En el taíno, una de las lenguas indígenas del Caribe, el término *Ara* significa árbol y gente, entre varias otras acepciones. *Ara* es un símbolo de identificación y arraigo 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.

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In the Taíno language, one of the indigenous languages of the Caribbean, the term *Ara* means tree and people, among various other significations. *Ara* is a symbol of Caribbean identity and origins as well as a universal symbol with a positive message.

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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.

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ÍNDICE
SUMMARY

An Exploratory Study of Global Issues Impacting the Future of Tourism in Aruba

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Abstract

Worldwide competition, international foreign policy, changing demographics and the global environment emerged as primary concerns by participants in the think tanks on Visioning the Future of Aruba. The general goal of these forums was to identify and describe the forces driving change, competitive methods and core competencies that will impact the Aruban tourism industry in the next ten years. To achieve these objectives, thirty-five leaders of the Aruban tourism industry gathered for a series of think tank forums over a two year period. The results of the forums demonstrated that there is a distinct link between environmental forces and the impact that those forces have on tourism businesses located in Aruba. The tourism industry in Aruba is facing major challenges in a rapidly changing environment. Participants acknowledged the increasing difficulty associated with maintaining a competitive advantage in the tourism industry and asserted that it will be necessary to engage in creative new competitive methods as an investment in the future of Aruba. Specifically, the group agreed four future competitive methods were in need of development: ecologically responsible destination, sustainable development, safety & security, and sustainable growth & competitiveness.

Key Words:
Aruba, tourism, trends, competitive methods, core competencies

Resumen

La competitividad mundial, la política exterior internacional, los datos demográficos en cambio constante y el medio ambiente surgieron como preocupación principal en los grupos de expertos de Visioning the Future of Aruba. El objetivo general de estos grupos era identificar y describir las fuerzas que impulsan cambios, métodos competitivos y las principales capacidades que afectan a la industria de turismo de Aruba en los próximos diez años. Para conseguir estos objetivos, 35 líderes de la industria de turismo de Aruba se juntaron para formar los mencionados grupos durante un período de dos años. Los resultados del Foro demostraron que hay un eslabón claro entre las fuerzas ambientales y el impacto que èstas tienen en los negocios de turismo instalados en Aruba. La industria de turismo en Aruba afronta grandes desafíos en un ambiente que cambia rápidamente. Los participantes reconocieron la creciente dificultad asociada al mantenimiento de una ventaja competitiva en la industria de turismo y afirmaron que será necesario posicionarse en nuevos métodos creativos competitivos como una inversión en el futuro de Aruba. El grupo estuvo de acuerdo en que se necesitan en un futuro cuatro métodos competitivos para su desarrollo: destino ecológicamente responsable, desarrollo sostenible, seguridad, crecimiento y competitividad sostenible.

Palabras clave:
Aruba, turismo, tendencias, métodos de competitividad, competencias esenciales

Introduction

Leading strategists suggest that in order to gain a competitive advantage and succeed in the future, an organization needs to develop industry foresight and to stake their business claim before anyone else (Porter, 1985; Prahalad & Hamel, 1990; Connolly & Olsen, 2000). Implementing this advice is not easy, as one can imagine, in an era of increased competition and rapid technology change. However, by using a disciplined approach to scanning the external environment, the seeds of change can be spotted early and action can be taken. With this in mind the leaders of the Aruban tourism industry set out to conduct a *Forum for the Future of Tourism in Aruba* by holding a series of think tank forums over a two year period, sponsored by the Aruba Timeshare Association (ATSA). The objectives of the forums for the future of tourism in Aruba were to develop insight into the macro forces/trends driving change in the Aruban hospitality and tourism industry over the next ten years; then describe the associated competitive methods and core competencies that will impact these trends driving change for Aruba.

The first think tank *Forum for the Future of Tourism in Aruba* focused on the five major forces driving change in the tourism industry as identified in the International Hotel and Restaurant Association's publication, "Forces driving change in the foodservice industry and competitive methods of multinational foodservice firms" (Olsen, & Zhao, 2002). The forum included thirty-five representatives from private sector organizations, government ministries and educational institutions. These leaders of the Aruba tourism industry were asked to consider the future in the context of five remote business environmental forces: socio-cultural, technological, ecological, economic and political. A number of critical issues for the Aruban tourism industry were identified and disseminated to the group. The participants were instructed to use the hospitality co-alignment strategic planning model, developed by Olsen, West and Tse, (1998; 2008), as a framework for the think tank. The co-alignment hypothesis: "if an organization is able to identify the opportunities that exist in the forces driving change, invest in competitive methods that take advantage of these opportunities, and allocate resources (core competencies) to those that create the greatest value, the financial results desired by the owners and investors have a much better chance of being achieved" (Olsen, et al., 1998, p. 2).

The goal of the second think tank *Forum for the Future of Tourism in Aruba* was to identify and describe the competitive methods and core competencies that will impact the Aruban tourism industry in the next decade. The underlying premise was to build on the first think tank forum session results; therefore, the same hospitality co-alignment strategic planning model was used for the second forum. Previous studies have shown that those organizations that match their core competencies and competitive methods to the impacts generated by environmental forces are in alignment and thus perform better than those that are not (Olsen et al., 2008). While discussion and debate was robust with many divergent views, all participants agreed that the international market place will continue to drive and reshape the products and services that make up what has become known as Aruba's number one industry, tourism; and this will change Aruba's competitive landscape more than most realize.

Literature Review

Global Issues Impacting Tourism

Tourism, as an economic and cultural activity, does not occur arbitrarily in the Caribbean. Some island-state destinations appear to be more successful than others in offering tourism services and activities, and in attracting travelers. Since the recent global economic crisis, the struggle for tourism dollars is forcing national, state, and local governments to re-evaluate their existing tourism assets and to make the most of them in order to draw more tourists (Sheldon & Dwyer, 2010). Tourism spending has experienced greater declines than other consumer discretionary spending and is impacting the economic contribution of tourism to destinations worldwide. The numerous stakeholders, NGO's, governments, businesses, communities, etc., involved in determining the growth of an area define different interests and goals, which ultimately must converge to sustain the marketed image of that area as a tourism destination (King, McVey & Simmons, 2000).

In recent years, tourism destination organizations have been disparaged for their difficulty in reinventing themselves in the face of radical changes in the way that business is now conducted in the new technological era. War, terrorism, political upheaval, the spread of infectious diseases, airline restructuring and the advancement and use of technology are just a few of the environmental events that are providing an intense shock for tourism destinations' outcomes around the globe. For example, political, socio-cultural, economic and ecological instability are compelling many tourism destinations to hire experts in specialized areas, such as disaster management planning to respond to increasing human calamities and natural disasters (Ritchie, Dorrell, Miller & Miller, 2004). The damage to the British tourism industry caused by the bovine foot and mouth outbreak in Great Britain could have been contained with the availability of a disaster plan and appropriate implementation. However, the supreme change agent in destination marketing is technology. Recent studies have confirmed that tourist managers have not fully embraced and incorporated technology in their operations and strategies (Yu-Lan, Gretzel & Fesenmaier, 2003).

Tourism in Aruba

Successful tourist destinations perform activities that are more strategic in nature and which quickly adjust to the continuous changes that are occurring in the external environment (Jurowski & Olsen, 1995; Olsen, 1995; Olsen & Zhao, 2002). Poon (1993) urges tourism destinations to reframe their goals and actions because tourism is a volatile, highly competitive, and unforgiving industry. Poon also emphasizes that: "the industry is undergoing rapid and radical transformation; the rules of the game are changing for everyone" (p. 291). Caribbean nations dependent on tourism often try to diversify their economy with other sources of revenue. Aruba at different intervals has expressed a desire to diversify the economy with a financial center, free trade zone and as of late a knowledge economy. However, since the 1980s tourism has been the mainstay of the economy and has served the country quite well (See figure 1). Aruba's tourism base is well established with currently almost 7000 rooms available and another 4600 units in various phases of development (Van Neys, 2007).

Tourism is the foundation of the small open Aruban economy with about three quarters of the Aruban GDP earned through tourism or related activities according to the Aruba Tourism Authority (2010). It lies 25 kilometers (15.5 miles) off the coast of Venezuela and 68 kilometers (42 miles) west of Curaçao. The capital is Oranjestad. Originally part of the Netherlands Antilles, Aruba achieved separate self governing status within the Kingdom of the Netherlands in 1986. Aruba is about 33 km long (21 miles) and encompasses 193 sq km (74.5 sq miles) with a population of just over 104,589 (Central Intelligence Agency, 2011). There is some cultivation of aloes and a small petrochemicals industry based around St Nicholas oil refinery, but financial services and tourism are the major economic activities. Aruba enjoys one of the highest standards of living in the Caribbean region and an estimated unemployment rate of 5.7%. The rapid growth of the tourism sector over the last several decades has resulted in a substantial expansion of other activities. In 2008 tourist visits to Aruba that stayed overnight were 826,774, with 65% of those from the USA; this does not include visitors from cruise ships (Central Bureau of Statistics, 2011). Construction continues to boom, with hotel capacity five times the 1985 level. Tourist arrivals rebounded strongly following a dip after the September 11, 2001 attack on New York City. Hotel occupancy in 2004 averaged 81%, Aruba's best year ever for hotel occupancy, compared to 68% throughout the rest of the Caribbean. However, in 2008 the hotel occupancy rate had slid to 73% for the year, largely because of the global economic downturn and additional capacity.

Figure 1: Map of Aruba in the Caribbean

Co-Alignment Framework for the Forum

The goal of the think tank Forum for the Future of Tourism in Aruba is to identify and describe future trends and events that are likely to affect the Aruba tourism industry in the next five to ten years. To this end, the co-alignment hospitality strategic planning

Table 1 Aruba Lodging Trends 1975-2010

Year	Rooms	Overnight Arrivals	Occupancy Rates %
1975	1,700	128,900	74.2
1980	2,300	199,200	82.5
1985	2,400	206,700	80.5
1990	5,000	425,000	68.5
1995	6,000	618,900	70.8
2000	6,500	721,200	76.1
2005	7,569	732,514	81.7
2006	7,689	736,177	78.7
2007	9,249	846,603	79.8
2008	10,970	922,797	73.3
2009	11,002	1,015,077	80.4
2010	12,102	1,096,283	79.1

Source: Central Bureau of Statistics & Aruba Tourism Authority model developed by Olsen, West and Tse, (1998) is used as a framework for the forum (figure 2). The co-alignment theory states: "if an organization is able to identify the opportunities that exist in the forces driving change, invest in competitive methods that take advantage of these opportunities, and allocate resources to those that create the greatest value, the financial results desired by the owners and investors have a much better chance of being achieved" (Olsen, et al., 1998, p.2). However, this is not always the case and thus organizations suffer from missed opportunities in the implementation stage of their strategy. Environmental scanning is the first of the four constructs of the co-alignment principle. Pinto and Olsen (1987) defined environmental scanning "as the process of probing an organization's external environment for information which may be directly or indirectly relevant to top management in making decisions of a long term strategic nature" (p. 183). Environmental scanning is performed at multiple levels such as remote, task, functional and firm (Kim & Olsen, 1993).

Strategy choice is the organization's purposeful choice of the competitive methods (the second construct of the co-alignment theory) that are used to compete in the market place and which should be reflective of the organization's intended strategy. Competitive methods are bundles of products and services combined in unique ways so as to produce a sustainable competitive advantage (Murphy & DiPietro, 2005). The entire set of an organization's competitive methods is their strategic portfolio of goods and services which should set an organization apart from its competitors. Slattery and Olsen (1984) analyzed the environment of hospitality organizations and identified patterns in the relationships between the environment and the organization.

Firm structure is how the organization organizes itself so as to efficiently, consistently and effectively allocate its scarce resources to the implementation of its competitive methods. To do this the organization must develop or already possess the core competencies needed to carry this out (Prahalad & Hamel, 1990). Core competencies are the resources and capabilities that an organization possesses; those things which an organization does well and ideally better than anyone else (Murphy, 2008). The combination of competitive methods and core competencies should produce a competitive advantage that cannot be easily copied or substituted and is sustainable (Barney, 1991). The essence of good strategy is to be able to position the organization to achieve a sustainable competitive advantage in one or more areas, which will enable the organization to produce above average returns (Porter, 1985). To do this the organization must not only be successful in crafting a good strategy, competitive methods and core competencies, but the organization must be highly successful in the implementation phase of the plan.

The think tank Forum for the Future of Tourism in Aruba occurred over a two year period starting in November 2006 with the final report issued in January 2009.

Three research questions were posed to the groups:

1) What are the emerging patterns of change over the next five to ten years?

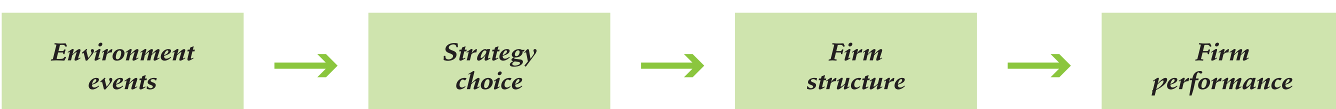
2) What are the current competitive methods (products and services) of Aruba's tourism industry?

3) What are the current core competencies (resources and capabilities) of Aruba's tourism industry that support the competitive methods?

Methodology

The goal of the forum was consensus development with a broad representation of constituents on the environmental trends, competitive methods, and core competencies that will impact the Aruban tourism industry in the next five to ten years; therefore, the methodology employed was a qualitative case study approach that used a modified nominal group technique for broad consensus building. Additionally, a modified Delphi technique was used for plenary sessions to rank and prioritize the top issues identified across all groups and secondary data was collected to verify facts. Hence, the information amassed was from a representative group of experts from independently owned businesses,

Figure 2: The Co-Alignment Principle



Source: Olsen et al. (2008)

NGOs, government officials, industry consultants and academics.

A case study is an "empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident" (Yin, 2003, p. 13). It is appropriate when no experimental control can be used in the data collection process and when a researcher seeks an answer to "what", "how", and "why" questions (Adler & Ziglio, 1996; Yin, 2003). This study has characteristics of an exploratory case study that is focused on contemporary events and seeks to answer "what" questions (Benbasat, Goldstein, & Mead, 1987). Since this study was exploratory in nature and seeks to answer "what" questions, the case study research methodology was deemed to be appropriate.

The minimum number of Delphi participants to ensure a good group performance is somewhat dependent on the study design. Experiments by Brockhoff (1975) suggest that under ideal circumstances, groups as small as four can perform well. The forum used a cross section of experts from Aruba to achieve the greatest breadth of opinions and dialogue. This technique is designed to take advantage of participants' creativity as well as the facilitating effects of group involvement and interaction. Even though there are no definitive guidelines for determining the optimal number of participants, a panel of 10 to 15 members is sufficient for producing effective results if the group is homogeneous (Brady, 1988; Tersine & Riggs, 1976). However, if the panel members are heterogeneous (with wide representation), a larger number is required to achieve realistic quality (Taylor & Judd, 1989). Though there is no specific procedure for determining the optimal number of group members to use, more group members should be used to compensate for those group members who drop out between rounds (Maxwell, 1996). The Delphi technique is a labor-intensive research method and the larger the number of group members, the greater the information load, for both the participants and the investigator (Murphy & Murrmann, 2009; Linestone & Turtoff, 1979). Therefore, it is critical to seriously apprise the number of participants; specifics on the group for this study are provided in Table 2.

To achieve the stated objectives, leaders of the Aruban tourism industry met on four separate days between November 2006 and December 2008 as part the think tank forum sponsored by the Aruba Timeshare Association (ASTA). This selection method was used intentionally to help insure a wide range of participant perspectives and that all participants were fully versed in the relevant subject topic. Organizations of all sizes, both public and private were selected to participate in the Delphi (Creswell, 1994). Out of 50 people who were invited to participate in the Delphi, 35 accepted (see Table 2). The participants were from all areas of the country, ranging from NGO executive directors, business leaders to government ministries. Additionally, consultants, academics and industry managers at all levels from small business owners to Presidents whom are involved in the tourism field were chosen to participate to top out the field of experts to provide opportunities for a cross-pollination of ideas and to stimulate creative (i.e., out-of-the- box) thinking. Since each participant was told that their answers would only be reported in the aggregate and without affiliation, no data is linked to any specific company or person. The participant's association is listed to demonstrate the breadth of experience and knowledge represented.

Participants first gathered for a plenary session, which consisted of a brief welcoming address, overview of the think tank forum process, research questions and the workshop's agenda. The large group was divided into five, predetermined break out groups of approximately seven participants each. The groups were deliberately chosen to ensure representation was spread among the various groups to prevent domination and conflict by some participants, while ensuring an atmosphere conducive to open discussion, information sharing and provocative debate (Delbecq, Ven & Gustafson, 1975).

Each break out group was moderated by a facilitator and conducted using a modified focus group format. Sessions lasted approximately 60-90 minutes each, spread over the course of the day. There were four separate days over a two year period that the research was conducted. Each facilitator was assisted by a public recorder for each of the groups, documenting all the discussion. Flip charts for reference, on-going dialogue, and later consolidation of common themes and ranking were used by the facilitators. The purpose of the facilitator was to encourage as much discussion and debate as possible while keeping the group on target.

At the conclusion of each session, a modified nominal group technique was applied to build consensus and collapse each of the discussion into common themes and prioritize the outcomes in terms of importance and impact to the Aruban hospitality industry (Delbecq, Ven & Gustafson, 1975). Each participant was asked to rank the top three ideas they felt will have the biggest impact on the tourism industry in the next five to ten years and were of highest import. This was done by point ranking their top three choices. Upon completion of this exercise, the points were tallied and reported to the break out group session for final discussion.

