Study of the Commercialization Chain and Market Opportunities for Eco and Sustainable Tourism

Prepared by the Sustainable Tourism Division of the Rainforest Alliance for
PROARCA/APM

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Acronyms

BMP – Best Management Practices

CCH – Camara Costarricense de Hoteleros

CMB – Mesoamerican Biological Corridor

CST – Certification for Sustainable Tourism

DM –Deutsche Mark (Currency of Germany)

IATOS - The International Adventure Travel and Outdoor Sports Show

ICT – Instituto Costarricense de Turismo

ITB – Internationale Tourismus-Börse

PROARCA/APM - The Protected Areas and Environmentally Sound Products Components of the Central American Environmental Program

RSTA - Regional Site Technical Advisor

RA – Rainforest Alliance

STSC – Sustainable Tourism Stewardship Council

SWOT – Strengths, Weaknesses, Opportunities, and Threats

TIES – The International Ecotourism Society

TNC – The Nature Conservancy

U.S – United States of America

UN – United Nations

UNEP – United Nations Environment Program

UNIBERO – Centro Universitario Iberoamericano

USAID – United States Agency for International Development

WTO – World Tourism Organization

WWF – World Wildlife Fund

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The Protected Areas and Environmentally Sound Products Component of the Central American Environmental Program (PROARCA/APM) is an ambitious, five-year initiative (2001-2006) of the Central American Commission for the Environment and Development (CCAD) and financed by United States Agency for International Development (USAID). The Nature Conservancy (TNC), World Wildlife Fund (WWF), and the Rainforest Alliance (RA) are implementing this effort to consolidate the Mesoamerican Biological Corridor.

The strategic objective of PROARCA seeks to improve the environmental management of the Mesoamerican Biological Corridor (CMB), which focuses on four priority areas of Central America:

1. Gulf of Honduras (Belize, Guatemala, and Honduras),
2. Gulf of Fonseca (EL Salvador, Honduras, and Nicaragua)
3. La Mosquitia (Honduras and Nicaragua)
4. Amistad-Cahuita-Río Cañas (Costa Rica and Panama)

To reach this regional objective, PROARCA has structured its efforts in four components that implement actions to:

1. Improve management of protected areas.

2. Promote environmentally friendly products in distinct markets.
3. Harmonize environmental laws.
4. Encourage the use of less contaminated technology in municipalities and private sectors.

The Protected Areas and Environmental Marketing (AMP) element of PROARCA focuses on components 1 and 2. The mission of PROARCA/APM is to support responsible management of protected areas and the commercialization of environmentally friendly products. PROARCA/APM conducted a tourism diagnosis of the four aforementioned target sites with the objective to:

a) Investigate the development of tourism operations in the priority geographic sites of the project.

b) Analyze the possibilities for the implementation of certification activities in these and other relevant sites.

c) Make recommendations to develop an implementation plan for each site.

1. Presentation

This market study employed the findings compiled by the PROARCA/AMP Tourism Diagnosis carried out by Turismo y-Conservación Consultores as a baseline or starting point for the conduction of this study. The diagnosis is based on the results of systematized and analyzed interviews with accommodation providers in the target sites with the goal of interpreting the status of business development, their involvement with best management practices, and opportunities for certification. This information was complemented with visits to the sites, information gathered by PROARCA/AMP's Regional Site Technical Advisors (RSTAs), and bibliographical resources. The study was conducted during the months of August through October 2002.

The main results of this PROARCA/APM Diagnosis suggested the need for a market study to examine more in depth two sites that showed a more solid platform for eco and sustainable tourism. The two sites of study are the Gulf of Honduras and La Amistad-Cahuita-Río Cañas, as they displayed considerable infrastructure, some knowledge and interest for certification, and a commitment to best management practices.

The main results of the PROARCA/APM diagnosis for the two regions chosen for this study may be summarized as follows.

