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The Three Cs of Caribbean Tourism: Contexts, Characteristics, and Consequences*

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Abstract

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

Key words:

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

Resumen

■ La metáfora de las “Tres C” (contexto, características y consecuencias) se emplea para obtener un marco alrededor del cual visualizar el fenómeno del turismo. Cada elemento está estrechamente relacionado con los otros, y cada uno se ve afectado por e insertado en los otros. En conjunto, las Tres C determinan la configuración del turismo en destinos específicos. Es un mecanismo simple pero potente analíticamente que aporta un enfoque multidisciplinario al análisis de los problemas del turismo, lo que permite una comprensión más matizada de las temáticas y los desafíos del turismo internacional. El trabajo intenta destacar dos aspectos. En primer lugar, el estilo o carácter del turismo en un determinado destino resulta de un complejo conjunto interrelacionado de macro fuerzas socio-económicas e históricas -los contextos- que difieren de destino a destino (o de isla a isla). En segundo lugar, la interacción entre el contexto y las características define en gran medida las consecuencias o resultados que se observan, tanto positivos como negativos. Para ilustrar el enfoque de las Tres C, se realizaron análisis contrastados entre la República Dominicana y las Islas Turcas y Caicos, con extensiones a Cuba. Sugerimos el modelo de Tres C es lo suficientemente amplio para adaptarse a una variedad de destinos y puede dar lugar a mejores conclusiones de política regional.

Palabras clave:

multidisciplinario, Modelo Tres Cs, turismo caribeño, Cuba, República Dominicana, Islas Turcas y Caicos

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Introduction

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

Good hotel rooms and satellite TVs are found in all parts of the world. What the Caribbean “sells” is its amazingly fragile and bio-diverse environment: clear and unspoiled beaches, healthy coral reefs, remarkable flora and fauna, all in attractive and safe surroundings for its visitors. The explosion of mass tourism in the Caribbean over the last two decades increasingly threatens these sources of comparative advantage. Tourism development is welcomed by local politicians and decision-makers because it brings foreign currency and jobs to poor areas in dire need of economic opportunity. But research has not grappled with the simultaneous (and to an extent, mutually exclusive) challenges of explosive growth and long-term sustainability in a credible manner.

Regrettably, the recent Caribbean explosion has not been comprehensively studied in terms of its broader effects on society, culture, business, and politics. Studies tend to generate narrow policy outcomes that predictably conflict with pressing social needs of destinations challenged by poverty, population growth, and political corruption. A sampling of recent literature on sustainable tourism in the Caribbean is illustrative of a narrow economic focus (e.g., Mycoo, 2006; Johnson, 2006; te Velde & Nair, 2006; Marshall, 2002). Development strategies for tourism in fragile cultures and bio-diverse ecosystems interface among economic, business, political, societal, and environmental concerns. As a result, tourism in the Caribbean confronts the twin challenges of sustainability and development. The “sustainable” side affects not only the environment, but also the culture and sociology of the region. The “development” side deals with the capacity of low-income countries to achieve higher levels of well being. As a consequence, there is a notable dissonance between policy conclusions of scholarly experts on the one hand and the behaviors and actions of the politicians and other policy-makers with responsibility for tourism in Caribbean destinations on the other. A more comprehensive approach is needed to assist decision-makers responsible for shaping the region’s tourism experience.

Scope

■ This paper represents a beginning toward a multi-disciplinary approach to analyze and examine the anatomy of tourism in the Caribbean. It is a conceptualization focusing on interconnections among various elements of the island system. Since such general approaches run the risk of not being entirely suitable for specific situations or locations, the present effort is offered as a beginning toward a more general theory. It allows for the interplay of various approaches that ultimately might lead to a more useful understanding

of threats and opportunities confronting Caribbean tourism. The metaphor of the Three Cs —context, characteristics, and consequences— is employed to derive a general framework around which to view the phenomenon of tourism (See Figure 1). Each of the three aspects is closely related to the others, and each is affected by and embedded within the others. As an ensemble, the three Cs determine the configuration of tourism at a particular destination.

Figure 1. Macro-environmental contexts

ECONOMIC	POLITICAL / LEGAL	SOCIAL / CULTURAL	
<ul style="list-style-type: none"> - Economy’s growth and versatility - Trading partners - Income distribution - Stability of prices and exchange rates - National wealth - Unemployment levels 	<ul style="list-style-type: none"> - Local civic self-government - Levels of corruption - Political systems and dispersion of governmental authority - Strength of legal and regulatory institutions - Impacts of global trade 	<ul style="list-style-type: none"> - Emerging social and demographic issues - Strength of local culture and national traditions - Acceptance of tourism - Crime trends - Labor force preparation 	
<th>ENVIRONMENTAL / GEOGRAPHIC</th> <th>HISTORICAL</th>		ENVIRONMENTAL / GEOGRAPHIC	HISTORICAL
<ul style="list-style-type: none"> - Pollution levels - Water quality and availability - Public health infrastructure - Environmental infrastructure - Environmental fragility - Topographical characteristics 		<ul style="list-style-type: none"> - Patterns of development and colonization - Traditional economic industries - Historical patterns of population distribution 	

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

Characteristics define the types of tourism that prevail in, or characterize, a particular destination. Examples would be all-inclusive 3-S resorts, cruise ship tourism, and smaller forms of ecotourism (heritage, cultural, nature). Following Weaver (2004), it is assumed for expository purposes here that a destination can be

broadly characterized by a single tourism style that either dominates the landscape or generates the most significant economic impact.

Consequences summarize the results, both positive and negative, that obtain from the interaction and combination of the first two elements or Cs. In developing this general anatomy, the Dominican Republic and the Turks and Caicos will be used as contrasting illustrations, followed by an extension to the Cuban case, both in the present situation and speculatively, in a post-Castro scenario.

Contexts

■ The context reflects the macro-environment within and around which tourism takes place. It includes five important categories: (1) economic forces and conditions; (2) political, legal, and regulatory; (3) social and cultural; (4) environmental, geographic, and topological; and (5) historical. Each of these dimensions

can have determinative effects on tourism strategies and possibilities, but most are largely outside the immediate policy control because they either reflect a long history of development or are determined by external forces and events.

Economic factors

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

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

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

Political and legal elements

■ Until fairly recently, democracy was rare in developing nations, but now "bare bones" democracies in Europe and Central and South America confront real economic and political challenges (Aron, 2001). Several Caribbean destinations fit this category where citizens enjoy freedom of speech, assembly, press, travel abroad, and elections but lack a highly developed and widespread culture of governance and locally effective civic institutions. Such fragile democracies struggle to strengthen the middle class, the base of democracy,

atop often unstable economies in nations characterized by the combustible combination of high illiteracy, youth unemployment, and income inequality (Richardson, 1992). Limited democratic traditions (including highly centralized decision-making with little input from local communities) and growing corruption (Maingot, 2004), affect tourism in two ways. First, there is a declining capacity to curb rising serious crime rates and second, there is a significantly higher drug-transit trade (Deosaran, 2004).

Social and cultural aspects

■ Nascent governments struggle to control negative socio-cultural impacts of tourism. Caribbean destinations, given their small size, proximity to North America, and extensive history of metropolitan migration (Richard-

son, 1983) are vulnerable to the effects of mass tourism as practiced in the region. The "all-inclusive," "garrison" style of tourism (in Cuba, it's known as "apartheid" tourism since local citizens are not allowed to go to

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

of revenues circulating through the local economy and the growth of local talent, capital, and decision-making (McElroy & de Albuquerque, 1994).

Environmental and geographic considerations

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

Every destination experiences some form of impact, depending on existing governmental standards and the professional infrastructures. Most impacts are significant enough to warrant implementation of major rehabilitation projects (e.g., Osama River harbor in

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

Historical legacies

■ Legacies of history are important and highly specific to various Caribbean nations. The Caribbean Sea is home to the world’s largest assemblage of small and mini-states, a mixture of large to small islands with a wide fusion of languages, religions, ethnic groups, and customs (Thomas, 1988). The pattern of development reflects influences of colonization and settlement: four European empires, as well as the United States and the former Soviet Union, historically have operated in the region. The Caribbean’s economic development, including its traditional industries and its workforce, reflect the import needs of colonial powers as well as the particular resource endowments of the nations. Refined sugar, for example, was highly prized in Europe

in the 1600s and 1700s; a spoonful sold in Paris for a fortune during the 16th century. Sugar was known as “white gold;” wealthy people stored sugar as a form of savings (Deere, 1950). By the mid-16th century a nascent sugar industry dependent on African slave labor had emerged in the Spanish Caribbean. (The extraordinary prominence of the Dominican Republic in the sport of American baseball might be traced to the presence of baseball “leagues,” or day camps, for the children of African-Dominican sugar cane workers). Population patterns and densities are easily explained by historical contours of development, agricultural crop land requirements, and general patterns of economic growth.

Characteristics

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

some extent Barbados.

The interaction between the contexts and the characteristics is quite real and seldom simple. Both capital scarcity and pressures to create additional jobs create

Figure 2. Tourism Characteristics

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

a heavy dependence on large-scale, foreign-owned “all inclusives” in many islands. These dependence challenges for host island nations are magnified due to ineffective local governments. Typically, the European all-inclusive operations are heavily vertically integrated with their own management structures, architects, hotels, and airlines. The tour operators from the origin markets are extremely powerful vis-a-vis a small Caribbean destination; tour operators tend to set the rules regarding occupancy and pricing. In fact, just a few conglomerates control nearly 80 percent of the tourism business in Europe, and they have great influence over pricing. Touristik Union Internationale (TUI) from Germany, the largest tourism conglomerate in Europe, included as of 2004 over 3,600 travel agencies, 104 aircraft, and 285 hotels (including brands like Iberotels, Sol y Mar, and RIU) with over 157,000 beds in 25 countries. Around 12,000 business travel professionals in over 70 countries also look after the TUI’s business customers. (See the company’s web site at <http://www.tui.com>). A small locality in the Caribbean is overwhelmed by the power and influence of such a global force.

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

The terrorist attacks of September 11, 2001, altered

Consequences

■ The consequences emanating from the first two Cs result in both negative and positive impacts, particularly in the local and national economy, environment, infrastructure, and cultural and social activities (see Figure 3). Butler’s (1980 and 1993) well-known lifecycle model suggests that as tourism destinations develop, they pass through predictable stages that involve increasing facility scale, capital intensity, and socio-environmental encroachment. Butler’s lifecycle stages would be subsumed under the scope of this more general frame-

work. Among the positive outcomes, of course, are net inflows of foreign currency, the expansion of labor-intensive employment and entrepreneurship, the generation of local taxes, the improvements in transport and other infrastructure (better roads, airports with a greater number of flights, police enforcement), and enhanced international reputation and publicity for the country. These represent the visible economic benefits touted in the postwar literature (Jafari, 2002) that dominate the initial stages of tourism development.

Figure 3. Positive and Negative Consequences of Tourism Activities

Economic:	Foreign currency, economy’s diversity, infrastructure impacts, labor force development, taxes, real estate impacts
Environmental:	Water, air, coastal, forests, marine, pollution/environmental
Political:	Local self-government impacts, corruption, government agency professional expertise development, regulations, regional collaborations
Social/Cultural:	Local cultural impacts, crime and crime abatement, international recognition

On the other hand, during the later stages of the resort cycle, many of the negative externalities appear. At the economic level, the tendency is for declines in visitor stay, per trip real spending, and holiday (versus business) travel accompanied by rising realty inflation (McElroy, 2003). At the ecosystem level, because of the dominant “sunlust” character of the region’s tourism, the location of large-scale resorts, marinas and access infrastructure on scenic mountain slopes and fragile coastlines damages watersheds, mangroves, beaches, and reef systems (Apostolopoulos & Gayle, 2002). At

the social level, increased seasonal crowding and rising crime are associated with deterioration in the pace of island life. In most developed destinations, to retain market share there is a tendency to replace lost natural amenities with man-made attractions (golf, conventions, etc.) and to promote duty-free shopping by promoting cruise activity. While tourism brings important benefits to small island nations with few or no other options (Wilkinson, 1989), it also brings negative consequences that partially offset positive ones and that flow directly from the contexts and characteristics of that destination.

Case applications

■ The Dominican Republic and the Turks and Caicos represent rather extreme examples of Caribbean tourism: one with explosive growth, primarily in the all-inclusive mode, an example of one of the “bare bones” democracies, developing slowly a better understanding of tourism and its effects and how to control them, moving toward less dependency on all-inclusives, and

another a British overseas territory, emerging initially in the “boutique” and upscale markets, but now facing economic and environmental pressures as it moves toward a greater emphasis on mass tourism, but with a greater reservoir of planning experience and more competent “civic” or local governments compared to the Dominican Republic.

Dominican Republic

■ Several context elements help explain the Dominican Republic’s (DR) emphasis on mass tourism. First, more than most Caribbean nations, the DR on the eastern part of Hispaniola, has suffered a number of postwar macroeconomic shocks that have weakened traditional sectors. These include the declining terms of trade for sugar and tobacco and the wholesale loss of thousands of textile/assembly jobs to Mexico through NAFTA and to China, through globalization. Second, the country suffers from marked income inequality. It is estimated that the top 10 percent of the population enjoys over 40 percent of GNP while the poorest half receives less than a fifth of national income (CIA, 2009). These contrasts are evidenced by extremely high infant mortality (26 deaths per 1,000 live births) and relatively low adult literacy (87%) for the region (See Table 1). Third, population pressure has been severe with the rate of natural increase approaching two percent per annum with decision-makers facing significant momentum in the future since roughly one of every three of the islanders is under 15 years of age. These economic and social challenges were greatly magnified by a major financial scandal resulting in the failure of the nation’s three largest banks in 2003. As a result of declining employment opportunities, rapid demographic growth, and relatively high population density (198/km²), the DR has experienced chronically high unemployment (15.4%) and emigration (2.2/1,000).

The absence of local capital and the attractiveness of Caribbean weather and beaches prompted the DR government to pursue mass tourism by luring large-scale foreign investments with tax holidays, land incentives,

and other guarantees. As a result, the DR has become the largest island destination in the Caribbean with four major tourist zones served by their own international airports: Santo Domingo (the capital), Puerto Plata in the north, San Pedro and La Romana in the southeast, and Punta Cana/Bávaro in the east. This has been accomplished extremely rapidly during the past two decades. Some of the resorts/infrastructure have been poorly planned, a result of the pace of development and DR’s “newcomer to democracy” status. Weak local government in general and agencies with environmental and planning oversight in particular are not adequately staffed and suffer from the lack of continuity due to frequent civil service turnover when new presidents are elected. In addition, the nation’s infrastructure and education system are significantly below standards. A final contributing factor has been a traditional policy of heavy natural resource use (monoculture and mining -nickel, gold, silver) and environmental neglect.

Tourism began in the Puerto Plata region, boosted initially by U.S. and, to a lesser extent, Canadian visitors. Consistent with Butler’s theory of rise and fall of tourist destinations, weak governmental oversight and corruption led to a decline in the infrastructure of the region and in the overall quality of the resorts (with some exceptions), and this in turn led to heavy discounts and a different class of tourist. Crime also increased over the last twenty-five years partly resulting from increasing cocaine trafficking into Haiti (DEA, 2001). As Puerto Plata matured and declined, the other areas developed and flourished (Padilla & McElroy, 2005). Foreign investors developed various resorts and

golf courses in La Romana and then more recently, an explosion of “all inclusive,” foreign-owned hotels opened in the previously-uninhabited region of Punta Cana and Bávaro on the eastern-most tip of Hispaniola. Even though the Punta Cana region boasts several relatively “upscale” resorts, there are increasing signs of over-development in the area today, though it remains the fastest growing tourism region in the Caribbean.

Today the DR has over 4 million visitors annually who spend close to \$4 billion. Over 90 percent are tourists (stopovers) almost exclusively on holiday (93%) who stay an average of 10 days (9.3 nights) largely because of the heavy package traffic from Europe that comprises over 40 percent of the market (see Table 1). These

features plus low per resident visitor spending (\$386), a low visitor/population ratio (0.44) and a profitable hotel occupancy rate (73%) reflect -on an all-island basis- behaviors associated with the expansion stage of the destination lifecycle. However, because of the heavily concentrated nature of tourism activity, two of the tourism zones resemble highly developed, tourist-driven small-islands. For example, in per resident visitor spending (\$7,941), daily visitor density per 1,000 population (204), and rooms per square kilometer (5.7), Punta Cana ranks with the most tourist penetrated island destinations in the world; and Puerto Plata ranks with the intermediate group that includes Antigua, Bahamas, Barbados and others (Padilla & McElroy, 2005: Table 3).

Table 1. Selected Tourism and Other Indicators

Indicator	Dominican Republic	Turks and Caicos	Cuba*
Visitor growth ¹	58%	123%	57%
Room growth ¹	42%	86%	36%
Occupancy ¹	73%	73.0%	61.0
Percent No. America	58%	90%	52%
Percent European	42%	10%	46%
Holiday Purpose	93%	59%	90%
Average Stay	9.3	7.0	10.5
Spending (\$millions)	\$8,729	\$392	\$2,404
Avg. Spend/Trip	\$897	\$1,581	\$1,082
Avg. Spend/Day	\$96	\$225	\$103
Spend/Population	\$386	\$17,087	\$210
Tourists/Population	0.44	10.80	0.19
Percent 0-14 yrs	31.4	30.2	18.3
Median Age (yrs.)	24.9	27.9	37.3
Pop. Density (km ²)	198	24	103
Crude Birth Rate	22.4	20.8	11.1
Crude Death Rate	5.3	4.2	7.2
Net Migration Rate	-2.22	9.0	-160
Infant Mortality	26.0	13.9	5.8
Life Expectancy (yrs.)	73.7	75.4	77.5
Literacy Rate	87.0	98.0	99.8
Per capita GDP	\$8,100	\$11,500	\$9,500
Unemployment Rate	15.4	10.0	1.8
Phones/Population ²	665	322	108

**Data on GDP, unemployment, and infant mortality for Cuba is from official Cuban government sources"*

"Datos de Cuba del PIB, desempleo, mortalidad infantil proceden de fuentes oficiales del gobierno cubano"

Sources:

Compendium of Tourism Statistics;
Data 1998-2006 (WTO, 2008); World Factbook
(CIA, 2009).

Notes:

- ¹ Total rate of change between 1998 and 2004.
² Includes phone lines and cellular phone
per 1,000 population.

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

Turks and Caicos

■ The Turks and Caicos (TCI), an “overseas territory” of Britain with a local ministerial government, comprise a 40-island archipelago of low-lying coralline limestone islands 150 miles southeast of the Bahamas. Only eight are inhabited and over 80 percent of the population is concentrated on Grand Turk and Providenciales. In addition to their small size -they represent less than one percent of the population and area of the DR- extremely limited rainfall (29 inches/yr.) and arable land (less than 5% of the total) hindered intensive development of plantation agriculture. The extensive reef system, shallow salt flats, and prevailing winds (for evaporation) provided for a viable fishing industry and salt exports for fish preservation during the colonial era. In the 1960s, however, the salt industry collapsed with the introduction of new canning preservatives and freezing methods (Royle, 2001). The economy remained weak and dependent on two U.S. military bases until they closed in 1970. The modern era began with the deliberate attempt to diversify along Bermudian lines into offshore finance and tourism. Initial success in the insurance business was followed by scandals in the late 1980s later corrected by British oversight (Aldrich & Connell, 1998). Since then the offshore finance industry has rebounded and represents a second major source of foreign exchange behind tourism but ahead of fishing, which remains a source of island protein.

The high-end visitor industry was created by a confluence of favorable context factors. First, it was fostered by a relatively enlightened civil service with a long period of stable democratic practice under the British Crown. As a relative tourism newcomer, decision makers may also have been aware of the ecosystem damage experienced by other nearby destinations that had entered the resort cycle decades earlier. Second, since it is only a 75-minute flight from Miami to Providenciales, geographic proximity to the lucrative North American origin market -which accounts for nine of ten tourists (see Table 1)- facilitated development. Third, the TCI has extraordinary environmental assets, including pristine white beaches, healthy and easily accessible reef systems, and abundant wildlife: flamingos, iguanas, turtles, and dolphins. These resources provide a base for ecotourism opportunities like birding, whale watching, diving, and sport fishing in a territory that had historically escaped the environmental ravages of plantation monoculture. Fourth, a combination of three interre-

lated socio-economic conditions reduced pressure to pursue the high-density, middle-to-low end of the mass market. These included the relatively buoyant alternative export sectors of offshore finance (only 59% of visitors arrive for holiday purposes) and fishing (lobster and conch); relatively low population density (24 persons/km²); and relatively rapid labor-absorbing visitor and construction growth. The pace has been particularly brisk most recently with very sharp increases in tourist arrivals and hotel rooms since 1998 (Table 1). Finally, the Islands’ tourism trajectory has been supported by externally subsidized transport infrastructure improvements (three international airports) partly the result of its dependent status as a British overseas territory.

After two decades of rapid growth, the economic axis has shifted from the administrative capital of Grand Turk to the tourism center in Providenciales. Today the TCI is one of the more affluent small island tourist economies in the region with multiple times the level of per resident visitor spending (\$17,087 vs. \$386) of the DR. As evidence of progress, the territory enjoys high life expectancy (75 yrs.) and literacy (98%) and relatively low infant mortality (14/1,000) and has become independent of budgetary aid (not capital grants) from Great Britain since 1989 (Connell, 2001:118). Much of this success has been due to the upscale tourism where some superlative beachfront hotel accommodations and other amenities (spas, cuisine) routinely cost above \$500 per night (double occupancy) (West Indies online, 2005). This explains the TCI’s very high rate of repeat visitation (60%), the high average hotel occupancy (73%) as well as its average per trip and per day visitor spending more than double the DR values (Table 1). In fact, according to Duval (2004:15), the TCI recorded the highest average per trip tourist spending (\$1,879) for 2000 in the Caribbean. The British Virgin Islands (\$1,262) and Barbados (\$1,205) were distant seconds.