Finally, participants were then reassembled in a plenary session so that the highlights of each group could be shared, discussed, synthesized, and validated. A modified Delphi approach was used with the closing plenary session to rank and prioritize the top issues identified across all groups which will impact Aruba over the next 5-10 years. A final large group vote/ranking was conducted and the top three items were recorded for each topic area. The result is the collapsing and ranking of group priorities for each of the research goals.

By using multiple breakout sessions from multiple forums, the researchers were able to triangulate their findings to build higher validity and reliability (Zikmund, 2003). This process reduced any bias introduced by any one facilitator or facilitation style, since the results were collated in the final plenary session. The rest of this paper is devoted to presenting the themes that emerged as the result of this two year study.

Results

The findings from the *Forum for the Future of Tourism in Aruba* that attempt to answer the research questions are presented in three parts: macro environmental forces/trends, competitive methods, and core competencies (Table 3). The findings from the first think tank forum identified and describe future trends and events that are likely to affect the Aruban tourism industry in the next five to ten years based on the five major forces driving change in the tourism industry. Further, the participants estimated the timing and the impact the future trends could have upon the Aruban tourism industry. The second think tank forum answered research questions two and three; which identified and describe the competitive methods and core competencies that will impact the Aruban tourism industry in the next decade.

Macro Environmental Forces Driving Change

Economic Issues

The dominant economic topic discussed at the forum was competition from other Caribbean destinations and how to guarantee a stable flow of funding to direct the appropriate budgeting of marketing and planning money. The common concern about inadequate funding was based on the assumption that public authorities recognize tourism as a leading economic engine, but have other public concerns, and spending priorities.

Local, national, and global markets are becoming more competitive and will exert more financial pressure on business and public organizations. Participants acknowledged the increasing challenges associated with providing adequate returns on invested capital in the tourism industry and asserted that it will be necessary to engage in creative forms of funding and investment in the future. Public and private partnerships involving tourism and non-tourism organization ventures in projects such as tourism marketing, infrastructure and transportation will help maximize revenue. Higher tourism taxes will lead to travelers' discontent since; ultimately, travelers will carry the burden of increased economic costs.

International destinations (competition) of high quality are being developed and have a lower cost base that is more affordable than Aruba. The island could potentially lose tourists to these new markets, because consumers may go somewhere else that is more reasonably priced. This impact could become substantial over the next decade. New markets may offer new opportunities for inbound travel to Aruba but they also generate more competition. Currently, there are no new markets discovering Aruba (e.g. China). Aruba needs new market development over the next decade to increase diversification in the tourist economy.

Over the next 10-15 years Aruba will continue to depend on the U.S. as its major source of visitors. Currently, upwards of 75% of the island's tourists' departure originate in the US. Aruba must expand its tourist economic base over the next ten years to augment diversification in the tourist sector. Additional devaluation in the U.S. currency causes tourists to hold back on international travel. Also the current devaluation of the currency in some Latin American countries makes travel unaffordable to their residents. It has already started in Argentina and most probably will continue to increase.

The economic challenges that lie ahead are of utmost concern to the Forum participants. One group specified that "we can't wait to act" to highlight its belief that tourism organizations will face more threats than opportunities. A number of additional global and domestic challenges were identified in this section such as: the upward trend in energy prices, increasing taxation for tourism services, the changing structure of the labor market, increasing competition, insufficient funding and the hope to form new public/private partnerships within Aruba to combat the slide in visits.

Political Forces

Tourism is a highly fragmented global industry and it is unavoidably dependent on the political environment because of its reliance upon governmental policies, stability and funding. Tourism encompasses issues of freedom of mobility, the politics of safety and security and the compromise of risk; thus, it challenges the very notion that tourism can exist apart from the policy-making arena. Considering the significant impact that politics has on this business, Forum experts identified the political environment to be one of the most important among all the environments discussed during the think tank.

The governments search for new sources of revenue is recognized as an important force within the political environment by the think tank forum members. Most participants believe that a number of the policies and regulations, such as visa restrictions and arrival taxes, imposed upon tourists and tourism businesses will create a negative image of Aruba as a tourist destination to new and existing markets. This negative image, of course, will then result in decreasing numbers of visits. The participants suggested that adequate representation by tourism industry experts during policy formulation and decision making processes can result in more 'tourist friendly' regulations as opposed to the current 'tax the tourist' regulations.

The political problems in Venezuela and the impact that this is having on the relationship with the United States of America are not good for tourism. Hugo Chavez, Venezuelan President, is moving towards socialism in concert with Cuba and other socialist governments in South America creating a destabilizing effect in some parts of the world. In Cuba, the assumption of the presidency by Raul Castro presents a lot of uncertainty in the region. What will happen when Fidel dies? What will be the response of the new leaders of Cuba? Will they continue with the socialist movement or will the country become more open? Will the U.S. lift its trade ban? If Havana returns as a U.S. tourist destination it would impact Aruba's tourism and economy negatively. The way tourists travel has changed with the introduction of new

Table 2: Aruban Major Forces, Competitive Methods & Core Competencies

Major Forces Driving Change	Competitive Methods
Socio-cultural	Aruba brand
Changing Demographics	E- brands
Social Conscience & Awareness	Aruba Destination marketing
Worldwide Terrorism	Global Orientation
Technological	Attractive Friendly Investor Climate
Internet & E-business	Guest Experience Management
Alternative Energy	Cultural Diversity
Knowledge Factor	
Economic	
Energy	
Competition	
US Economy	**Core Competencies**
Ecological	Institutional Infrastructure
Global Environment	Human Capital & Educational Productivity
Sustainable Development	Technology & Knowledge
Waste Management	Absorptive Capacity
Political	Financial Capital
US Foreign Policy/Politics	Imagination/will/commitment
Global Foreign Policy	
Chavez/ Cuba Effect	

policies and more restrictions. Tourists are experiencing a greater feeling of uncertainty when it comes to their security and safety which is impacting the amount of tourists that visit annually.

Socio-cultural Issues

The socio-cultural environment includes factors such as demographics, diversity, immigration and migration, religion, culture, generational gaps, and others. Participants identified the role of multicultural fragmentation of the tourism market as having a considerable impact on the travel industry. Additionally, the changing demographics of Aruba's population are placing a significant strain on the country's infrastructure, culture and identity. This, combined with the graying of the population and increasing rate of leisure time, will strongly influence how and with whom business will be conducted.

Changes in migration patterns of the workforce could disproportionately affect Aruba because of its small size and an increase in immigration by those seeking improved economic circumstances. Aruba's population has soared to over 104,000 in 2011 largely due to immigration and this has changed the demographics of the population dramatically. Shifts in global demographics will also challenge the tourism industry in ways that will have far reaching implications. These shifts include the aging of populations in developed countries as compared to the burgeoning youthful populations of developing countries.

Unchecked immigration has strained the infrastructure, changed the demographics of the population and in some cases damaged the tourist product that Aruba is offering. The native Aruban people that traditionally worked in the tourist industry are aging and the labor force willing to work in the tourism industry is very different from the labor force of the past. As one expert phrased it "many Arubans do not care for certain jobs in the hotel industry anymore, think of housemen, roomkeepers, beach and pool boys; consequently there will be a need for additional immigration" to fill these vacancies. The Global movement of people and foreign cultural influences impact the essence of Aruba's native culture and as a consequence will eventually change the Aruba tourism product. For example, Aruba promotes a multilingual island that has been a source of strength to the major tourist markets. Currently most workers are Latin and not all of them speak English, Dutch or any other language apart from Spanish. Native Arubans need to get re-involved with tourism and hospitality to try to maintain the traditional identity.

Aging tourists have more time and money to travel than ever before. The trend is to travel to different countries globally to learn different cultures and gain new experiences. Tourists want to experience more spirit/soul of a destination. This will mean less return visits for the Aruban tourism industry. The loss of return visitors is commencing now and more resources will need to be devoted to the development of new customers.

There is strong pressure to satisfy the demands of travelers who define themselves and their needs in countless different ways. These differences will place a greater demand on the type of product offered to the customer and will require a greater menu of services at destination. In the service industry, with today's consumers becoming more demanding and more diverse, the concepts of mass customization and catering to a segment-of-one become important. Consumers have become more self-focused, emphasizing their needs for pampering as well as spiritual enlightenment. This requires the service provider to become increasingly focused upon giving personal attention to each client.

Technological Forces

Without a doubt, the internet, social media and e-commerce has reshaped most aspects of business. It is through these technologies that the concept of real-time becomes a necessity in the mind of the consumer. Consumers have instantaneous access to information about organizations and their product offerings without having to use an intermediary. Customers have the tools to easily and effortlessly shop for tourism products and substitutes at their convenience and pay for them electronically. Hospitality enterprises need to focus on providing customers with real-time to product information, availability, and rates. The Internet also provides the hospitality industry with opportunities to rethink how they interface with their employees, suppliers, and affiliates. Participants noted how the increase use of technology for travel and internet booking changes their distribution channels. The access that the tourist has to the information from other travelers' opinion and experiences can work in either a positive or negative way of promotion. Internet "blogs" and travel rating sites have increasing impact on the travel decision making.

The panel of experts identified some advantages that people are getting through the internet such as destination education and increased vendor options. Additionally, work is more systematic and easier for employees with rapid reaction and more efficiency. There is greater consumer demand for instant gratification from services especially for a tourist island like Aruba. There is increased control of the interaction between the suppliers and wholesalers and recognition of the products that we are buying. "We have more control over our distributors, more accessibility to promote and sell our island."

Another technology impact at all levels is that employees will be expected to become greater content consultants. This implies a much higher level of knowledge about their hospitality enterprise and its products. It also requires an elevated level of awareness about the surrounding domain in order to achieve better matches for the guest to the experience desired. Like any consultant the employee's understanding of the business is expected to be substantial. In addition, they are also expected to be able to understand the guest's problems or needs at higher levels, or at least be capable of probing these needs effectively. Once this is accomplished employees will be expected to not only provide for customers' wants but also be able to conduct the search for the solutions needed and do so efficiently and effectively. This is truly the definition of the knowledge worker.

This is different than the creative experiences found at a place like Disneyland where in reality, the guest experiences are carefully scripted and coordinated. Increasingly, the guest will want to achieve a customized set of experiences timed to their needs and not those of the organization. This will perhaps be the greatest challenge for not only the employee of tomorrow but also the technology. The matching process, no matter what, will become more complicated.

Alternative energy development is an ongoing effort to provide sustainable, accessible energy resources through knowledge, skills, and construction. Technologically advanced societies have become increasingly vulnerable in their dependence on external energy sources for the production of many manufactured goods and the delivery of a myriad of services.

Ecological Environments Forces

Aruban tourism leaders will need to pay more attention to the actual and potential impact of ecological forces on both the local residents and the visiting traveler. Tourism represents a significant part of Aruba's economy. Island-wide, nearly one job in four is directly or indirectly dependent upon tourism. Increasing development activities and an overabundance of tourists are endangering the integrity of the destinations. Pristine natural settings, the uniqueness of the regional culture and the hospitality of the local population are in peril of losing those attributes that draw tourists. From a business standpoint, the greatest justification for being environmentally friendly and supporting sustainable development is economic, which relate to the very existence of tourism.

Global ecological changes are impacting Aruba in many ways, some positive and some negative. There has been an increase of jelly fish affecting the pristine beaches, which is an indication of warming sea. Global warming is occurring according to many scientists and the Arctic ice cap is melting according to the U.S. Environmental Protection Agency (2011). Ecological imbalance in weather may mean changes to Aruba's weather, which could translate into less travel to Aruba in the coming decades. Oil spills, like the 2010 one in the Gulf of Mexico, are damaging coastal areas and destroying marine life, coral reefs and other eco systems around the world. With an oil refinery on the island, this is of elevated concern. The key to success of the Aruban tourism industry in the future will be a sustainable rate of growth on the island.

The government is introducing some policies in order to maintain the quality of the environment, but more needs to be done. Much of the pollution is a result of Aruba's growth, from a sleepy Caribbean island in the 1960s to a major tourist destination of over 104,000 residents in 2011. As a result, services such as water treatment, sewage treatment and sanitation have struggled to keep up. Tourists complain about the litter all over the island and developers go unchecked and are accused of spoiling the environment, while illegal dumps appear on parts of the island and go unmonitored.

Current Competitive Methods

The seven current competitive methods that the think tank forum participants agreed that Aruba currently possess and executes well are listed in Table 2. The following sections discuss each competitive method in detail.

Aruba Brand

Many tourists that return year after year to Aruba do not in fact consider themselves tourist. They view Aruba as a home away from home, a second or shared home. This was the consensus for Aruba's number one tourism competitive method, the Aruba Brand. The Aruba brand competitive method is comprised of several product and service components: high quality sun, sea & sand, friendly people, infrastructure, spa salons, water sports, safety & security, timeshares & hotel, and restaurants & retail.

In spite of its small size compared to other major islands of the region, the Aruba brand has been a strong contender in the tourism industry. Several factors demonstrate this; first and foremost, tourism is the main contributor to the island's economy according to the Aruba Tourism Authority. It is the premier vacation spot in the Caribbean with 40% of loyal visitors returning year after year, which is the highest repeat visitor rate of any Caribbean island.

E-Marketing

Without a doubt, the internet and e-commerce has reshaped all aspects of business. It is through these technologies that the concept of real-time becomes a necessity in the mind of the consumer. Consumers have instantaneous access to information about organizations and their product offerings without having to use an intermediary. They have the tools to easily and effortlessly shop for products and substitutes at their convenience and pay for them electronically. Therefore, hospitality enterprises need to focus on providing customers with real-time to product information, availability, and rates. The Internet also provides the hospitality industry with opportunities to rethink how they interface with their employees, their suppliers, and their affiliates. To this end, in 2008 Aruba Hotel & Tourism Association (AHTA) launched a web based meta-search engine on Aruba.com, similar to Kayak.com and Sidestep.com. Further down the road, an expansion into a social networking site with video placement and a message board will supplement this competitive method.

Aruba Destination marketing

Aruba has an effective destination marketing cooperative which over the years has been a major contributor to the island's success. The two principal players in the marketing effort for Aruba are the Aruba Tourism Authority (ATA) and the Aruba Hotel & Tourism Association (AHTA).

The Aruba Tourism Authority is a government agency and its scope of responsibilities is the continuous successful development of Aruba's tourism industry. The main purpose of ATA is to function as a leader in all forms of marketing, and promotion, online and offline, tourist information and customer service, sponsorship and organization of special events and hosting of partners, media, agents and special guests. The AHTA is the recognized private sector voice and representative organization for the private sector hospitality and tourism industry. Its strength is derived from the combined energies of its 101 members representing hotels, vacation ownership resorts, casinos, restaurants, attractions, car rental companies, special events experts. AHTA is one of the most unique and progressive hotel and tourism entities.

Global Orientation

Tourism is a highly fragmented international industry and it is unavoidably dependent on the global business environment. Tourism encompasses issues of freedom of mobility, safety and security and trade; thus, it challenges the very notion that tourism can exist apart from the international arena. Considering the significant impact that globalization has on this tourism, Forum experts identified this to be one of the most important competitive methods discussed during the think tank. To this end Aruba has U.S. customs on the island (only one of two locations outside the U.S.), a tax exchange act and a friendship treaty with the U.S. Its exchange rate is pegged to the U.S. dollar.

Attractive & Friendly Investor Climate

According to CIA's The World Fact Book (2011) the main economic activities in Aruba are tourism, banking and transportation. New business development is one of the most vital and often controversial aspects of tourism development. Aruba seeks to provide an attractive and friendly investor environment, while at the same time weighing the associated economic and environmental impacts to the island's residents. Aruba has managed to maintain a stable government that is friendly to foreign investment, residents and tourists. This is demonstrated in the new Free Trade Zone, hotel renovation, the improvements in the linear park and several new attractions including a water park and Palm Beach shopping areas.

Guest Experience Management

The ATA interviewed tourists and asked what they liked most about Aruba. Aruba enjoys a very high rate of repeat visitors (40%) that keep coming back year after year (2007). They tell their friends Aruba is "their home away from home". To honor these loyal tourists' dedication to Aruba as their holiday destination, the ATA has implemented a Distinguished Guest award designated for those who have visited the island for 10 consecutive years. Testimonials such as these from loyal visitors are common place.

Cultural Diversity

The native Aruban people that traditionally worked in the tourist industry are aging and tourism industry workforce will be increasingly more diverse. The Global movement of people and foreign cultural influences will change the Aruba tourism product. Aruba markets a multilingual product that has been a source of strength to the major tourist markets. This includes language, customs, cuisine, festivals and events. Aging tourists have more time to travel and they will require such accommodations as easy accessibility to travel destinations, larger print promotional material and other acknowledgements of their particular concerns for safety and comfort. Niche markets will develop to accommodate the specific needs of emerging travel segments such as gay and lesbian tourists to the financial benefit of those businesses which accurately identify them. These markets are comprised of loyal customers and big spenders who respond particularly well to quality service.

Current Core Competencies

The Visioning the Future of Aruba think tank forum process proceeded from scanning of the business environment for opportunity and threats to the selection of competitive methods. The next step in the strategic process is to ensure that core competencies, resources and capabilities, are consistently allocated to those competitive methods that are determined to add the greatest value to the tourist customer and, by extension, to Aruba. The forum participants identified Aruba's current core competencies as: Institutional Infrastructure, Human Capital & Educational Productivity, Technology & Knowledge, Absorptive Capacity, Financial Capital and Imagination/will/commitment (Table 2).