The Gulf of Honduras site presents:

- Greater access to transportation services.
- Support from the government in all three countries. (Belize, Guatemala, Honduras)
- Enormous diversity of resources and attractions.
- Opportunities to develop new products and to be converted into a sustainable tourism destination.
- Interest by NGOs on the development of tourism programs.
- Hotels participating with organizations contributing to conservation.
- Efficient communication means.
- Hotels are implementing best management practices and using different methodologies for its implementation. There is knowledge about different certification systems.
- High level of interest in participating in joint marketing programs.
- Hoteliers have participated in technical assistance and orientation programs.
- A geographical location that allows this site to integrate with other important tourism destinations such as Tikal, Copan, and Islas Bahía, contributing to the growth and development of the region.

Amistad-Cahuita-Río Cañas site presents:

- Increased potential for development of tourism products and services.
- Growing numbers of foreign tourists visiting the area.
- The site presents a greater demand for complementary services such as tours, local guides, etc.
- Access to communication.
- Highest coverage on web pages and email.
- High number of hotels implementing environmentally sound practices.
- Interest in participating in certification programs.
- Knowledge of various certification systems.
- Interest in joint marketing efforts.
- Site is adapting to new promotional tools and market needs.

Tourism has a key role in the local economies and societies within each of these regions, which are considered to have, among other strengths, more developed means of communication and a higher level of awareness of BMPs. Communication mechanisms play a fundamental role in the commercialization chain and it is an integral part of the necessary infrastructure to link markets with destinations. The diagnosis identified four means of communication in these two sites: telephone, fax, email and Internet. The study was able to rank the various sites based on the level of availability and use of these means of communication.

Availability Level of Communication Mechanisms

Level of Development	Telephone	Fax	E-Mail	Web
Gulf of Honduras	1	1	**2**	**2**
Amistad-Cahuita-Rio Cañas	**1**	2	**1**	**1**
Gulf of Fonseca	1	**2**	3	3
La Mosquitia	3	4	4	4

(Source: PROARCA/APM, Diagnosis, 2002, pg 3-9)

The level of development was evaluated in a scale from 1-4, being 1 the best ranking. In general, the Gulf of Honduras and Amistad-Cahuita-Río Cañas regions were found to have the most access to the mentioned communication mechanisms as shown in the above table. The Internet has become one of the most important means of communication for two reasons (PROARCA/APM, 2002, pg 3-41):

- The number of people going online to find information about tourism continues to grow.
- Independent travelers, the most profitable for local service providers as there are no leakages to other organizations, utilize the Internet as one of the major tools to look for information about potential destinations and tourism products.

Lodgings with a High Level of BMPs

Number of lodgings	Location
7 of 41 Interviewed	**Gulf of Honduras**
5 of 28 Interviewed	**Amistad-Cahuita-Rio Cañas**

(Source: PROARCA /AMP, Diagnosis, 2002, 3-80)

The PROARCA/APM diagnosis also contained several questions pertaining to BMPs. These questions closely matched standards outlined by the Instituto Costarricense de Turismo (ICT) as part of the Certification for Sustainable Tourism (CST) program. As some accommodations are already implementing the BMPs outlined in the guidelines for a certification system, it follows that these would be primary market opportunities for certification. Simply stated, those that have the least to change about the way they are operating their business, will most likely be more receptive to certification in the short term. The regions that contained the most lodgings practicing a high level of BMPs as identified by PROARCA/APM’s diagnosis are located within Amistad-Cahuita-Rio Cañas and Gulf of Honduras.

2. Summary

This market study was prepared as part of the ongoing five-year effort of The Protected Areas and Environmentally Sound Products Components of the Central American Environmental Program (PROARCA/APM). The main objective of the following study is to seek out potential market opportunities for eco and sustainable tourism through an examination of the commercialization chain. The commercialization chain maps the interactions between consumers and local suppliers including all the communication channels and actors involved. The areas covered include two key functional landscapes within the Mesoamerican Biological Corridor as delineated by PROARCA/APM. These sites are the Gulf of Honduras and Amistad-Cahuita-Rio Cañas.