However, the pace of development is accelerating beyond the labor force’s capacity to serve recent growth. For example, net migration approaches ten persons per 1,000 population and fuels population growth close to three percent. Moreover, annual tourists exceed ten times the resident population making the TCI one of the most tourist-penetrated small-island destinations across the world. In fact, according to Parry and McElroy (2009), the average daily visitor density on Turks and

Caicos is 174 visitors per 1,000 population, equivalent to a 17 percent increase in the resident population year-round. As visitation and tourism dependence increase and as the growing number of travelers threatens the environment and the cultural traditions, pressure will mount to downscale towards the popular all-inclusives enclave developments to preserve an ever rising stream of foreign exchange. As an indication of this direction, recent plans have surfaced to convert East Caicos into a major cruise ship port to accommodate “up to 660 cruise liner visits per year. . . that would involve nearly half of the island going under the bulldozer” (Royle, 2001:173). Promoting large-scale cruise traffic is considered an appeal to the lower end of the market since such one-day visitors spend only an average of eight percent of what stayovers spend (Duval, 2004:15) and principally on liquor, gifts and jewelry which all have very high import content (low local value-added). While the current global financial recession will slow such plans, over the

longer term the pressure to add more development will remain.

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

Figure 4. Comparison of the Three Cs: DR and Turks and Caicos

Dominican Republic

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- Second largest island in Caribbean, Spanish-speaking
 - Amazing bio-diversity, great natural beauty
 - Poor economy, few resources
 - High levels of poverty, high unemployment, fast population growth
 - Weak infrastructure
 - Good international access, airports
 - New democracy
 - Weak local self-government, very strong presidency
 - Poor institutionalization of agencies and civil service, low professionalism, high turnover from administration to administration
 - High levels of pollution and environmental degradation, crime in tourist zones

Turks and Caicos

- British dependency
- Isolated, small population, hard to reach smaller islands, weak availability of trained personnel
- Good utilities, civic government is moderately active
- Relatively low poverty (though some recent immigration causing problems)
- Investor-friendly environment, stable political system
- Good international access to one island (Providenciales) but poor elsewhere
- Strong concern for environment with several carefully guarded preserves and sanctuaries
- Increasing encroachment by “all inclusives” and significant impact on land and home prices

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- Largely all-inclusive tourism
 - Heavy European presence (mostly German, British, Italian, and French), with significant U.S. and Canadian visitors
 - Centrally-controlled process, little or no local involvement
 - Inadequate or non-existent environmental regulations and zoning laws
 - Middle- and low-middle class tourism, with a few isolated upscale resorts and marinas
 - Some cruise ship tourism in the capital, but mostly through-traffic
 - Fastest-growing tourist destination in Caribbean, but also experiencing deep discounts in over-crowded, older areas

- Mostly English-speaking visitors U.S. Canada, and England)
- Largely middle-and-up tourism, with significant upscale sector. Recent “all inclusive” (Beaches) has increased tourist traffic to Providenciales
- No cruise ship traffic due to shallow harbors
- Faster population growth, largely associated with immigration and mass tourism activities
- “Quiet” tourism centered around beautiful beaches and carefully guarded reefs

- “Turbo” growth in tourism, strong inflow of foreign currency initially
 - Decline of Puerto Plata tourist pole in north, with subsequent rise in crime and pollution, followed by deep discounts and lower class of tourists
 - Explosive growth of tourism in south and east of the country
 - Heavy demands on infrastructure (roads, police protection, crime control, water and sewer, electrical services, schools for workers’ children)
 - Diminishing net receipts from tourism but increasing reliance on tourism receipts to offset declining sectors in agriculture and manufacturing
 - External pressures to expand development into protected, fragile coastal areas
 - Increased pressures on already weak environmental and planning governmental structures
- Tourism up sharply from 1980s, when it was virtually non-existent. Large fraction of economy, intense tourism relative to local population.
 - Remoteness and smallness have hindered access and kept development down below what it has been elsewhere, particularly in outlying islands.
 - Relatively strong, locally managed resorts catering to higher class tourists
 - Increasing tensions between developers and locals
 - Evidence of increasing impact on local real estate prices and environmental challenges
 - Lagging development in more remote islands and locations, limited international access
 - Highly dependent on continued international airline access and tour operators

Extensions to Cuba

■ Although Cuba was the dominant insular destination in the Caribbean in the late 1950s (Maribona, 1959), tourism became “a capitalistic vice” under Castro. It virtually disappeared in the early 1960s. In recent years, new context factors have surfaced for Cuban tourism. These include Cuba’s re-emergence as a “new” destination, its vast and semi-unexploited resources and biodiversity, its relative poverty of income, and a desperate need for capital. In addition, the collapse of the Soviet Union in the early 1990s and the subsequent loss of \$6 billion in annual Russian subsidies contracted the economy by one third (Gonzalez, 2002). These factors contributed to the re-emergence of tourism in Cuba. Castro’s reluctant but aggressive pursuit of European and Canadian investors to develop large-scale beachside resorts (many all-inclusives) yielded rapid returns. Between 1996 and 2006, the number of visitors rose 120 percent and hotel rooms by 65 percent (WTO, 2008).

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

In addition, centralized control has reduced cost efficiencies in industry and allied services and limited the growth of local entrepreneurship and management. The government’s policy to practice “apartheid” tourism keeps local populations away from visitors to minimize cultural and domestic political impacts. Similarly, the placing of large-scale resorts on offshore keys and deserted islands further tends to mask local concerns or disagreements arising from mass tourism’s impact on the socio-economic structure. All such practices further reduce the local tourism income multiplier. As a result, Cuba typifies a middle-and-down, mass market Caribbean destination. There is heavy dependence on non-US tourists who stay roughly ten days and spend on average of \$1,082 per trip and \$103 per day. Overall, net tourism revenues, even when augmented by remittances from Cuban-American exiles, represent less than one-third of the peak Soviet assistance (Perez-Lopez, 2001).

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

“forbidden” aspects of Cuba travel by US residents are likely to uncap an avalanche of interest in the island, at least for the near term (Padilla & McElroy, 2007). In such a case, a particular emphasis on two aspects might avoid some of the problems plaguing Caribbean destinations today: an international effort to “jump-

start” the development of strong local governments and significant strengthening in the preparation of environmental scientists and regional planners with independence of action and support from government leaders.

Conclusions

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

In the model’s application, contrasting cases were drawn between the Dominican Republic and the Turks and Caicos. The former’s propensity to create large-scale, mass-market, environmentally intrusive, all-inclusive resorts reflects several factors: failing non-tourist sectors, widespread demographic and unemployment pressures, weak government planning oversight, and a legacy of ecosystem neglect. The Turks

and Caicos preference for upscale or boutique tourism is predominantly a function of viable non-tourist sectors (fishing and finance), a cadre of civil service professionals, and a unique natural patrimony of reefs and wildlife conducive to high-end and high value-added ecotourism. The sense of civic government and local involvement in tourism issues (buttressed by the oversight and resources of Great Britain) are also more highly visible (or developed) in the Turks and Caicos.

Finally, in the case of Cuba, the Caribbean tourism leader in the pre-Castro era, the key context features in the rapid drive to create foreign exchange and employment through large-scale, all-inclusive, European investment have been the absence of local capital/entrepreneurship, an abundance of unexploited coastal and interior biodiversity assets and, most importantly, the massive loss of assistance after the collapse of the Soviet Union. In conclusion, the success of the model in highlighting the underlying determinants of tourism evolution in these three islands suggests further applications are warranted. These might include the contrasting profiles of upscale Bermuda with all-inclusive St. Lucia, and perhaps Nevis with its sister island of St. Kitts.

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Conceptualizing Caribbean Tourism through Hybridity: The Grenadian Tour Product

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Abstract

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

Key words:

Hybridity, nature-culture dualism, Grenada, guided tours, tourism promotions

Resumen

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

Palabras clave:

Hibridación, dualismo naturaleza-cultura, Grenada, visitas guiadas, promociones turísticas

Introduction

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

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

Romantic images of tranquil azure seas, sandy white beaches and gently swaying palms have occupied the imagination of the Caribbean visitor since 19th century travelers painted vivid portraits of exotic island paradises in their narratives (Nelson, 2007). Although modern scholars take pains to emphasize the cultural, socio-economic and environmental diversity of the islands, “sun-and-sand” remains the pervasive stereotype of the Caribbean as tourism planners capitalize on the legacy of this imagery (Torres, 2005; Jayawardena, 2007; Nelson, 2007; Daye, 2008). Yet, overemphasis on the beach in tourism promotions, and underrepresentation of local people, places and customs, has had the effect of stripping away the unique cultural landscapes and identities within the Caribbean. Even islands that may be less competitive in “sun-and-sand” continue to vie for this market rather than develop a distinctive product. As this “sun-and-sand” pattern attracts mass tourists who do not go “off the beaten path,” these tourists fail to recognize the distinctive nature of the islands in the region. Likewise, they fail to develop strong attachments to places that might foster a desire to return and explore the region further on future holidays. Indeed, with the rapidly changing and more globalized nature of tourist demand and consumption, the failure to highlight the diversity of the islands and their different attractions is a lost opportunity for all.

Tourism studies in the Caribbean have also reinforced the “sun-and-sand” stereotype by focusing on mass beach tourism and treating alternative destinations or products as aberrations. While there has been considerable research on tourism diversification in the Caribbean (e.g. Cameron & Gatewood, 2008), discussions often imply a linear trajectory from “sun-and-sand” tourism in the past to recent diversification efforts. This fails to recognize that beach tourism often coexist with a variety of other products. Similarly, tourism studies typically place Caribbean visitors in dichotomous and static typologies that do not capture the diverse nature of tourists, even mass tourists and their complex consumption patterns (Torres & Nelson, 2008).

The limited perspective on the interrelationships and interactions between different tourism products conceals diversity and perpetuates homogenized representations of the unique destinations, identities

and activities of places within and between islands. This dearth of analysis reveals a failure to grasp the true complexity of the nature of Caribbean tourism production and consumption. Scholars can play an important role in elucidating the diverse and changing landscapes of tourism products by casting off narrow categories of tourism and dualistic thinking in favor of analysis through the lens of hybridity.

Hybridity is a broad concept applied in diverse contexts to understand the complexities of the world. In geography, hybridity has been used as a metaphor to overcome the nature-culture dualism by highlighting the ways in which the components are entangled (Demeritt, 1994; Castree & MacMillan, 2001; Whatmore, 2002; Castree, 2005; Urry, 2006). The concept has significant potential to enrich theorizations of the evolution of tourism products in place-specific contexts and practical applications to help tourism planning and promotion better capitalize on the unique circumstances of destinations. Ultimately, recognizing hybridity will help better connect tourism development with the rapidly shifting tastes of 21st century travelers.

The primary objective of this article is to draw on the geographic tradition of hybridity and demonstrate its potential as a theoretical tool to understand tourism products as complex and fluid. In particular, the article applies the concept to tourism products at a Caribbean tourism destination where “sun-and-sand” exists alongside special interest tourism, and the typical tour offerings are hybrid products. Drawing upon multi-method research conducted in Grenada, the article examines tourism products through a lens of hybridity to demonstrate how this conceptualization can lead to a more nuanced understanding of products and their representation. This island was chosen for this case study as an example of a destination where the dominant image and largest tourist market is “sun-and-sand” (Daye, 2008) but also where varied dimensions of tourism products have emerged, co-existed and complemented each other. Grenada’s popular “Island” and “Rainforest” tours have emerged to satisfy tourists’ interests beyond the beach, even if their primary objective was “sun-and-sand.” Such tours help create a sense of differentiation for the island and meet the demands of tourists with multiple interests that extend beyond the beach; they do not easily fall into “mass” versus “alternative,” nor “nature” versus “cultural” tourism binaries. Hybridity helps elucidate the complexity and complementarity of the components that make up these products without resorting to reductionism and oversimplification.

The article begins with a brief review of the geographic literature of the nature-culture dualism and hybridity as a means of looking beyond this dualism. This is followed by a discussion of the Caribbean tourism brand and the potential applicability of hybridity to explore the

relationships between different forms of tourism in the region. Next is an overview of the context of tourism on the island of Grenada. The article then outlines the methodology of the research on which this discussion is based. The results section examines the hybridity in the representation of Grenadian tourism products, through promotional imagery and descriptions as well as the products themselves. The article concludes with

suggestions that research can play an important role in shifting conceptualizations of tourism in the islands towards a richer understanding by employing hybridity as an analytical lens that challenges homogenization and false distinctions made between traditional types of tourism products (i.e. “sun-and-sand” versus ecotourism).

Conceptual Framework: Dualisms and Hybridity

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

Hybridity describes the process in which different entities or elements come together and interact in ways that produce new strains or variants. These new variants are products that are distinct from and can exist alongside the original entities (Gold & Revill, 2004; Ray, 2006). This metaphor forces us to recognize that the world is complex, heterogenous, even messy and impure. In the context of the nature-culture dualism, “Hybridity draws attention to the ways in which the physical and social worlds interact and combine in a multiplicity of ways” (Gold & Revill, 2004: 76). Therefore, a hybrid is made up of entangled, not purely natural nor cultural entities that are not easily separated (Castree & MacMillan, 2001; Whatmore, 2002; Castree, 2005; Haldrup & Larsen, 2006; Urry, 2006). Importantly, it should be recognized that the hybrid variant is not a static third category but an ongoing negotiation of and response to the interacting entities (Meethan, 2003).

The modern world is one of ever increasing complexity (Urry, 2006) and one that is always changing (Meethan, 2003). Hybridity provides a means of organizing the world in terms of the ways in which it is connected

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

The concept of hybridity is not completely new to tourism studies, although it has not been used to a great extent. Studies such as Hertzman, Anderson, and Rowley (2008) recognize that tourism is characterized by heterogeneity and identify “edutainment” heritage tourist attractions as a hybrid form of tourism. Hybridity has also been applied in tourism studies to describe to the interactions of different cultures in the context of tourism and the idea of tourism as performance. For example, Meethan (2003) explores the emergence of a hybrid touristic culture from the interaction of the fixed local culture and the trans-local mobile culture of tourism, and Shepherd (2002) finds that the outcome of tourism development in Bali is more complicated than traditional ideas of tourism either destroying or recreating local culture. Also, Haldrup and Larsen (2006) and Ryan and Collins (2008) discuss the hybridity in tourism performances.

In the context of this paper, the concept of hybridity can provide the framework for exploring the ongoing negotiation of special interest tourism products. In recent years, increasingly specialized tourism products have been categorized by labels such as agrotourism, cultural tourism, ecotourism, health tourism, heritage tourism, and wildlife tourism, among others. These labels have value in the development of products that satisfy particular tourism demands with specific goals. However, such labels are often defined in very narrow terms that determine the components that will, or will not, be included in a particular tourism product as well as the type of tourists that participate in the activity. This effectively draws distinct lines between the different categories and frequently leaves little room for overlap. In reality, the definition between types of tourism is rarely clear, often blurred, and

with considerable overlap. Perhaps the reason for the continuous adjustment of tourism labels and definitions is that tourism products are often too complicated to fit into such neat packaging. Tourism products are typically made up of a complex mix of components that might be individually categorized in many different ways and not always the way in which the product is labeled. Moreover, the tourists themselves are equally difficult to categorize. They demonstrate a complex spectrum of motives and behaviors that vary on an individual basis according to different circumstances, contexts

and places (Torres & Nelson, 2008). Therefore, tourists often have a range of primary and secondary interests. As such, “As the international tourism industry expands and develops, it continues to motivate the creation of new forms of tourism and tourist attractions. The desire for innovative, unique, novel, alternative, multimedia and/or multidimensional experiences and attractions has led to processes of hybridization in which new amalgamations of phenomena come into being” (Hertzman et al. 2008: 169).

The Context of Grenada

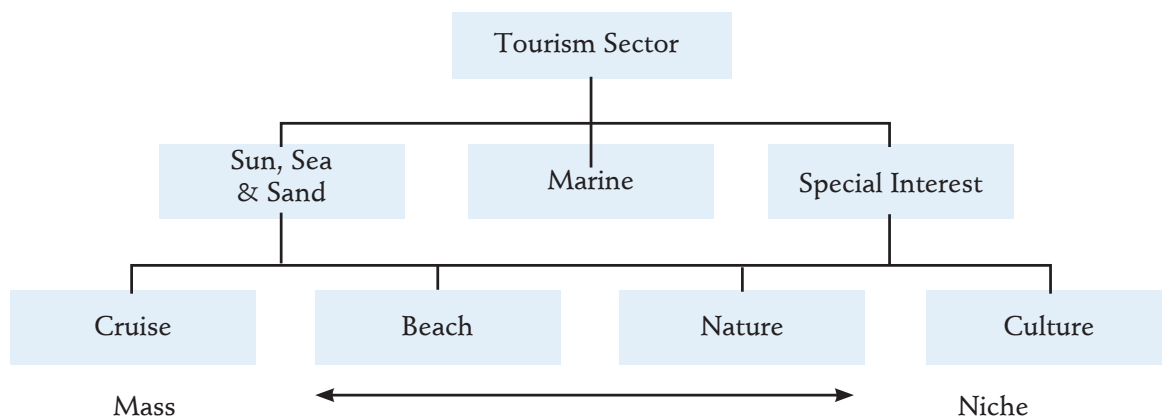
■ Grenada has historically been a predominantly rural, agrarian based society. However, the decline of agriculture was particularly accelerated over the past two decades as the government began to push for tourism to be a major part of its economic development and diversification strategy (Government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

Grenada was considered to be an appropriate destination for this study because the island has diverse tourism resources that the government has sought to tap, including a tropical climate, white sand beaches, and a mountainous volcanic interior. In 1997, the government of Grenada’s Master Plan for the Tourism Sector identified four primary tourism sub-sectors, including cruise, beach, nature, and culture (Figure 1). Cruise tourism and beach resort tourism, comprising the “sun-and-sand” category, were the principal types of tourism identified. O’Reilly (2005: 266) cites Grenada as one of the islands possessing “beautiful beaches and the ideal sunny climate for leisure tourism,” and Daye (2008: 36) identifies the island as one of the destinations in which the main image construct is paradisiacal, characterized by “the typical recreational sun, sand

and sea holidays.” Indeed, these two sub-sectors have typically accounted for nearly all of Grenada’s tourists (Woodfield, 1998). Yet, despite the importance of these categories, government officials argue that Grenada is not a mass tourist destination (McDonald & Hopkin, 2003).

Recognizing the island’s other tourism resources, two additional tourism categories were identified: marine tourism and special interest tourism. This latter category was further divided into nature tourism and cultural heritage tourism sub-sectors. Nature tourism has been used as a popular marketing tool, as the island has often promoted itself as “the Caribbean as it originally was” (Rare 2004: 1). Ecotourism was also listed in the Master Plan as “an important potential future direction for tourism” (Government of Grenada, 2000: 25). Although the government of Grenada has recognized ecotourism as an alternative to mass tourism (Jayawardena, McDavid & Spence, 2007), Grenada has not been considered a significant ecotourism destination in the Caribbean (Weaver, 2004; O’Reilly, 2005). In many cases, the term is used as a synonym for nature tourism on the island without adherence to the tenets of ecotourism (Woodfield, 1998).

Figure 1. Grenada's Tourism Sub-Sectors



As is common in the region, special interest tourism products exist side-by-side with Grenada's conventional tourism sub-sectors (Duval, 2004). This complicates the categorization of Grenada's tourists as well as tourism products. Most stay-over tourists would be classified beach resort tourists, and based on a survey undertaken by Rare (2004), beaches accounted for the largest category in terms of reasons for visiting Grenada. Yet many also participate in marine and/or special interest tourism activities, and in the survey, sightseeing/landscape accounted for almost as high a ranking as beaches. Nearly half of tourists visit the well known

and marketed sites, such as the Grand Etang National Forest, spice estates, and Concord Falls. Respondents were also interested in historic sites, cultural activities, wildlife viewing, and hiking opportunities. (Rare, 2004).

Tourists may participate in these activities independently; however, approximately half of tourists use guides (Rare, 2004). Reflecting the varied primary and secondary interests of tourists, guided tours draw upon the characteristics for different types of tourism and blend them into a type of tourism product that is not easily labeled, as discussed below.

Methodology

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

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

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

Nelson, 2005). Other print materials were obtained at key locations of the destination, including the airport, hotel lobbies, and the Board of Tourism office. These twenty-two sources were comprised of a total of 376 images, all of which were included in analysis.

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

In addition to content analysis, materials were submitted to a deeper analysis through semiotics. Semiotics is the study of signs and is used as an analytical tool for interpretation of cultural creations (Hopkins, 1998; Morgan & Pritchard, 1998). The first layer of signs is denotation, in which something is described. The second layer is connotation, or myth, in which ideas are structured to convey particular messages with ideological meanings (Morgan & Pritchard, 1998; Rose, 2001; Hunter, 2008). Bhattacharyya (1997) and Nelson (2005) provide examples of the use of this methodology in the context of tourism representations. Hopkins (1998), Jenkins (2003) and Scarles (2004) each combine the use of content and semiotic analysis as quantitative and qualitative methodological compliments. The two were combined in this study with the theoretical frame of hybridity to provide the means of investigating the overt function of the images in Grenada's destination literature, in terms of the sites and components of guided tours, as well as the deeper ideological meanings.