Aruba's institutional infrastructure is well developed and in good repair. The institutions that provide water, electricity, fuel and food remain strong. The basic physical and organizational structures needed for the operation of Aruba's hospitality and tourist industry have long been in place. The services and facilities necessary for the tourism economy to function are maintained at the level of a developed country. Aruba has a strong educational system that is patterned after the Dutch system, and provides for education at all levels. The Government finances the national education system and the percentage of money earmarked for education is higher than the average for the Caribbean/Latin American region. Arubans benefit from a strong primary and secondary school education. Higher education goals can be pursued through the University of Aruba (UA) which offers bachelors and masters programs in law, finance and economics and hospitality and tourism management, as well as other schools.

Aruba's institutional infrastructure has become strained, but remains strong. The legal system is well intact, the government has formed private/public partnerships and the governing system is sound. The imagination, will, commitment and resilience of the Aruban people remains strong. While Aruba is facing many challenges to its resources, there is much resolve to meet the challenges.

Conclusion

Undoubtedly, Aruba faces many challenges in a rapidly changing and uncertain environment, both in the short and long term, like many other island-states that rely heavily on tourism. The goal of the Aruba Timeshare Association (ATSA) sponsored think tanks on Visioning the Future of Aruba was to generate awareness of Aruba's strength and weakness as well as the opportunities and threats and take proactive action based on their meaning and consequences. Hospitality and Tourism professionals in Aruba are encouraged to think through each of the key points presented to better understand an increasingly turbulent business environment. After generating awareness of future forces, industry leaders must make business decisions today based on what will happen tomorrow. Participants acknowledged the increasing challenges associated with maintaining a competitive advantage in the tourism industry and asserted that it will be necessary to engage in creative new competitive methods as an investment in the future of Aruba. Specifically, four future competitive methods the group agreed were in need of development: Ecologically Responsible Destination, Sustainable Development, Safety & Security, and Sustainable Growth & Competitiveness.

All the development on the island and the impact it is having on the environment is not going unnoticed. In a 2007 ranking of the world's islands by National Geographic Traveler magazine, Aruba scored 48 out of 100 versus 54 in 2004 (Tourtellot, 2007). Aruba is in the category 'in serious trouble'. The need to sustain the earth's resources is an overwhelming task. Tourism leaders will need to pay more attention to the actual and potential impact of ecological forces on both the local residents and the visiting traveler. Tourism represents a significant part of Aruba's economy. Island-wide, nearly one job in four is directly or indirectly dependent upon tourism. Increasing development activities and an over-abundance of tourists in traditional areas of tourism are endangering the integrity of the destinations. Pristine natural settings, the uniqueness of the regional culture and the hospitality of the local population are in peril of losing those attributes that drew tourists to those settings in the first place. The greatest justifications for being environmentally friendly and supporting sustainable development are economic and monetary that relate to the very existence of businesses. "Sustainable" and "green" are no longer just marketing buzz words, the ecology if not protected can be a public relations nightmare.

The forum consensus recognized that there is a link between environmental forces and the impact that those forces have on tourism businesses located in Aruba. The global economy will offer more opportunities, threats, new market segments, generate more challenges, and new competitors. Seeking new sources of revenue will be paramount to survive and prosper in an increasingly challenging environment. These emerging trends will require a strong lobbying network and innovative partnerships to sustain Aruba's growth rate.

Additionally, a multicultural fragmentation of the tourism market, older travelers and more leisure time will have a significant impact on the Aruban hospitality industry (Hahm, Lasten, Upchurch & Peterson, 2007). More differentiated services at destinations will be offered to satisfy an increasingly self-centered and diverse traveler. Technology will play a critical role in quicker response to the requests of clients and in the delivery of quality services. However, it will increase the pressure on tourism companies as they will be required to invest more in technology goods and services. Public and private partnerships involving tourism and non-tourism organizations ventures in projects such as tourism marketing, infrastructure and transportation will help maximize revenue. Higher tourism taxes will lead to travelers' discontent since; ultimately, travelers will carry the burden of increased economic costs. Creativity will be a core competence in such a competitive environment because it will be increasingly difficult to generate additional cash flow. Creative alliances with community organizations, business representatives and developers will become a popular strategy for survival and success.

Limitations

This was an exploratory study and is strictly a qualitative assessment of Aruba's hospitality and tourism industry and was not intended to present any analysis of the forum's results. One of the key objectives of the Delphi method is to obtain a reliable consensus from a group of specialists in their particular field. Using this method, a group of experts is asked to evaluate research problem initially identified in prior research and add to the components using their knowledge of the industry. The Delphi technique also has drawbacks. Sackman (1975) suggests that anonymity may lead to a lack of credibility and accountability since responses may not be traced back to the source. In addition, Delphi is time consuming and the best opinions may be diluted through a consensus approach (Powell, 2003). It goes without saying, that the growth of the tourist industry has yielded much research surrounding social impacts. Experts will undoubtedly design studies focusing on types of tourists, relationship upon native cultures, influence upon local lifestyles, and belief systems, changing family structure, safety and security as well as local crime for Aruba (Hahm et al., 2007). One of the most critical and often controversial aspects of tourism development that was not explored is economic impact. In Aruba's case various detailed studies are required to outline present and projected employment impacts, gross product index, return on investment to the national and local economies, required investments, ancillary revenue generation, influence upon import / export ratios and inflation rates. Lastly, a whole assortment of environmental impacts is yet to be addressed concerning management of resources, conservation of Aruba's heritage, ecological disruptions, pollution impacts, infrastructure strain, and erosion of soil and flora.

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The Impact of Tourism on Curaçao's Economy: A Scenario Approach.

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Abstract

As of 2010, Curaçao is an autonomous country within the Kingdom of the Netherlands. The government wants to support tourism development. However, various development strategies are possible. This article presents four scenarios of marketing and investment strategies that will affect the number of tourists from The Netherlands and North America (USA and Canada) in different ways. A multiplier model was used to calculate the economic impacts of the four scenarios. By doing so, this article shows how the government's decision to support particular marketing and investment strategies may have certain outcomes for the number of jobs in Curaçao's tourism industry.

Key Words:
Tourism Impacts, Tourism Employment, Curaçao Tourism, Scenario Approach, Model Results

Resumen

Desde el 2010, Curazao es un país autónomo del Reino de los Países Bajos. El gobierno desea apoyar el desarrollo turístico, sin embargo existen varias estrategias de desarrollo posibles. Este artículo presenta cuatro escenarios de estrategias de marketing e inversión que afectarán el número de turistas provenientes de los Países Bajos y América del Norte de diversas maneras. Se utilizó un modelo multiplicador para calcular el impacto económico de los cuatro escenarios. Por medio de dicho procedimiento, este artículo muestra cómo la decisión del gobierno de Curazao de apoyar estrategias de marketing e inversión en particular podría tener ciertas consecuencias para el número de empleos en la industria del turismo en Curazao.

Palabras clave:
Impactos turísticos, empleo turístico, Turismo de Curazao, aproximación a la realidad, modelo resultante.

Introduction

As of 10-10-2010, Curaçao is an autonomous country within the Kingdom of the Netherlands. The island is located in the southwestern Caribbean, just 70 km north of South America (Curaçao Tourist Board [CTB], 2011). Curaçao covers an area of 444 square kilometers and has 142,000 inhabitants and is therefore the biggest island in the former Dutch Antilles (Central Bureau of Statistics, 2009). Curaçao is a Caribbean island, with white beaches and a popular underwater diving world. It has a tropical climate and temperatures around 30°C, which makes it a popular holiday destination for tourists, particularly from The Netherlands and North America [1].

Curaçao's tourism sector is a significant contributor to the country's economy. Therefore, the government wants to support tourism development (Marcouiller & Xianli, 2008). This article describes several scenarios of tourism development, the consecutive changes in tourism numbers from the Netherlands and North America, and the resulting impacts on Curaçao's economy. Dutch and North American tourists differ in their holiday pattern; North American tourists mainly stay in hotels during their holiday, Dutch tourists mostly stay in an apartment, rent a car and visit local supermarkets and beaches. Each group therefore has its own impact on the island economy and changes in their number of visits to Curaçao will influence tourism employment in different sectors. The results of this study give insight into the economic impacts of several ways of tourism development. In the future, using the findings of this research, the government of Curaçao may modify its tourism strategy, targeting its product development and marketing activities to specific tourist groups.

The purpose of this paper is to suggest the best strategy for the government creating jobs that are based on the tourism industry. In order to achieve this, a Dutch impact model is used. This model is developed to allow a simple calculation of tourism expenditures and the number of jobs directly and indirectly related to these expenditures. In order to use the model, data concerning the numbers of tourists staying in different types of accommodation and their expenditure are needed. Tourism expenditure is defined as the total expenditure in visitors' consumption during their journey and stay at the destination (Valdés, Torres & Dominguez, 2007).

To determine the role of tourism in the economy, tourism has to be defined. There are multiple definitions of tourism. "Attempts to define tourism are made difficult because it is a highly complicated amalgam of various parts. These parts are diverse, including the following: human feelings, emotions and desires, natural and cultural attraction, suppliers of transport, accommodation and other services and government policy and regulatory frameworks" (Holden, 2008). United Nations World Tourism Organization (UNWTO) has defined tourism as 'the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes' (UNWTO, 1994).

The remainder of this article is organized as follows: Section 2 compares North American and Dutch tourists; Section 3 explains the model that is used; Section 4 presents the results of the model computations, and, lastly, Section 5 includes a conclusion and discussion.

North American versus Dutch Tourism

The yearly arrival numbers shown in Table 1 indicate that North American together with Dutch tourists make up 38 percent of the total arrivals in Curaçao (CTB, 2006). Because these markets are so important to Curaçao's tourism industry, changes in their touristic behavior will influence that part of the economy that is based on tourism. Therefore, this paper concentrates on these two tourist groups.
In this study, the holiday behavior of North American and Dutch tourists is compared. First, the expenditure of tourists from The Netherlands and from North America are discussed.

Table 2 shows the difference in expenditure of Dutch and North American tourists. The North American tourist spends more per day than a Dutch tourist. On the other hand, the length of their trips is shorter than those of Dutch tourists. The total amount of money spent on a trip to Curaçao is nearly the same for both groups.

Table 3 shows the differences in types of accommodation for North American and Dutch tourists. North American tourists prefer to stay in large hotels, while Dutch tourists prefer large hotels, bungalows or their

Table 1: Arrival nationality (percentages)

The Netherlands	23
North America (USA & Canada)	15
Other	62

Source: CTB, 2006.

1. With North America is meant: USA and Canada.

private holiday homes. These differences in accommodation lead to differences in expenditure patterns tourists show during their stay. The percentages shown in Table 3 are an estimate based on the history of arrival numbers (CTB, 2006).

In 2007, the world was hit by the economic crisis. This substantially influenced the flow of tourists to Curaçao in the years thereafter. Table 4 shows that after 2007, North American visitors diminished from 53,097 in 2007 to 50,924 in 2008 and 42,055 in 2009, which was a result of the financial crisis in North America that began in 2007.

However, the total number of arrivals was still growing in 2008 because the economic crisis started later in the rest of the world and did not strike Europe until the summer of 2008 (Rijksoverheid 2011). A possible explanation is that Latin America remained relatively stable during the crisis that affected the US financial system. "Despite rising fears and forecasts, predicting an economic slowdown in the region, most Latin American economies have shown resilience amid the US market convulsions. Latin America's banking systems may be strong enough to weather the storm because many have not invested significantly in the US market, and their domestic financial markets are not as developed as those of other Western countries" (Fagá, 2008).

Furthermore, Table 4 shows that after the economic crisis there was no decline in people arriving from The Netherlands; the numbers are still increasing. A possible explanation is that many Dutch people visiting Curaçao own private homes, which was the case of 33% of the Dutch visitors in 2006. The only travel expenses for private home owners consist of plane tickets.

The conclusion is that Dutch and North American tourists turn out to have different holiday behavior. This means that the choice of a marketing and investment strategy will have certain effects on the number of arrivals of each group. At the moment, the trend on the island is to build new luxurious resorts. Simultaneously, the numbers of old hotels and apartments have declined. With this shift in types of accommodation supply, there will be a change in the number of tourists from North America and The Netherlands.

Table 2: Expenditure of tourists from North America (USA & Canada) and The Netherlands

	Expenditure per day in US dollars	Length of stay in days	Total expenditure per trip in US dollars
North America (USA & Canada)	168.55	6.7	1129.29
The Netherlands	119.32	9.8	1169.34

Source: CTB, 2006.

Table 3: Visitor arrivals by accommodation types for the Netherlands and North America in 2006 (percentages)

	The Netherlands	North America (USA & Canada)
Large Hotels	35	68
Small Hotels	5	15
Bungalows	21	1
Apartments	3	1
Guesthouses	0	0
Private Homes	33	14
Other	3	1

Source: CTB, 2006.

Table 4: Visitor arrivals to Curaçao

	Total	The Netherlands	North America (USA & Canada)
2001	204,603	56,530	34,464
2002	217,963	55,256	40,903
2003	221,395	75,999	43,805
2004	223,427	73,826	47,218
2005	222,099	77,879	50,792
2006	234,383	85,246	54,850
2007	299,730	100,384	53,097
2008	408,942	113,696	50,924
2009	366,837	126,209	42,055
2010	365,000	127,000	42,000

Source: CTB, 2010; the data for 2010 are estimations.

The model

For this paper a model developed by ZKA Consultants and planners has been used: the ZKA impact model. ZKA Consultants and planners is a consultancy that focuses on the tourism and leisure industry in the Netherlands and surrounding countries (ZKA, 2009). The ZKA impact model calculates, based on expenditure and reliable key figures, the employment that is generated by the tourist expenditure. In a relatively simple way, the number of nights spent and the tourist expenditure can be put into the model. The model calculates the effects on turnover and employment. Figure 1 describes the steps that are necessary to calculate the output.

Figure 1: Schematic approach of the ZKA impact model

Input: Number of nights spent by tourists
(Arrivals * Average length of stay)

*

Expenditures per person per sector per day

=

Output: Total Expenditures per sector

/

Ratio of: Total Turnover per sector/ given Value Added per sector

=

Value added per sector

*

FTE per mi $ Added value per sector

=

Output: Direct Employment in FTE is allocated to the different sectors; with a multiplier the total indirect employment is calculated.

The model uses different ratios for the different sectors, because not all sectors generate the same percentage of Added Value. Sectors where the repurchase rate is low will generate more added value than a sector with a high repurchase rate. Another component that influences the ratio is the number of subsidies that a sector gets from the government and the amount of VAT that sectors have to pay.

The data in the model can be divided into different categories. For this research, data were divided into different accommodation types. The model calculates the differences in turnover and employment over the different accommodation types. With the outcome of the model, conclusions can be drawn about these different accommodation types.

After the direct employment generated by the tourist expenditure is calculated, the indirect employment can be determined. The ZKA impact model uses a multiplier of 1.37. This means that 1 Full Time Employee (FTE) directly generates 0.37 FTE indirectly. This number is calculated by taking into account the role of purchase, service providers and others (ZKA, 2009). In this research, no changes were made to this multiplier, as the data needed to calculate a multiplier for Curaçao specifically were lacking.

The ZKA impact model is a simple multiplier model which shows indicative effects on tourism employment for each scenario. As the model was developed for The Netherlands, the model does not correctly reflect the economic structure of Curaçao. This means that the actual number of jobs related to tourism expenditure will deviate from the numbers presented in this article. More importantly, the use of multiplier models for the economic evaluation of tourism policy is widely discussed. The main reason is that multiplier models have "the presumption that the increase in economic activity represents the net change in activity in the economy overall; there is generally nothing said about offsetting negative effects elsewhere in the economy" (Dwyer, Forsyth & Spurr, 2004). However, this study shows that each scenario will have different effects on tourism employment. These effects need to be studied in more detail, when strategies are defined by Curaçao's government.

Scenarios and results

The year 2010 is used as a baseline, with the number of arrivals having been estimated at 365,000. The most recent data on visitor expenditure concern the year 2006. Therefore, in this research the assumption is made that the expenditure profiles per accommodation type have not changed over the period 2006-2010.

Assuming there is no change in tourism strategy nor in the distribution of tourists over the different accommodation types, it is possible to compute the number of nights spent per accommodation type for 2010. Next, four scenarios have been designed for the future:

0) Scenario 0 is the baseline scenario, which assumes that the situation in 2015 will remain unchanged relative to 2010 (See Table 5).

1) Scenario 1 assumes that in the upcoming period 2010-2015, the government and the hotel industry will focus their marketing efforts towards North American tourists. As a result, North American arrivals would increase by 20% per year. Marketing efforts towards Dutch tourists would end, which would lead to 10% fewer Dutch tourists, with the exception of the Dutch owning private homes in Curaçao. Arrivals from other inbound markets will increase by a normal 5%, as no other changes will be made.

Table 5: Number of overnight stays in 2010 and 2015 according to Scenario 0

Accommodation type	Number of nights spent
Hotel/resort	1,421,743
Apartment	301,564
Friends/relatives	768,686
Own Property	15,615
Timeshare	43,097
Other	123,671
Not Stated	55,824
TOTAL	**2,730,200**

Source: CTB, 2006.

