playa.

**Ecoturismo**

Por otro lado, se afirma que el medioambiente es la principal motivación turística de más de 20 millones de europeos (FITUR, 1999). Algunas fuentes informan que, a partir de 1990, el ecoturismo ha crecido 20-34% por año, que ha sido el turismo de naturaleza más creciendo 10% y que puede llegar al 30% en algunas zonas. En la hoja informativa de The International Ecotourism Society se afirma que mientras que el turismo mundial crece 4% anual, se estima que el ecoturismo lo hace entre el 10 y el 25% (EcoTurismo Global, 2006).

El turista que selecciona el Turismo de Naturaleza para su viaje y estancia, en cualquiera de sus modalidades, suele a la par estar sensitizad con los valores de la cultura local y creciente sentido de pertenecer a un conjunto de aves, caminatas y recorridos, cabalgatas, cicloturismo, espeleoturismo (blando), montañismo (blando), turismo ecológico y agro-ecoturismo. El turista ha dado lugar a la creación y auge de un tipo de alojamiento especializado, el ecoalojamiento, caracterizado por su integración con las modalidades arquitectónicas con la naturaleza, y no sobre ella. De su entretenimiento o descanso. Sin duda el ecoturismo ha resultado un término atractivo y comercialmente exitoso, que ha sido profusamente utilizado, en diversas modalidades, tales como senderismo, entre otros, como el turismo de aves, caminatas y recorridos, cabalgatas, cicloturismo, espeleoturismo, montañismo (blando), turismo ecológico y agro-ecoturismo. El turista ha dado lugar a la creación y auge de un tipo de alojamiento especializado, que contribuye, caracterizado por su integración con las modalidades arquitectónicas con la naturaleza, y no sobre ella.

**Agroturismo**

El agroturismo se basa en la visita y el disfrute de ambientes campesinos o agro-productivos, y el mismo también puede ser practicado en diferentes enfoques. No obstante, hay consenso en que su base motivacional es una especie de regreso a los orígenes, al medio rural trabajador por el hecho de estar en el destino a la producción agropecuaria, como a la pecuaria o forestal, y que de su entretenimiento o descanso. Sin duda el ecoturismo ha resultado un término atractivo y comercialmente exitoso, que ha sido profusamente utilizado, en diversas modalidades, tales como senderismo, entre otros, como el turismo de aves, caminatas y recorridos, cabalgatas, cicloturismo, espeleoturismo (blando), montañismo (blando), turismo ecológico y agro-ecoturismo. El turista ha dado lugar a la creación y auge de un tipo de alojamiento especializado, que contribuye, caracterizado por su integración con las modalidades arquitectónicas con la naturaleza, y no sobre ella.

**Estructura y Desarrollo**

Dentro del producto ecoturismo se identifican muy diversas modalidades, tales como senderismo, entre otros, como el turismo de aves, caminatas y recorridos, cabalgatas, cicloturismo, espeleoturismo, montañismo (blando), turismo ecológico y agro-ecoturismo. El turista ha dado lugar a la creación y auge de un tipo de alojamiento especializado, que contribuye, caracterizado por su integración con las modalidades arquitectónicas con la naturaleza, y no sobre ella.

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que ha salido más recientemente al mercado, no obstante lo cual se ha ido consolidando en varios países europeos, donde se ha practicado por los habitantes de las cercanías de grandes ciudades, sobre todo en visitas de fines de semana. Aunque no necesita de grandes inversiones en instalaciones ni en infraestructura, el agroturismo conlleva un activo trabajo de comercialización, promoción y mercado de sus productos. Las actividades turísticas que se realizan en los espacios rurales son disímiles, tales como rentar una cabaña auto-abastecida de alimentos en las montañas o áreas cercanas; participar en ciertos trabajos, sea la práctica de una experiencia hotelera singular, mezclándose con las actividades de la población local, y otras. Por lo general, a ello se añaden diversas actividades recreativas al aire libre, como cabalgatas, caminatas, observación de aves, montañismo, ciclismo, escaladas y otras.