Table 1: Content Analysis of Destination Literature

<i>Medium</i>	%
Pamphlet	9
Tour guide	13
Brochure	32
Magazine	23
Website	23
<i>Illustrations</i>	%
Map	4
Logo	2
Photographs	94
	%
Black & white	4
Color	96
<i>Tourism Sub-Sectors</i>	%
Beach	15
Marine	10
Nature	25
Cultural Heritage	50

Hybridity in Destination Imagery

Visual imagery is acknowledged to be an important part of tourism promotion (MacKay & Fesenmaier, 1997; Morgan & Pritchard 1998; Jenkins 2003; Scarles 2004; Nelson, 2005; Hunter, 2008). Given that the destination literature used in this study represents one island, much of the imagery is similar in nature and composed of many of the same elements that typically correspond with Grenada's tourism sub-sectors. The elements of graphic logos are used to represent beach, nature and cultural heritage tourism. The photographs were more complex, but each of the beach, marine, nature and cultural heritage tourism categories were represented.

The graphic logos were relatively simple illustrations that contained multiple pictorial elements. Taken together, logo elements are intended to symbolize the character of the island; taken individually, they may represent a type of tourism experience. As a result, different types of experiences may be combined in one logo. For example, the yellow sun, blue water and green palm trees were frequently used elements typically representative of a "sun-and-sand" destination associated with Grenada's beach tourism category. However, this was also combined with elements such as mountains, wildflowers, or birds that would be more indicative of nature tourism experiences.

The other principal imagery used in logos for Grenada is the nutmeg. The nutmeg is a key component in Grenada's destination promotion, as the concept of spice has long been used as a focal point for creating a sense of unique identity and distinction from the other islands in the region. The nutmeg not only denotes the

traditional importance of spice in the island's agricultural industry but also connotes ideas of something natural and exotic. Playing upon this sense of identity, tour companies also incorporate the nutmeg into their logos. For example, one tour company juxtaposed a wildflower and a ripe nutmeg in a striking image. The wildflower is indicative of tropical nature and can be attributed to the nature tourism sub-sector. The nutmeg is perhaps more difficult to classify, as agriculture does not easily fit into one of the identified sub-sectors. Cultivation is a human activity and a sign of civilization; therefore, it may be considered part of the cultural heritage category. The argument could also be made, however, that nutmeg trees are a product of nature. It is a signifier of colonial history, place identity, human-nature interactions, and culture. Thus, while it would be simple to characterize the tourists and destination as primarily "sun-and-sand," the nature of tourists, places and products in Grenada are far more diverse.

Photographs play an important role in not only depicting the appearance of the destination but also in creating expectations for tourism experiences and reinforcing ideologies that permeate Caribbean tourism promotions. The photographs typically depicted an individual scene that might be encountered during the course of a visit to Grenada, such as on a tour, and these images also contained multiple elements. Each photograph was classified by tourism sub-sector in terms of its best fit. The sub-sectors that contribute to "sun-and-sand" (beach and marine tourism) collectively accounted for one-fourth of photographs. Nature tourism also accounted for one-fourth, and fully one half of photographs fell under the broad cultural heritage

category (see Table 1). Clearly Grenada's tourism product, as well as its promotion, is much more diverse than one would expect. Unlike generalized stereotypes, this suggests a hybrid experience where visitors not only avail themselves of the luxuriating beach or cruise trip holidays but also of elements specific to Grenada. This includes the Grand Etang National Park, the Carenage, the spice estates, and more.

To explore the imagery that specifically pertains to Grenada's tour products, tour company brochures were subsequently examined in greater depth. Table 2 highlights further analysis of the photographic

images represented in these brochures, which were also categorized by the principal tourism sub-sectors identified in the Master Plan. Beach tourism accounted for 15 percent of photographs, the majority of which were prototypical beach imagery. Specifically, these were natural beaches in which the primary focus was on clear blue waters, white sands and green palm trees, as opposed to a social beach filled with high rise hotels, umbrellas, and sunbathers (Nelson, 2005). Marine images provided a related category that accounted for 10 percent of photographs and focused on fishing and diving activities.

Table 2: Destination Imagery in Tour Brochures

<i>Tourism Sub-Sectors</i>	<i>%</i>	<i>Imagery</i>	<i>Connotations</i>
Beach	15	Water White sand Palm trees	Natural beach Tropical island paradise
Marine	10	Sailing Fishing Diving	Adventure Activity
Nature	35	Waterfalls Forest Wildlife	Exotic Undisturbed
Cultural Heritage	40	St. George's Spice estates Food & beverage	Timelessness Indulgence

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

The cultural heritage category still accounted for the largest single category of photographs, but at 40 percent of images in tour brochures, the overall proportion was smaller. The capital city, St. George's, was pictured most often and included scenes such as Fort George and the Saturday market. While the urban market serves a function for local populations, it is also promoted to tourists as a unique glimpse into "colorful" island culture and an opportunity to interact with local people. Vendors sell various types of agricultural produce, including tropi-

cal fruits, spices, and wildflowers. Also included in this category were historic sites, spice estates, agricultural produce, prepared foods, and alcoholic beverages.

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

Hybridity in the Promotion of Grenadian Tour Products

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

Each of the companies offered a slightly different variation of the "Island" tour. Several standard attractions for these tours included St. George's, a spice estate, a waterfall, the rainforest in the Grand Etang National Park, and the Grand Etang volcanic crater lake. Additional attractions offered on some of the tours included a historic fort, a nutmeg processing station, a rum distillery, and historic site Carib's Leap. This eclectic hybrid tour clearly suits the needs of the special interest tourism sub-sector within mass tourism. It is billed as "a bit of everything," and incorporates attractions from both the natural and cultural heritage categories. Additionally, two tours included a visit to a beach, although clearly the emphasis was on a hybrid experience, not a beach-centered outing.

Hybridity in Grenadian Tour Products

■ The "Island" tour provides a clear example of a hybrid tourism product variant. This type of special interest tourism does not fall neatly into a particular category. Each of the different tourism categories identified for the island are represented in the alternating urban and rural settings. Yet it is not simply a matter of including a cultural heritage component as well as a natural component in the tour. These elements are blended together almost seamlessly so that one cannot be untangled from the other.

In this regard, each attraction may be examined as hybrid. For instance, an example of an historic spice estate is one typical attraction on the "Island" tour. Such sites, frequently dating back to the 18th century, have tremendous appeal in their preservation of the past. These estates are often set in an area in which the agricultural plants cannot be easily distinguished from the surrounding forest. Examples of spice plants, as well as their finished products are shown to visitors,

There were fewer variations in the "Rainforest" tour. These were more active tours billed as walks, hikes or treks for those tourists seeking a nature experience. Each "Rainforest" tour included a light to moderate hike through the forest of the Grand Etang National Park and a visit to one or more waterfall sites. Two tours also included a visit to the Grand Etang volcanic crater lake and a natural warm water spring with reportedly therapeutic properties. This tour explicitly draws upon ideas of the environment and nature tourism. The tourist is invited to discover the natural beauty of Grenada and to experience it away from the crowds. Such "ecotouristic treasures waiting to be discovered" are described as exciting and spectacular – "a naturalist delight" – in the brochures.

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

and both their natural properties and their cultural purposes are described. The billed natural attractions are also scarcely indistinguishable from the cultural. For example, the Grand Etang volcanic crater lake, from one view, surrounded by thickly forested hills gives tourists the feeling of something very old and the product of forces nearly incomprehensible to humans. From another view, though, the area is frequented not only by tourists but also by families and schoolchildren as a place for picnics and get-togethers.

The rainforest is one of the primary reasons for visiting Grenada, and the Grand Etang National Park is the most frequently visited attraction (Rare 2004). Although the "Rainforest" tour appears to be a straightforward nature tourism product, the experience is nonetheless hybrid. Initially, the majority of plants are agricultural, including bananas, breadfruit, clove, cocoa and nutmeg. These plants become less dominant farther along the trail; however, the forest is still secondary growth. These are

areas that had been cleared at one time for agriculture; therefore, they have clearly been modified by humans. Such sites continued to be modified for tourism, as paths are cleared and maintained, often by lining them with fragments of nutmeg shells to prevent erosion. Guides provide information about the natural flora and fauna, but this information is culturally conditioned. It is processed into a language that tourists can understand and presented in a way that will be interesting to them. In particular, this refers to items tourists would be familiar with, such as agricultural produce, or stories they could relate to, such as the guide's memories of or experiences in a place. While marketed as a rainforest expedition, which tour promoters believe appeal to "ecotourists," in reality the tourists observed were not particularly concerned with experiencing pristine nature.

Recognizing the hybrid nature of the Caribbean tourist product, as well as the growing desire for diverse experiences (including nature tourism) even among the most conventional mass "sun-and-sand" tourists, is critical to the future of Caribbean tourism. With the rapidly changing and increasingly complex nature of global tourism consumption, it is essential for tourism planners and policy makers to recognize hybridity and to capitalize on this notion in both tourist destination development and place promotion. This may mean offering new products adapted to the time constraints and comfort requirements of mass tourists but also to these tourists' desires to experience "local," "authentic," or "natural" dimensions of a place. For example, there could be considerable demand in a primarily "sun-and-sand" destination for short expeditions to villages,

artisan workshops, nature preserves, agricultural plantations or others; such activities may not be the primary motivation for the visit to the destination but have the potential to considerably enhance the tourist experience. In order to leverage and capitalize on the Caribbean's hybridity, planners and policy makers may need to consider improving infrastructure and working with local communities to make more aspects of destinations accessible, comfortable and convenient to a wider range of tourists. However, this process of adjustment must not sacrifice the authenticity, distinctiveness or hybridity of a place for the sake of mass consumption.

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

Conclusion

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

Tourism product labels may serve to organize tourism, but the resulting categories should not be seen as distinct and definitive. Hybridity rejects these clear cut distinctions that gloss over the unique character of individual islands and interactions between the multiple

tourism products which have emerged and co-existed, thus creating a far more diverse tourism landscape. The concept of hybridity offers a new way of looking at tourism products and understanding those that seem to elude definition. This concept helps us to see the ways in which varied dimensions of a destination may be interconnected in a tourism product, rather than the ways in which they are separated. Indeed, this perspective challenges neatly categorized products and opens the possibility for further innovation, in what might at the surface appear to be a standard "sun-and-sand" destination appealing to monolithic notions of the mass tourist market. Therefore, this type of thinking can be useful in developing special interest tourism products that more effectively address the diverse interests of both conventional tourists, as well as more niche market visitors, to generate more comprehensive tourism experiences.

This case study of Grenada illustrates that tourist products often become hybrid in nature, as a response to the expressed demands of tourists, even those who are superficially portrayed as exclusively interested in "sun-

and-sand.” In terms of primary motivations for travel, the majority of Grenada’s tourists would be considered conventional beach resort or “sun-and-sand” tourists; they are not explicitly ecotourists nor cultural tourists with clearly defined expectations of “authentic” nature or culture. However, even within this market, there is considerable hybridity emerging, which can be leveraged to offer a greater diversity and depth of products, attract new types of visitors, and perhaps generate more return visits. Grenada’s visitors have been shown to have a range of secondary interests beyond the beach, including sightseeing, history, culture, water sports, and others (Rare 2004). Most are interested in an activity to supplement their beach vacation and to experience more of the destination. The reality of hybrid tourism provides some insight into tourism products that have developed to effectively address tourist demands.

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

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Visitor Safety and Security in Barbados: Stakeholder Perceptions

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Abstract

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

Key words: stakeholder, safety, security, crime

Resumen

■ ¿Es suficiente la información sobre la naturaleza, la ubicación y la incidencia de delitos contra los turistas/visitantes para desarrollar una política significativa de seguridad de los visitantes? ¿Las opiniones de los principales grupos interesados (los stakeholders) en el turismo son de utilidad para mejorar la política de seguridad de los visitantes y la sensación de seguridad? Para responder a estas preguntas, este estudio analiza 24 años de datos de delitos registrados cometidos contra los visitantes de Barbados y los datos de investigación de grupos de actores clave del turismo, y concluye: 1) que la información sobre la naturaleza, localización y la incidencia de los delitos contra los visitantes es necesario pero no suficiente para influir la política de seguridad de los visitantes, y 2) que las opiniones y aportaciones de las principales partes interesadas son esenciales para que los destinos serán más eficaces en la mejora de seguridad de los visitantes.

Palabras clave: stakeholder, actores clave, seguridad, delincuencia

Introduction

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

illicit substances.

Indeed, Caribbean destinations have come under international microscope in recent years following a number of incidents involving both stay over and cruise ship visitors. Extensive media coverage has been given to the 2005 disappearance of American teenager, Natalee Holloway, while on vacation in Aruba, which is considered one of the safest Caribbean destinations. And back on 27 May 2000, New York travel writer, Claudia Kirschhoch, disappeared without a trace while in Jamaica. From both a scholarly and a policy perspective, therefore, understanding this issue of visitor safety and security is important given the increasingly

prominent role that tourism plays as a development strategy for many tourism destinations, generally, and the Caribbean, in particular. It is also an important area of inquiry given the new reality that tourists/visitors not only expect safety and security but demand it.

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

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

With regard to the first question, the argument is that recorded data on the nature, location and incidence of crimes against tourists/visitors are necessary for meaningful policy development. Policy makers can examine these data and allocate resources accordingly. However, these data are not in themselves necessary and sufficient for policy formulation. Moreover, the literature on crime consistently points out that all crime victims do not usually report that they have been victimized. Consequently, recorded data almost always understate crime rates. Furthermore, understanding the types of crime does not necessarily imply an understanding the reasons for or the perpetrators of these crimes.

Secondly, because certain stakeholders interact more closely with tourists/visitors than most residents in a community, they are in a position to have greater access to information about tourist/visitor victimization than the police. For example, tourists/visitors often mention and stakeholders, including taxi drivers, tour operators, travel agents, hotel and guest house managers, often commiserate with these victims. Therefore, with regard to the second question, many key stakeholders are well

positioned to garner and provide policy makers with useful insights into the nature and levels of tourist/visitor victimization. Stakeholder perspectives are useful on another level as well. These individuals and groups operate at different junctures in the tourist/visitor experience and tend to have a narrow, self-interested perspective on the role and importance of each stakeholder group in the entire tourism enterprise. Self-interest may lead one group to criticize the behavior and attitude of other(s) especially if the one suspects that such attitude/behavior might be undermining its pecuniary interest in the sector.

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

What the foregoing suggests is that an assessment of the level of visitor safety and security in the Caribbean is useful to different publics, and to the industry as a whole, for a number of reasons including, but not limited to, the following: 1) the type of sales pitch that one finds on *Expedia.com*, among other advertisers and promoters of Caribbean tourism that contributes to the perceived homogeneity of the region in the minds of many travelers despite the wide range of destinations and products offered; and 2) the implied safety and security of tourists/visitors to the region that flies in the face of the vast amount of publicity given to the disappearance of Natalee Holloway as well as several other highly publicized disappearances of both stay over and cruise ship tourists/visitors to the Caribbean since 2000.

But destinations across the world, including the Caribbean, tend not to make statistics on tourist/visitor victimization available largely out of concern that publicizing such data can only create negative perceptions of the destination and, thereby, lead to reductions in tourist/visitor arrivals. Consequently, there is a paucity of reliable data on the region. Barbados, however, is one of the few countries in the world that collects and publishes tourist/visitor victimization data, and will be the focus of this analysis.

The purpose of this study, therefore, is threefold. First, to analyze the types and incidence of reported crimes against tourists/visitors to Barbados over the 24 years from 1980-2003; second, to analyze the survey data of tourism stakeholders to ascertain their perspectives on

the contribution that stakeholder groups wittingly or unwittingly make to the enhancement or undermining of visitor safety and security in Barbados; and third, to offer some policy recommendations for enhancing

visitor safety and security in Barbados. This analysis and its findings will have implications for other Caribbean countries due to their high degree of dependence on tourism.

The Safety and Security Context

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

Of thirteen regions estimated by the World Travel and Tourism Council (WTTC), the Caribbean ranks 13th globally in absolute size but first in relative contribution to regional economies (As defined in this analysis, the Caribbean comprises the following countries and territories: Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Bermuda, British Virgin Islands, Cayman Islands, Cuba, Dominica, Dominican Republic, Grenada, Guadeloupe, Haiti, Jamaica, Martinique, Montserrat, Netherlands Antilles, Puerto Rico, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines,

Trinidad and Tobago, Turks and Caicos Islands and US Virgin Islands). Total travel and tourism demand for 2007 is projected at \$56.1 billion (0.8 per cent of global demand), which translates into 16.5 per cent of GDP and 2,447,000 jobs (14.8 per cent of total employment). Projected growth for 2007 is 3 per cent and 3.3 per cent in real terms from 2008-2017 (<http://www.wttc.org>),

Put differently, the Caribbean is regarded as the most tourism dependent region in the world where the sector accounts for approximately 25 per cent of all exports and services; contributes 31 per cent to the region’s Gross Domestic Product (GDP); is the region’s primary generator of foreign exchange; provides the largest number of jobs; and has the greatest growth potential (Nurse, 2002). In the case of Barbados, specifically, the industry generated \$494m in revenues or \$1,880.47 per capita in 1990. A decade later, tourism revenues had grown by 46.4 per cent to \$723m or \$2,633.90 per capita. And by 2003, revenues had grown to \$758m or \$2,733.50 per capita, representing an increase of 4.8 per cent over 2000 (see Table 1).

Table I: Barbados Tourists/Visitors and Tourism Revenues

Year	Tourists/Visitors (000)	Population (000)	Tourism Revenues (US\$m)	Tourism Revenues Per Capita
1990	794.7	262.7	494.0	1,880.47
1995	926.8	255.8	622.0	2,431.59
2000	1,077.0	274.5	723.0	2,633.90
2001	1,034.7	275.3	658.0	2,390.11
2002	1,027.2	276.6	648.0	2,342.73
2003	1,090.3	277.3	758.0	2,733.50

* Includes Cruise Tourists. Average length of visit per stay over visitor: 6.6-7.6 days.

* Source: Barbados Ministry of Tourism Annual Tourism Statistical Digest.

But as the number of destinations and the volume of traffic have grown worldwide, so have the number of incidents of crime and other forms of victimization of tourists at these destinations. The disappearance of Natalee Holloway and the subsequent international media coverage not only underscored that concern but brought to public attention the long-known fact among tourism scholars—that everyday someone is victimized at a tourism destination somewhere in the world (Pizam & Mansfield, 1996).

In a number of Caribbean tourism destination, such as the Bahamas, Barbados, Jamaica, and Trinidad and

Tobago, for example, some of this crime takes place against a backdrop of rising crime rates against locals. Growing unemployment, coupled with other economic woes, contributed to a number of muggings and drug-related violence to some formerly calm destinations in the region. To complicate matters, victims frequently complain that local police are slow to respond and/or do not thoroughly investigate the crimes. The insinuation is that a large percentage of criminal cases are left unresolved, including the Holloway case and that of the travel writer who went missing in Jamaica. But, according to the Miami Herald, of the millions of Americans who traveled abroad in 2004, the US State

Department listed some 2,000 as missing (Miami Herald.com 25 July 2005). However, when crimes against tourists/visitors receive the types of media coverage as the Holloway case, governments and other key stakeholders in the travel and hospitality industry are forced to allocate scarce resources to convince tourists/

visitors that the destinations in which the victimization occurred are indeed safe. But as Crystal (1993) argues, such sensational reporting has the tendency to take a relatively few crime incidents against tourists and create the impression that a particular destination holds a high level of risk for travelers.

Understanding Visitor Safety and Security

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

This variety of themes notwithstanding, a major criticism holds that research into this phenomenon of tourism and crime “has not been undertaken in a particularly systematic manner and individual studies vary in their focus, the extent to which they can be replicated, and the sagacity of research methods” (Brunt et al.). To address these criticisms George (2003), for example, investigated tourists’ perceptions of safety and security while visiting Cape Town, South Africa; Brunt et al. (2000a) analyzed tourist victimization and the fear of crime on holiday; and Brunt et al. (2000b) investigated the extent to which British holidaymakers were fearful of crime. With regard to the Caribbean, which will be the focus of this enquiry, Albuquerque and McElroy (1999) speak to the failure of previous research on tourism and crime in the Caribbean to discriminate between crimes against tourists/visitors and crimes against residents.

Collectively, these studies underscore a number of challenges inherent in conducting research into tourist/visitor safety and security, including: being able to generate representative samples; the timing factor—whether the respondents were just beginning their vacation, were in the middle of it, or had already completed it; whether the respondent was the actual victim or another family member; the respondent’s prior experience with crime; the destination’s image as portrayed in the news media about the level of crime;

perceptions about police effectiveness at the destination; and the individual tourist’s risk fear/portfolio.

While the tourist/visitor perspective on safety and security is important to informing policy, the perspective of key stakeholders is equally important due to the vested interest that these publics necessarily have in the viability of the tourism industry. A number of studies have investigated the attitudes and perspectives of hosts to the social and economic impacts of tourism. King, Pizam, and Milman (1993), for example, analyzed the perceptions of the residents of Nadi, Fiji, on the social impacts of tourism and concluded that residents were able to differentiate between the social and economic costs of tourism expansion. From their analysis of households on the Greek island of Samos, Haralambopoulos and Pizam (1996) concluded that despite a number of the industry’s negatives, including crime, vandalism, drug addiction and sexual harassment, respondents who were economically dependent on tourism evinced more positive attitudes towards the industry than those who were not dependent on it. Lindberg and Johnson (1997) argued that the strength of the value that a community places on economic gain is a stronger predictor of attitudes toward tourism than do values regarding disruption in that community. Economic and congestion impacts affect attitudes more strongly than the perceived impacts of crime and aesthetics.