2) Scenario 2 assumes that in the upcoming period 2010-2015, the government and the hotel industry will focus their marketing efforts towards Dutch tourists. As a result, Dutch arrivals would increase by 20% per year. Marketing efforts towards North American tourists would end, which would lead to 10% fewer North American tourists. North Americans would now prefer the big resorts in neighboring island Aruba. Arrivals from other inbound markets will increase by a normal 5%, as no other changes will be made.

3) Scenario 3 assumes that the government and private entrepreneurs will decide to build new luxurious resorts. Due to the increasing stock of resorts, the number of nights spent in hotel/resorts will increase by 25% and all other accommodation types will decline equally by 25%, with the exception of private homes. It is expected that this change in accommodation supply would attract more North American tourists to Curaçao.

The total number of nights in 2010 and 2015 according to Scenario 0 are presented in Table 5. Table 6 presents the number of jobs that is generated when the number of nights spent from Table 5 are used as an input to the model.

Table 7 presents the expected visitor arrivals for Scenarios 0-3

Table 6: Number of jobs generated by the tourism industry in 2010 and 2015 according to Scenario 0 (FTE)

Acc. type	Acc.	Catering	Trade	Entrance fees	Transport	Direct	Indirect	Total
Hotel/resort	2,836	1,189	105	146	267	4,542	1,681	**6,223**
Apartment	243	66	57	33	48	448	166	**613**
Friends/relatives	186	279	374	8	94	941	348	**1,289**
Own Property	0	3	8	0	3	14	5	**20**
Timeshare	11	32	6	4	3	56	21	**77**
Other	41	26	24	17	2	110	41	**151**
Not Stated	118	25	5	2	15	165	61	**226**
TOTAL	**3,435**	**1,620**	**579**	**210**	**431**	**6,276**	2,322	**8,598**

Table 7: Visitor arrivals in 2015 (Scenarios 1-3 as percentage deviation from Scenario 0)

	Scenario 0	Scenario 1	Scenario 2	Scenario 3
North America (USA & Canada)	42,000	+20%	-10%	+16%
The Netherlands	127,000	-10%	+20%	-5%
Other	196,000	+5%	+5%	+4%
TOTAL	**365,000**	0%	**+10%**	+2%

Tables 8 and 9 present the results of the model estimations. Table 8 shows the percentage deviations from Scenario 0 for Scenarios 1-3. Table 9 presents the number of jobs generated under Scenarios 0-3. It appears that Scenario 3 creates most jobs.

Conclusion

Tourists from North America (USA & Canada) and The Netherlands differ in accommodation use and expenditure. Knowing that the total expenditure per visit is nearly the same for both tourist groups, and, in absolute numbers more Dutch tourists arrive, it could be stated that Dutch tourists are better for Curaçao because, in total, they spend more on the island. However, on average, North American tourists spend more per day. The employment that is generated by the tourist expenditure is shown in Table 9.

In Scenarios 1 and 2, tourism from other countries would increase by 5%. In Scenario 1 North American tourism would increase by 20% while Dutch tourism would decrease by 10%. This would lead to an increase in employment of 218 FTE (+2.5%). In Scenario 2, North ¬American tourism would decline by 10%, while Dutch tourism would increase by 20%. This would lead to an increase in employment of 566 FTE (+6.6%).

Table 9 shows the sectors in which the jobs are located. In this respect, there are no major differences between Scenarios 1 and 2.

Table 8: Number of overnight stays in 2015 (Scenarios 1-3 as percentage deviation from Scenario 0)

Acc. Type	Scenario 0	Scenario 1	Scenario 2	Scenario 3
Hotel/resort	1,421,743	+4%	+6%	+25%
Apartment	301,564	-6%	+16%	-25%
Friends/relatives	768,686	+5%	+5%	-25%
Own Property	15,615	-2%	+12%	+0%
Timeshare	43,097	+0%	+0%	-25%
Other	123,671	-1%	+11%	-25%
Not Stated	55,824	+0%	+0%	-25%
TOTAL	**2,730,200**	**+3%**	**+7%**	**+1%**

Table 9: Number of jobs (direct and indirect) generated by the touristic sector according to Scenarios 0-3 (percentage deviation from Scenario 0 in brackets)

Acc. Type	Scenario 0	Scenario 1	Scenario 2	Scenario 3
Hotel/resort	6,223	6,467	+6%	+25%
Apartment	613	575	+16%	-25%
Friends/relatives	1,289	1,348	+5%	-25%
Own Property	20	19	+12%	+0%
Timeshare	77	77	+0%	-25%
Other	151	149	+11%	-25%
Not Stated	226	226	+0%	-25%
TOTAL	**8,598**	**8,816 (+2.5%)**	**+7%**	**+1%**

Scenario 3 describes the changes that occur when people prefer to stay in large hotels and resorts. From baseline to Scenario 3, there are only 1.2% more arrivals. Yet, according to this scenario, the total amount of FTEs will grow by 11.2%. Table 9 presents the differences in sectors for the employment. When hotels and resorts cover a bigger part of the total arrivals, more jobs will be created in the Accommodation Sector and fewer jobs in the Trade Sector. Table 3 shows that 83% of all North American tourists prefer to stay in hotel or resort, where only 40% of the Dutch tourists prefer this. This means that investment in resorts would have to go hand in hand with a marketing campaign aimed at the North American market (USA & Canada).

From the scenarios used in this research, it appears that if the government and private sector do not want to invest in extra hotels and resorts, Scenario 2 (more Dutch tourists, fewer North American tourists) would be attractive. However, if the government, in cooperation with the private sector, decides to invest in hotels and resorts (Scenario 3), this could generate more extra jobs than the other two scenarios, provided sufficient numbers of North American tourists could be attracted. The consequence of this may be that, if more and more people prefer to stay in hotels and resorts, employment in the Trade Sector will decrease.

This article shows the employment impacts of several ways of tourism development. However, in order to genuinely assess scenarios for tourism development, research needs to be done into social and environmental impacts as well. By doing so, the government of Curacao can safeguard the sustainable development of tourism.

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Linkages at Tourism Destinations: Challenges in Zanzibar

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Abstract

This study explores challenges facing the linkages between the tourism industry and local suppliers at the destinations. During 2010 surveys involving hotel and restaurant operators, local suppliers and tourists were conducted in Zanzibar. Qualitative analysis of the perspectives of the respondents reveals the multitude of constraints. From operators, the main constraints include poor quality of the locally supplied products, business informalities, high transaction costs and violation of agreements by local suppliers. Low production levels, low prices offered by hotels and restaurants coupled with late payments for the products delivered were the most serious problems cited by local suppliers. There is also a certain degree of mistrust between the local suppliers and the operators. However, the source of the tourism products consumed in the hotels or restaurants was not a point of concern, at least from the tourists' perspective. Strategies to bridge the demand-supply gaps in order to maximize the benefits of tourism, among the tools for fighting the rampant poverty, have been recommended.

Key Words:
Local Linkages, Tourism Industry, Local Suppliers, Zanzibar

Resumen

Este estudio explora los retos vinculados entre la industria turística y los proveedores locales en las destinaciones. Durante el 2010 se realizaron estudios en Zanzíbar entre los tres grupos involucrados: hoteleros y restauradores, proveedores locales y turistas. El resultado del análisis cualitativo de las perspectivas de los encuestados revelan una multitud de coacciones y restricciones. Para los operadores la mayor restricción serían la baja calidad del producto local, la poca formalidad en los negocios, el alto nivel de costes y el incumplimiento de acuerdos por parte de los proveedores locales. El bajo nivel de producción, los bajos precios ofrecidos por los hoteleros y restauradores, en combinación con el pago tardío por los productos suministrados, representan los problemas más serios comentados por los proveedores locales. Existe también un cierto grado de desconfianza mutua entre proveedores locales y operadores. No obstante, desde el punto de vista del turista, el origen de estos productos consumidos en los hoteles y restaurantes, no resulta ser una gran preocupación. Se recomiendan estrategias que unan el desequilibrio entre oferta y demanda con el objetivo de maximizar los beneficios turísticos como método para combatir la intensa pobreza.

Palabras clave:
vínculos locales, industria turística, proveedores locales, Zanzíbar

Introduction

Tourism industry involves hosts of linkages within destinations. The potential benefits of this industry to the development of local economic sectors, through local linkages, have been widely acknowledged (e.g. Telfer, 2000; Goodwin & Bah, 2003; Mitchell & Page, 2005; Ashley, Goodwin, McNab, Scott & Chaves, 2006; Meyer, 2006; Mitchell, 2006; McBain, 2007). The expansion of local linkages connotes the increase of usage of other sectors at the destination which stimulates the economy as a whole and creates synergy effects between different sectors of the economy. The concept of local linkages has been defined generally as the mechanisms through which, businesses build economic links with residents in their local economy (Pattullo, 1996). Focusing on a sector specific, Ashley, Goodwin & Roe (2002) refers to the linkage between tourism and the local agricultural sector as a situation in which each of the two sectors benefits from each other's activities. In many destinations, though, local linkages have failed due to a numerous challenges that confront the tourism industry.

The most recognized challenges facing the tourism industry, particularly in developing economies include poor infrastructure, poor product development and management, poor marketing, poor linkages within local economy, poor institutional and technical capabilities, and shortage of appropriate and specialized core and skilled personnel (Mitchell, 2006). In most cases, islands are characterized by smallness and external dependence; and therefore, most of the requirements are imported to meet the needs of the residents and tourists. This is also supported by Lundgren (1973) who found that hotel-generated importations in many Caribbean resorts were due to the lack of ability of the local economy to meet the hotel demands and many other challenges experienced in the tourism destinations.

Sometimes, though, tourism providers prefer to source their input wherever they can to take advantage of already-known suppliers, take advantage of bulk purchasing discounts, reliability of supply, the quantity and quality of supplies or to cater for tourists' tastes (Belisle, 1983; Goodwin & Bah, 2003; Meyer, 2006). These are reasons given by Oppermann (1993) who found that formal sector in the Caribbean tourism operations entails high leakages in the form of large imports of food and other items to meet the tourists' preferences; or Torres and Skillicorn (2004) and Momsen (1998) who show that, massive importation of meat by the Caribbean resorts were due to the demand of tourists who prefer the grain-fed flavour of the US beef; and Abdool & Carey (2004) who found that lack of varieties and small range of products were among the main reasons indicated by hotels in Tobago for not sourcing food from local suppliers. Generally speaking, of critical importance in the development of tourism is the need to focus on pro-poor tourism strategies in order to address the rampant poverty facing these countries. There is need for a systems and innovative analyses to identify opportunities for inclusive and sustainable tourism development. Analysis of the value chains to identify linkages with the rest of the local economy is of paramount importance at this stage.

Like most islands found in the Caribbean destinations, the Zanzibar archipelago which is a semi-autonomous state within Tanzania, located in the Indian Ocean, is highly characterized by smallness in land size coupled with external-dependent economy. This Archipelago relies heavily on agriculture; with the majority of its citizens making their living from subsistence farming and fishing. However, following the decline of clove production and the fall of its price in the international markets in the early 1990s, Zanzibar has adopted tourism as a priority sector for its economic growth. Hence, tourism accounts for over 51% of its GDP (Steck et al., 2010). The annual tourist arrival has increased from 86,918 in 1999 to 134,919 in 2009 (Table 1). Europe is by far the most important market and accounts for around 75% of tourist arrivals. Italy alone accounts for over one third of all direct arrivals in Zanzibar. This is largely due to increased direct flights from Italy to Zanzibar together with the creation of all-inclusive resorts hotels. The UK market makes 10% of international arrivals. South Africa, USA and Scandinavia are also becoming important markets for Zanzibar tourism.

Unfortunately, the gain due to increased tourist arrivals may be offset by losses both in terms of revenue leakage and failure to involve the local people in meaningful activities that would help in the improvement of their welfare. Poverty rates in Zanzibar are more than 50% according to Revolutionary Government of Zanzibar (RGoZ), (2007). In recognition of this challenge, Zanzibar has launched several measures intended to tackle it including the adoption of the Zanzibar Strategy for Growth and Reduction of Poverty commonly known as MKUZA which advocates for inter-sectoral linkages (Revolutionary Government of Zanzibar, 2010). In addition, most of the government policies related to tourism development, for example The Zanzibar Tourism Master Plan 2003 (United Republic of Tanzania (URT), 2003); Zanzibar Tourism Policy Statement 2003 (RGoZ, 2003a), the Strategy for Half a Million Tourists in Zanzibar of 2005-2014 (RGoZ, 2005) and Zanzibar Strategy for Growth and Reduction of Poverty commonly known as MKUZA (RGoZ, 2010), have been formulated based on the assumption that the economic benefits of tourism would stimulate the development of other economic sectors through increased demand for local agricultural commodities. However, despite these positive intentions by the government and other key stakeholders, the linkage between tourism industry and the local suppliers is not encouraging.

On one hand, tourism supply is growing extensively in the archipelago, evidenced by the development of about 349 registered hotels with 7,009 rooms and 13,198 beds as Table 2 summarizes (Zanzibar Commission for Tourism, 2010). But on the other, there has particularly been a concern that many hotels and restaurants import a substantial amount of their food requirements (Zanzibar Association for Tourism Investors-ZATI, 2009; Zanzibar Business Council, 2009; Anderson, 2011a; Steck, Wood & Bishop, 2010). In order to realise the positive impact of the tourism sector on poverty reduction, it is necessary to create a strong linkage with other economic sectors, particularly the agricultural sector. The linkage between tourism and local suppliers of agricultural commodities is constrained by many barriers ranging from demand and supply related to legal and constitutional factors (see for example Belisle, 1983; Torres, 2003; Meyer, 2006).

This study, therefore, proposes a case for the need for more local linkages by revealing the challenges on the linkages between the tourism industry and local suppliers in Zanzibar. To achieve this objective, the paper is organised as follows: the literature review part comes before the methodology, then followed by the findings and finally the conclusion is given.

Literature review

In order for the tourism sector to play a bigger role in poverty reduction in a destination country, it ought to be developed in a manner that enables its effective integration into the local economy. It thus serves as a development medium for other local activities particularly the agricultural sector. However, in many developing destinations, developing tourism in this manner has not been easy. Studies (including Driscoll, 2005; Torres, 2002; Telfer, 2000; Torres & Skillicorn, 2004) have listed a number of challenges that should nevertheless be over-

Table 1: Total arrivals by Country/Region: 1985-2010

Year	Italy	UK	Rest Europe	Total Europe	Rest Africa	North America	Rest of the World	**Total**
1985	4,392	1,952	10,027	16,371	339	2,230	428	**19,368**
1990	4,345	5,584	17,398	27,327	2,836	5,173	6,805	**42,141**
1995	8,922	10,391	18,882	38,195	6,680	5,173	6,367	**56,415**
2000	25,764	16,307	29,368	71,439	8,718	8,048	8,960	**97,165**
2005	49,978	12,963	32,241	95,182	14,098	7,225	8,938	**125,443**
2010	42,452	13,414	39,121	94,987	18,265	12,101	11,573	**136,926**

Source: Computed from the tourism database of the Zanzibar Commission for Tourism (2011

Table 2: Distribution of Accommodation Capacity in Zanzibar in 2009

Place	Registered Establishments	Rooms	Beds
Unguja			
North & East Coast	91	3,167	6,219
South & East Coast	106	1,732	3,159
Stone Town & Ng'ambo	85	1,134	2,057
Suburb Town Vicinity	48	764	1,351
Pemba	19	212	412
TOTAL	**349**	**7,009**	**13,198**

Source: Computed from the tourism database of Zanzibar Commission for Tourism (2010).

come in order to enable the linking of tourism with local suppliers of agricultural commodities. These have been grouped into demand, supply, and institutional and legal related challenges.

Demand-related Challenges

Usually tourist hotels and restaurants require high quality products to meet the requirements of their highly selective customers. If the tourist hotel does not have confidence in the environment where food is produced, it will be more likely to import its food products (Driscoll, 2005). Demand for local foodstuffs in tourist hotels and restaurants can be influenced by a number of factors including hotel characteristics, the maturity of the tourism industry, types of tourists, types of tourism, promotion of local foods, the concerns over food safety and health, training and nationality of chefs, seasonality of tourism, informal nature of smallholder suppliers as well as unhygienic and unhealthy post slaughter handling.

Size of hotel, class and nationality of the owner can influence the decision of a tourist hotel to source agricultural products from either local or foreign suppliers. Larger size and high class hotels owned and/or managed by foreigners are less likely to source their food items locally; compared to the smaller and lower class hotels owned by locals (Belisle, 1983). Probably it is due to the fact that high class hotels receive high class customers, who require high quality food items that sometimes cannot be sourced locally (Meyer, 2010).

It has also been argued that foreign hoteliers might have established business relations with suppliers in their home countries and therefore want to maintain the relationship. To confirm this, Meyer (2010) found that most South African owned hotels in Zanzibar prefer to source their processed foods and beverages from South Africa. Likewise Kenyan and Italian owned hotels import their requirements from Kenya and Italy respectively. To expand the issue further, some of the big hotels in the developing countries are just extensions of groups of hotels abroad (Telfer and Wall, 2000). In such cases hoteliers buy for several hotel branches from foreign suppliers thereby enjoying cost saving from bulk purchase. Other studies have not found any differences in demand for foods between hotels with different sizes, nationality of owner/manager and hotel classes (see Torres, 2003). Instead, Torres (2003) associates the disparity in food demand between hotels of different characteristics with the way in which tourism has been planned in the destination country.