However, the information presented in this study provides and disseminates market information for all tourism enterprises within the target sites in Central America that are promoting 'green' products or with an interest for it. It will also further facilitate the implementation of certification and best management practices (BMPs). Those market opportunities identified, comprise businesses that expressed a positive interest in certification, are willing to employ many of the best management practices, or are currently positioning themselves as having a level of environmental, social, and cultural responsibility. As the study advances more potential market opportunities will be identified. The study is still in progress so this report includes the results to date (September 2003).

In order to better understand the tourism industry in general, an overview of the world travel market is included. The chapter describes tourism as one of the world's largest industry with estimates from the WTO placing the number of international travelers during 2001 at nearly 693 million worldwide, spending in excess of US$463 billion (WTO 2002), growing at an estimated 4% per year, and generating, directly or indirectly, nearly 200 million jobs or some 10% of the jobs globally" (TIES, 2000).

Increasing negative environmental impacts of tourism combined with an increasing environmental awareness on the part of consumers and the tourism industry has given rise to the concepts of 'sustainable' and 'ecotourism'. As mentioned in the Sustainable Tourism Stewardship Council report (Sanabria, et. al. 2002): "The emergence of these concepts, coupled with the need for providing a mechanism for guiding change towards

a more environmentally and socially sound tourism industry and the need to acknowledge the efforts that many tourism companies have implemented to “green” their operations, have stimulated the demand for setting standards for the tourism industry through another tool: certification.”

Work on this study involved the use of both primary and secondary sources of information. As part of the primary sources, personal interviews were conducted with local industry leaders in Costa Rica. When interviewees reported about possible trends towards more environmentally friendly tourism, nearly each interview yielded a different answer. These interviews also provided varied opinions on a variety of subjects related to the study. Some of the conclusions were:

- Consumer behavior research should be considered to discover the importance given by travelers to environmental friendliness when choosing tourism products and services; in other words, their buying decision process.
- NGOs should engage mainstream and specialized media to further increase environmental awareness in tourism
- Focus should be centered on marketing benefits and certification cost savings potential.
- Professional organizations such as the Camara Costarricense de Hoteleros (CCH), The International Ecotourism Society (TIES), etc. that support sustainability provide direct access to a large portion of the travel market and should be involved in efforts to increase awareness within the industry.

Questionnaires have been administered to 87 hoteliers within the target areas. The information compiled from local tourism providers included their responsiveness to certification, positioning in the marketplace, their need for technical support, and communication strategies among other important aspects. The following are some of the most relevant findings.

- Accommodation providers are receiving reservations through independent tourists, followed by travel agencies.
- There is a great need for technical assistance from accommodation providers. Costa Rica showed its highest percentage in energy efficiency, Panama in communications and contribution to conservation, Belize expressed that the most important aspect was the development of local

initiatives, and Guatemalans considered environmental education as their greatest need.

- Some entrepreneurs do not have a clear understanding of the concept of certification and its potential as a marketing tool.
- Accommodation providers perceived benefits in obtaining a potential certification, mentioning a better image, added value and promotion of the hotel, an increase in tourists with greater demand for certified operations, customer satisfaction, and the protection of the environment. However there were also negative opinions in which the hoteliers expressed the high cost and long process of certification, and the lack of government support for its implementation.
- In general, most entrepreneurs are not offering special packages for tourists. The few hotels that offer them are especially for locals.
- Most hotels are being promoted as quiet and peaceful places as well ad operations located in natural areas.
- Canada, U.S and Germany are the three tour operators that offer more travel packages to Central America. Belize in the Gulf of Honduras is the country to where more tours are offered by travel agents and tour operators. Amistad-Cahuita Río Cañas is barely promoted by tour operators.

A total of 187 tour operators in mostly outbound markets were studied. Market opportunities through tour operators were identified based on several factors such as: position within the market, types of tours offered, programs in place to support the ideals of sustainable or ecotourism, and destinations served. This evaluation was done throughout the examination of tour operators web sites to identify those companies that have a strong environmental image and who have operations in Central America. International information has been covered for seven countries: United States, Canada, Germany, United Kingdom, France, Italy, and Spain.