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

Key Stakeholders

■ Tourism stakeholders consist of a variety of public, private and nongovernmental groups, who possess a vested (including pecuniary) interest in ensuring that the “right image” of the destination is cultivated and

maintained. Key stakeholders are also the individuals who interact very closely with tourists/visitors and, consequently, are strategically positioned within the industry to have an impact on the experience of the

tourist/visitor in terms of what they do or don't do; say or don't say; and the way they behave or misbehave. An understanding of the Barbados' tourism organizational structure provides insights into who the key stakeholders are and the role they play in the industry.

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

Research Design and Methodology

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

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

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

A survey instrument was developed and the BMOT was asked and agreed to send an electronic copy to each member organization. Usually, the message was sent to the president of the service provider organization. The statistical department of the BMOT administered this survey between July 13th 2003 and August 15th 2003. Although delivered electronically, the survey instrument was a self-administered, two-part questionnaire. The first part sought to ascertain the respondent group's opinion on the nature and extent of crime in the country and the nature and extent of crime against tourists in the country, while the second part sought to ascertain similar responses regarding the issue of harassment of tourists/visitors to the country. The respondent group was asked to identify its service area so that its perspective on offenders could be clearly determined.

The survey consisted generally of questions concerning the identity of the respondent group; questions regarding the respondent group’s perspective on whether or not the stakeholder group perceived the country to have a crime problem as well as a problem with harassment of tourists/visitors; questions regarding the level of seriousness of the problems of crime and harassment; questions regarding whether or not tourists/visitors had reported that they had been victims of crime and/or harassment over the past five years and, if so, the number of reports they received; questions regarding the types of crime and the types of harassment reported; the name of the offending group—tour guide, taxi driver, hair braider, craft seller, etc.; questions regarding any action that the responding group took;

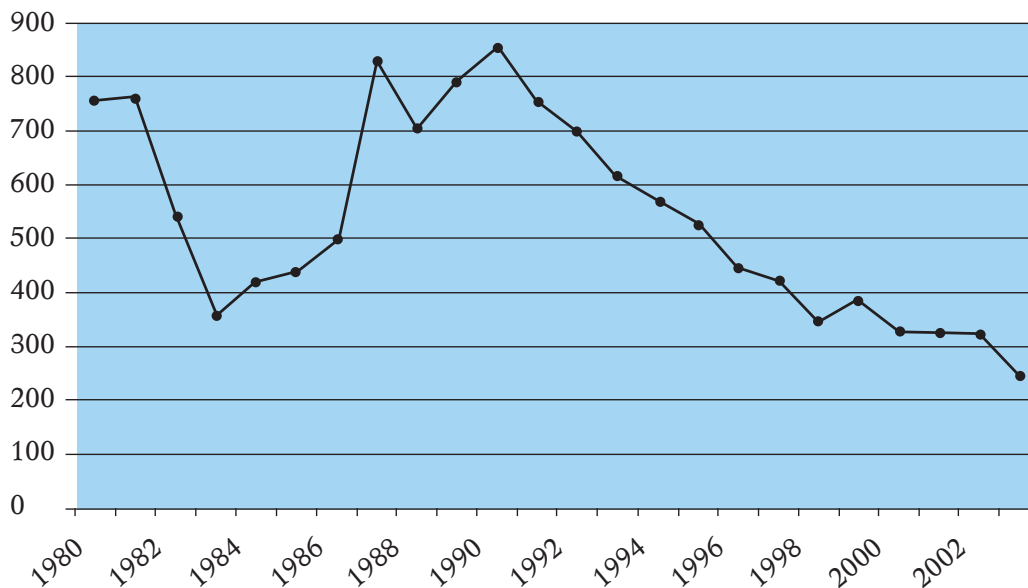
questions regarding responding group’s awareness of any legislation regarding crime and harassment of tourists/visitors; questions regarding responding group’s perception of the effectiveness of such legislation; 10-point scale questions regarding responding group’s perception of level of concern exhibited by public officials about crime and harassment in the country; 10-point scale questions regarding responding group’s perception of level of concern exhibited by the general public officials about crime and harassment in the country; and questions regarding responding group’s recommendation of action that is likely to reduce the incidence of crime and harassment in the country.

Analysis of Crimes Against Tourists/Visitors To Barbados

■ The incidence of crime against tourists/visitors to Barbados over the 24 years from 1980-2003 as displayed in Chart I reflects a triple-peaked distribution involving the years 1980-1981; 1987 and 1990. While the number of reported crimes between 1980-81 registered an increase of approximately 1 per cent from 751-758 incidents, they declined by approximately 32 per cent from 758 incidents to 352 incidents between 1981 and 1983. The number of recorded incidents then jumped 15.3 per cent to 416 in 1984, and continued to increase at an average annual rate of 25 per cent through 1987

when a total of 821 crimes were reported. The numbers of incidents dropped by 120 (15 per cent) between 1987 and 1988 only to increase to 787 in 1989 and finally peaking at 849 in 1990, thereby reflecting an annual rate of increase of 10.1 per cent during this period. From a peak recording of 821 incidents in 1990, the annual number of recorded incidents declined at an average rate of 7.3 per cent between 1990 and 2003. Except for two brief reversals in 1998-99 and 2000-01, the number of recorded incidents of crimes against tourists/visitors reflected a monotonic decline.

Chart 1. Barbados Tourism Crime 1980-2003



When the data are examined by category, they reveal that burglaries account for almost one-half (48 per cent) of all crimes committed against tourists/visitors. However, rather striking is the fact that 99 per cent of all burglaries occurred against guests in hotels and/or guest houses. The pattern of burglaries against tourists/visitors is almost a mirror image of the overall pattern of

crime against tourists/visitors over the 24-year period. The data also indicate that thefts account for 35 per cent of all crimes against tourists/visitors over the period 1980-2003. The distribution of this type of crime reflected 28 per cent against the person; 28 per cent theft from beaches; while miscellaneous theft account for the rest. Eleven per cent of all crimes were robberies

and assault with intent to rob, with 95.8 per cent being robberies. Less than 1 per cent of all crimes against tourists/visitors from 1980-2003 were sex assaults. Nonetheless, these are crimes of a very violent and personal nature that can cause long-term trauma, and that are highly unlikely to engender positive memories

about the country. This means that no matter how few sexual assaults were recorded, they still are too many. Finally, approximately 2 per cent of all crimes against tourists/visitors were considered major crimes, including murder and wounding (major and minor).

Chart 2: Distribution of Tourist / Visitor Crime 1980-2003

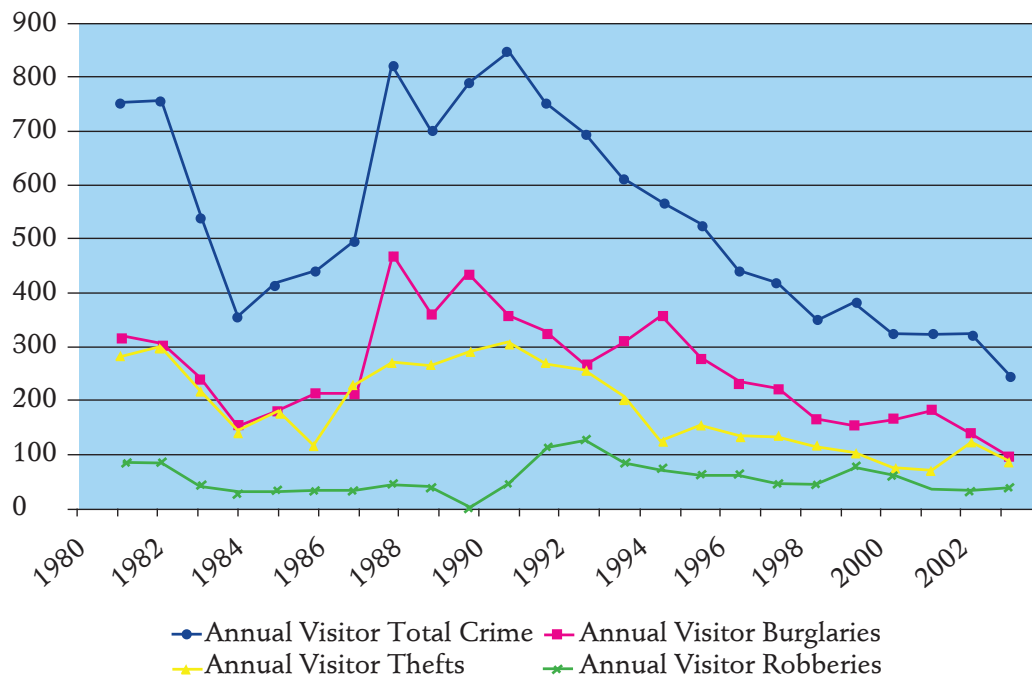
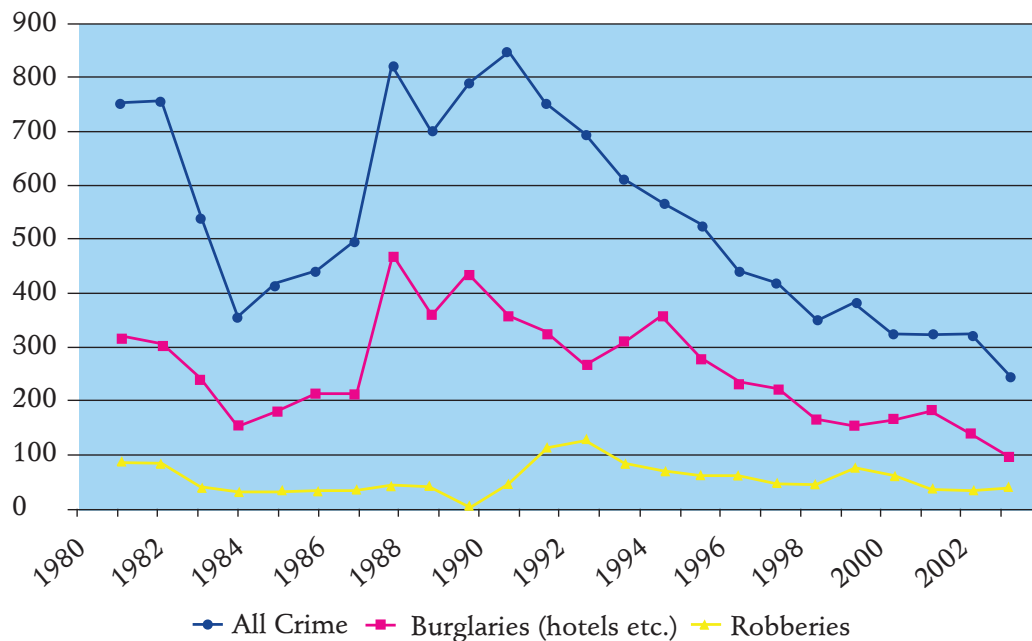


Chart 3: Recorded Burglaries of Tourists/Visitors Barbados 1980-2003



In sum, over the period under survey:

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

The data in Table II put the tourist/visitor victimization picture in greater perspective. They indicate that the

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

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

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

Year	Tourists/Visitors Days* (000)	Crimes Against Tourist/Visitors	Crimes/100,000 Tourists/Visitors	Prob. of Being Crime Victim
1990	3,552.6	849	106.8	0.00024
1995	3,791.6	379	48.9	0.00010
2000	4,509.6	323	29.9	0.00007
2001	4,178.7	324	31.3	0.00008
2002	3,859.2	321	31.3	0.00008
2003	4,398.2	244	22.4	0.00006

* Includes Cruise Tourists. Average length of visit per stay over visitor: 6.6-7.6 days. Source: Barbados Ministry of Tourism and the Caribbean Tourism Organization.

Discussion and Findings of Stakeholder Survey

■ The membership database of the Barbados Ministry of Tourism was used to generate a random and representative sample of population of 90 to whom surveys were sent electronically with a cover letter discussing the purposes of the survey. Survey instruments were sent to 30 hotels, 10 travel agencies, 10 tour operators, 10 taxicab companies, 5 government representatives, 3 private security services, and 22 “other service” providers, including, among others, restaurants, pubs, museums, parks, duty free and shops. A total of 78 responses were returned reflecting a response rate of 87 per cent. This is an unsurprising response rate given that Barbados operates on the principle that “Barbados is Tourism” and given that the Ministry of Tourism

regularly conducts seminars, workshops and other types of training sessions for the stakeholders, who regularly participate.

When asked if they thought that crime against tourists/visitors to Barbados is a problem 74.4 per cent (58) of respondents indicated that crime against tourists/visitors to Barbados is a problem while 24.4 per cent (16) disagreed; and the remaining 1.2 per cent (1) gave no response to this question. As shown in Table 3, the following percentages of stakeholders indicate that they think that crime against tourists/visitors to Barbados is a problem: hoteliers (76.2 per cent); security service personnel (75 per cent); travel agency

representatives (100 per cent); tour operators (100 per cent); government representatives (100 per cent); miscellaneous other service providers (70.4 per cent); and various unidentified respondents (88.9 per cent).

The surprise is that fewer taxi services/operators/drivers think that crime against tourists/visitors is a problem (44.4 per cent) than those who do not think that it is a problem (55.6 per cent).

Table 3: Perceptions of Crime Problem Against Tourists/Visitors

Stakeholder Groups	Yes (%)	No (%)	No Response (%)
Hotels	76.2	23.8	0.0
Security Service	75.0	25.0	0.0
Travel Agency	100.0	0.0	0.0
Tour Operator	100.0	0.0	0.0
Government Representative	100.0	0.0	0.0
Taxi	44.4	55.6	0.0
Other Service	70.4	25.9	3.7
Unidentified Respondent	88.9	11.1	0.0

Regarding the level of seriousness of crime against tourists/visitors to Barbados, different perceptions exist among stakeholders regarding the level of seriousness of the issue of crime against tourists/visitors despite the overwhelming percentage who think that crime against tourists/visitors is a problem. Whereas only 21 per cent of respondents think that the problem is not serious,

approximately 75 per cent of respondents expressed, to varying degrees, that crime against tourists/visitors is a problem. Specifically, 15 per cent think that it is very serious; 33 per cent think that it is serious; while 26.9 per cent think that it is somewhat serious. The remaining 2.6 per cent gave no response to this question (See Table 4).

Table 4: Perceptions of Seriousness of Crime Against Tourists/Visitors

Perceptions of Crime	Percentage
Very Serious	15.0
Serious	33.0
Somewhat Serious	26.9
Not Serious	21.0
No Response	2.6

The disaggregated data indicate that the views of most stakeholders fall between the “very serious” and “not serious” range. Approximately 67 per cent of hoteliers, 100 per cent of private security service providers; 100

per cent of travel agency operators; 100 per cent of tour operators; and approximately 63 per cent of “other service providers” think that the problem is either somewhat serious or serious (See Table 5).

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

	Very Serious %	Serious %	Somewhat Serious	Not Serious	No Response
Hotels	14.3	52.4	14.3	19.0	0.0
Security Service	0.0	75.0	25.0	0.0	0.0
Travel Agency	0.0	50.0	50.0	0.0	0.0
Tour Operator	0.0	50.0	50.0	0.0	0.0
Government Rep	100.00	0.0	0.0	0.0	0.0
Taxi	22.2	11.1	11.1	55.6	0.0
Other Service	11.1	37.0	25.9	18.5	7.4
Unidentified Respondent	22.2	0.0	44.5	22.2	11.1

As mentioned above, 14.3 per cent of hoteliers think that it is a very serious problem while 52.8 per cent think that it is a serious problem, 14.3 per cent think that it is somewhat serious, and 19 per cent do not think that it is a problem at all. However, when these views are considered in light of the fact that burglaries constitute approximately one-half of all recorded crimes against tourists/visitors from 1980-2003, and that burglaries in hotels and guest houses account 99 per cent of all burglaries against tourists/visitors, it would appear that only about 20 per cent of hotel/guest houses provide their guests with a very high degree of security.

Stakeholders also indicated in their responses that tourists/visitors to Barbados are most frequently

victims of the following types of crime: theft of jewelry (33 per cent); theft of money (29.5 per cent); armed assault (10 per cent); armed robbery 3.9 per cent; and miscellaneous other types of crime (10.3). And regarding the general level of concern of public officials about crime against tourists/visitors to Barbados, 57.7 per cent of stakeholders think that they are quite concerned as opposed to 37.2 who think otherwise. The perceptions are similar regarding the general public's concern about the level of crime in the country: 56.4 per cent think that the public is quite concerned while 35.9 per cent think otherwise.

Conclusion

■ Rather than focus on the perceptions of tourists/visitors to assess the level of visitor safety and security at a tourism destination, this analysis examined visitor safety and security from the perspective of the stakeholders, who provide the tourism product and who, necessarily, have a vested interest in the sustainability of the sector. To what extent are stakeholder attitudes, behaviors and roles contributing to the enhancement or erosion of visitor safety and security? This stakeholder-specific study has determined that there is wide variability in the perceptions among tourism stakeholders of level of seriousness of crimes against tourists/visitors to Barbados, specifically, and the level of visitor safety and security, generally. This variability in perceptions is due in part to the absence of a holistic understanding of

the role, structure and function of the tourism industry. Consequently, rather than seeing themselves as integral parts of a network that come together to create the tourism product, each stakeholder group tends to focus rather narrowly on its own service provision area. In so doing, rather than cooperate to ensure that a sustainable product is developed, each not only competes with the other but also tends to view the other with suspicion borne largely by ignorance of the complex functioning of the sector. As a result, some of the activities of particular groups hurt rather than aid in product development. What is called for, therefore, is greater public education, especially among key stakeholders to ensure that a more holistic and interdependent understanding and approach to tourism development is pursued.

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

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Abstract

■ The main objective of this paper is to analyze the contribution of tourism to economic growth in Central American and selected Caribbean countries (The Bahamas, Dominica, Dominican Republic and Saint Lucia). Following recent methodology presented by Ivanov and Webster (2007), this paper will utilize the rate of growth of real Gross Domestic Product (GDP) per capita as a measure of economic growth. This will then be disaggregated into a growth component attributable to tourism and a second growth component generated by the other industries of the economy. This methodology, which has the characteristic of generating a per

formance measure of tourism's past contribution to economic growth, will be applied to the period 1990-2007. The results are compared with those of a group of developed destinations including Spain, France, Italy, UK and USA. The comparison between the two groups shows that the tourism contribution to GDP is higher in general for the developed group but it is not associated necessarily with a greater contribution to the economy's growth.

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

Introduction

■ It has long been recognized that the tourism industry can relevantly impact the economic activity and consequently the economic performance of a country. Tourism can increase foreign exchange earnings, stimu-

Resumen

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

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

late employment and entrepreneurial activity in a given country. Additionally tourism makes an important contribution to a country's balance of payments. Tourism has become one of the largest and fastest growing world

industries and an economic and social phenomenon of major importance. With an average annual growth rate of 6.5%, the number of international arrivals by visitors rose worldwide

from 25 million in 1950 to an estimated 806 million in 2005, showing that tourism is one of the fastest growing economic activities globally (UNWTO, 2009b). Further-

more, according to the estimates of the Tourism 2020 Vision, this number is expected to experience continued growth and reach a total of nearly 1.6 billion international arrivals by the year 2020 (UNWTO, 2009a). The World Travel and Tourism Council estimated that the Travel and Tourism industry currently employs nearly 240 million people and creates 10% of the global GDP (WTTC, 2008).

Figure 1: Evolution of the number of international tourist arrivals

	Base Year	Forecasts		Market share (%)		Average annual growth rate (%)
	1995	2010	2020	1995	2020	1995-2020
<i>World</i>	565	1006	1561	100	100	4.1
Africa	20	47	77	3.6	5.0	5.5
Americas	110	190	282	19.3	18.1	3.8
East Asia + Pacific	81	195	397	14.4	25.4	6.5
Europe	336	527	717	59.8	45.9	3.1
Middle East	14	36	69	2.2	4.4	6.7
South Asia	4	11	19	0.7	1.2	6.2

Source: UNWTO, 2009a

Figure 1 portrays two interesting facts. Firstly, we can notice that even though the number of international tourist arrivals will continue to grow, the average growth rate for the period 1995-2020 is projected to slow moderately averaging 4.1% for the period 1995-2020, which is much lower when compared to the 6.5% encountered during the period 1950-2005 (UNWTO, 2009b). As global markets mature the adverse uncertainties of the global economy affect consumer confidence and the disposable income of tourists. This results in a continuous need of diversification, innovation and commitment on the tourism supply side in order to satisfy the continuously changing demands and needs of the “new tourist” (Poon, 2002). Secondly, from the table we can see a projection of how the market share of the total international arrivals is going to evolve within the world. The more mature travel destinations of Europe and the Americas that in 1995 received almost 80% of total international arrivals are forecasted to decrease and in 2020 account for 45.9% and 18.1% of total international arrivals respectively. This underlines the emergence of new travel destinations especially in developing countries combined with the changing tastes and preferences of tourists in the new millennium.