Moreover, the maturity stage of the tourism industry is also said to have an influence on the demand for local foods. However, contrary to what is stipulated in Lundgren (1973:15)'s models which state that, "as hotels become more established, over time they tend to increase use of local product". Torres (2003) argues that the more a tourism industry matures with a high number of tourism arrivals, the more likely to use imported foods. Torres's viewpoint is more applicable in small islands that lack adequate land resources and capacity to feed both locals and visitors (Anderson, 2008). Likewise, different types of tourism offer dissimilar possibilities on linking tourism with other local sectors. McBain (2007) noted that high income tourism operated by five stars hotels and villas which provide high quality and expensive foods is less likely to source foods locally.

Similarly, mass tourism requires bulk supplies of foods which are more likely to be sourced through imports. On the contrary, in ecotourism, culture and community tourism, the tourists are more likely to use locally produced food stuffs as part of their experience in the destination country (Mc Bain, 2007). Anderson, Juaneda & Sastre (2009) and Anderson (2010)'s findings for instance, show that enclave tourism has the least contribution to local economy as compared to the rest of travel modes as most establishments offering the former kind of tours tend to import more. However, some tourists are conservative with the types of foods that they are familiar with rather than experimenting different types of foods (Pattullo, 1996; Momsen, 1998). This is due to the fear to try new foods and sometimes concerns over food related illnesses. However, Torres (2002) contended that tourist food consumption and preference do not necessarily represent a significant obstacle to promoting linkages between the local agricultural sector and the tourism industry.

In order to create linkages between tourism and local suppliers of local agricultural products, foods must be produced in a safe, sanitary and healthy environment that ensures high quality food product. Most tourists, particularly those visiting the developing countries, are cautious of the gastro-intestinal illness (Torres & Skillicorn, 2004). This concern could lead some hotel chefs to avoid purchasing locally produced foods because they perceive such foods (including beef and chicken meats) to be unsanitary and inferior (Driscoll, 2005). This perception adds to the barriers that constrain the creation of linkages between the tourism industry's demand for foods and local agricultural production.

The nationality of hotel owners and managers is said to be another factor that influences a hotel's acceptance of local products as suggested by Ashley (2006), Momsen (1998) and Pattullo (1996). The authors found that a hotel managed by a local with the kitchen run by a local chef is more likely to demand locally produced food items than the hotel with expatriate or internationally trained chefs. According to Pattullo (1996) expatriate chefs prefer foods that they are familiar with. They may also find imported goods more convenient (Ashley, 2006).

In many developing countries, most local food suppliers are small scale and informal by nature. They pay no tax and therefore cannot provide formal receipts required by formal hotels (Telfer, 2000; Meyer, 2006). This factor makes individual small scale producers unsuitable as suppliers of food items to the hotels. In addition, local suppliers may lack the distribution infrastructures. For example, meat distribution requires refrigerated trucks or well packed boxes, which usually are beyond the financial muscles of most small scale and informal suppliers. Telfer and Wall (1996) suggest that joint ventures between local suppliers and hoteliers to buy expensive post slaughter infrastructures could provide a possible solution.

Supply-related Challenges

Normally, hoteliers select food suppliers basing on the types of production systems, accessibility of local supplies and the ability of a particular supplier to meet the specific needs of the hotels in terms of quality, quantity, consistence, price of local products, level of technological innovation and the likes (Telfer, 2000; Torres, 2003; Meyer, 2006; Ashley, 2006). Some of the known factors that hinder the supply of local agricultural products to tourist hotels include scale of production, accessibility of local supplies, quality, lack of information, lack of technical know-how, price of local produce, the terms of payment, marketing related constraints and mistrust. However, smallholder local suppliers may only manage to supply a small quantity of produces and the volume that could be purchased is therefore limited. They are often unable to achieve economies of scale in production and marketing related activities.

It is generally known that different agricultural commodities require different agro-climatic requirements; thus some crops or certain breeds of animals cannot be produced successfully in some destinations. Therefore, hotels in these areas need to rely on imported foods. The problem is more pronounced in small island countries. For instance, few varieties and small range of products was found to be among the main reasons indicated by Tobago hotels for not sourcing food from local suppliers (Abdool & Carey, 2004). The aspect of quality is probably the most pronounced factor constraining the supply of local beef and chicken meats to tourist hotels and restaurants. Torres (2003) reported that Caribbean countries imported a lot of beef meat; most of it were beef prime cuts imported from USA because it was preferred by American tourists due to its grain-fed flavour. In order to produce high quality meats there should be appropriate infrastructures for slaughtering, transportation and storage of these products.

Furthermore, just like other agricultural products, local suppliers of meats may not link with tourist hotels and restaurants because of the lack of awareness of the existence of such trade opportunities. The informed supplier is better able to bargain on a level playing field with customers instead of being cheated by the middlemen on matters pertaining to price and quality of their produces (Bahigwa, 2006; Mukhebi, 2004). However, Abdool and Carey (2004) noted that both, namely, the hotel industry and local suppliers, need information on the quantity, quality, variety and usage of goods in demand in order to plan production, harvesting and distribution schedules to bring about harmonization of the supply and demand parameters and make it responsive to the dynamics of the tourism industry on a year-round basis. In some cases, the potential suppliers may also lack the necessary technical know-how particularly that related to post slaughter handlings. Many developing countries have limited capacities to process agricultural products (including beef and chicken meats) to make them available for tourist consumption (Meyer, 2006). There can also be a lack of technical know-how in production methods and marketing skills (Abdool & Carey, 2004).

The selling price of a given product is among the important factors in making the buying decision. For instance, in Tobago, price was found to be the most critical factor, with hoteliers showing that they would always prefer to deal directly with local suppliers in Tobago and would support initiatives if the price of local supplies is reduced (Abdool & Carey, 2004). Small scale producers though do not enjoy the economies of scale in both production and marketing and they are generally incurring high production and marketing costs (Meyer, 2006). Therefore, their selling price could definitely also be high. As a response, it is possible for local products to be devaluated by cheap imports (Ashley, 2006).

Furthermore, the long period taken to effect payment could make small farmers (who lack adequate capital) inappropriate as suppliers (Ashley, 2006). A small scale producer fits well with business arrangements that allow the supplier to be paid within a few days; so that one can have the capital to supply goods as agreed. However, the provision of working capital in terms of credit would enable smallholder producers to match with the hotel payment arrangement. There can also be no operating market that would bring local producers in touch with hotel and restaurant operators to exchange information, negotiate contracts and execute business transactions.

Solving the information-related problems may be difficult as very often, small scale suppliers in developing countries compete with each other instead of pooling together their marketing efforts as a cooperative or alliance (Meyer, 2006). If they could cooperate, it would increase their access to the market in the tourism businesses that require quality products, large volumes as well as consistent supplies. Related to that is that small scale producers are believed to have inadequate marketing skills and techniques such as niche marketing and strategic planning. They are also short of important marketing information (Meyer, 2006). Consequently, they often market their produce through middlemen who are normally more skilled and better informed than themselves (Bahigwa, 2006). Last but not least, the existence of mistrust between the hoteliers and local suppliers has been reported (see for example Meyer, 2006; Torres, 2003). The mistrust and the lack of communication between hoteliers and small scale producers are often associated with socio-economic and cultural differences between the two parties.

Legal and Institutional-related Challenges

Legal- and institutional-related challenges are an additional important concern for the tourism industry. This, significantly, leads to the inability of small local suppliers to meet the needs of large hotels and resorts. Theoretically, hotels could secure to a certain extent a regular supply of food items locally by establishing contracts with farmers and giving them incentives such as production inputs on credit. The experience of Indonesia has shown that when the contract is done successfully both parties benefit (Telfer & Wall, 1996). In this special case the executive chef of the hotels carefully investigated the potential use of local products and established agreements with local suppliers. Thereafter, step by step, through regular communication, quality standards were set and adopted by the local suppliers.

Adherence to the agreed terms and conditions in the contracts is another area of concern. In this, smallholder suppliers are usually vulnerable to liability of defaulting on contracts with hotels. It is logical that if the hotel's quoted price is lower than the prevailing market price; local suppliers cannot respect the contract. Again, if a local producer is unable to supply a hotel the agreed quantity and at the right time, the producer can be held legally liable for the damage caused. However, once a hotel sues the local supplier on this ground, it will be difficult to establish contracts with other local suppliers in the future. This type of scenario is often motivating the hotels to buy imported food items. But also, the informal nature of local producers makes it very difficult to establish formal contracts with tourist hotels. In this case, Meyer (2006) suggested that signing contracts with a well organized group of suppliers may help to ensure continuity and respect of the agreements rather than reliance on the commitment of one supplier.

In a country where small scale farmers have been linked to hotels and restaurants, normally there used to be a strong institutional support that looked at the whole range of tourism-agriculture linkage holistically; rather than addressing individual constraints (Kindness & Gordon, 2001). In St. Lucia for instance, the government created what is known as "the St. Lucia Heritage Tourism Program" which is responsible for evaluating food products purchased by the island's tourism industry so that local producers can increase their share of the market (Driscoll, 2005). It also facilitates local producers to make their production and marketing decisions (Kindness and Gordon, 2001). The facilitating role of the institution involves the development of policies, regulations and strategies that can ensure agricultural commodities, such as beef and chicken meats, produced for tourist hotels and restaurants consumption comply with food safety regulations (Driscoll, 2005).

The institutional factors which constrain the marketing of local agricultural products to tourist hotels as identified by Ashley (2006) include lack of institutional focus, weak market links and failure to promote local foods. More specifically, the lack of focus on how to diversify the tourism experience away from 'beach and adventure excursions' to culinary, or farm-based tourism may also constrain the supply of local agricultural to tourist hotels. To a large extent this is caused by the misalignment of agricultural development interventions with the tourism development process (Torres, 2003).

If local products are not supplied through a wholesaler or producers' association, procurement from a number of smaller suppliers may be a hassle for the hotelier or restaurant operator. Formation of cooperatives/alliances of food producers and/or distributors with their own quality standards and quality control mechanism may guarantee that the commodities supplied are of the acceptable quality. This would increase the capacity of local producers as suppliers to tourist hotels and restaurants. The public sector has a big role to play in the promotion of local foods for tourist consumption through conducting regular meetings with hoteliers (Meyer, 2006). It is suggested that the outcome of these meetings would help to guide both suppliers and hoteliers on the matters pertaining to demand, quality standards and price for various agricultural commodities. Public institutions would also help in providing training and information on the various aspects of food quality.

To that end, Table 3 summarises the challenges on local linkages based on the literature review.

Methodology

As it has been mentioned before, various studies indicate that linkage between tourism and local suppliers face challenges related to demand and supply as well as institutional practices (Driscoll, 2005; Torres, 2002; Telfer, 2000; Torres & Skillicorn, 2004). Borrowing from this knowledge, and taking Zanzibar as a case study, we focus on the linkages between the tourism industry and

Table 3 Challenges on Linkages at Tourism Destinations

S/N	Demand-Related Challenges	Supply-Related Challenges	Institutional & Legal-Related Challenges
1.	High quality products to meet the requirements of highly selective customers	Inadequate marketing skills and techniques	Adherence to the agreed terms and conditions in the contracts
2.	Inadequate promotion of local foods leading to unawareness of their existence	Conflicting terms of payments between buyers & sellers	Inability to supply the agreed quantity and at the right time
3.	The consumer concerns over food safety and health	High asked prices of local products	Inability of small local suppliers to meet the industry needs-quality standards
4.	Lack of training to national employees leads to foreign recruitment; which eventually results to foreign product preferences	Mistrust and the lack of communication between buying and selling parties	Institutional development of policies, regulations and strategies that can ensure conformity to healthy and safety regulations
5.	Types of tourists and tourism determines types of product requirements	Inadequate information on the quantity, quality, variety and usage of goods in demand	Lack of institutional focus, weak market links and failure to promote local products
6.	The maturity of the tourism industry	Low level of technological innovation and scale of production	Formation of cooperatives or alliances which guarantee the acceptable quality of the commodities supplied
7.	Seasonality of tourism	The inability of a particular supplier to meet the specific needs of the hotels in terms of quality, quantity, consistence, price of local products	Provision of training and information on the various aspects of product quality by public institutions
8.	Informal nature of smallholder suppliers at the destination	Inaccessibility of local supplies	
9.	Unhygienic and unhealthy post slaughter handling of local butcheries	Crude and poor production systems	

Source: Constructed in this study based on empirical studies livestock sector (particularly, the local beef and chicken meats). The decision to focus on beef and chicken meats in this study is based on the evidence reported by the Zanzibar Association of Tourism Investor (2009) that beef and chicken represents the worst cases in term of proportion of the commodity used by hotels in Zanzibar.

In this, it was indicated that only 10% of beef and chicken meat consumed in local tourist hotels and restaurants were sourced from local suppliers, while the rest (i.e. 90% is sourced from outside Zanzibar). Besides, there has been no study conducted to identify factors constraining the linkages between tourism and local suppliers of specific agriculture commodity in Zanzibar. The previous studies on value chain analysis such as Steck et al. (2010) and Anderson (2011b), focused on the entire value chain in Zanzibar tourism, instead of commodity approach that would focus on the constraints on linking tourism with particular agricultural commodity. Using a sectoral approach entails ignoring the diversity of the sector and the varying nature of commodities within the sector that cannot be treated equally. That is, different commodities require different techniques for handling; hence the linkage constraints for one commodity might also be different from others. Thus using a commodity approach to study factors constraining the linkage between tourism and local suppliers is important both practically and theoretically.

This study is in-line with the Zanzibar Livestock Policy draft (Revolutionary Government of Zanzibar, 2009), which acknowledges the fact that currently the livestock sector lacks appropriate marketing avenues, quality standards, assurance and control system and thus it advocates for investment in value addition for livestock products and promotion of formation of strong livestock producers, traders and processors' associations. The main attention in the recent has been directed towards linking the livestock sector with the booming tourism industry in order to benefit individual Zanzibaris as well as the Zanzibar economy in general. This assumption has also been verbally supported by the Zanzibar Association of Tourism Investors (ZATI) chairperson who expressed the interest and willingness of ZATI members to use locally produced foodstuffs. In particular, when giving his welcoming note in the ZATI progress report 2009-2010, the ZATI Chairperson plausibly said:

> *"We certainly need better food security – not just to be able to be less reliant on imports to feed ourselves, but to satisfy the requirements of a growing hotel industry. In addition, a common unit of mutual benefit will be of assistance to help villagers to participate in small scale farming, building a strong network with investors around their respective areas by being able to sell their products and setting up advisory council which can guide them toward the demands of the tourism industry". (ZATI, 2009:4)*

The livestock sector is an important economic activity in rural Zanzibar. The sector includes keeping of dairy and beef cattle, goats and poultry among others. It is estimated that about 37.8 % of agricultural households are engaged in livestock production activities. In most cases livestock are kept to provide a safety-net during times of financial hardship. The Isles has a significant potential for market-led commercialization of the livestock sub-sector, driven by domestic urban demand and the increasing tourist investments. In 2009 the livestock sub-sector contributed to about 4.5 per cent of Zanzibar's GDP; which is about 14.6 % of the total agricultural share in Zanzibar GDP (Revolutionary Government of Zanzibar, 2009).

Despite its importance, the sector's potential is underutilized, and the archipelago has large deficit in livestock products which is addressed by import. Available data show that about 91 percent of livestock products consumed in tourism sector are imported; with 70 per cent of beef meat consumed in Zanzibar coming from Tanzania mainland. The remaining requirements in chicken and beef meats are mainly imported from South Africa, Kenya and Brazil (Department of Livestock Development, 2010; ZBC, 2009).

Locally, there are three supply lines of beef and chicken meats: from within Zanzibar (see Table 4), from Tanzania Mainland and outside Tanzania. The low adoption of

Table 4 Estimated beef and chicken meats production - in Zanzibar in tons (2004-2010)

Products	2004	2005	2006	2007	2008	2009	2010
Beef meat	1,256	1,772	1,584	1,766	1,650	1,266	1,392
Chicken meat (layer & broiler meat)	255.6	297.8	308	292	333	353	302.8
Local (indigenous) Chicken	1,071	1,103	1,136	1,170	1,245	1,282	1,274

Source: Department of Livestock Development (2011). Supply Utilisation Assessment 2000-2010: 38

improved production technologies, unorganized market outlets and lack of value addition have been mentioned in the RGoZ(2009) as among the main constraints facing livestock development in Zanzibar. Besides, the current tourism activities in Zanzibar are guided by the Promotion of Tourism Act (1996), the Zanzibar Tourism Master Plan (URT, 2003), Zanzibar Tourism Policy Statement (RGoZ2003b), and the Strategy for Half a Million Tourists in Zanzibar 2005-2014 (Revolutionary Government of Zanzibar, 2005). All these documents declare explicitly the desire, and the need, to effectively link tourism with agriculture and other economic sectors.

In-line with the efforts invested on creating local linkages between tourism and local livestock sector, this study intends to respond on the following questions: What are major constraints associated with sourcing beef and chicken meats locally? What are opinions of the tourists towards the local beef and chicken products? What are the main supply related problems encountered by local suppliers to tourist hotels and restaurants as well and difficulties feared by those who are hesitant to supply to tourist hotels and restaurants?