Some of the information gathered includes sources of information sought by travelers and tour operators, marketing channels for tour operators, ecotourism trends, international travel destinations, and activities sought by ecotourists among others.

Additionally, a database was created. These contacts include hotels in the target sites, tour operators from the seven countries studied and from Central America; press and tourism contacts, specialized magazines, tradeshows and newspapers.

The study intends to contribute to the Intermediate Result II of PROARCA, which seeks to extend the market access for environmentally sound products and services in these regions. Valuable information has been gathered to be used in future marketing strategies and projects involving sustainable tourism and ecotourism.

3. Objective

The overall purpose of this study is to identify the most appropriate market opportunities for eco and sustainable tourism by studying the commercialization chain (local, regional, and international), focusing in two of the PROARCA/APM's target sites, but also identifying key players in the Central American region as a whole. This study operates inside a framework with two primary components:

- Gathering and disseminating tourism market information and enhancing the capacity of local tourism service providers to participate in the marketplace through sustainable practices.
- Creating alliances for effective commercialization of certified tourism operations.

3.1 Geographical Scope

As described in the PROARCA overview, the market study will focus on two areas considered to be key functional landscapes within the CMB:

- The Gulf of Honduras, (includes areas of Belize, Guatemala, and Honduras).
- Amistad-Cahuita -Rio Cañas (includes include areas of Costa Rica and Panama).

3.2 Limitations

1). The lack of response rate of tour operators with the e-mailed questionnaire is considered an important limitation for the study, since it was not possible to gather all the information needed from them. Tour operators were researched through a web search, where some important data was not found.

2) Efforts were made to obtain responses from owners or managers, but in some cases it was not possible. Occasionally, people who filled out the questionnaires were not able to provide accurate information due to their lack of knowledge or had limited access to information, fact that could have biased the results.

3) Demographic and psychographics statistics of local tourists traveling to the target sites were not compiled in this study. Due to the high percentage of locals visiting the areas, it is considered an important aspect to take into consideration.

3.3 Project Deliverables

The final products expected at the end of this study are:

- Documented methodology for performing the market study.
- Identification of target markets found in the course of this study.
- A database containing contact information of relevant players in the target sites (tourism operations, governmental entities, tourism chambers/associations, media, etc.) that are part of the commercialization chain.
- A detailed mapping of the commercialization chain including main actors and communication channels.
- Regional conclusions on main opportunities and obstacles for commercialization of eco and sustainable tourism services, particularly certified tourism products in this region.

4. Methodology

4.1 Resources & Procedures Employed

The market study relied on primary sources (observation, interviews, questionnaires), and additional information gathered from secondary sources, supplying various types of information: On-site interviews and surveys to primary tour operators and travel agents were administered to key players in Costa Rica (appendix 2). The main purpose of the interviews was to gather information from tourism experts regarding their perceptions, beliefs, and recommendations of the eco and sustainable tourism market trends and the role of certification. A questionnaire was designed and applied to a representative sample of accommodation providers in the target sites, to gather specific information about the tourism commercialization chain and to obtain an impression of the existing market for eco and sustainable tourism so that future projects can
use this information as they deem necessary. (appendix 1).

A web search was done in order to survey inbound and outbound tour operators to identify market opportunities through information such as destinations served, programs in place to support the ideals of eco and sustainable tourism (i.e. green positions within the market, view of certification as a marketing tool, etc

4.2 Units of Study

Sample formula utilized:

$$n = \left(\frac{z*s}{E}\right)2$$

n= sample
z= confidence level
s= max.error
e= variation

The study sample used a confidence level of 95% and an estimated error of 5%.