There is a wealth of information collected on tourism for a large set of countries. There are details of who visits and how much they spend and do while they are in a destination. The headline figures concentrate on numbers of visitors, the number of nights they stay and how much they spend in total. This information is invaluable to those involved in tourism, but it is not

useful to measure the size and make-up of tourism in a region and to evaluate how it contributes to the economy as a whole. In the literature related to measure the impact of tourism on GDP it can be found that three methodologies have been developed for and are usually applied to estimate the impact of tourism on GDP: Tourism Satellite Account (TSA), Computable General Equilibrium models (CGE) and Input-Output analysis (IOA). The most commonly used is the IOA (Fletcher, 1994), which is also the most used for regional accounts, though its main weakness is that it assumes unrealistic bases that tend to exaggerate the effect of tourism growth on output, income and employment at destination (Groenewold, Hagger, & Maden, 1993; Dwyer & Forsyth, 1998; Dwyer, Forsyth, & Spurr, 2003, among others). Interesting CGE-based studies of tourism contribution to national economies model have been undertaken like e.g. for Hawaii (Zhao, Yanagida, Chakravorty, & Leng, 1997) arguing that tourism can indeed increase a destination’s welfare by turning the terms of trade in its favor. For Blake, Durberry, Sinclair, and Sugiyarto (2000) CGE models provide an important tool for policy makers and for business people wishing to plan for the future. Comparing with Input-Output models, CGE can show the inter-industry feedback effects and resource constraints (Dwyer, Forsyth, & Spurr, 2006) although Input-Output analysis is the technique most often used to quantify the impacts of tourism (Fletcher, 1994). All such studies, though, seem to agree that tourism contribution is well below any IOA estimates. The main measurement difficulty is that for total economic impact of tourism as the sum

of direct, indirect, and induced effects upon current production and employment, at a region's level there is generally very little data collected. Moreover, tourism is not an industry in the traditional sense, and therefore its linkages outside the destination can be a relevant feature of the supply chain that is at the same time difficult to track.

In a recent paper, Ivanov and Webster (2007) present a methodology for measuring the contribution of tourism using the rate of growth of real per capita GDP as the measure of economic performance. Therefore, such a rate is approximately factored out into the growth contribution by tourism plus growth generated by other industries. One such methodology has been tested with data for Cyprus, Greece and Spain and compared with alternative methodologies by Ivanov and Webster (2007). It is to be pointed out, however, that this methodology only allows for measuring direct effects of tourism activities on an economy's GDP, a serious limitation, though the approach points into the right direction for a more balanced assessment of the short and long term effects of tourism development. This paper will apply this methodology to the countries of Central America including Belize, Costa Rica, El

Salvador, Guatemala, Honduras, Nicaragua, Panama and to the Caribbean countries of the Bahamas, Dominica, the Dominican Republic and Saint Lucia. The choice of these countries is due to their awareness of tourism's potential in Central America and the Caribbean and due to the interest of analyzing a geographical area which is lacking in this kind research. Application of the analyzed methodology has already been tested for countries such as Spain, Greece, Cyprus (Ivanov and Webster, 2007), Argentina, Brazil, Uruguay, Mexico (Brida, Pereyra, & Such, 2008a), Colombia (Brida, Pereyra, Risso, Such, & Zapata, 2009) and the "world's top 5" tourism destinations Spain, France, Italy, U.K. and USA (Brida, Pereyra, Such, & Zapata, 2008b). It will be extremely interesting to analyze and compare Central American and Caribbean countries with each other however it will be even more interesting to discuss any similarities and inconsistencies in the patterns of tourism's contribution on the economic growth for the countries of which data is already available.

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

2. Data and methodology

■ The first problem faced with measuring the contribution of tourism to economic growth is that most countries lack the appropriate data and information. Being an activity defined by consumers at the point of consumption, tourism does not exist as a distinct sector in any system of national accounts. In effect any type of expenditure that tourists make is a contribution to the economy that is generated by tourism. Traditionally a large proportion of tourist expenditure goes into identifiable tourism characteristic sectors such as transport, hotels and recreation but tourists also spend money in other sectors that are not dedicated to tourism. For example, Meis (1999) shows that only 75% of all tour

ism GDP came from industries in the Canadian tourism sector. This places a first restriction on this exercise for, having data from systems of national accounts, it is considered as "tourism" only what might be classed as tourism related sectors (i.e., hotels and restaurants).

Following Ivanov and Webster (2007), this paper uses the growth rate of real GDP per capita (g_r) as the measure of economic performance over time, GDP per capita being a proxy for the level of welfare and its rate for its dynamic evolution, reflecting on its turn the net accumulation of productive capacities, and therefore an indicator of future welfare evolution:

$$g_r = \left(\frac{\frac{\sum_t Y_{r(p_0)}^t}{N_r} - \frac{\sum_t Y_{r-1(p_0)}^t}{N_{r-1}}}{\frac{Y_{r-1(p_0)}}{N_{r-1}}} \right)$$

where $\sum_t Y_{r(p_0)}^t$ is total GDP of the economy (as the sum of sector added value) at constant prices (p_0) while (N_r) is population, both at time r . Then, disaggregating the GDP of tourism from the GDP of the rest of the economy it is obtained:

$$g_r = \left(\frac{\frac{Y_{r(p_0)}^T}{N_r} - \frac{Y_{r-1(p_0)}^T}{N_{r-1}}}{\frac{Y_{r-1(p_0)}}{N_{r-1}}} + \frac{\frac{\sum_{t \neq T} Y_{r(p_0)}^t}{N_r} - \frac{\sum_{t \neq T} Y_{r-1(p_0)}^t}{N_{r-1}}}{\frac{Y_{r-1(p_0)}}{N_{r-1}}} \right)$$

and the first component in this expression:

$$g_r^T = \left(\frac{\frac{Y_{r(p_0)}^T}{N_r} - \frac{Y_{r-1(p_0)}^T}{N_{r-1}}}{\frac{Y_{r-1(p_0)}^T}{N_{r-1}}} \right)$$

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

One particularity of this measure is that once the necessary statistical data has been provided, the methodology could also be applied to any other industry or type of tourism. An example of the application of the measure to the different industries of a country's economy was presented in an additional paper presented by Ivanov and Webster (2008). The analysis, which was tested specifically for Bulgaria, assesses the contribution of a single industry to economic growth in a way that allows for inter-industry comparison. The methodology could also be applied utilizing the Gross Added Value (GAV) instead of the GDP. As explained by Ivanov and Webster (2008), even though GAV represents a better measure for estimating the economic welfare of

the population GDP is a more appropriate variable for measuring the economic growth and welfare because GDP includes net taxes. In an example for calculating the contribution of tourism to the economic growth of Spain, Ivanov and Webster (2007) utilized both data for their research using GAV in hotels and restaurants and GDP for tourism as a whole. The results obtained from the use of these two indicators showed a similar pattern with the results having one remarkable difference, in 2001 the data that utilized GDP estimated a contribution to economic growth equal to 0.15%, while GAV estimated a decrease of the welfare of the population of 0.12%.

3. Empirical results and discussion

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

The time period analyzed are the years from 1990 to 2007. First the paper created conventional share measures which measure the weight of the tourism sector on GDP. The tourism sector will be defined according to the definition of the systems of national accounts, basically lodgings and restaurants. For convenience the tourism industry will stand for the national section of the local economy where tourism expenditure generates income and employment, directly and indirectly.

Results are presented in Tables 1 and 2.

Table 1. Share of tourism sector on the economy

	1990	1995	2000	2007
Central America				
Belize	20.11%	18.11%	19.78%	18.49%
Costa Rica	18.01%	18.73%	17.52%	15.93%
El Salvador	17.66%	19.83%	19.38%	19.83%
Guatemala	12.55%	12.93%	12.84%	12.14%
Honduras	14.56%	14.69%	14.73%	13.55%
Nicaragua	13.51%	13.64%	14.54%	14.29%
Panama	15.74%	17.08%	16.10%	16.91%

Table 2. Share of tourism sector on the economy

Caribbean	1990	1995	2000	2007
Bahamas	24.08%	21.60%	20.89%	22.87%
Dominica	10.78%	11.96%	12.23%	12.65%
Dominican Republic	14.38%	16.86%	16.51%	15.38%
Saint Lucia	23.56%	22.29%	21.83%	20.55%

Note that El Salvador and Belize represent the Central American countries with the highest contribution to GDP, accounting for 19.32% and 19.06% respectively. The lowest values are found in Guatemala (12.66%), Nicaragua (14.27%) and Honduras (14.33%). With regard to the analyzed Caribbean countries, the destinations with the lowest percentage of GDP contributed by tourism are Dominica (12.01%) and the Dominican Republic (15.94%). A noteworthy fact is that the country with the lowest percentage of GDP resulting from tourism, in this case Dominica, presents a value that is remarkably higher than the “world top 5” destinations of the U.S., Spain, France, Italy and the U.K. when analyzed in a recent paper by Brida et al. (2008a). Thus Spain, which according to the study is the destination with the highest percentage of GDP resulting from tourism (7%), records a value that is almost half as much of the lowest Central American country analyzed (Dominica) while almost three times less than the countries with the highest values (Saint Lucia and the Bahamas). This fact underlines the rising importance of tourism in the economies of Central American and Caribbean countries. As discussed before, tourism is highly sensitive to both internal and external factors and therefore an over-reliance on tourism as the main source for economic growth, can carry significant risks for the overall economy of these countries. Furthermore, a more diversified economy, such as those

displayed by the “world top 5”, with strong agricultural and industrial developments will foster linkages and international relationships in the region, reducing any created leakages.

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

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

Table 3. Contribution of tourism to economic growth (rate of variation)

<i>Central America</i>	1991	1995	2000	2007
Belize				
Growth of all sectors (a)	-0.11%	-2.49%	9.09%	-0.89%
Growth of tourism sector (b)	-4.28%	-3.49%	8.63%	0.19%
Tourism contribution	-0.86%	-0.64%	1.71%	0.03%
Costa Rica				
Growth of all sectors (a)	-0.23%	1.41%	-0.46%	5.50%
Growth of tourism sector (b)	-2.24%	0.95%	-0.76%	4.88%
Tourism contribution	-0.40%	0.18%	-0.13%	0.78%
El Salvador				
Growth of all sectors (a)	1.65%	4.16%	0.17%	2.93%
Growth of tourism sector (b)	5.04%	7.60%	1.58%	3.59%
Tourism contribution	0.89%	1.46%	0.30%	0.71%
Guatemala				
Growth of all sectors (a)	1.28%	2.55%	1.19%	3.10%
Growth of tourism sector (b)	1.79%	3.62%	1.71%	1.43%
Tourism contribution	0.22%	0.46%	0.22%	0.18%
Honduras				
Growth of all sectors (a)	0.44%	1.58%	3.56%	4.18%
Growth of tourism sector (b)	-0.59%	3.06%	1.54%	2.94%
Tourism contribution	-0.09%	0.44%	0.23%	0.40%

Nicaragua				
Growth of all sectors (a)	-2.54%	3.52%	2.43%	2.40%
Growth of tourism sector (b)	2.33%	2.45%	0.04%	3.29%
Tourism contribution	0.32%	0.34%	0.01%	0.47%
Panama				
Growth of all sectors (a)	7.20%	-0.27%	0.76%	9.41%
Growth of tourism sector (b)	12.91%	-2.70%	1.84%	7.62%
Tourism contribution	2.03%	-0.47%	0.29%	1.31%

Caribbean	1991	1995	2000	2007
The Bahamas				
Growth of all sectors (a)	-6.02%	2.51%	2.92%	1.53%
Growth of tourism sector (b)	-16.56%	5.97%	-4.35%	7.09%
Tourism contribution	-3.99%	1.25%	-0.98%	1.54%
Dominica				
Growth of all sectors (a)	2.16%	3.35%	2.11%	3.26%
Growth of tourism sector (b)	4.91%	3.19%	4.24%	4.53%
Tourism contribution	0.53%	0.38%	0.51%	0.57%
Dominican Republic				
Growth of all sectors (a)	-0.97%	3.58%	3.90%	6.91%
Growth of tourism sector (b)	-0.98%	8.74%	2.70%	7.67%
Tourism contribution	-0.14%	1.40%	0.45%	1.17%
Saint Lucia				
Growth of all sectors (a)	-1.35%	1.00%	-1.50%	0.45%
Growth of tourism sector (b)	2.08%	-3.07%	-3.26%	-2.72%
Tourism contribution	0.49%	-0.71%	-0.72%	-0.58%

(a) Growth of per capita GDP in constant prices

(b) Growth of per capita GDP in the tourism industries

In general, each year is characterized by a strong prevalence of either negative or positive growth values of the tourism sector which consequently affects tourism's contribution to the economy. With regard to the Central American countries, it can be noted that during the years 1997, 1998, 2005, 2007 all the countries recorded positive values of (g_r^T). The same can be observed for the Caribbean countries during the years 1994, 1996, 1998, 1999, 2005 and 2006. Although the values did not record a similar negative tendency during the analyzed years, we can note that the years 1999, 2001 and 2002 were characterized by a negative or weak tourism performance among the analyzed countries. As displayed by Table 3, most of the Central American countries and in particular Costa Rica, El Salvador, Honduras and Panama present some negative values of (g_r^T), therefore the contribution of tourism on economic growth during those years was negative. Furthermore, during the years 2001 and 2002 three out of four of the analyzed Caribbean countries recorded alarmingly negative values in the growth of the tourism sector. A noteworthy fact is that although the events of September 11th 2001 had an obvious impact on tourism, destinations such as the Dominican Republic and Saint Lucia presented declining values in indicators such as tourist arrivals and amount of tourism receipts prior to September 11th 2001 (CTO, 2007). Thus, according to the concept of the Tourism Area Life Cycle (TALC) developed by Butler in the 1980s (Butler, 1980), this might be a sign that the destination has reached its stagnation phase. The theory also suggests the need of urgent remedial actions

in order to avoid a fall into the decline phase. For these reasons the tourism industry needs to be reinvented and transformed in a way that allows a continuous growth of the sector. The time period from 1991-1992 displays some contrasting results among the different countries. The negative values from the Bahamas and Belize should be noted because these two countries rely on the American market for the majority of their tourists. During 1991-1992 the US was in an economic recession and this could be a possible explanation for the decrease in the growth of the tourism sector. In particular during 1991 the growth of Belize's tourism sector measured a decrease of 4.28% ($g_r^T = -0.86\%$), while the Bahamas recorded a corresponding value of -16.58% ($g_r^T = -3.99$), which becomes even worse the year after. Since the highest drops in tourism related values are found in countries that rely on only one main market for generating tourists, it can be concluded that a more diversified composition of tourist might be indispensable in limiting the negative effects of a decline in the sector.

The results summarized in Tables 1 to 3 confirm the fact that tourism's contribution to the economy crucially depends on the way that it is measured. Thus, a high percentage of tourism's contribution on the economy is measured with so-called "conventional" or "share measures" which do not necessarily reflect high values for its corresponding "performance measure". In this paper "share measures" estimate the weight of the tourism sector on the economy, while the "perfor-

mance measures” reflect the contribution of tourism to the economy’s growth rate. The lack of correlation between the two measures is particularly true in the case of the Bahamas and Saint Lucia, where tourism’s contribution to GDP is the highest of all the analyzed countries. The Bahamas however recorded the lowest value concerning tourism’s contribution to economic growth, averaging only 0.04% during the analyzed period. Saint Lucia’s corresponding value was only slightly higher at 0.20%, however this is still low when compared to the other analyzed countries.

The application of this methodology by other authors allows for the comparison of the obtained results with other nations. When comparing results of this paper with the ones obtained by Ivanov and Webster (2007) and Brida et al. (2008a, 2008b, 2009), we can immediately notice that the contribution of tourism to economic

growth of Central American and Caribbean countries is generally higher. This is true for both “established” and “emerging” destinations that are analyzed in the paper. In particular the first group comprises countries such as the United States, Spain, France, Italy and the United Kingdom, while the second group is made up by Uruguay, Argentina, Brazil, Mexico and Colombia. Generally the contribution of tourism to economic growth in Central American countries is often higher than in the countries analyzed in the previously mentioned papers. For instance, in 1995 the GDP per capita of Colombia increased by 3.4%, and only 0.09% of this was directly attributable to the tourism industry. On the other hand during the same year Dominica recorded the same increase of 3.4% in the overall economy, but 0.38% was the percentage generated by tourism. Similar comparisons could be done between Guatemala and Colombia in 1992, Honduras and Brazil in the year 2004.

4. Final conclusions

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

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

Central America’s and the Caribbean’s tourism industry is faced with challenges arising from increasing competition and a rapidly changing global tourism industry. The potential of positive results that characterized the

final analyzed years shows that is an ongoing need to explore new tourism niches and to differentiate each country’s tourism product in order to stay competitive in the tourism market. In all the countries, with exception of Belize in 2006 and Saint Lucia in 2007, tourism had positive contributions to economic growth during the last three analyzed years. This highlights the importance of tourism as a source of economic growth and development for these destinations. For these reasons Central American and Caribbean countries should plan

for the economic long run when developing and implementing policy measures in order to enhance and extend tourism’s positive effects.

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

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

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Abstract

Tour operators are the key elements in the tourism system; they are the link between the tourist and the destination. As a result, tour operators are in many ways the key to achieving more sustainable forms of tourism. This study aims at examining the actual experience of tour operators who adopted sustainability practices in their business with the purposes of: 1) Identifying the priority implementation areas; 2) Determining the most important motivators which encourage tour operators to adopt more responsible strategies; 3) Exploring the outcomes and benefits as well as the major obstacles and barriers that deter the integration of sustainability strategies in the tour operator business. For this study 32 tour operators have been investigated. In addition, in-depth interviews with stakeholders from destina-

tions were conducted to reflect their experience. Results revealed that "Supply Chain Management" has the priority for tour operators during the implementation of sustainable practices. "Building Positive Public Image" is the main reason for implementing sustainability integration in business. The results also outline many benefits for both tour operators and destinations. However, both are encountering a number of barriers that hinder them from applying sustainable principles in the tour operator business on a large scale with more efficiency.

Key words:

Supply Management; CSR ; Sustainable Tourism; Tour Operator.

Introduction

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

According to studies, mass tourism activities are considered responsible for generating the most severe negative impacts of tourism; consequently, large-scale tourism, by its very nature, is unable to fulfill the requirements of sustainability (Mason, 2003). In contrast, small-scale activities (nature tourism, alternative tourism or eco-tourism) are seen as

beneficial and more responsible; thus, they are able to incorporate sustainability principles (Mowforth & Munt, 2003; Sigala, 2008). Taking into consideration that mass tourism is a reality of our time that will not disappear but continue to expand, the greatest challenge of sustainable tourism is to find ways of incorporating strong preventative approaches in all tourism activities. (Swarbrooke, 1999)

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

facilitating the dissemination of these attitudes into the entire tourism industry (Tepelus, 2005; Wijk & Persoon, 2006; Font, Tapper & Kornilaki, 2008).

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

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

Although there are just a few tour operators in Europe that take responsibility for sustainability and protecting the environmental and cultural resources (Sigala, 2008), it has been noted recently that the attitude of

tour operators towards the environment in the tourism destinations has been slowly changing (Budeanu, 2005).

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

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

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

Literature review

Principles of Sustainability

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

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

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

2- Social Sustainability: It refers to the ability of

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

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

4- Economic Sustainability: It refers to the level of economic gain from activities which are sufficient to cover the costs of any special measures taken to cater the tourists and mitigate the effects of tourist presence or to offer an income appropriate to the inconvenience caused to the local community visited without violating any of the other conditions (Mowforth & Munt, 2003). Vanhove (2005) argued that economic sustainability must aim at meeting the economic needs and aspirations of residents on the long term. On the other hand, Ritchie and Crouche (2003) added other considerations to determining economic sustainability such as: tourism should benefit the many, not just the few,

and the utilization of local labor should be encouraged in addition to any efforts that would enhance job

security and improve economic sustainability.

Tour operator & sustainability concept

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

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

In the past, tour operators have sometimes neglected their environmental and social responsibilities, arguing that they are simply intermediaries between customers and service providers, and that destination impacts are the responsibility of the sub-contracted suppliers or the local authorities. While these stakeholders clearly share

the responsibility, most tour operators now understand that it is precisely their responsibility because they are intermediaries, working closely with both tourists and tourism service suppliers (Budeanu, 2005; Swarbrooke, 1999; Cochrane, 2006; Font & Cochrane, 2005a).

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

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

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

	Large-scale Mass Market Operators	Small-scale Specialist Operators
- Environmental Impact	- High	- Low
- Economic Impact	- Low per head expenditure - Benefits relatively few enterprises - High leakage from community	- High per head expenditure - Benefits spread quite widely through the community - Low leakage from community
- Socio-cultural Impact	- High	- Low
- Host Community Relations	- Formal - Institutionalized	- Informal - Personal
- Commitment to Destination	- Low - Generally insensitive	- High - Generally sensitive
- Type of Tourist	- Disinterested in destination specifically	- Interested in destination specifically

- Source: (Swarbrooke, 1999)

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

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

Despite these efforts, a few international initiatives to improve the sustainability of tourism sector have

been initiated by non-governmental organizations and tour operators (Wijk & Persoon, 2006). The most prominent is the Tour Operator Initiative (TOI) which was developed with the support of the United Nations Environment Program (UNEP), the United Nations Educational, Scientific and Cultural Organization (UNESCO) and the World Tourism Organization (WTO) in 2000 (Holden, 2008).

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

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

The role of tour operators in the package tours industry

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

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

Under the principles of sustainable development, tour operators may often have only indirect control of the

environmental and social impacts of their holidays. Despite this, consumers expect the tour operating companies to assure that those holidays meet certain standards such as safeguard environmental and social sustainability, in addition to offering quality and value for money (TOI & Association of British Travel Agents-ABTA, 2002).

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

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

Importance of sustainability for tour operators

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

A strong positive reputation as a company that cares about sustainability issues, coupled with improvements to the quality of the tourism experience provided to clients, can result in increased customer satisfaction and loyalty, strengthened brand value, and enhanced publicity and marketing opportunities (TOI, 2007a; Font & Cochrane, 2005a; Thompson, 2008; Kusters, 2009).