To respond on the research questions, interviews which involved 78 hoteliers and restaurants, 105 tourists and 94 local suppliers of beef and chicken meats were conducted between January and June 2010. The target respondents in the hotels and restaurants were procurement officers, managers or any member of buying centre in the respective hotels. The study covers three out of four existing tourism zones in Zanzibar; the zones under study are in Unguja Island, namely Stone Town and Suburbs, North-East Coast, and South-East Coast. See Map 1, which show the tourism concentration zones in Zanzibar. Moreover, the list of beef butcheries and suppliers of chicken meat was obtained from the meat inspection unit of the Ministry of Livestock and Fisheries Development-Zanzibar. The majority of local suppliers were interviewed at Darajani and Mwanakwerekwe central markets, while few of them at their localities. About two thirds of respondent tourists were sampled at the Kizimbani Spice Farm, a famous area for Spice Tours in Zanzibar, and the remaining one third were interviewed in Stone Town area. The next section presents the findings.

Findings

This section analyses the challenges as perceived by the tourism actors including hotels and restaurants, local suppliers of beef and chicken meats in Zanzibar and the tourists visiting Zanzibar who are the target client in the tourism industry.

Challenges as perceived by hoteliers and restaurant operators

On average, in Zanzibar, the number of tourists accommodated in a single tourism establishment is about 5000 tourists annually with the average length of stay per tourist being between 7 and 13 days. When hoteliers and restaurant operators were asked to indicate the number of years they have been in operation, the majority (i.e. 60%) reported to be in operation for between 5 and 15 years; which suggests that many hoteliers have experience in the local environment. The relevance of this information is in-line with the Lundgren (1973)'s models on the maturity of the establishment vis-à-vis local procurement; while the Torres (2003)'s viewpoint is more applicable in Zanzibar that lacks adequate land resource and capacity to feed both locals and tourists leads to more importation.

The nationality of hotel owner and manager is said to be another factor that influences the hotel's acceptance of local products as suggested in Torres (2003), Momsen (1998) and Pattullo (1996). It was found out that a hotel managed by a local and operated by local chef is more likely to demand locally produced food items than the hotel with expatriate or internationally trained chefs. Pattullo (1996) also found that expatriate chefs prefer foods that they are familiar with in their preparation. The findings show that 44 % of hotels were owned by Zanzibaris, 6 % by people from Tanzania mainland; and 50% by foreigners. Similarly, 41% of the interviewed hotels were managed by Zanzibaris, 15% by Tanzania mainlanders, while 43 % were found to be managed by foreigners.

With regard to the use of beef and chicken meats from local suppliers, about 60 % of the interviewed hotels indicated that they use beef and chicken meats from local suppliers. The findings reveal further that the average daily requirements per hotel during high seasons are 15 kilograms of beef, 28 kilograms of sea foods and 18 kilograms of chicken. However, the local sourcing for beef meat is about 7% of the requirements.

Given the limited amount of local sourcing, the enquiries onto what makes the hotels not source most of their beef meats locally were posed. The results which are summarized in Figure 1 indicate that the majority of the hotels listed the poor quality of local products, high transaction costs, high level of mistrust between hoteliers and local suppliers; local suppliers violate agreements and do not offer formal receipts in addition to inconsistent supplies; and the shorter payment period demanded by local suppliers were the main constraints. The burning issue was the shortage of supply in the local market. It was common to get this response from every respondent hotel or restaurant. For example, from the hotel responses, the following common responses were recorded:

> *"I have experienced a problem of getting what the hotel needs from the local suppliers... if you can show me where to get enough meat to satisfy our kitchen needs, we will buy everything from Zanzibar".*

Moreover, the selling price of the product was among the important factors in making buying decision, whether buying locally or outside the destinations. This was not unusual. In a research project conducted by Abdool and Carey (2004) in Tobago, price was found to be the most critical factor and, all interviewed hoteliers in Tobago reported that, they would always prefer to deal directly with local suppliers and would support initiatives if the price of local supplies is reduced (Abdool and Carey, 2004). Small scale producers do not enjoy the economies of scale in both production and marketing and they are generally incurring high production and marketing costs (Meyer, 2006; 2010). Therefore, their selling price could be also high. On the other hand, it is also possible for local beef and chicken meat to be devaluated by cheap imports. This was also a major concern in Zanzibar where hoteliers complained about the prices charged by local suppliers. For example, one of the respondents pointed out that:

> *"Locally sourced meats are more expensive than bulk purchased equivalents imported from other place outside Zanzibar".*

> "*The local butcher men never know how to cut the pieces of meat… sometimes they bring bones without meat… how can we buy bones without meat?"… "I think they want to get more money by selling more bones"*

Many developing countries have limited capacity to process agricultural products (including beef and chicken meats) to make them available for tourist consumption and there is a general lack of technical know-how in production methods (Meyer, 2006; Abdool and Carey, 2004). The local suppliers in Zanzibar lack the necessary technical know-how particularly in relation to post-slaughter handlings. Most respondent hoteliers complained about this. Examples of statements include:

> *"The men bring meat in the bucket without proper covering... we do not know if the cow was slaughtered today or yesterday… they simply do not have refrigerated trucks. Our visitors cannot eat such kinds of meats".*

Many hotels were not sourcing beef and chicken locally because they lacked confidence in the capacity of local suppliers to meet the hotel requirements, also because local suppliers could not follow proper procurement procedures like giving receipts. In their responses, we captured statements such as:

> *"The local supplier may bring several chicken one month and then not be seen again for months... when they appear they end up giving unacceptable excuses including the illness of the chicken and so forth".*

> *"She used to supply us chicken. Sometimes she brings very tiny chicken, which look like 'birds'... as a result we are forced to serve the whole chicken as a single portion, instead of two portions... that is a total loss for us".*

> *"We are always required by ZRA [Zanzibar Revenue Authority] to show the hotel expenditure. The local suppliers never give us the purchases receipt. That works badly for us. ZRA never trusts us. Therefore we prefer buying from supermarkets and get proper receipts".*

Most of the complaints could also be related to suppliers' ignorance of the needs and wants of the hotels. From what was ascertained from the hoteliers, a list of their requirements was prepared. The meat suppliers were then explicitly asked about the attributes good quality beef or chicken meats should possess in order to find out whether they were aware of the qualities needed by their potential clients. The suppliers were expected to know attributes like tenderness, size, cleanliness, low fat content, good quality cuts, proper storage and transportation in refrigerated trucks or well packed in boxes certified by veterinary doctors. The majority (57 per cent) of the meat suppliers were not familiar with most of these quality requirements. The results reveal a gap that exists between the local meat suppliers on one side and the tourism providers on the other regarding quality attributes. A possible explanation for this gap may be the lack of communication between the two parties, which may further complicated by poor business-to-business networks between stakeholders or even the lack thereof. The next section focuses on information from the suppliers' viewpoints on the same issues.

Challenges in local linkages according to local suppliers

It would not be realistic to conclude this case using demand-centred perspectives only. Therefore, the local suppliers of beef and chicken meats in Zanzibar were asked to describe their experiences in dealing with the tourism businesses. There were mixed feelings from the respondents about their relationships with the hoteliers and restaurateurs. While some were supplying to these tourism businesses, others were not. Of the 62 local suppliers of beef, only 23 per cent indicated that they supplied to tourist hotels and/or restaurants. Likewise, it was only 25 per cent of the chicken suppliers who indicated that they were supplying to tourist hotels and/or restaurants.

When asked the problems that continue constraining the business to business relationships between their businesses and the tourism industry, suppliers had their viewpoints. For example some of the respondents have cited the problem of language, while others citing the complexities involved in negotiating with the foreign operators. Likewise they have cited the lack of trust between the two parties involved. These kinds of problems have been acknowledged in the previous studies (such as Torres (2003). According to Torres (2003), the mistrust and the lack of communication between hotelier and small scale producers are often associated with socioeconomic and cultural differences between the two parties. In Zanzibar, one respondent was even quoted saying:

> *"It is always difficult to trade with these wazungu [whites] as they bombard you with many words we are not familiar with, and later they ask you to sign a paper on something you do not know... I prefer to sell my product [beef] to Zanzibaris because we understand each other".*

The language problem can be explained in two ways. Firstly, it can be a lack of basic education. Of the total respondents, 38 per cent had attained secondary school education, while almost half (49 per cent) had only attained primary school education. A tertiary education had been attained by only 2 per cent. Low education levels hinder basic business practice including negotiations, keeping proper records, and obtaining credit and market information. In this case, most suppliers with at least a primary level of formal education were supplying to hotels. But the ones without a formal education showed some reluctance to deal with hoteliers, especially the foreign managed hotels.

Secondly, the lack of experience in the business, and sometimes unwillingness and inability of the suppliers to learn might have contributed to the lack of trust between the two parties. Building trust between parties always requires investment in terms of time and money. The results indicate that the more experienced the suppliers were, the more likely they were to supply beef or chicken to hotels. A possible explanation is that the suppliers had studied the industry and developed working relationships with the hoteliers. Long-term positive relationships signal the existence of trust and confidence between the hoteliers and local suppliers. They also show that the suppliers have developed appropriate mechanisms to deal with the corporate clients. A majority of respondents in this case had over 10 years of experience in the meat industry, with 26 per cent having between 10 and 15 years of experience, 27 per cent 15 to 20 years, and 22 per cent over 20 years.

The majority of suppliers mentioned the late payment they receive from the hoteliers as one of the major challenges. Many hotels and restaurants prefer a credit purchase when buying large stock, with credit terms requested by the hoteliers varying between 30 and 60 days. On the other side, most local suppliers require cash on delivery to enable them to continue with production. To beef suppliers, 30 days without cash at hand was too long as they could not afford to order the next stock. For chicken suppliers, the main issue was the money to feed the next round of supplies. The two sides - hoteliers and meat suppliers - were both concerned about how to secure the right partner and final financing of the products delivered.

Some of the local meat suppliers who were not supplying to hotels were also not considering selling to hotels or restaurants in the future. The main reason given was their lack of knowledge about the requirements of the hoteliers and restaurants, while others said that they were comfortable dealing with individual clients but they were not ready to deal with corporate clients, because of the low prices offered by hoteliers and restaurant operators. To the hoteliers and restaurants, the sales price is one of the most important factors when making the decision to buy. As a result, cheap imports from big meat exporting countries such as Kenya, Brazil and South Africa substitute local supplies in Zanzibar. However, some of the local suppliers were ready to let it go as one supplier has even said clearly that:

> *"If I can sell to an individual client and get my 4500 Shillings [equivalent to 3 US$] a kilo today, why should I go to hoteliers who never buy in cash and sometimes price our products below the market price¿"*

Finally, when the local suppliers were asked about some complaints raised by the hotel and restaurant operators, for instance, that local suppliers did not issue receipts for the supplied products, several responses were recorded. Some openly revealed that they wanted to evade taxes upon receiving the money, thus they preferred not to give any official receipts. While some cited the lack of motivation to pay taxes to the government, others did not want to spend money on buying receipt books. In the first group, the lack of knowledge on how the taxpayers' money was spent was one of the justifications for not paying the tax.

Challenges according to tourists

As it has been captured earlier (e.g. from Belisle, 1983; Oppermann, 1993; Momsen, 1998; Goodwin & Bah, 2003; Abdool & Carey, 2004; Torres and Skillicorn, 2004; Meyer, 2006, Anderson, et al., 2009; among others), some tourists prefer to consume familiar products while abroad, and where possible, the same foods they use at their origin. An additional interesting point is the common belief, typically in the developing countries, that tourists coming from the developed world are wealthy and therefore demand high quality products. That belief leads many tourism providers in the developing countries to have little confidence in locally produced products and opt to buy these stuffs from abroad.

Trying to test this belief, while using the tourist's standpoint, this study captured the origin of tourists visiting Zanzibar as follows: 67% of the interviewed tourists were from Europe, 14% from East Africa, 11% from South Africa and only 8% were from North America. This suggests that most of the tourists visiting Zanzibar are from developed countries.

To see if the assumption in the developing countries holds any truth with regard to the preferences of the tourists from developed world visiting developing countries, the question to capture the viewpoints of the tourists regarding the foods they consume in Zanzibar was asked. Surprisingly, based on the analysis of the tourists' perspective, a high proportion (that is, more than 70%) of tourists were not sure of the source of meat they consumed during their stay in Zanzibar. They even did not bother to ask for the specification of the foods that they consume at the destination. To this end, it can be concluded that the source of the tourism products at Zanzibar was not a point of concern, at least from the tourists' perspective.

Conclusion

This study explored challenges on the local linkages between the tourism industry and local suppliers of beef and chicken meats in Zanzibar. Hotels encounter a multitude of problems in sourcing beef and chicken meats from local suppliers. These include the poor quality of products supplied locally, high transaction costs, and violation of agreements between suppliers and hotels, and reluctance of local suppliers to issue formal receipts. There is also a certain degree of mistrust between the two parties. Other issues are inconsistent supplies, shorter payment periods and unreliable prices. In order to realise the benefits from the tourism industry, the meat sector could invest in production and marketing infrastructure including the construction of modern slaughterhouses.

The small size of (immature) chickens from local suppliers was another problem, to the extent that some hotels were forced to shift from their normal menu to suit the food portion provided by their suppliers. The problem is likely associated with the fact that in Zanzibar the chickens are sold in units rather than weight. Thus it is advisable to introduce the system of selling chickens by weight. Related to that was the belief that many hotels underrate the capacity of local suppliers to maintain consistent supplies of beef and chicken meat as per agreements. Even those hotels that currently source beef and chicken meats from local suppliers do so without formal contractual agreements. This is due to the fact that if they adopt a formal contracting system most of the local suppliers would fail to meet their contractual obligations or agreements. A large proportion of hotels that had stopped sourcing locally, and those that had never sourced beef and chicken meats locally indicated their willingness to source from local suppliers. Hence, there is potential for local suppliers to increase the supply of these commodities to tourist hotels as long as their production and distribution methods are substantially improved.

With regard to the local suppliers' perspective, the analysis of the results leads to a number of issues. One is that the level of formal education of the majority of local chicken and beef meat suppliers is generally low. This disadvantages them when negotiating business contracts with hotels on matters pertaining to supplying foodstuffs, such as price and terms of payment. They also face difficulties in understanding the contents of the supply contracts. Similarly, the lack or low levels of education incapacitate suppliers to keep proper records of their businesses and create difficulties in obtaining basic production services such as credit and market information. The most serious problems appeared to be late payments from the hotels and having inadequate capital. The price offered by hotels was not acceptable to many local suppliers. These findings are useful for all institutions responsible for promoting linkages between the tourism and agriculture sectors in Zanzibar. Based on the findings, we give a number of recommendations.

First, training of local suppliers on skills and techniques related to post-slaughter handlings is of paramount importance. This includes cutting, packing, transportation storage and general cleanliness and hygienic requirements. The hotels' decisions on whether to continue sourcing beef and chicken meats from local suppliers are a function of various factors, such as the quality of the products, consistent supplies and size and availability of chicken. Thus, any program designed to promote the linkages between tourism and local suppliers of beef and chicken meats should address these problems holistically. Isolated interventions such as increasing production or improving marketing infrastructures are unlikely to succeed in this respect. There is also a need to provide at least basic business and entrepreneurship skills for local suppliers.

Second, the formation of stronger associations or networks of local suppliers would enable them to pool resources and benefits from economies of scale instead of competing between themselves. These networks could set their own quality standards and quality control mechanisms that would guarantee that the products supplied to tourist hotels were of acceptable quality. This would not only increase their capacity to supply according to the hotels' requirements, but also through their alliances they could forge effective partnerships with public institutions and donor agencies.

Third, to overcome capital constraints, local suppliers ought to be assisted to get working capital in terms of credit. This would enable them to comply with hotel payment arrangements. The establishment of a guaranteed fund specifically for local suppliers to tourist hotels would increase their access to credit from formal financial institutions. Policy guidelines could be developed alongside shifting the policy focus towards mainstreaming agricultural development interventions within the tourism development process. The focus would include diversification of the tourism experience away from beach and adventure excursions to culinary tourism.

Fourth, strong institutional support to look into the whole process of tourism-agriculture linkage could be established. The facilitating role of such an institution could involve the development of policies, regulations and strategies that could ensure beef and chicken meats produced for the consumption of tourist hotels and restaurants complied with food safety regulations. The same institution could also address the problem of mistrust, the lack of communication between the hotels and local suppliers, and the promotion of local beef and chicken meats for tourist consumption through regular meetings with hotel managers and chefs. Through these meetings the local suppliers could liaise with hotels to exchange information and determine agreements that would guide both suppliers and hotels on matters pertaining to demand, quality standards and pricing.

Finally, future studies may expand the scope of this research by deepening the analysis particularly on the context of specific sectoral approaches, and analyse in detail the legal and institutional factors constraining the linkages between the tourism industry and local sectors in Zanzibar.

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An Importance-Performance Analysis of Backpackers at Robinson Crusoe Island Resort, Fiji

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Abstract

Rapid tourism growth over recent decades has brought with it a number of challenges for accommodation providers, and particularly located on small islands. Increasing competition has necessitated the need to secure high customer satisfaction, and to develop techniques that allow such satisfaction to be measured and monitored. Traditional tourist satisfaction research commonly used standard Likert-type scales to assess to what degree tourists were satisfied with certain attributes. However, this method neglects the fact that some of these attributes are of more or less importance to guests than others. The Importance-Performance Analysis (I-P Analysis) measures both the importance of an attribute to the guest, as well as the satisfaction with the same attribute. An I-P survey and analysis was conducted at a backpackers resort on Robinson Crusoe Island, Fiji. Results show that resort management know their target audience and cater well for them. However, results also show that there is room for improvement in some areas, and that other areas appear to get too much attention.