La oferta de alojamiento rural abarca una amplia variedad de albergues, apartamentos, camping, villas, casas rurales, hostales, pensiones, hoteles, paradores y residencias, cuyos precios varían en dependencia del lugar, el confort, los servicios que se brindan y la calidad de las prestaciones. A todo ello se suman las comidas típicas, las actividades culturales locales, el contacto con la naturaleza, algunas familias rurales, el entorno natural limpio y protegido, la participación en ciertas labores agropecuarias, factores motivacionales todos ellos de esta modalidad turística.

Esos beneficios reales, sin embargo, no deben conducir a desconocer ciertos peligros también inherentes al turismo rural, si éste no se concibe y se opera de forma responsable y respetuosa con los valores ambientales, sociales y culturales sobre los que descansa. La búsqueda y procura de beneficios pasando por alto tales atributos y realidades, puede conducir a la banalización de las ofertas, a la caricaturización del modo de vida tradicional y auténtico que se pretende mostrar. Como en el caso del ecoturismo, el turismo rural tampoco es de por sí una garantía, sino una herramienta para alcanzar resultados positivos, tanto para el turista consumidor como para el campesino prestatario, siempre que éste, como centro gestor de este nuevo producto emergente, sepa conservar sus valores auténticos, sin dejarse llevar por engañosos senderos mercantilistas que terminarán por degradar su propio producto.

Turismo de Aventuras

Este es un producto cuya motivación lo constituye el alto grado de vivir experiencias nuevas, con el riesgo de características más o menos excitantes, que suelen llevar aparejadas ciertas dosis de riesgo o peligro, en párs. acotado, cuya realización significa un grado de desafío que se establece una persona a sí misma, y que se realizan, por lo general, en un entorno natural. Es por esto último que se le inscribe dentro del producto genérico de naturaleza. Dentro de este producto se realizan las siguientes actividades: en el aire se hacen vuelos en globo, en paracaidas, en alas delta, en ultralíderes, en parapentes, paracaidismo; en el agua se practica saltar o natación en ríos rápidos, cañonaje, kayakismo, buceo de profundidad con equipos de inmersión y espeleobuceo, surf y windsurfing, motonauta, esquí acuático; en la tierra se realizan modalidades duras de ciclismo, senderismo, caminatas y cabalgatas; espeleoturismo, montañismo y escaladas, esquí de fondo, plataformas y canyoning; en un contexto turístico, el turismo rural tampoco es de por sí una garantía, sino una herramienta para alcanzar resultados positivos, tanto para el turista consumidor como para el campesino prestatario, siempre que éste, como centro gestor de este nuevo producto emergente, sepa conservar sus valores auténticos, sin dejarse llevar por engañosos senderos mercantilistas que terminarán por degradar su propio producto.

Ética

El Turismo de Naturaleza se rige por rigurosos principios y códigos éticos que, en el momento de jugar su papel de producto complementario del de Sol y playa, indiscutiblemente le añadirán valor al producto principal.

La OMT ha asumido la siguiente definición del turismo sostenible: “Atiende a las necesidades de los turistas y las regiones huésped, al mismo tiempo que preserva y fomenta oportunidades para el futuro. En principio, gestiona todos los recursos de tal forma que las necesidades económicas, sociales y ecológicas puedan satisfacerse sin dejar de conservar y aumentar la biodiversidad, la diversidad ecológica y los sistemas de soporte de vida”. Son innegables los puntos de coincidencia que existe con esta definición, con las del Turismo de Naturaleza que dan la OMT y la UICN.
La coincidencia se basa en que, teniendo en cuenta los escenarios naturales y socioculturales en los que se fundamenta, que son los que conforman sus productos, el Turismo de Naturaleza está obligado a luchar por mantener esos escenarios en un óptimo estado de conservación. El Turismo de Naturaleza tiene que luchar por la sostenibilidad, por lo que cualquier acercamiento a éste de los productos de Sol y Playa le proporcionara a estos un acercamiento a la sostenibilidad.