TOI (2007a) added that good performance and a high-quality sustainable product can also help a tour operator reduce the risk of conflict or problems with governments, staff and local communities, and improve its status as a respected partner in destinations. This may mean enhanced access to key business resources such as capital, ability to develop products to meet growing market demand, improved relationships with governments, and a motivated and loyal staff.

Main areas of tour operator contribution

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

There are many areas where tour operators can integrate sustainability practices. The key operating areas are (Carbone, 2004; TOI, 2007b):

1. Internal Management
2. Product Development
3. Supply Chain Management
4. Customer Relations
5. Co-operation with Destination

The first four categories cover actions and decisions that tour operators make in preparation for the holiday package. Through these actions and decisions, tour operators have either a direct impact on sustainability (e.g. managing office supplies) or a significant influence on sustainability (e.g. through the supply chain). The fifth area covers efforts to address product impact at the destination (TOI & Global Reporting Initiative-GRI, 2002).

Internal management

■ This includes all the operations and activities that take place at the tour operator headquarters and in its country offices. The day-to-day administrative and operational activities within a tour operator office have the potential to cause a wide range of environmental impact. Implementing practices to reduce consumption of paper, energy, water and other office supplies and to dispose of waste in a sustainable manner can directly reduce the impact of operations, lead to cost saving as a result of more efficient resource use, and help staff to focus on the importance of environmental efficiency. Employment issues, including labor rights, human

rights and staff training, are another important part of the responsible Internal Management. Implementing good labor practices and respecting human rights will increase staff morale and allow for greater retention of high-quality staff, while improved working conditions will contribute to high-quality service for clients. In addition, staff training on sustainability issues and how they can make a difference is the key to ensuring employee commitment to sustainability strategies and improving performance throughout the company (Font & Cochrane, 2005a).

Product development & management

■ According to Miller and Twining-Ward (2005), this area includes actions related to the tour operator choice of the destination and selecting holiday package components that minimize environmental, economic and social impacts. Font and Cochrane (2005a) added that it is important for responsible tour operators to choose destinations that have good environmental management systems. Tour operators should also favor destinations with good quality local labor.

Font and Cochrane (2005a) explain the product management as the design and management of sustainable

holiday packages including the assessment of various components of a tour, from accommodation to transport services to excursions, in order to determine their potential environmental, social and economic impacts, minimize negative impacts and maximize positive benefits to the environment and local communities and destination economy. They added that choosing local suppliers and locally-owned services can also help ensure that a significant portion of the tour revenues stays in the destination and benefits local people, rather than being lost to leakages.

Supply chain management

■ Zhang, Song and Huang (2009:345) defined the Tourism Supply Chain as “a network of tourism

organizations engaged in different activities ranging from the supply side to the distribution and marketing

of the final tourism product; it involves a wide range of participants in both the private and public sectors”.

Most elements of a holiday package are delivered by suppliers who are sub-contracted by the tour operator. Thus, the selection of service providers and contracting with them is an important opportunity to influence the sustainability of the products. The main goal of Supply Chain Management is to work on product and service stewardship across the entire life cycle of the holiday package to design packages with lower environmental and social impacts (Budeanu, 2009; Font et al., 2008; Miller & Twining-Ward, 2005).

TOI (2007b) suggested that a tour operator can support

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

While TOI (2007a) has developed a methodology for tour operators seeking to integrate sustainability criteria into their choice of service suppliers, the key component of this methodology included establishing a sustainable supply chain policy and management, supporting suppliers in reaching sustainability goals and integrating sustainability criteria into suppliers' contracts.

Customer relations

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

Tour operators are ideally positioned to support and influence responsible actions by their customers. They can promote appropriate behavior in pre-departure information through a fair portrayal of the destination

and local cultures and can continue raising awareness of sustainability issues throughout the tour and excursion. In any post, holiday information sustainability messages should encourage customers to behave in a more responsible way. A tour operator can reinforce its messages by inviting feedback on the sustainability issue and channeling this feedback to suppliers, destination representatives and local policymakers.

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

Co-operation with destinations

■ According to the Tour Operators Initiative (2005), this area includes efforts made by tour operators to influence the sustainability of destinations, safeguard a destination culture, economy and environment, and increase benefits for the local community.

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

In addition to the above area, it is recommended to

ensure that activities targeted towards sustainability are comprehensive, credible and leading to long-term positive change, and to monitoring and reporting on performance (Carbone, 2004).

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

Good practices of tour operator sustainability performance

■ Since the launch of the Tour Operators Initiative in 2000, the TOI Secretariat has been collecting, from the individual members, good examples of how a tour operator can effectively integrate the principles

of sustainability in various areas of operations (TOI, 2003). Table 2 concludes a number of examples for good practices that are implemented by large tour operators:

Table 2: Examples of Good Practices of Integrating Sustainability Principles into Tour Operator Activities

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

Synthesized by authors from TOI (2003).

Methodology

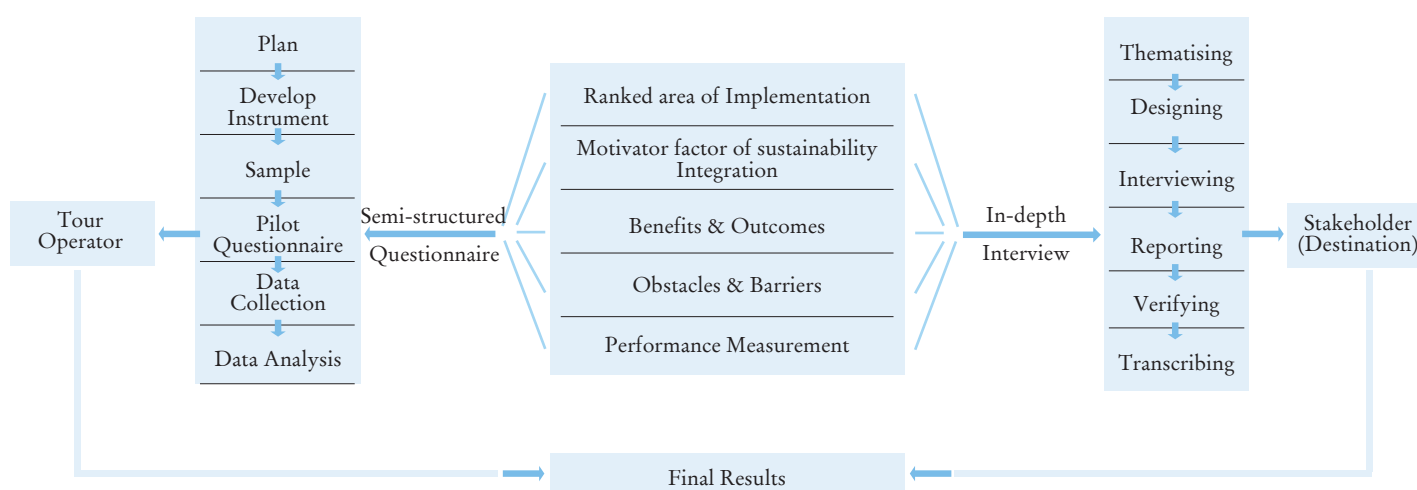
■ The methodology depends on developing a model for the factors to be investigated and guiding work through the field study (Figure 1 illustrates these factors). The data were collected through qualitative and quantitative methods; and the methods were broken down into three phases:

- Phase I: In this phase, the research depends on exploratory research techniques where in-depth interviews (Qualitative Method) are conducted with a representative sample of the stakeholders of tour operators in destination. This preliminary work usually explores the perspective on particular idea (Boyce & Neale, 2006;

Guian, 2006), formulates and defines a problem more precisely, in addition to gaining insights into the comprehension of research (Malhotra, 1996).

In this research, the main objective of these interviews is to gain familiarity with the research problem and guide the process of questionnaire compilation and development. The main topics discussed are: the main challenges and barriers facing tour operators in destination with respect to achieving sustainability goals, the outcomes and benefits returning to the destination adopting sustainability principles in the tour operator business, and the performance measurement.

Figure 1: Investigated Factors (Research Purpose)



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

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

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

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

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

eco-friendly tour operators (<http://ecofriendlytourist.com/touroperators.aspx>). Those companies were selected for their leading market position and interest in integrating sustainability in their business.

Due to the geographical distribution of the tour operator sample, the questionnaire had to be distributed by e-mail. According to Dejong, Steenkamp, Fox, and Bamgartner (2008), there is no difference in results when using online or pencil & paper questionnaires. Questionnaires were directed to managers holding the responsibility of environmental activities; they were selected as the ones most aware of drivers and challenges encountered during the process of adapting and implementing the sustainability strategies.

Phase III: In this phase, the research uses secondary data sources, such as tour operator documents, printed contributions and environmental reports. These documents are accessed through the internet, perusal, recorded or published information and websites. This data provided supporting evidence regarding the investigated tour operator experiences in the investigated topic.

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

Data analysis

Data and information found in this study were analyzed and discussed in accordance with the research objectives. The Statistical Package for the Social Sciences (SPSS, v17.0) was used to analyze the data obtained in this study. Descriptive statistics including simple frequencies and mean ratings were computed. Moreover, the chi-square test, a quantitative measure used to determine whether a relation exists between

two categorical variables or not (Berman, 2001), was also applied.

The analysis of variance (ANOVA) was used to test significance between groups of respondents in order to indicate if there is any difference among the means of two or more groups or not (Decoster, 2006). The used level of significance was ($p > 0.05$).

Findings and discussion

The results are structured into four main areas:

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

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

The analysis of data shows that 90.6% of the sample consisted of outbound tour operators, while 9.4% were inbound tour operators. The main service offered was package tours and guided tours (47%), hotel reservations (40.6%) and flight booking (12%) of the total sample.

Investigating the main activities of tour operators, the results show that 62.5% of the sample was involved in "leisure & resorts", 25% chose adventure tourism, while only 12.5% focused on sightseeing.

Table 3. Contribution Areas Ranking

Area of Contribution	Mean	Std. Deviation	Rank	X2 (Main Activity)	
				F Value	Sig
Supply Chain Management	4.00	1.29	1	40	0.000
Internal Management	2.84	1.16	5	15.34	0.053
Product Management & Development	2.91	1.34	4	40.10	0.000
Customer Relations	3.03	1.07	3	7.59	0.269
Cooperation with Destination	3.93	1.40	2	7.53	0.430

Used Scale:
 1 = very low priority of implementation
 5 = very high priority of implementation

Main motivators

■ The results of this study highlight the positive attitude towards integrating sustainability into the tour operator business due to a number of motivators. When ranking the pushing motivators, the most important factors with the highest mean score (4.06) and (4.00) were “Building Positive Public Image” and “Responding

to Customer Demands”, while the factors “Becoming an Environmental Leader” and “Expected Regulations & Licenses to Operate in Destination” were ranked as the least important with mean (2.56) and (2.06) (See Table 4).

Table 4. Ranking of Sustainability Integration Motivators

Motivators	Mean	Std. Deviation	Rank	Importance
Building Positive Public Image	4.06	1.01	1	Most Importance
Responding to Customer Demands	4.00	0.88	2	
Industry Initiatives	3.25	0.78	3	Moderate Importance
Reducing Environmental Impacts	3.09	0.82	4	
Becoming an Environmental Leader	2.56	1.10	5	Least Importance
Expected Regulations & License to Operate in Destination	2.06	0.72	6	

Used Scale:
 1 = not at all important
 5 = very important

Although results show that “Responding to Customer Demand” was the most important motivator, Wijk and Persoon (2006) argued that a clear market demand for more sustainable tourism is, still, absent. They give example of the Dutch tour operators in Holland International (part of TUI) which stopped offering sustainable tourism packages because of lack of demand. On the other hand, the results confirm the study of Gilgs and Ford (2005) who found that customers were more likely to purchase responsibly if they perceived that their act of purchase made a difference in the environment of destination.

Using the ANOVA test shows that there was significant difference between tour operators nationality with respect to motivators. The result of interviews shows that most participants agree that “Building Positive Public Image” and “Industry Initiatives” are the most important factors. The respondents explain that the willingness of stakeholders in destination to change

their management practices into sustainability practices aims at building a positive public image and to be able to join special organizations.

On the other hand, by applying the chi-square test, the results indicate that there is no significant relation between the motivators of tour operators to adopt sustainability practices and the main service provided (chi-square value = 35.77, Sig = 0.008). But there is a significant relation between the main activity offered by tour operators and their motivators to apply sustainability practices (chi-square value = 41.28, Sig = 0.001).

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

Benefits and barriers

■ Although the results confirmed – to a great extent – the findings from the literature and secondary data obtained, the research revealed some specific aspects related to the benefits and outcomes of integrating sustainability practices into the tour operator business as well as to obstacles and barriers that face tour operators

through the implementation stages. Table 5 outlines the results of questionnaire and interview concerning the benefits and barriers from the tour operator point of view and the destination experts and suppliers point of view:

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

	Destination	Tour Operator
Benefits & Outcomes	<ul style="list-style-type: none"> - Increasing long-term competitiveness - Increasing tourists demand who are seeking high-quality experience - Increasing customer loyalty - Safeguarding the destination resources - Encouraging investors interested in long-term sustainability - Increasing benefits for local communities - Providing source of income for conservation 	<ul style="list-style-type: none"> - Customer satisfaction (N=12) - Cost saving and financial situation improvement (N=3) - Enhanced product quality (N=8) - Increased operational efficiency & business opportunities (design innovation) (N=18) - Cooperation advantage (N=7) - Improved image of company in general (N=10) - Competitive advantage (N=16) - Strengthening staff skills and creating new competencies (N=9)
Obstacles & Barriers	<ul style="list-style-type: none"> - Level of stakeholder confidence - as a whole - in the importance of sustainable policies for their work. - Having little regulatory pressure in the tour operators operation - Lack of agreed metrics for application or measurement of performance - Fragmented structure of tourism sectors - Beliefs that sustainable policies reduce the company profit - Discouraged by competitive market condition - Tendency of tour operators to put responsibility on host destination 	<ul style="list-style-type: none"> - Lack of demand for sustainable tourism packages (N=12) - Cost of staff development (N=5) - Complexity due to numerous parties and partners (N=19) - Difficulty in co-operation with suppliers to apply their sustainable policies (N=20) - Weakness of shareholders support (N=22) - Difficulty to gather and report necessary information (N=11) - Long time for making performance evaluation (N=13) - Lack of reliable ways to measure performance (N=14) - Facing different regulatory systems in destination countries (N=8) - Bad effect on product quality (in some cases) (N=15) - Setting aside funds for environmental or social activities (N=17) - Costs involved with obtaining certificates such as ISO 14001 (N=2)

N = Frequency Response

The findings in Table 5 may explain why, despite responsible tourism policies and sustainable practices implementation, the tour operator business does not

have a satisfactory level as a result of facing many constraints.

Performance measurement

■ According to UNEP (2002) and WTO (2004), using the indicator measurement of performance has become important for setting evaluation, review and modification policies. The results of interview clearly ensure the need for measuring performance in order to know the issues faced in destination so that those

destinations can co-operate with tour operators. However, several participants strongly felt that the lack of examples for sustainability reports in the sector meant that performance indicators could not be based on existing practices.

Most participants commented that there is general tendency for large tour operators to be more socially responsive than the small ones because they can develop their qualitative and quantitative performance measurement.

Font and Cochrane (2005b) recommended that you cannot manage what you cannot measure; thus, sustainability performance should regularly be monitored and documented to assess whether targets and objectives are being met or not and to identify necessary action.

As for the means of measuring performance, most participants of tour operators use annual surveys, analyze environmental performance, set environmental check lists, revise the used standard metrics, analyze samples of guest information by environmental management to possess strategic functions and environmental coordinators in the affiliated companies, write reports to check environmental quality in the holiday regions, and hold

communications and exchange information with suppliers, sometimes accompanied by brief suggestions for improving supplier performance.

According to the field study and secondary data, there are two main types of performance reports and management practices:

i) A review report that provides clear and appropriate recommendation for following the annual management cycle.

ii) A sustainable report that may include a description of changes in the holiday package design, measures to maximize economic benefits for destination and other actions to address key environmental issues. The most common method of publishing and disseminating sustainability reports is through the internet, to help both staff and external stockholders to get feedback.

Conclusions

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

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

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

The main benefits reported by the majority of tour operators are "Increased Operational Efficiency & Business Opportunities (design innovation)", "Competitive Advantage" and "Improved Image of Company in General". While for destination, the main outcomes are

"Increasing Long-term Competitiveness", "Increasing Tourist Demand Seeking High-quality Experience" and "Increasing Customer Loyalty".

The research concluded that although the principles of sustainable tourism are beneficial, their implementation in tour operator business is a difficult task to achieve as there is still a major gap between strategy and implementation. The results indicated that the main obstacles that face tour operators are "Weakness of Shareholder Support", "Complexity due to Numerous Parties & Partners" and "Obligation of Setting aside Funds for Environmental or Social Activities". As for destination, the main barrier is the level of stakeholder confidence - as a whole - in the importance of sustainable policies for their work. Finally, the study discovers considerable differences in reporting behavior with respect to nationality and main services provided by tour operators.

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

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El Turismo Internacional en una Era de Cambio

Augusto Huéscar Martínez, Michel Julian

Resumen

■ El turismo es una actividad de una importancia económica considerable: exportó en 2009 unos 2.700 millones de dólares diarios. Ese mismo año, el turismo internacional sufrió un decrecimiento de 4,2 por ciento superior a los tres únicos años negativos previamente registrados desde el año 1950: 1982 (-0,1%), 1991 (-0,3%) y 2003 (-1,5%). Es una corrección apreciable a la tendencia que el turismo internacional ha experimentado de forma sostenida. El turismo es vulnerable, pero se recupera. No obstante volver a la senda de crecimiento histórico en la que estaba instalada tomará su tiempo y es cierto que ha de desarrollarse con renovados criterios de gestión. El marco económico y social que se ha ido conformando en los meses pasados crea un nuevo entorno que hace necesaria, más que nunca, una reflexión sobre el rumbo que ha de darse al desarrollo del turismo. El año 2008 presentó un punto de inflexión hacia mediados del año. En sus seis primeros meses el turismo internacional aumentó un 6 por ciento, pero decreció en los meses posteriores. El año 2009 consolidó un retroceso del turismo internacional en todas las regiones, salvo en África; los datos iniciales disponibles muestran un mantenimiento y en muchos casos crecimiento del turismo interno. Los turistas siguieron viajando pero en su propio país o a destinos cercanos, y mantuvieron un comportamiento mucho más conservador en el momento del gasto. Para el año 2010 la Organización Mundial del Turismo (OMT) espera que la demanda internacional crezca un 4% o quizás algo más. El mercado se ha hecho más rígido, mucho más competitivo y más dependiente de los mercados de proximidad y de algunos de los emergentes. El presente artículo aborda las características actuales del turismo y analiza su evolución entre 2008 y 2010, haciendo hincapié en el Caribe.

Palabras clave:

Crecimiento, resistencia, competencia, cambio, situación económica, factores de influencia

Abstract

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

This article deals with current characteristics of tourism and examines its evolution between 2008 and 2010, with emphasis on the Caribbean.

Key Words:

Growth, strength, competition, change, status of the economy, factors of influence

Introducción

Una mirada convencional sobre el turismo

■ Una vista retrospectiva de la evolución del turismo nos define los rasgos estructurales del turismo tal como lo conocemos en la actualidad. El turismo, tanto el internacional como el interno, se ha caracterizado por su permanente tendencia al crecimiento. Entre 1950 y 2008 las llegadas por turismo internacional pasaron de 25 millones a 900 millones, creciendo a una tasa media anual de 6,3 por ciento. Conviene recordar que las estimaciones de la Organización Mundial del Turismo (OMT) cifran el turismo interno en hasta cinco veces el volumen del turismo internacional.

El paso del tiempo ha impuesto, por un lado, ritmos de crecimiento menor y, por otro, un claro proceso de diversificación de destinos, de motivación y de momento de practicar el turismo. Esto se ha potenciado por la incorporación permanente de nuevos destinos deseados de contar con el turismo en su estrategia de desarrollo. Una muestra: en 1950 el 97 por ciento del flujo turístico se concentraba en tan solo 15 países; en 2009 los primeros quince países receptores captaron poco más de la mitad del total mundial (53%). La primera consecuencia es que el turismo se hace más complejo y más competitivo. Se tiende a viajar todo el año gracias al fraccionamiento creciente de las vacaciones y al escalonamiento de las vacaciones escolares y laborales.

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

También las vacaciones son mucho más variadas por su motivación, la duración de la estancia y el tipo de alojamiento utilizado. Esto ha propiciado una ampliación de la oferta de destinos y un fuerte desarrollo tanto en el turismo cultural, rural, urbano o en el turismo de deportes, de naturaleza, de aventura, de cruceros y toda clase de combinaciones entre los tipos de turismo. Se ha registrado por igual una sustancial expansión de los segmentos de turismo de incentivos, congresos y reuniones. A pesar de esa clara tendencia a la diversificación de los flujos turísticos, conviene decir que aún perduran pautas tradicionalmente observadas en el comportamiento de los turistas de forma que el segmento de sol y playa es y seguirá siendo, a medio plazo, el de mayor dimensión.

El turismo ha hecho frente a numerosos impactos exógenos (económicos, políticos, desastres naturales, pandemias, entre otros) y seguirá haciéndolo. El turismo es vulnerable, pero también ha demostrado ser resistente a los choques externos. El turismo se ve afectado por

dichos factores pero no está a su merced porque: a) es una necesidad para quienes lo practican, ya sea por ocio, negocio u otros motivos; b) por la capacidad de gestión de crisis acumulada en los sectores público y privado; y c) por la nueva percepción que hoy tienen los turistas sobre la "seguridad".