Key Words:
action grid, backpackers, Fiji, I-P Analysis, Robinson Crusoe Island, satisfaction, sustainability, tourism

Resumen

El rápido crecimiento del turismo durante las últimas décadas implica retos para los proveedores de servicios de alojamiento, especialmente aquellos establecidos en islas pequeñas. La creciente competencia demandaba una absoluta satisfacción por parte del cliente, y a la vez el desarrollo de nuevas técnicas para poder medir y monitor aquella satisfacción. El método que se usaba comúnmente para medir la satisfacción del cliente eran escalas estándar tipo Likert. Esto para evaluar hasta qué punto los turistas estaban satisfechos con ciertas características del hotel. Sin embargo, este método pasaba por alto que algunas de las características tienen un diferente nivel de importancia unas de otras para los clientes. El análisis Importancia-Rendimiento (I-P Analysis), mide tanto la importancia de una característica del hotel para un cliente como la satisfacción del cliente con la misma. Un estudio I-P fue aplicado en un hotel de mochileros en la isla Robinson Crusoe, en Fiji. Los resultados muestran que la administración del hotel conoce su clientela objetivo y les proporciona un buen servicio. No obstante, los resultados también muestran que hay posibilidad de mejora en algunas áreas y que en otras parece haber demasiada atención.

Palabras clave:
action grid, backpackers, Fiji, I-P Analysis, Robinson Crusoe Island, satisfacción, sostenibilidad, turismo

Introduction

With the enormous growth of tourism over recent decades, competition between the stakeholders in the tourism industry has increased as well. So much so that Noe (1999: xi) contends that "no greater challenge exists in the marketplace than for businesses to be responsible for providing satisfactory tourism and hospitality services". Satisfaction has been defined as a congruence of needs and experiences, whereas operators are aware of their clients' needs and motivations, the kind of experiences that satisfy those needs, and that they can accurately judge when these needs are met (Mannell & Iso-Ahola, 1987).

For accommodation providers, satisfaction is often measured on a basic Likert-type scale (from very satisfied to not at all satisfied), addressing various attributes of the place. Respondents tick a number on the scale, indicating how satisfied or dissatisfied they were with the respective attribute. However, Lindberg and McKercher (1997) warn of the simplicity of this method and suggest that results of such a model can be misleading. For example, visitors may report high satisfaction while still desiring improvement in facilities, activities, or conditions.

Dunn Ross and Iso-Ahola (1991) argue that tourists are motivated by an escaping force and by a seeking force. While escaping the everyday environment tourists are seeking intrinsic psychological rewards; they leave behind personal problems, troubles, difficulties, and failures. The rewards they seek by escaping the home environment can be personal rewards, such as self-determination, sense of competence, challenge, learning, and exploration. On the other hand, tourists are often seeking social contacts. The psychological benefits emerge from a simultaneous interplay of both forces, escaping the everyday environment and seeking psychological rewards (Dunn Ross & Iso-Ahola, 1991). The more those needs are met, the higher the satisfaction.

While investigating visitor satisfaction is important for operators (Noe, 1999), the knowledge about satisfaction alone can be flawed, even if psychological items are included in a survey. For example, an operator can do well in a certain activity/service, but that might not be of great importance to visitors. Thus, would it make sense to spend time, money and/or energy on such an activity/service? On the other hand, a certain service might receive low marks on a satisfaction survey. But since it is not known how important this service is to the customers, it is difficult for management to decide whether or not it is important for this service to be improved. The importance-performance analysis (I-P Analysis) attempts to rectify this problem, by looking at two sides of a feature: the importance of that feature to the customer, and how the customer rates the performance of the business with regards to the same feature (Guadagnolo, 1985; Hollenhorst, Olson, & Fortney, 1992).

This paper presents the findings of a study at Likuri Island in Fiji, also known as Robinson Crusoe Island, an island that falls into the classical 3S (sun, sand, surf) category (Lacher & Harrill, 2010). An importance-performance analysis was employed in order to investigate some features about the Robinson Crusoe Island Resort. Resulting from this analysis, recommendations for the resort operator on Likuri Island were developed.

Methods

The Study Site

Likuri Island is a small island in the estuary of the Tuva river, at the south-west tip of Viti Levu, Fiji's main island (Figure 1). Although Likuri Island is the official name of the small island (less than 1km long), it is widely known as Robinson Crusoe Island (RCI), which is how it will be referred to in this paper. The only developed area on the island is the Robinson Crusoe Island Resort (RCR), which is a backpacker-style resort with a number of bures (Fijian style huts/cottages) and some common area buildings, such as the reception and administration, a pool, a kitchen, bathrooms, and a staff area. Because RCR is the only development on the island, there are no shopping opportunities, and all meals are served at set times under straw roofs that provide shelter from sun and rain.

Access to the island from Viti Levu is by boat only, and takes approximately 40 minutes. A "shuttle service" is provided a few times per day by the resort (both for guests and staff). RCR also offers onwards transfers by

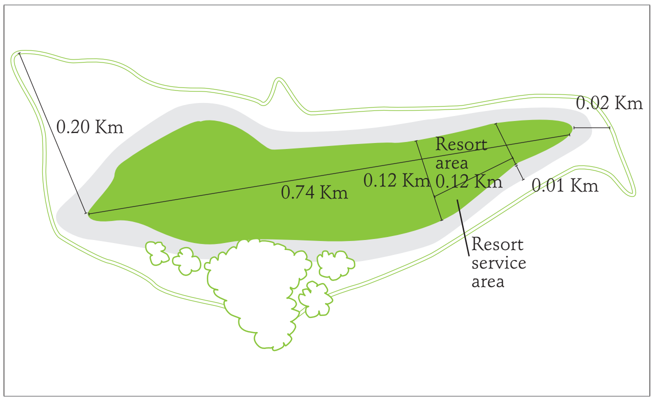
Figure 1: Likuri Island (Robinson Crusoe Island), Fiji. (Source: M. Lück)

bus/van to Nadi, with the main international airport in Fiji, and port of entry for most tourists. The island is surrounded by a reef on the seaside, the river channel, as well as shallow waters on the landside. During low tide, the shallow waters recede and expose some mangroves and extensive mud/sand flats (Figure 2).

The Importance-Performance Analysis

In order to overcome the problem of having the results of a standard satisfaction survey, but no information as to how important the same features are for the guests, an importance-performance analysis, similar to an action grid analysis (AGA), was employed for this study (Huan, Beaman, & Shelby, 2002). It can provide a quick overview of what areas of the resort are most in need for improvement, and what areas received too much energy from management (Lacher & Harrill, 2010). A survey for the I-P Analysis comprises of two sections, one in which the respondent rates the importance of a number of items, and one in which he/she rates the performance of the same items. The items of both sections are rated on a five-point Likert-type scale, from 1 = not at all important to 5 = very important, and from 1 = poor and 5 = excellent, respectively. The mean of each performance attribute is then matched with the mean of the corresponding importance attribute. These matching means of each item are then transferred into a scattergram (action grid), with the performance value on the x-axis, and the importance value on the y-axis. Finally, the crosshairs are determined by using the grand means of both sections. Some previous studies have positioned the crosshairs at the middle point of the two scales (e.g., Mengak, Dottavio & O'Leary, 1986, in Bennett, Dearden & Rollins, 2003), or at some arbitrary point (e.g., Guadagnolo, 1985). However, since the most attributes tend to fall into the category of high importance and high performance, it was decided to follow Hollenhorst et al.'s (1992) example and set the crosshairs at the overall means of the importance and the performance. However, it is acknowledged that any definition of attributes and the placing of crosshairs introduce a certain bias, since these are subjective.

Figure 2: Map of Likuri Island (Robinson Crusoe Island), Fiji. (Source: Sykes (2003:6)



The crosshairs subdivide the graph into four quadrants, which indicate suggestions as to how the respective managers should deal with various items; such as if they should improve them, put more or less effort in these items, and so on. The top right quadrant shows items that rated high in importance and high in performance, and thus are the best performing items: the resort performs well and should keep up the work on these items. The top left quadrant represents items that are rated high in importance, but low in performance: it is recommended that the management concentrates on improving these items. The bottom right quadrant shows items that are low in importance, but high in performance. Although the high performance is a good sign, the resort might waste time and energy on these items, because they are of low importance to guests. Lastly, the bottom left quadrant shows items that are low in both importance and performance: they should be of least concern to the resort management (Guadagnolo, 1985; Hollenhorst, et al., 1992; Martilla & James, 1977).

Another advantage of the I-P Analysis is that results can be displayed in a graph that is easy read and understand (Martilla & James, 1977). Since research reports are often prepared for non-academics, i.e. the managers of a resort, hotel, or operator, it is important that the material is presented in a way easy enough to grasp for people who are not familiar with complicated statistical analyses. The graph (action grid) can be useful for managers to evaluate the success of their operation (Bennett, Dearden, & Rollins, 2003), because it gives them information of both their clients' motivations (importance) and satisfaction (performance). They then can develop appropriate actions to improve certain services to increase the customers' satisfaction (Huan et al., 2002).

Sampling and Data Collection

The presented data stem from a study, undertaken at RCI from April 2008 to May 2010. RCR staff invited guests at Robinson Crusoe Island Resort to fill in the questionnaire when they checked out. This was a good opportunity, because guests were waiting for the boat transfer back to the mainland, and thus had some spare time to fill in the survey. A total of 246 surveys were returned during the survey period. Nine out of these were discarded because they were not completed, which left a usable sample of 237 completed surveys. The data were entered into, and processed with SPSS for Windows. A reliability test of the data set resulted in a reliability coefficient (Cronbach's Alpha) of .938, which suggests that sufficient internal consistency is given.

During the pilot study, respondents had the opportunity to add, in an open-ended section, additional items they felt were important. Additional items suggested by respondents included 'access to management/reception (office hours)', 'no smoking policy', 'good value for money', 'travel information/travel bookings at backpackers', and 'credit card acceptance'. These items were added to the main survey.

Limitations

Since the data represent a relatively small sample, the results might not be representative for the whole population. However, the sample was deemed to be large enough in order to elicit some trends. A further limitation is that some of the items are not necessarily very well suited for RCI. However, these are usually items that are of importance to backpackers in general (based on literature, researcher opinion, and provider interest), and it was decided to keep them in the survey.

Results and Discussion

A Demographic Profile

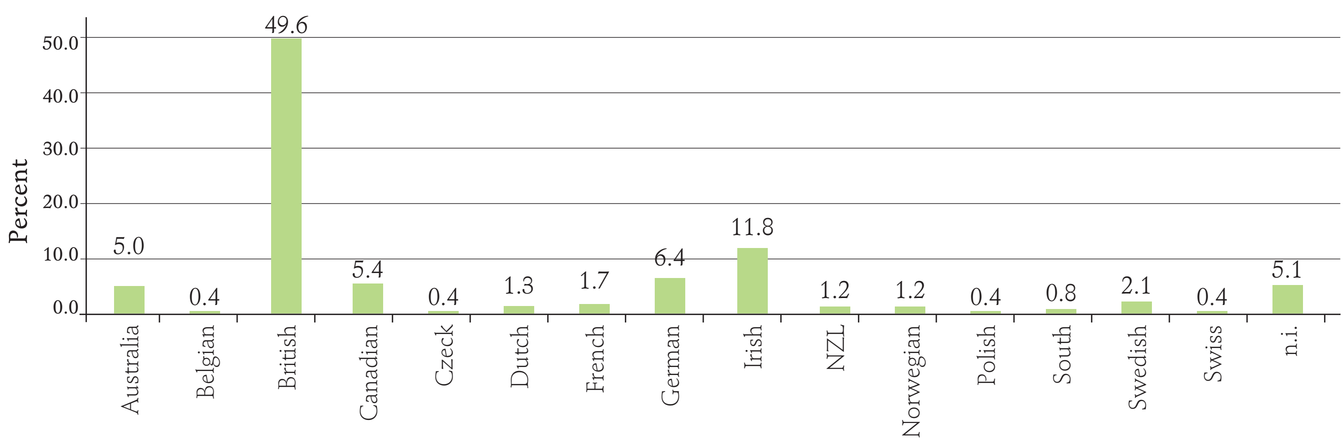
Approximately two-thirds of the respondents were female (66.1%), and 33.9% of the respondents were male. The vast majority of all respondents (89.9%) were in the age bracket 18-29 years old, with only 6.7% in the 30-39 years age group, 1.8% in the 40-49 years, and 1.8% in the 50-59 years age group. This result is not surprising, since RCR is a backpacker style resort, without running water (they use bucket showers, see discussion below) and relatively basic facilities.

British travelers dominated the sample with 49.6 percent, followed by respondents from Ireland and Germany with 11.8% and 6.4%, respectively. Other nationalities included Australian (5.0%), Belgian (0.4%), Canadian (5.4%), Czech (0.4%), Dutch (1.3%), French (1.7%), New Zealander (1.2%), Norwegian (1.2%), Polish (0.4%), South African (0.8%), Swedish (2.1%), Swiss (0.4%), and the USA (5.94%). Approximately five percent of the respondents did not indicate their nationality (Figure 3). Given the fact that Australia and New Zealand are geographically the closest countries to Fiji, the very low numbers of Australians and New Zealanders in the sample are surprising. For Fiji's tourism overall, Australians are the largest country of origin (ca. 33%), followed by New Zealand with around 17% (Fiji Islands Bureau of Statistics, 2006). RCR is a classical backpacker style resort, and thus attracts mostly young international travelers. Many of them are on extended holidays and gap years, traveling around the world. Australians and New Zealanders who visit Fiji are less likely to stay at a backpackers resort, which may explain the low numbers of guests from these two countries.

Thirty-one percent of the respondents indicated that they were living in a rural area, while 69% stated that they lived in an urban area.

Given the fact that RCI Resort is a backpacker style place, it is not surprising that almost half of the respondents indicated that they were traveling with friends (45.1%), followed by traveling alone or with their partner (22.4%

Figure 3: Nationality of guests at Robinson Crusoe Island Resort

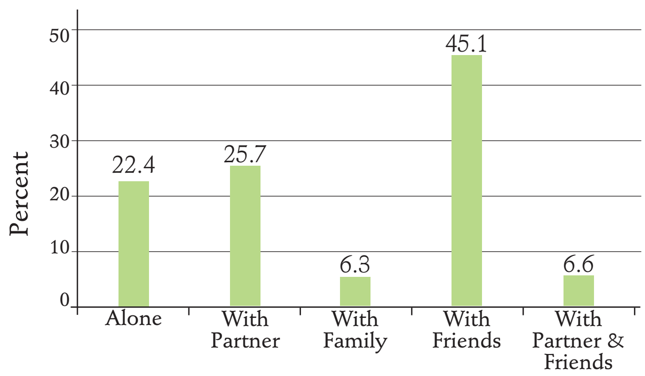


and 25.7%, respectively). Only 6.3% of the respondents traveled with family members (Figure 4).

When it comes to their length of stay in Fiji, there seems to be a weekly pattern, i.e. respondents stayed in multiples of seven days, i.e. one, two, or three weeks (Figure 5). Only 3.4% of the respondents had visited Fiji before, while 96.6% were visiting Fiji for the first time.

Out of this time, the majority of respondents stayed on RCI for up to six days (37.0% for three days, 21.7% for fours days, 15.3% for two days, 7.2% for six days, and 2.6% for one day), with a total of under 10 percent staying for seven or more days (Figure 6). Few respondents (2.5%) indicated that they had stayed at RCI before, while for 97.5% of the respondents it was their first visit on the island.