Hay que reconocer que en la actualidad, para no pocos empresarios turísticos la sostenibilidad es sólo una lejana quimera que no les proporcionará beneficios de ningún tipo, o al menos, ningún beneficio económico, y sí en cambio previsibles erogaciones. Es indudable también que donde quiera que este pensamiento se encuentre, poco avanzará la sostenibilidad, y en rigor nada se alcanzará si las acciones dependen de los que así piensan.

Sin embargo, el cumplimiento de determinados parámetros de la sostenibilidad ya está condicionando cada vez con mayor influencia el posicionamiento internacional de los destinos y productos. Esto se debe a que la sostenibilidad ha pasado a ocupar un lugar de primer orden en la competitividad de los productos ante mercados cada vez más exigentes en cuanto a la preservación del medio ambiente, al respecto de los valores culturales, histórico patrimoniales y de identidad, y a la propia sociedad objeto del viaje turístico.

En la Guía para planificadores locales, de la OMT, se expresa que “la mayoría de los destinos turísticos preferidos por el público dependen de entornos físicamente limpios, de ambientes naturales protegidos y, con frecuencia, de rasgos culturales distintivos de las comunidades locales”. Sin lugar a dudas, un destino o un producto turístico sostenible implicita la existencia de valores que incrementan la satisfacción del visitante, que influyen de forma beneficiosa en su percepción acerca de la calidad integral de los soportes de su experiencia turística, y, consecuentemente, en su apreciación del precio que paga por dicha experiencia.

La importancia cada vez mayor de la sostenibilidad en el turismo lo demuestra la prioridad creciente que le han concedido los organismos internacionales de mayor autoridad sobre el tema, como la OMT, y de forma particular en el ámbito caribeño por parte de la Asociación de Estados del Caribe y la Organización de Turismo del Caribe. Sobre esto vale la pena destacar que los países de la región, y sus organizaciones turísticas regionales, han asumido un papel de punta en el plano mundial, al suscribir el Acuerdo de declarar al Caribe como Zona de Desarrollo Sustentable del Turismo, proyección todavía no asumida por ninguna otra región del planeta.

Todo destino turístico, producto, empresario o especialista del sector que aspire a su éxito y competitividad, no puede desconocer esta nueva dimensión contemporánea del desarrollo que es la sostenibilidad. Además, mirando hacia adelante no se vislumbrará ningún otro camino que haga viable el futuro, y ya hay un número creciente de turistas que comienzan a comprender o a vislumbrar esa realidad.

Por sus características, concepciones, códigos, ética, respeto, el Turismo de Naturaleza es capaz, sin dudas, de añadir valor a los productos caribeños de Sol y playa, y convertirlos en nuevos productos, más consecuentes con los nuevos tiempos y con los gustos y preferencias de los turistas actuales; haciendo posible que dichos productos sean capaces de evitar su declinación, e iniciar nuevos ciclos de vida.

De todos sus productos y modalidades podrán ser empleados los menos especializados y por lo tanto más adaptables como el senderismo, caminatas y recorridos, ciclismo, cabalgatas, snorkel, navegación naturalista por esteros y manglares, tomos en el ecoturismo; visitas a haciendas y participación en labores agrícolas en el agroturismo, y también algunas de las modalidades sin riesgo y que exigen esfuerzos menores en el turismo de aventuras, que son sin duda productos factibles de crear en lugares relativamente cercanos a los destinos de Sol y playa de la región Caribeña. O factibles también de ser incorporados a dichos destinos, en caso de que ya existieran, aunque con una visión y gestión de productos aislados.

Un ejemplo cubano. Los turistas que se alojan en Varadero, el destino de Sol y playa más importante de Cuba, optan por la excursión por un día a la Península de Zapata, el humedal más extenso del Caribe insular, situado a una hora de recorrido por carretera, donde pueden acceder a senderos para la observación de aves, recorridos fluviales y terrestres, visita al Centro de Información, a estaciones científicas y al Centro de crias de cocodrilos, y almorzar en alguno de sus restaurantes especializados. En la práctica, Zapata ha devenido un producto complementario “obligado” de Varadero, y de forma progresiva lo está siendo también de otros destinos cercanos de Sol y playa de la Isla.