Los acontecimientos vividos en los años 2001 y 2003 originaron lo que posiblemente hayan sido los momentos de mayor dificultad sufridos por el turismo hasta la fecha. No obstante, en 2004 el turismo internacional experimentó una recuperación de escasos antecedentes en la serie histórica de llegadas del turismo internacional: un crecimiento de 10 por ciento respecto al año anterior.

La experiencia de varias décadas de análisis muestra que si bien es cierto que puede sufrir desaceleración en su crecimiento, el turismo tiende a recuperarse con una rapidez que no es usual en un sector económico tan importante. En el año 2009 sólo el turismo internacional generó 852.000 millones de dólares en el mundo, a los que se ha de añadir unos 161.000 millones por los servicios exportados en el capítulo de transporte internacional.

Dónde estamos...?

En 2010 tenemos que plantearnos si todo sigue igual. Estamos instalados irremediablemente en una pendiente de crecimiento? Todo parece indicarnos que nos adentramos en una nueva era. La economía está cambiando, la sociedad mundial también. El turismo no puede permanecer como antes. Se transforma a resultados de la mutación de su entorno.

... en un entorno de cambio

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

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

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

En un mundo en el que los flujos migratorios se cuentan en millones y se calcula que hasta el año 2050 han de ser bastantes millones más.

En un mundo con una creciente conciencia en la preservación de su patrimonio cultural, social y natural. Con un mayor interés por mejorar la gestión de recursos básicos como el agua, el aire o las materias primas. Con ajustes pendientes en los tipos de cambio en países con peso importante en la economía internacional, con unos precios volátiles de los productos energéticos o de alimentación humana que hacen bascular las balanzas de pagos de países proveedores y compradores de forma dramática en poco tiempo.

En el campo estrictamente turístico asistimos a la presencia de mercados emergentes que superan las previsiones más optimistas en cuanto a emisión y también como receptores, lo que no sólo reordena la lista de destinos nacionales sino que potencia la competencia entre destinos de forma significativa. Se profundiza la necesidad de reforzar los destinos, es decir la acción y la gestión a escala local, o se presta cada vez más atención al enorme segmento de oferta que en todos los países forman las micro, pequeñas y medianas empresas y a la participación de la población local. También a la internacionalización de las empresas turísticas. La preocupación por el uso eficiente de los recursos es

2008: el inicio del deterioro económico

que están influyendo de forma positiva y negativa en la evolución del turismo internacional.

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

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

La OMT señala que todas las regiones obtuvieron resultados positivos salvo Europa que sufrió un estancamiento de las llegadas (+0,4%). El mejor

universal y por ello todas las administraciones, por supuesto también las empresas turísticas, se ven afectadas en sus sistemas de gestión. La lucha contra la pobreza y, más recientemente, contra el cambio climático, son objetivos explícitos de la comunidad internacional. La implantación cada vez más generalizada de tecnologías de información y comunicación están modificando los esquemas tradicionales de administración, producción, distribución y venta en el sector turístico.

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

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

comportamiento se observó en Oriente Medio, donde las llegadas de turistas internacionales alcanzaron los 56 millones, un aumento del 19 por ciento sobre el año anterior. África registró un crecimiento del 3 por ciento. Por el contrario, Asia y el Pacífico sufrieron una disminución importante en las llegadas en comparación con los excelentes años anteriores, creciendo poco más del 1 por ciento en 2008.

En cuanto a Las Américas, las llegadas a esta región alcanzaron los 148 millones (+3%), impulsadas por el buen comportamiento de los destinos de América Central y del Sur (6% y 4% respectivamente) y por la fortaleza del tráfico hacia los Estados Unidos de América durante la primera mitad del año.

El Caribe registró un modesto crecimiento de las llegadas del 1 por ciento. Algunos destinos como Cuba (+9%) y Aruba (+7%) lograron excelentes resultados, mientras que los inferiores resultados del resto del área caribeña se pueden atribuir en gran medida a los elevados precios de los billetes de avión y a la disminución de la capacidad aérea, así como a las dificultades económicas en los Estados Unidos de América y en Europa.

La OMT estima que los ingresos provenientes del turismo internacional alcanzaron los 941.000 millones de dólares en 2008, lo que supuso un crecimiento de 1.3 por ciento en términos reales (es decir, ajustado al tipo de cambio y a la inflación). El Caribe captó 23.600 millones de dólares EE.UU., lo que representa un 2,5 por

ciento del total mundial. Estos ingresos derivados del turismo representan la primera categoría de exportación para gran parte de las islas del Caribe. En algunas, los ingresos por turismo internacional pueden representar hasta seis veces las exportaciones de bienes. En cuanto a

la participación de los ingresos por turismo internacional en las exportaciones de servicios, la mayor parte de las islas del Caribe registran ratios dentro del rango 60-90 por ciento, muestra de la prominencia del turismo en dichos Estados y territorios insulares.

Turismo en el Caribe: Factores que han influido en su reciente evolución

La situación turística en el Caribe actual está fuertemente marcada por la de la economía mundial y la de los países emisores a los destinos de esta región. Es sin duda el factor más veces señalado por el Grupo de Expertos de la OMT. Según estos expertos, el deterioro de la economía se manifiesta por elementos tales como:

- el aumento del desempleo,
- la pérdida de confianza de los consumidores,
- las tasas de cambio desfavorables,
- y las previsiones económicas negativas en algunos mercados emisores.

Sobre esa base se apoya parte de las opiniones de los expertos a la hora de manifestar que se está produciendo una contracción de la demanda a pesar de las reducciones de precios y tarifas de los servicios turísticos. Esta situación a su vez lleva a una clara reducción del gasto medio por turista recibido.

El mercado se está haciendo más complejo dado el sensible incremento de la competencia en destinos de Europa, Norte de África, Estados Unidos y Canadá. Buena parte de ellos está actuando en base a precios muy agresivos.

Se aprecia también una contracción de llegadas en el segmento de negocios e industria de reuniones.

Los factores que han influido de forma negativa según el Grupo de Expertos de la OMT se enumeran a continuación:

1. Contracción de la demanda a pesar de las reducciones de precios y tarifas de los servicios turísticos. Esta situación a su vez lleva a una clara reducción de los gastos medios por turista recibido.
2. Un mercado más complejo dado el sensible incremento de la competencia en destinos de Europa, Norte de África, Estados Unidos y Canadá. Buena parte de ellos está actuando en base a precios muy agresivos.
3. Contracción en la inversión para la ampliación o mejora de la oferta.
4. Reducción de los presupuestos de apoyo a la promoción y sistemas de venta.
5. Inestabilidad del transporte aéreo.
6. La amenaza de huracanes en la zona como factor estacional.

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

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

Esta trama de factores puede tener muchas lecturas pero hay una que parece muy sugerente en el sentido de la preocupación percibida por actualizar, refrescar y diversificar el producto turístico caribeño. En este sentido se ha de citar los esfuerzos que en muchos destinos se está haciendo por ofrecer nuevos productos que tienen su raíz en el patrimonio natural y cultural, en eventos deportivos, en eventos de otra naturaleza (musicales por ejemplo) o en nichos específicos en los que se puede mejorar la calidad de los servicios prestados.

Otra preocupación evidente es la de actuar mejor en los mercados emisores. Significa mejor información del cliente objetivo y desde luego más pero sobre todo mejor acción promocional. En el contexto actual de limitaciones económicas, y por lo tanto presupuestarias, hay dos vías que se hacen más evidentes: La eficacia en las campañas promocionales y la cooperación entre el sector público y el privado. Tradicionalmente los tiempos de crisis alientan el trabajo en común, también entre las administraciones públicas.

En tercer lugar, aunque de gran importancia, es el conjunto de factores que tienen que ver con facilitar la accesibilidad a los destinos. En el Caribe eso significa mantener la preocupación por ampliar la oferta de transporte aéreo a tarifas competitivas, además de mejorar la infraestructura portuaria para atraer más cruceros.

2009: año de la crisis anunciada

■ Como se preveía, la tendencia a la baja de la demanda turística que se inició a partir de mediados del año 2008 como consecuencia del deterioro económico mundial se intensificó en 2009, año en el que la OMT estima que las llegadas de turistas internacionales en el mundo, 880 millones, descendieron un 4,2 por ciento. Generaron 852.000 millones de dólares de los Estados Unidos, lo que supuso un descenso, en términos reales, del -5,7 por ciento respecto al año anterior.

En las Américas, la gripe A(H1N1) se sumó a los efectos de la crisis económica mundial, impactando los flujos de llegadas a México y en destinos tanto de América Central como del Sur.

Las llegadas a los destinos del Caribe disminuyeron un 2,9 por ciento en 2009, reflejando la debilidad y los cambios de comportamiento de los mercados de ocio de América del Norte y de Europa. De los países con datos de llegadas muy pocos finalizaron en positivo el año, entre ellos Cuba, Jamaica, República Dominicana y San Eustaquio. Los ingresos por turismo internacional, sin considerar los atribuibles a transporte internacional, ascendieron a 22.200 millones de dólares EE.UU., un 4,4 por ciento menos que el año precedente. Nótese que esa cifra es de un orden de magnitud similar a los ingresos de América del Sur (18.200 millones de dólares) y de América Central (5.900 millones de dólares) juntos.

Llegadas de turistas internacionales por (sub)regiones

Llegadas de turistas internacionales (millones)	Cuota de mercado (%)		Variación (%)		Crecimiento medio anual (%)			
	1990	2000	2008	2009*	08/07'	09*/08	'00-'09*	
Mundo	438	683	919	880	100	2.0	-4.2	2.9
Europa	265.0	392.2	487.2	459.7	52.2	0.4	-5.7	1.8
Europa del Norte	28.6	43.7	56.4	53.1	6.0	-2.9	-5.8	2.2
Europa Occidental	108.6	139.7	153.2	146.0	16.6	-0.4	-4.7	0.5
Eur. Central/Oriental	33.9	69.3	100.0	89.5	10.2	3.5	-10.4	2.9
Eu. Meridional/Medit.	93.9	139.5	177.7	171.1	19.4	0.5	-3.7	2.3
Asia y el Pacífico	55.8	110.1	184.0	181.2	20.6	1.1	-1.6	5.7
Asia del Nordeste	26.4	58.3	101.0	98.1	11.1	0.0	-2.9	5.9
Asia del Sudeste	21.2	36.1	61.7	62.1	7.1	3.4	0.6	6.2
Oceanía	5.2	9.6	11.1	10.9	1.2	-0.9	-1.8	1.4
Asia Meridional	3.2	6.1	10.3	10.1	1.1	1.1	-1.5	5.8
Américas	92.8	128.9	147.8	140.7	16.0	2.8	-4.8	1.0
América del Norte	71.7	91.5	97.7	92.1	10.5	2.6	-5.7	0.1
El Caribe	11.4	17.1	20.1	19.5	2.2	1.2	-2.9	1.5
América Central	1.9	4.3	8.2	7.6	0.9	6.4	-7.4	6.5
América del Sur	7.7	15.9	21.8	21.4	2.4	3.8	-1.6	3.3
África	14.8	26.5	44.3	45.7	5.2	2.5	3.1	6.2
África del Norte	8.4	10.2	17.1	17.6	2.0	4.8	2.5	6.2
África Subsahariana	6.4	16.3	27.2	28.1	3.2	1.1	3.4	6.3
Oriente Medio	9.6	24.9	55.6	52.9	6.0	19.0	-4.9	8.8

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

Aunque las condiciones económicas desfavorables influyeron negativamente en la demanda turística, a lo largo del año se evidenció una moderación en el decrecimiento de los flujos turísticos mundiales.

Los factores que más han influido en la elección de destinos han sido: distancia, precios, relación calidad/precio, y calidad de recursos y productos.

Los turistas, por lo general, todavía viajan a un reducido número de destinos. Pesan mucho "los tópicos". Hay, por consiguiente, muchas oportunidades para generar nuevos productos. Con frecuencia muchos de los recursos turísticos, e incluso algunos países de la región americana, son auténticos desconocidos para el viajero.

2010: Recuperación con crecimiento incierto

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

Naturaleza y cultura son los recursos básicos de atracción para el mercado turístico de las Américas. Entre los tipos de viajes realizados, los más frecuentes son los que combinan: ciudades + naturaleza + cultura; playa + naturaleza + cultura; ciudad + playa + cultura.

Hay cuatro asuntos clave que se han de operar eficazmente: a) gestionar convenientemente la marca del destino; b) proporcionar un papel clave al canal de distribución atendiendo debidamente las nuevas formas que adquiere; c) desarrollar una estrategia flexible de precios; y d) considerar la calidad del producto como una decisiva herramienta de marketing.

del Norte (7%). América del Sur (5%) y el Caribe (4%) crecieron ligeramente menos.

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

Conclusión

■ Las circunstancias actuales ponen a prueba, una vez más, la capacidad de desarrollo del turismo. Los datos disponibles muestran que vivimos una época de crecimiento limitado. Se abre un período difícil que se puede convertir en una oportunidad para volver a pensar estrategias de desarrollo y criterios de gestión del turismo. La mayor complejidad y competencia entre destinos, las consecuencias esperadas de un cambio climático o las limitaciones que existen a medio plazo de determinados recursos marcan la necesidad de buscar nuevas fórmulas de desarrollo que acerquen más decididamente a abordar temas que son base para un futuro cierto del sector turístico y de nuestra sociedad. Sin duda hay que pensar en una más intensa aplicación de los criterios de desarrollo sostenible y a usar de forma más racional los recursos. A la vez se ha de potenciar la conciencia cada vez más amplia de hacer del turismo una fuerza que contribuya de forma decidida a eliminar

las barreras que impiden reducir el desempleo, la pobreza, el hambre u otros estigmas que afectan a capas importantes de la población en el mundo.

Un factor clave en esa toma de conciencia es el hecho de que la sociedad se está moviendo en ese sentido de conseguir un mayor desarrollo, pero bajo criterios de sostenibilidad y solidaridad. Es la sociedad civil la que está de alguna manera apoyando, y acelerando, la puesta en práctica de nuevos criterios de gestión que hagan del turismo un sector más respetuoso con el medio que es su soporte. El turismo es víctima y también vector del cambio climático, por lo que la expansión del turismo no podrá realizarse indefinidamente con los criterios pasados. Los sectores público y privado tiene ante sí el reto de continuar trabajando conjuntamente y con la sociedad civil para garantizar la sostenibilidad económica, social y medioambiental del turismo.

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Notas biográficas

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

Norman Medina, Jorge Santamarina

Inversiones Trafitur, Cocotal, Bávaro, República Dominicana

Abstract

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

Key words:

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

Resumen

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

Palabras clave:

Producto turístico, productos de Sol y playa y de Naturaleza, Caribe, ética y sostenibilidad turística.

Introducción

■ Los productos de Sol y Playa están en plena fase de madurez y en muchos casos mostrando síntomas de agotamiento (Medina, Salinas & Santamarina, 2009). El turismo de sol y playa ha madurado como mercado y se proyecta que su crecimiento quedará plano (OMT, 2001).

Estos productos fueron los principales protagonistas de la gran expansión que tuvo el turismo a partir de los años cincuenta, y posteriormente se desarrollaron ininterrumpidamente hasta ocupar un indiscutible primer lugar entre todos los otros productos.

Su estabilidad competitiva hizo que durante años, hasta finales de la década de los 70, el turismo de playa continuara manteniendo casi los mismos códigos de ofertas que en sus orígenes, aunque ahora participaba en el mismo un mercado creciente en cantidad, motivaciones y en expectativas. Las actividades

recreativas se mantvieron durante todo ese periodo consistiendo en tomar baños de mar y solearse, practicar el ocio y el descanso pasivo, y en menor medida realizar algunos deportes náuticos y el buceo.

A finales de la década de los ochenta comenzaron a manifestarse signos de agotamiento en los productos de Sol y playa que mantenían su perfil clásico, de turismo pasivo, lo que, sumado al incremento sostenido de ofertas de turismo especializado, cada vez más diverso, aquel comenzó a ser objeto de transformaciones notables, dejando de ser sólo aquella conocida y exitosa fórmula de mar, arena y sol, de carácter más bien pasivo, para combinar su explotación con otros atractivos de la naturaleza y la cultura situados fuera del ámbito de la playa, y que se han integrado con esta para conformar productos más complejos y propiciadores de experiencias diversas y enriquecedoras (Medina et al., 2009).

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

Según Fuentes Guerrero (2005), en algunas zonas de la región andaluza, uno de los principales destinos de España, el turismo de sol y playa ha perdido cuota de mercado y ha bajado el grado de ocupación. Este autor considera que dentro de las razones para ello se encuentran la afectación al medio ambiente costero (particularmente sensible en las dunas de playa y en los ecosistemas coralinos que le son asociados); excesivo desarrollo inmobiliario en zonas alejadas o cercanas; deterioro de la calidad de las aguas y las playas; disminución o falta de zonas verdes e inexistencia de atractivos complementarios, entre otras. Recomienda apostar por un modelo sostenible, fortalecer otros segmentos para que complementen el de Sol y playa y, de acuerdo con eso, especializar a los destinos (Fuentes Guerrero, 2005). Esta situación de

los productos, principalmente los de Sol y playa, tiene sus raíces en los cambios que se están produciendo y seguirán produciéndose en los gustos y preferencias de los turistas, que son un reflejo de la gran dinámica del mundo actual, y producto de ello, de los consiguientes cambios que se están produciendo en las necesidades y anhelos del hombre, “que busca desesperadamente el toque humano y el turismo será la forma principal mediante la cual tratará de alcanzarlo” (OMT, 2001).

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

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

Fases en la vida de los productos

■ Los productos turísticos tienen ciclos de vida, es decir, nacen, se desarrollan, maduran y envejecen, y comienzan a declinar. Es conveniente señalar que a diferencia de otras épocas en las que la duración de las fases se alargaba, en tiempos recientes la aguda competencia ha dado como resultado que dichas fases se hacen cada vez más cortas. Algunos autores como Muñoz Oñate (2000), basándose en el proceso de desarrollo de productos, añaden lo que entonces sería la primera fase, antes del nacimiento: la fase de desarrollo, que incluye la concepción del producto, su diseño, preparación y puesta en el mercado, fase que, obviamente, solo ocasiona gastos. Este autor considera que, dentro del crecimiento, se producen momentos de saturación por la entrada de competidores, lo que conllevará una turbulencia competitiva, y que en la fase de madurez se volverá a repetir el fenómeno de la saturación, lo que, de no reaccionarse a tiempo, puede conducir a la decadencia y declive del producto, y acaso a su desaparición (Medina et al., 2009).

La desaparición de un producto parte de su envejecimiento. ¿Por qué envejece un producto? Téngase en cuenta que el mundo va cambiando y que, con éste, las gentes también van cambiando: tienen nuevas expectativas y necesidades, sin duda relacionadas con las precedentes, pero en el fondo, diferentes. Considérese también que la competencia está presente y muy activa,

al tanto de esos cambios y poniendo a disposición del público nuevas ofertas. Además, la tecnología se está desarrollando a velocidades inimaginables, abriendo más y más posibilidades de crear cosas nuevas y mejores, y creándolas.

¿Puede evitarse la muerte de un producto procurando que la curva –en descenso– de su ciclo de vida, retome su ritmo ascendente? La muerte de algunos productos, siempre que estos no sean modas o peor aún, modas pasajeras, puede evitarse mediante su rediseño o reciclaje, que puede extender su vida continuando su crecimiento hasta alcanzar una segunda madurez y volver a declinar, lo que requerirá de un nuevo rediseño, y así sucesivamente. El mantenimiento de su vitalidad va a depender, en gran medida, de que otros productos puedan complementarlo y enriquecerlo.

La constante búsqueda y renovación es ley del desarrollo de los productos, estrategia particularmente aplicable a los productos turísticos, sobre los que actúa permanentemente la gran dinámica de estos tiempos modernos.

Los productos turísticos pueden clasificarse en principales o básicos, periféricos y complementarios. Los principales son los que satisfacen de manera inequívoca las necesidades primordiales del usuario,

los periféricos son los que hacen posible el viaje, y los complementarios son los que le añaden valor al producto principal (Medina et al., 2009).

Algunos productos se categorizan como principales

para determinado segmento, puesto que son capaces de motivar el viaje de un cliente a un destino con una estancia de varios días, mientras que para otro cliente, que vino atraído por otro producto, aquellos los percibirá como complementario.

Tendencia a complementar

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

En la actualidad se está evidenciando una fuerte tendencia a la diversificación de los productos turísticos, lo que está conduciendo a que muchos comiencen a desempeñar un papel doble, el primero como productos principales y el segundo como productos complementarios de aquellos. Por ejemplo, ese segundo papel se viene haciendo cada vez más evidente en algunos deportes náuticos, comienza a desarrollarse en el ecoturismo y el turismo cultural, y más recientemente en algunas modalidades del turismo de salud, todos complementarios con respecto al producto turístico líder, el de Sol y playa, que motiva alrededor del 80% de los viajes en muchos países, entre ellos los del Caribe insular.

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

Sin embargo, no debe desconocerse que también se mantienen numerosos turistas que siguen prefiriendo la playa para sus vacaciones de forma estricta, sin buscar

otras formas de recreación. Se pudieran considerar quizás como los más tradicionales o convencionales, sin suponerse con ello que sean los de más edad. El mercado sigue siendo muy diverso, también en los turistas que buscan la playa.

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

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

El llamado Turismo de Experiencia como el ecoturismo, turismo rural, patrimonial, cultural, de aventura suave, y otros, está entre los sectores previstos a crecer rápidamente en las dos próximas décadas (OMT, 2001).