Figure 4: Travel Parties of guests at Robinson Crusoe Island Resort



Note: Total exceeds 100% because more than one response was possible

Figure 6: Length of stay on Robinson Crusoe Island

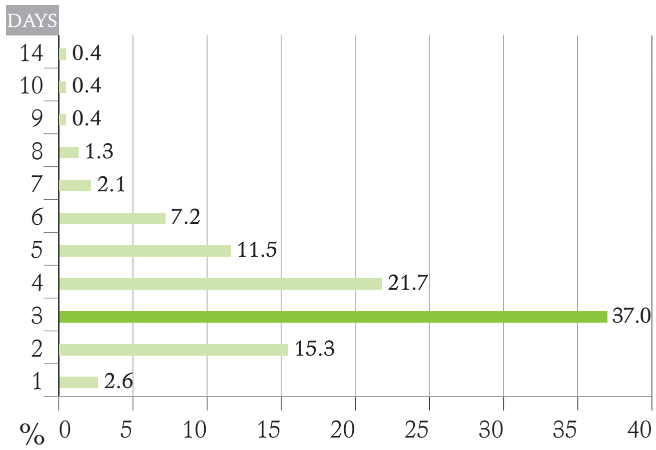
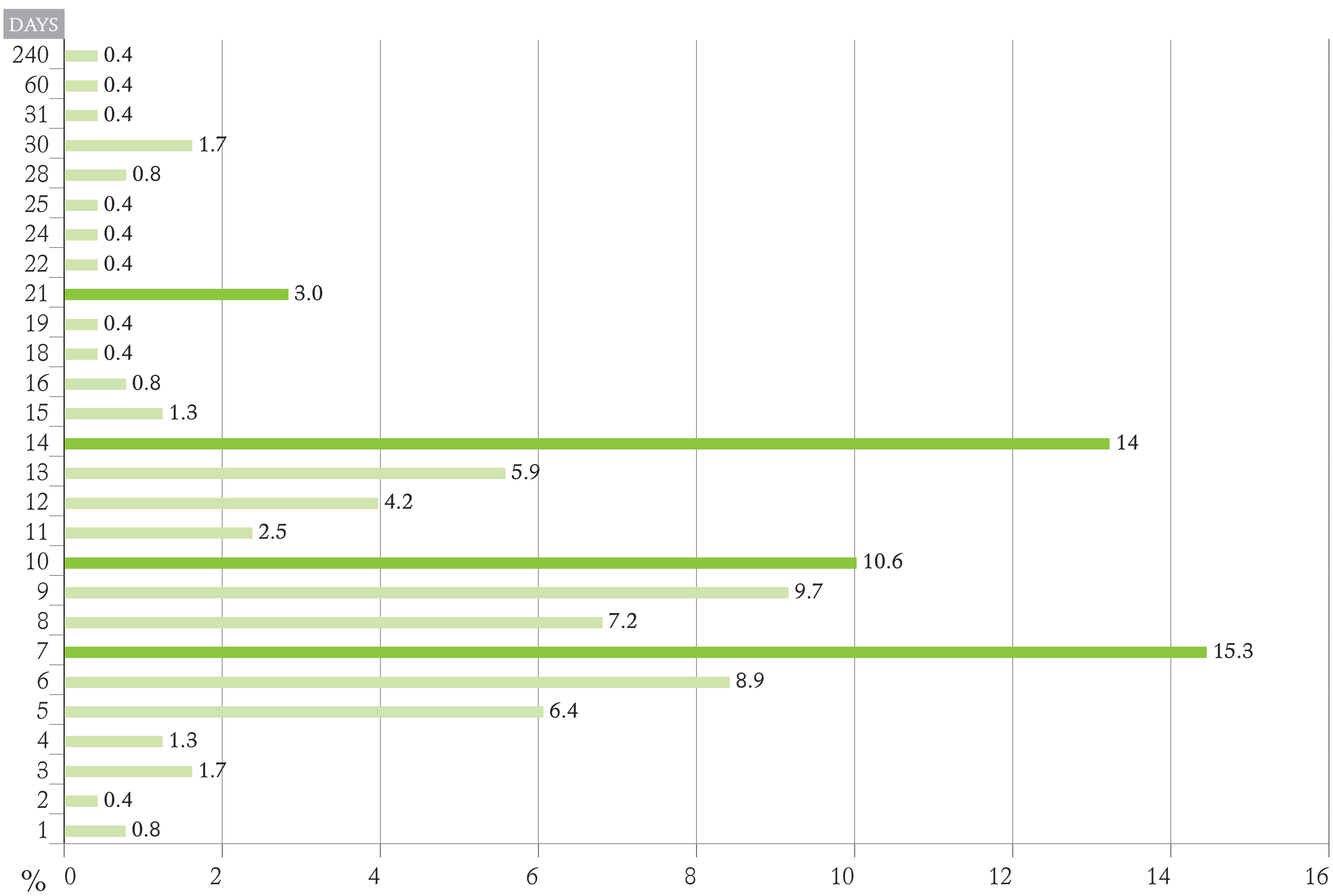


Figure 5: Length of stay in Fiji



The majority of the respondents (31.5%) indicated that they were not currently employed, followed by students (28.8%) and travelers who were working full time (23.9%). A relatively large group of respondents (7.2%) indicated that they were students and worked part-time, followed by 'other' (3.6%), and self employed travelers (4.1%). Only 0.5% each was working part time and retired and none of the respondents indicated that they were home-makers (Figure 7). The high share of people not being currently employed, as well as students, can be explained with a large number of travelers, who take six months or more off work, and travel extensively around the world. There are also a number of people who take a "gap-year", i.e. people who graduated from high school or university, and take a year for traveling, before joining the workforce.

More than half of the respondents had university qualifications (44.3%) or other tertiary qualifications (Polytechnic: 6.3%, vocational or trade qualifications: 5.5%). Twenty-two percent of respondents had a high school certificate or diploma, and 14.3% did not indicate their qualifications (Figure 8).

In summary, the average visitor at RCR is young (under 30 years old), relatively well educated and/or still enrolled as student, travels with friends and/or their partner, and is of British/Irish or German nationality. They generally stay in Fiji for two weeks or less, and on RCI for three days.

Figure 7: Employment status of guests at Robinson Crusoe Island Resort

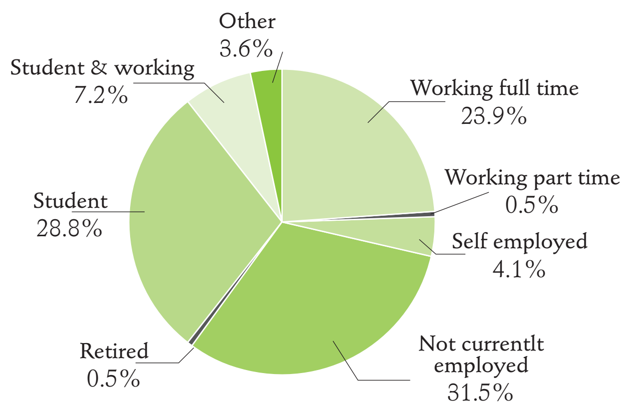


Figure 8: Level of education of guests at Robinson Crusoe Island Resort

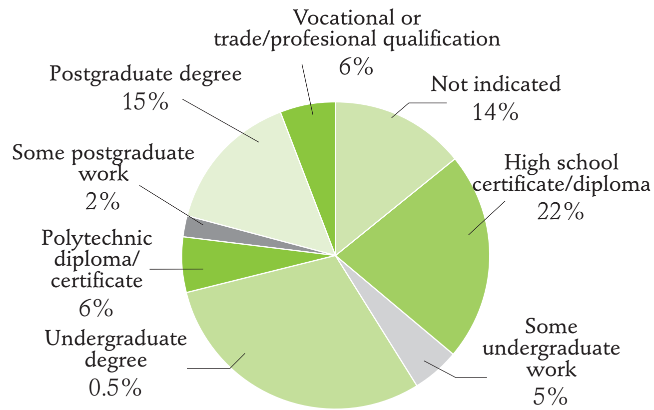


Figure 9: Importance-Performance Analysis of the Robinson Crusoe Island Resort, Fiji

Note: Performance means had to be reversed due to scale

Importance-Performance Analysis of the Robinson Crusoe Island Resort (RCR)

Respondents were asked to indicate, on a five point Likert-type scale ranging from 1 = not at all important to 5 = very important, how important twenty-five features (A-Y, Table 1) were in their decision to come to RCI. Then, they were also asked how RCR performed with these features, again rated on a five point Likert-type scale, ranging from 1 = poor to 5 = excellent. Due to the wording of the items of this scale, the means for the performance results were reversed. The means (original I-means and reversed P-means) of the twenty-five items were then plotted in an I-P graph or action grid (Figure 9).

Keep Up The Good Work

Eleven items fell into the top right quadrant (Keep Up The Good Work), which indicates that tourists placed high importance on those items, and that RCR performs very well for them. Among these items are factors that cannot be influenced by the resort management, such as 'location', and 'scenic views'. However, the majority of items mirror a successful provision of services. They include 'easy access', a 'visually appealing exterior', a 'visually appealing interior', 'free activities', 'overall cleanliness', 'friendly staff', 'good value for money', 'travel information/travel bookings at backpackers', and 'meeting other likeminded people'. While the latter cannot be influenced directly, RCR successfully attracts a certain target group, in this case young backpackers. The very high performance of 'friendly staff' (highest rated item overall: mean = 4.15; SD = 1.421) was underlined by numerous comments in the open-ended section of the survey, such as 'staff were very friendly', 'great fun and great staff', 'staff all very friendly', 'the staff were amazing', and many similar comments.

The relatively high performance scores for 'visually appealing exterior' (mean = 3.77; SD = 1.314), 'visually appealing interior' (mean = 3.58; SD = 1.333), and 'overall cleanliness' (mean = 3.75; SD = 1.270) mirror RCR's philosophy stated on their webpage: "Robinson Crusoe Island prides itself in maintaining a high level of cleanliness and hygiene." (Robinson Crusoe Island Fiji, 2011).

Overall, the majority of the guests were satisfied or very satisfied with RCR's performance with these eleven items. This is reflected in the opinion that RCR is good value for money. This item ranked high on the impor-

Table 1: Twenty-five features of the Importance-Performance Analysis

Code	Attribute	Code	Attribute
A	Reservation online (e-mail/Internet)	N	Activities at additional cost (excursions, SCUBA diving, etc.)
B	Location	O	Telephone
C	Easy access (airport, bus stop, railway station…)	P	Internet access
D	Scenic views	Q	Television
E	Visually appealing exterior	R	Overall cleanliness
F	Visually appealing interior	S	Friendly staff
G	Kitchen facilities (stove, oven, sink, refrigerator, etc.)	T	Meeting other likeminded people
H	Kitchenware (pots & pans, plates & cups, cutlery, etc.)	U	Credit card acceptance
I	Showers/bathtub	V	Non-smoking policy
J	Deck, furniture & barbecue	W	Office hours at reception
K	Common rooms	X	Good value for money
L	Books and games available	Y	Travel information/travel bookings at backpackers
M	Free activities (pool, volleyball net, pool table, darts, snorkel gear, etc.)		

tance scale (mean = 4.58; SD = .814) and on the performance scale (mean = 3.93; SD = 1.288).

Concentrate Here

The items in this category give management an indication as to what is important to guests, but where the performance does not really match the expectations. Interestingly, only two items fell into this category (items I and U: 'showers/bathtub' and 'credit card acceptance'). Clearly, respondents placed relatively high importance on showers/bathtubs (mean = 4.17; SD = 1.021), but their expectations were not met by the resort (mean = 3.20; SD = 1.190). RCR does not have private bathroom or toilet facilities. There are two shower/toilet blocks that provide eight toilets and nine showers (Sykes, 2003). Due to the small size of the island, there is not enough fresh water to supply the resort with running water. If a well on the island would be used, the ground water level would sink rapidly, and not provide enough water for the plants and animals on the island (W. Latter, pers. comm.). In order to avoid this risk, island management decided to bring in all water from the mainland. The 20-liter containers for the water transport are lined up in front of the showers and bathrooms. Guests then have to fill a bucket (equipped with a tap) from these containers, and hoist them up in the shower, before they can use the shower. This quite unusual procedure appears to be an inconvenience for a number of guests, and thus the performance for the item 'showers/bathtub' is rated relatively low (Figure 9). Toilets use sea water, and the sewage is collected in septic tanks. The water from these tanks runs off into leach pits (under the surface) and sinks into the sand. The solid waste of the toilets breaks down in the septic tanks and is dug into a burial pit. After three to six months it is crumbly and odourless, and can be used as fertilizer on RCR's grounds (Sykes, 2003). According to Thaman (n.d.), sewage pollution on RCI is not a concern.

The item 'credit card acceptance' was one of the five items that was derived from the open-ended question in the pilot survey. Respondents placed relatively high importance (mean = 4.23; SD = 1.118) on this item, and gave it one of the lowest performance ratings (mean = 2.80; SD = 1.524). As shown in the demographic profile above, the majority of guests at RCR are young travelers that often tour for extended periods of time. They try to avoid carrying large amount of cash with them, and thus prefer – and expect – credit card facilities at the accommodation. This is particularly important for RCR, because it is in such an isolated location with no access to banks or ATM facilities. RCR implemented credit card facilities between the survey period and the time of writing, although at a 5% surcharge for credit card payments was imposed (K. Latter, personal communication).

Although there had been no change in the provision of Internet facilities – that is, RCR still does not offer Internet access to guests - this item has moved from the 'concentrate here' quadrant in the pilot study to the 'low priority' quadrant in the main survey.

Low Priority

Nine items fell into this category, including 'reservation online', 'kitchen facilities' and 'kitchenware', 'common rooms', 'available books and games', 'telephone', 'Internet access', and 'non-smoking policy'. Since the only buildings on the island belong to the resort, RCR is providing a full meal service, which is included in the daily rate. In addition, a bar service is available for a charge. Thus, unlike most backpackers accommodations, RCR does not provide kitchen facilities and kitchenware for their guests. Consequently, due to the full meal service, these items were of low importance to the respondents. Phone access was seen as slightly less important (mean 3.71; SD = 1.261) than Internet access (mean 3.85; SD = 1.215), but since RCR provides a payphone at the central building the performance is rated as relatively high (mean = 3.15; SD = 1.260), whereas the performance rating for Internet was the lowest of all items (mean = 2.2; SD = 1.304). Internet access is a common feature at many backpackers and hostels around the globe, and was thus expected by many respondents (score just below the cross-hair line). RCR does not provide Internet access, and consequently the performance was rated as relatively low. The RCR management does not provide Internet access, because there are no phone line or cable connections on the island. The only possible access is via satellite, which has two main disadvantages. It is used by the management in the office (for bookings and e-mail), and proved to be very unreliable. In addition, it is very expensive, and thus not viable to offer to the guests at a reasonable charge. Management expects many complaints due to high cost, poor reliability and slow speed, so that they decided not to offer any Internet access at all (personal Communication, A. Spencer-Crusoe).

Common rooms and availability of books and games are not rated as very important (means = 3.59 and 3.50; SDs = 1.092 and 1.191, respectively). This is assumed to be related to the type of resort: RCR is a typical tropical beach resort, i.e. the weather is commonly good, and thus there is little demand for common rooms and books/games. Rather, guests spend most of their on the beach, or with beach related activities, such as snorkeling, swimming, kayaking, and SCUBA diving. The lowest score for importance (mean = 2.64; SD = 1.380) and the second lowest performance score (mean = 2.38; SD = 1.317) were given to television. RCR does not provide TV (hence the low score), but it is also of very low importance to the guests. Again, in a tropical backpacker type accommodation with plenty of outdoor activities, TV is not the kind of commodity guests might expect.

The item 'non-smoking policy' was added to the survey after it had been mentioned a few times in the open-ended section of the pilot study. Since smoking is allowed in most places on the island (except in the buildings and on the vessel), it appeared that some non-smokers were asking for a non-smoking policy. However, results reveal that it is of very low importance (second lowest overall mean of 3.49; SD = 1.400).

Possible Overkill

Only three items were placed in the category of low importance and high performance, including 'deck, furniture & barbecue', and 'activities at additional cost', and 'office hours at reception'. The first result confirms some results of the Low Priority category, i.e. tourists at RCR are not particularly interested in having deck, furniture, or common rooms provided, because they mostly use the beach and restrict themselves to beach activities.

The second result is quite interesting: The only activities provided at additional cost were a jet boat ride (twice a week) and SCUBA diving. The PADI dive school on the island appeared to have had very little business during the survey period. Only 3.4% of the respondents used this facility during their stay, with almost half of these doing so just once. Only 1.1% of the respondents stated that they came to RCI specifically to go SCUBA diving. This confirms that while some tourists on RCI make use of the diving school, it appears to be opportunistic, rather than a planned activity (Lück, 2006). In addition, there are many activities offered free of charge (snorkeling trips, bush walks, learn how to husk a coconut, beach volleyball, reef walks, etc.), so that guests tend to prefer those to activities they have to pay for. This is reflected in the low importance score (mean = 3.88; SD = 1.031) and a relatively high performance score (mean = 3.38; SD = 1.315).

The item 'office hours at reception' was added after the pilot survey. Results show that the relatively long office hours are potentially unnecessary. Guests rated the importance as relatively low (mean = 3.79; SD = 1.040) and the performance high (mean = 3.78; SD = 1.197).

Conclusions

The results of this study underlined that the prime market for RCR is a young backpacker type group of visitors. Only 3.6% of the visitors in the study were older than 40 years old, and almost 90% were between 18 and 29 years old. Along with the backpacker market, the results also showed that overall, respondents were satisfied with their experience at RCR. However, there is room for improvement in some areas. In particular, respondents would like to see more convenient shower facilities. This, however, would contradict RCR's philosophy of providing a sustainable form of accommodation. The island's finite and fragile resources cannot provide for a steady freshwater supply, and thus the bucket showers are designed in a way that guests safe water. The showers and sinks are deliberately equipped with dispensers/handpumps that encourage guests to use as little water as necessary (Sykes, 2003). Toilets are handled appropriately, and the sewage does not cause pollution, and/or increase in nutrients around the island (Thaman, n.d.). RCR management could more visibly emphasize their commitment to the sustainable use of the island's resources, which would help guests understand why the shower facilities are so basic.

Another item that could be improved is the acceptance of credit cards. Since the administration of this survey, RCR has implemented this, and is now accepting payment by all major credit cards.

Guests on the island are backpackers from around the globe. On average, they stay for three nights, before they continue their travels. Guests do not come to the island with a particular focus on snorkeling or diving. Snorkeling is seen as a welcome free activity (54.5% of respondents went on at least one snorkeling trip during their stay), but not as one of the reasons why people come to the island. The PADI dive centre on the island appeared to be largely underutilized during the pilot study. However, 9.1% of the respondents in the main survey went SCUBA diving seven times. It is very likely that those guests were enrolled in the Open Water dive certificate course. And almost half of the guests (45.5%) went SCUBA diving once. While the activities for an additional charge (including

SCUBA diving) are still in the 'possible overkill' quadrant, both the importance and performance scores improved from the pilot study, and are now both close to the cross hairs.

Generally, it seems that RCR have identified their target market correctly, and the majority of their guests are satisfied with their experience. A number of surveyed items fall into the category 'Keep Up The Good Work', which indicates that these items are important to the respondents, and that RCR is successful in meeting their expectations.

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