Si se desea lograr el éxito se debe tener una idea o atributo propio con el fin de concentrar sus fuerzas en ello. Si no lo tiene, ojalá que sus precios sean bajos. Muy bajos...” Esta idea, expresada por Ries y Trout en la Ley número 14, ‘De los Atributos, de su libro Las 22 Leyes inmutables del marketing, resulta una conclusión muchas veces comprobada, de que sólo aquellos que logren ofertar algo diferente tendrán abierta el camino del éxito. Hacia esa misma dirección apuntan el principio de que hay muchas formas de llegar a algo diferente, pero que las verdaderamente válidas son aquellas que buscan la diferenciación entre aquellos aspectos que resultan claves, según la valoración que hacen de ello los clientes. No se trata pues de hacer algo igual y pintarlo de un color distinto, sino de apuntar al interior de ese algo para que todos se den cuenta de que no es igual a ningún otro, que es diferente, o incluso lo contrario, hasta lo opuesto.

Ser diferentes significa lograr identificar algún atributo o la combinación de varios, que posean una alta valoración para los clientes, singular, único, mejor, relevante, y, de manera consecuente, apostar por ello. Se puede llegar a ser diferentes por la marca, la calidad, por los precios y por el tipo de servicio que se oferta y, sobre todo, por la singularidad de los atractivos, que siempre será lo verdaderamente distintivo. Dentro del área geográfica del Caribe predominan destinos de Sol y Playa que por lo general no presentan recursos exclusivos, y ahí es donde pueden entrar a jugar otros factores como los de marca, calidad y excelencia como elementos diferenciadores.

La estrategia de diferenciación de un producto o destino debe traducirse en una identidad y en la creación de una imagen y marca distintivas. La identidad supone características propias de algo, de las cosas, de organismos, de un individuo o grupo, de sociedades, de un país o una civilización, de una empresa, que las distingue del resto, que las hace identificables por una serie de señales de una u otra forma perceptibles.

Tal condición ha sido definida por Joan Costa (1987) como un signo fundamentalmente asociativo, que es la identidad visual: la firma o el sello que destaca al emisor de los demás concurrentes, y que personaliza sus productos y sus mensajes.

En ese camino se deben concentrar los esfuerzos en la integración consciente de los productos y servicios de manera consecutiva y creativa, con el potencial, las posibilidades y la identidad de cada lugar específico. Esto puede lograrse, no sin grandes empeños, por medio de la aplicación razonada, en el desarrollo de los productos, de un enfoque de oferta que, sin desconocer en ningún momento a la demanda, busque su expresión y solución en las potencialidades propias del territorio. De productos fragmentados, atomizados, incoherentes, y sin diseño propio, resultado de iniciativas aisladas enfocadas a satisfacer necesidades también aisladas, pasar a un nuevo concepto de ofertas basadas en productos diseñados integralmente, plenos y coherentes, con identidad propia, que conviertan a los actuales destinos en destinos-marca, con una perceptible identidad y coherencia interna entre todos los productos que en el mismo se ofertan.

Concretar los productos desde adentro, desde el territorio, de manera integral y coherente, siempre desde su conceptualización hasta su comercialización, y posterior desarrollo, por los principios y las mejores prácticas del Ordenamiento Territorial.


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Comme medio de comunicación científica, Ara fomenta los conocimientos teóricos sobre el turismo y sus técnicas de aplicación en países situados en ambientes naturales especialmente vulnerables, como el Amazonas, la selva costera, las regiones costeras y montañosas, y su funcionamiento, con el objetivo de fomentar y sustentar la conservación del medio ambiente y el desarrollo sostenible de las comunidades.

La zona geográfica de especial atención e interés para la revista Ara es la formada por el Caribe en su sentido más amplio, incluyendo las zonas costeras del continente latinoamericano colindante al Mar del Caribe. También serán bienvenidos aquellos artículos que se centren en otras zonas geográficas del mundo con situaciones similares o comparables a las del Caribe.

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La revista Ara tiene una periodicidad semestral.

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