El Turismo de Naturaleza como complemento por excelencia de los productos de Sol y playa en el Caribe

■ Budowski (2001) refiere que el resultado de agregar valor al turismo a través del ecoturismo ha sido responsable de buena parte de la adopción de políticas y decisiones por parte de autoridades nacionales y empresas. El mismo autor considera que el ecoturismo se

presenta como una actividad que puede innegablemente enriquecer a los productos de Sol y playa, para lo cual debe reunir las siguientes cualidades inherentes al desarrollo sostenible: ser ambientalmente amistoso y deseable; biológicamente valioso y satisfactorio;

social y culturalmente aceptable, y ojala beneficioso; económicamente viable y equitativo” (Budowski, 2001). Los atractivos naturales y culturales, principales componentes del Turismo de Naturaleza, se encuentran en pleno desarrollo, y se identifican como los principales complementos capaces de enriquecer los productos de Sol y playa en el Caribe. El Caribe se ha identificado mundialmente como un macrodestino de Sol y playa,

que es y será su principal vocación, pero no la única. En sentido general, cualquier playa caribeña está lo suficientemente cercana a atractivos naturales de valor, que pueden ser explotados como productos complementarios de los de Sol y playa.

La Naturaleza Caribeña

■ Por lo general, las islas caribeñas son salientes de formidables cordilleras sumergidas, o dorsales emergidos de plataformas continentales, o tierras donde se conjugaron, en tiempos geológicos, telúricos procesos vulcanógenos, de corrimiento de las placas continentales, y de fuerte oscilación de los niveles oceánicos. La condición de mosaico natural tiene, pues, un origen muy remoto. No obstante este mosaico, la naturaleza caribeña está profundamente marcada por ese denominador

común de todas las islas, que es precisamente la insularidad. Esto diferencia radicalmente a la naturaleza antillana de la naturaleza caribeña continental. Todas las Antillas, además, comparten un clima igual o parecido, desde el moderadamente subtropical de Bahamas, hasta el sub ecuatorial de las Antillas Holandesas. La Corriente del Golfo las baña o ejerce su influencia prácticamente sobre todas (Medina et al., 2009).

La Cultura Caribeña

■ Es probable que no exista en el planeta otra región tan variada en lo cultural como el Caribe, dentro de un ámbito geográfico proporcionalmente tan reducido. Ello tiene su origen en el complejo proceso de asentamiento humano y de interinfluencias culturales que se desarrollaron a partir de la llegada de Cristóbal Colón, durante los siglos subsiguientes.

Cuatro naciones europeas participaron en la colonización caribeña y asentaron poblaciones en estas islas: España, Francia, Inglaterra y Países Bajos, cada una de ellas con ricas y fuertes culturas, y con sus propias modalidades de llevar a cabo el proceso colonizador. En casi todas las islas se implantó la economía de plantación (caña de azúcar y café, principalmente), para cuya solución de las necesidades de fuerza de trabajo las respectivas metrópolis acudieron a la importación masiva de esclavos, la mayor parte proveniente del África negra. En los siglos XVIII y XIX también se efectuaron

importaciones de chinos, hindúes, y en menor cuantía, de otras naciones y etnias, aunque no en el caso de todas las islas.

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

Exigencia por formas de explotación más responsables.

■ Cada día los turistas se vuelven más exigentes con el turismo y exigen prácticas cada vez más responsables, tendencias que hay que asumir en positivo, como motores de constantes y provechosas transformaciones. En ese contexto, el Turismo de Naturaleza puede introducir en los productos de Sol y playa nuevos conceptos y formas de explotación, lo suficientemente responsables como para satisfacer las nuevas demandas de los turistas. Por ejemplo, dos tercios de los viajeros

norteamericanos y australianos, y 90% de los ingleses consideran que la protección activa del ambiente y el apoyo a las comunidades locales es una de las responsabilidades del hotel. Encuestas a esos turistas revelaron que 70% de ellos estará dispuesto a pagar hasta 150 euros más por una estancia de dos semanas en un hotel con un desempeño ambiental responsable (Ecoturismo Global, 2006). En Alemania, 65 % de los viajeros esperan calidad ambiental y 42% piensan

que es importante encontrar alojamientos que sean ambientalmente amistosos. En cuanto a los turistas europeos, 20-30% están conscientes de los valores del turismo sostenible; 10-20% van en busca de “opciones verdes” y 5-10% exigen vacaciones verdes (Ecoturismo Global, 2006). Por su parte, 53% de los norteamericanos dicen que su experiencia es mejorada cuando aprenden lo más que pueden sobre las costumbres y las culturas locales (Travelbiz, 2002).

Un ecoturismo genuino, concebido y operado de forma calificada y responsable, como industria sensible al medio ambiente, a la cultura y a las comunidades locales, es algo

alcanzable, y su gestión, por supuesto, resulta positiva. Debido a sus características y propósitos, el ecoturismo ha establecido un grupo de principios que, por su validez conceptual y práctica han ido ejerciendo una progresiva influencia favorable en el turismo en su conjunto. Sólo que siempre será indispensable estar en capacidad de poder distinguir entre el ecoturismo genuino y el otro. El Turismo de Sol y playa debe aprovechar el prestigio, la aceptación y el crecimiento que está mostrando el Turismo de Naturaleza, convirtiéndolo en su principal producto complementario, sumando a su desempeño las buenas prácticas de este.

EL Turismo de Naturaleza.

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

En la Resolución Conjunta MINTUR, CITMA, MINAG, de Cuba, el Turismo de Naturaleza se define como “todas las modalidades del turismo en que la motivación del viaje o excursión, o la selección del destino, este determinada por la necesidad del acercamiento y disfrute de la naturaleza o de componentes de la misma” (MINTUR, 1998). Lo cierto es que, tanto en la literatura como en la gestión, se le suele identificar de muchas maneras: Ecoturismo, turismo sustentable, turismo ambientalmente amistoso, turismo de naturaleza, turismo verde, turismo de vida silvestre, turismo de áreas prístinas, turismo especializado, etc.

Vale la pena repasar algunas definiciones, que llevan implícitos conceptos importantes:

La OMT lo define como “viaje responsable que conserva el entorno natural y sostiene el bienestar de la población local”, y la UICN: “la forma de desarrollo que cubre las necesidades de las generaciones presentes sin comprometer la capacidad de que las generaciones futuras puedan cubrir sus necesidades”; también, “viajar de forma responsable hacia áreas naturales conservando el ambiente y mejorando el bienestar de las comunidades locales” (Lindberg & Hawkins, 1993).

Ceballos la define como “aquella modalidad turística ambientalmente responsable que consiste en viajar o

visitar áreas naturales relativamente sin disturbar con el fin de disfrutar, apreciar y estudiar los atractivos naturales de dichas áreas, así como cualquier manifestación cultural que pueda encontrarse allí, a través de un proceso que promueve la conservación, tiene bajo impacto ambiental y cultural y propicia un involucramiento activo y económicamente benéfico de las poblaciones locales” (Ceballos Lascurain, 1996).

Chafe lo define como un “turismo basado en la naturaleza. Cualquier forma de turismo que depende del ambiente natural para sus atracciones o sitios” (Chafe, 2005).

Estas definiciones de ecoturismo han dado lugar a una confusión que ha perdurado, induciendo a pensar que este es sinónimo de sostenibilidad, al extremo de que en varios eventos internacionales convocados para un supuesto análisis de la sostenibilidad, el tema abordado resultó el del ecoturismo. En todos los casos, el acercamiento y disfrute de la naturaleza está íntimamente asociado al interés del turista por el contacto y conocimiento de las culturas locales (Medina & Santamarina, 2004).

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

En la actualidad no existen estadísticas del ecoturismo y del turismo de naturaleza a nivel mundial. Sin embargo,

algunos referentes pueden resultar de utilidad para estimar su peso o potencialidad:

Su crecimiento se estima entre el 10-15% anual, aunque estimados optimistas llegan a considerar 30% en algunas regiones. Ceballos Lascurain (AÑO?????) estima que genera el 7% de los gastos internacionales en viajes, y afirma que 30 millones de estadounidenses pertenecen a alguna organización ambientalista o tienen algún interés en la protección ambiental, lo que hace pensar que, a la hora de planificar sus viajes, busquen atractivos naturales diferentes a los que pueden encontrar en su país (Budowski, 2001).

Por otro lado, se afirma que el medioambiente es la principal motivación turística de más de 20 millones de europeos (FITUR, 1999). Algunas informaciones afirman que, a partir de 1990, el ecoturismo ha crecido 20-34% por año; que en 2004 el ecoturismo natural creció 3 veces más que el turismo total; y que

el turismo natural está creciendo 10-12 % por año. Varios autores han estimado que el crecimiento anual de la demanda es superior al 10% y que puede llegar al 30% en algunas zonas. En la hoja informativa de The International Ecotourism Society se afirma que mientras que el turismo mundial crece 4% anual, se estima que el ecoturismo lo hace entre el 10 y el 25% (Ecoturismo Global, 2006).

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

Modalidades del Turismo de Naturaleza

Ecoturismo

■ Sin duda el ecoturismo ha resultado un término atractivo y comercialmente exitoso, que ha sido profusamente utilizado, aunque no pocas veces con un sentido comercial ajeno a su verdadera esencia. La Unión Mundial para la Conservación de la Naturaleza UICN (1993) definió al ecoturismo como “aquella modalidad turística ambientalmente responsable, consistente en viajar o visitar áreas naturales relativamente sin disturbar, con el fin de disfrutar, apreciar y estudiar los atractivos naturales de dichas áreas, así como cualquier manifestación cultural que pueda encontrarse ahí, a través de un proceso que promueve la conservación, tiene bajo impacto ambiental y propicia un involucramiento activo y socio-económicamente benéfico de las poblaciones locales”.

Por su parte, la Organización Mundial del Turismo ha definido al ecoturismo como el “viaje responsable que conserva el entorno natural y sostiene el bienestar de la población local. Oscila desde pequeños grupos de personas con un eco-interés especial en la naturaleza que puede incluir un estudio serio de un tema concreto, hasta grandes números de personas corrientes que, en lugar de vacaciones, desean incorporar una excursión de

hasta un día a una Reserva Natural (o lugar semejante) como parte de su entretenimiento o descanso”.

Dentro del producto ecoturismo se identifican muy diversas modalidades, tales como senderismo, observación de aves, caminatas y recorridos, cabalgatas, cicloturismo, espeleoturismo (blando), montañismo (blando), turismo científico y natural, y otras. El ecoturismo ha dado lugar a la creación y auge de un tipo de alojamiento especializado, el ecoalojamiento, caracterizado por su integración con el entorno mediante realizaciones arquitectónicas con la naturaleza, y no sobre ella.

El turista que selecciona el Turismo de Naturaleza para su viaje y estancia, en cualquiera de sus modalidades, suele a la par estar sensibilizado con los valores de la cultura local y de la vida comunitaria en general –componentes del paisaje cultural-, por lo cual sus programas se conforman de modo que propicien el acercamiento a lo natural en un estrecho vínculo con lo cultural, aún cuando lo primero hubiera sido la motivación específica del viaje, por ejemplo, la observación de paisajes de montaña o de aves.

Agroturismo

■ El agroturismo se basa en la visita y el disfrute de ambientes campestres o agroproductivos, y el mismo también ha sido objeto de diferentes enfoques. No obstante, hay consenso en que su base motivacional es una especie de regreso a los orígenes, al medio rural trabajado por el hombre, ya sea el destinado a la producción agrícola, como a la pecuaria o forestal, y que en todos los casos el convivir con la población residente,

con su idiosincrasia y su cultura, forma parte del recurso turístico. La gestión del productor agropecuario local como prestatario de servicios turísticos y de ciertos suministros, define también a este producto.

Dentro del producto genérico de Turismo de Naturaleza, el agroturismo, también llamado de otras formas, es el que ha salido más recientemente al mercado, no obstante

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

La oferta de alojamiento rural abarca una amplia variedad de albergues, apartamentos, camping, villas, casas rurales, hostales, pensiones, hoteles, paradores y residencias, cuyos precios varían en dependencia del lugar, el confort, los servicios que se brindan y la calidad de las prestaciones. A todo ello se suman las comidas

típicas, las actividades culturales locales, el contacto con familias rurales, el entorno natural limpio y protegido, y la participación en ciertas labores agropecuarias, factores motivacionales todos ellos de esta modalidad turística.

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

Turismo de Aventuras

■ Este es un producto cuya motivación lo constituye el reto, junto con el deseo de vivir experiencias nuevas, de características más o menos excitantes, que suelen llevar aparejadas ciertas dosis de riesgo o peligro, en parte controlado, cuya realización significa un grado de desafío que se establece una persona a sí misma, y que se realizan, por lo general, en un entorno natural. Es por esto último que se le inscribe dentro del producto genérico de naturaleza. Dentro de este producto se realizan las siguientes actividades: en el aire se hacen vuelos en globo, en planeadores, en alas delta o ultraligeros, en parapentes, paracaidismo; en el agua se practica rafting o navegación en ríos rápidos, canotaje, kayakismo, buceo de profundidad con equipos de inmersión y espeleobuceo, surfing y windsurfing, motonáutica, esquí acuático; en la tierra se realizan modalidades duras de ciclismo, senderismo, caminatas y cabalgatas; espeleoturismo, montañismo y escaladas, deslizamiento por cables o canopy; jeep safari, caminatas sobre la nieve, rutas de orientación.

Estas actividades tienen en común el hecho de que requieren determinadas habilidades para su realización, conllevan el enfrentamiento de ciertos riesgos y la incertidumbre con respecto a sus resultados. El factor de

la presencia del riesgo juega un importante papel en la satisfacción de la experiencia, en realidad determinante; por lo general, el mismo se asocia comúnmente con el peligro de sufrir lesiones físicas, o con la frustración de no poder vencer la prueba, aspecto consustancial con la experiencia misma.

No obstante el interés por realizar acciones arriesgadas de diferente grado, los turistas que practican esas modalidades tienen una preocupación creciente por su seguridad, lo cual se refleja en la meticulosa preparación de sus equipos, en su detallado examen de las condiciones del escenario, y en la cuidadosa selección de las agencias especializadas a las que van a comprar el viaje de aventuras el cual, en la mayoría de los casos, incluye la participación de guías especializados.

Se puede afirmar que, en la actualidad, el grado de riesgo es en muchos casos mínimo. Aunque los practicantes del turismo de aventuras buscan desafíos y dificultades cada vez mayores, paradójicamente no buscan en rigor mayores niveles de riesgo, sino que lo que desean es poner a prueba sus habilidades y preparación frente a circunstancias arriesgadas.

Ética

■ El Turismo de Naturaleza se rige por rigurosos principios y códigos éticos que, en el momento de jugar su papel de producto complementario del de Sol

y playa, indiscutiblemente le añadirán valor al producto principal.

En octubre de 1999, los países miembros de la OMT, reunidos en Asamblea General en Santiago de Chile, aprobaron el Código Ético Mundial para el Turismo, documento que establece un conjunto de Principios dentro de los que se destacan: la contribución del turismo al entendimiento y respeto entre hombres y sociedades; el turismo como factor de desarrollo sostenible, de aprovechamiento y enriquecimiento del patrimonio cultural de la humanidad; el turismo como actividad beneficiosa para los países y las comunidades de destino, al tiempo que establece las obligaciones de los agentes del turismo. La importancia que adquiere la aplicación de principios éticos en el turismo es resaltado en una encuesta realizada en Gran Bretaña, en la cual casi la mitad de los encuestados dijeron que será más probable que utilicen una compañía que tenga códigos escritos para garantizar buenas condiciones de trabajo, proteger el medioambiente y apoyar a las comunidades locales.

Lo ético será, con razón, un tema grande en el nuevo milenio (Tearfund, 2000). Dentro de esa sombrilla temática de la ética de conducta del turista, es conveniente abrir un cierto paréntesis, a modo de ejemplo, sobre el Turismo de Naturaleza, en el que este asunto adquiere una importancia y sensibilidad decisivas. El análisis debe tener presente dos premisas conceptuales de partida: la primera es admitir la realidad de que lo más importante para la conservación de las áreas naturales no consiste en impedir que el hombre penetre en ellas, sino en asegurar que, cuando lo haga, se comporte adecuadamente dentro de las mismas; la segunda es que la conservación de las áreas naturales está orgánicamente relacionada con la conservación de la biodiversidad, que lo esencial es garantizar las condiciones que aseguren la continuidad de los procesos en el tiempo, y no tan sólo la supuesta preservación "inalterada" de los componentes de un ecosistema (Medina et al., 2009).

Acorde con esas premisas, y con el fin de impedir o minimizar cualquier impacto adverso, la presencia del hombre en los espacios naturales debe estar regida por regulaciones, algunas generales y otras específicas para

cada caso en particular; y, a la par, por la observancia de una conducta ética de respeto y protección de la naturaleza, así como hacia la cultura y costumbres de las comunidades locales. Las regulaciones por lo general se expresan e instrumentan mediante diversas normas, entre las que se encuentran la capacidad de carga de los escenarios o sitios, y las normas de conducta, de obligatorio cumplimiento por parte de los turistas.

Las normas de conducta más usuales en los productos de Turismo de Naturaleza, por lo general se refieren a exigir la presencia de guías para conducir a los grupos, o visitantes individuales; formas y tiempos aproximados de acceso a los lugares y medios necesarios para ello; tipos de caminos internos existentes; medidas de seguridad a observar en ciertos sitios; medidas de protección a la flora, la fauna y a los recursos naturales en general; indicaciones sobre los grados de esfuerzos a realizar y, consecuentemente, sobre las condiciones físicas de los visitantes para realizarlos sin riesgos; indicaciones especiales para casos de accidentes; medidas para conservar la limpieza e higiene del lugar, e indicaciones referidas al respeto de la población residente, sus costumbres, propiedades y animales domésticos.

El acierto de cualquier desempeño en este sensible tema de la ética, en definitiva, se basará en comprender y asumir una clara posición de principio en cuanto al enfoque general del asunto, y en ser cuidadosos y creativos al momento de definir y aplicar los que de forma específica correspondan al caso dado.

Hoy por hoy se vislumbra como una utopía, pero se trata de una utopía que, como tantas otras, indica un camino. A largo plazo, el único posible. Se perciben claras señales que indican que la sostenibilidad, que algún día regirá la conciencia y la conducta social e individual del hombre, comenzará por el turismo y por el Turismo de Naturaleza. No por casualidad, sino por causalidad, el turismo ya desde hoy se está planteando su consecución, y de varias formas también ya está avanzando en esa dirección, por delante de los demás sectores socioeconómicos.

Sostenibilidad

■ Es muy probable encontrar tantas definiciones acerca de la sostenibilidad, o sustentabilidad, como textos en que se aborde el tema. Sin embargo, sobre dos aspectos básicos existe consenso: primero, que se trata de un concepto moderno vinculado al desarrollo, y segundo, que el término postula un tipo de desarrollo que, dando respuesta a las necesidades del presente, tiende a asegurar simultáneamente las bases para responder de forma también permanente a las necesidades futuras.

La OMT ha asumido la siguiente definición del turismo

sostenible: "Atiende a las necesidades de los turistas y las regiones huésped, al mismo tiempo que preserva y fomenta oportunidades para el futuro. En principio, gestiona todos los recursos de tal forma que las necesidades económicas, sociales y estéticas pueden satisfacerse sin dejar de conservar la integridad cultural, los procesos ecológicos esenciales, la diversidad biológica y los sistemas de soporte de vida". Son innegables los puntos de coincidencia que tiene esta definición, con las del Turismo de Naturaleza que dan la OMT y la UICN.

La coincidencia se basa en que, teniendo en cuenta los escenarios naturales y socioculturales en los que se fundamenta, que son los que conforman sus productos, el Turismo de Naturaleza está obligado a luchar por mantener esos escenarios en un óptimo estado de conservación. El Turismo de Naturaleza tiene que luchar por la sostenibilidad, por lo que cualquier acercamiento a éste de los productos de Sol y Playa le proporcionara a estos un acercamiento a la sostenibilidad.

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

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

En la Guía para planificadores locales, de la OMT, se expresa que “la mayoría de los destinos turísticos

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

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

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

Conclusiones y recomendaciones

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

De todos sus productos y modalidades podrán ser empleados los menos especializados y por lo tanto más adaptables como el senderismo, caminatas y recorridos, ciclismo, cabalgatas, snorkeling, navegación naturalista por esteros y manglares, todos en el ecoturismo; visitas a haciendas y participación en labores agrícolas en el agroturismo, y también algunas de las modalidades sin riesgo y que exigen esfuerzos menores en el turismo de aventuras, que son sin dudas productos factibles de crear en lugares relativamente cercanos a los destinos

de Sol y playa de la región Caribeña. O factibles también de ser incorporados a dichos destinos, en caso de que ya existieran, aunque con una visión y gestión de productos aislados.

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

Singularidad, identidad y diferenciación

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

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

La estrategia de diferenciación de un producto o destino debe traducirse en una identidad y en la creación de una imagen y marca distintivas. La identidad

supone características propias de algo, de las cosas, de organismos, de un individuo o grupo, de sociedades, de un país o una civilización, de una empresa, que las distingue del resto, que las hace identificables por una serie de señales de una u otra forma perceptibles. Tal condición ha sido definida por Joan Costa (1987) como un signo fundamentalmente asociativo, que es la identidad visual: la firma o el sello que destaca al emisor de los demás concurrentes, y que personaliza sus productos y sus mensajes.

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

Concebir los productos desde adentro, desde el territorio, de manera integral y coherente, siempre regidos desde su concepción inicial, planificación y posterior desarrollo, por los principios y las mejores prácticas del Ordenamiento Territorial.

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