COUNTRY	OPERATORS (Absolute)	HOTELS (Relative)	n_h (95%)	n_h x w_h (95%)	SAMPLE SIZE (95% confidence level)	SAMPLE SIZE ADJUSTED (90% return rate)
UK	78	6,59%	384	25	19	**21**
Italy	94	7,94%	384	30	23	**26**
Spain	51	4,31%	384	17	12	**14**
Canada	34	2,87%	384	11	8	**9**
USA	62	5,24%	384	20	15	**17**
Germany	70	5,91%	384	23	17	**19**
France	90	7,60%	384	29	22	**24**
Costa Rica	221	18,67%	384	72	54	**60**
Guatemala	421	35,56%	384	137	103	**115**
Panama	23	1,94%	384	7	6	**6**
Honduras	40	3,38%	384	13	10	**11**
TOTAL	**1184**	**100,00%**	**4226**	**384**	**290**	**322**

Accommodation providers: Utilizing the above formula, the following sample was obtained for the target countries. (Gulf of Honduras and Amistad-Cahuita-Rio Cañas).

Belize	11
Costa Rica	31
Guatemala	19
Honduras	12
Panama	14

Tour Operators: The sample used for the tour operators is represented as follows:

UK	19
Italy	23
Spain	12
Canada	8
USA	15
Germany	17
France	22
Costa Rica	54
Guatemala	103
Panama	6
Honduras	10

5. The Tourism Industry
5.1 World Overview

The importance of tourism within the global market should not be underestimated. As stated in the objective of this project, the overall aim is to identify market opportunities for eco and sustainable tourism within the geographical scope also defined in the objective. Before identifying these market opportunities, it is important to have an understanding of the role of tourism within the world market. It would also be prudent to examine the concept of eco and sustainable tourism and how they fit within the larger concept of tourism in general, and the role of certification for eco and sustainable tourism.

Tourism is an immense industry involving many activities. Airline tickets, car rentals, accommodations, and guided tours are just some examples of the products and services that constitute tourism. Individually each of these services might not be very large. When grouped and thought of as components of a larger industry, tourism becomes the world's largest industry. As stated by the World Tourism Organization (WTO):

"Tourism, a sector that integrates a wide range of economic activities, is now regarded as the world's fastest growing industry. In 1998, 7.9 percent of the worldwide export value of goods and services came from tourism, surpassing such leading industries as automotive products and chemicals"(WTO 2001). Although 2002 was certainly not an easy year, international tourism held up fairly well. According to data collected by WTO from the vast majority of destination countries, the number of international tourist arrivals grew by 2.7% in 2002 (703 million worldwide) after a decrease of 0.5% in 2001, spending in excess of US$474 billion (Tourism Highlights Edition 2003. WTO). In terms of employment, the statistics are equally impressive. According to data from 2000, "tourism is the world's largest employer, generating, directly or indirectly, nearly 200 million jobs or some 10% of the jobs globally" (TIES, 2000).

International Tourist Arrivals (million)

	2000	2001	2002
World	815.3	804.1	817.6
Africa	27.4	28.3	29.1
Americas	128	120.2	114.9
North America	91.2	84.4	81.6
Caribbean	17.2	16.9	16.1
Central America	4.3	4.4	4.7
South America	15.2	14.4	12.5
Asia and the Pacific	115.3	121.1	131.3
Europe	392.7	390.8	399.8
Middle East	24	23.6	27.6

Source: WTO (Data as collected by WTO Sept. 2003)

As impressive as this industry already is, tourism is expected to continue to grow both in terms of economic indicators and geographical scope and it has proven that it can quickly recover from outside threats. The main influence on tourism is the economy. The main destination for travelers is the country in which they live. Poor domestic economic performance has the tendency to negatively impact local travel. In other words, if the domestic economy is doing poorly, the people that live within that country will travel less, negatively affecting the level of tourism within that country. However, due to the influence of international travelers, the negative impacts generated by poor domestic performance can be balanced by an increase of foreign travelers from stronger economies. As the world economy continues to grow and people become more affluent, tourism can also be expected to increase. As a result, “Tourist arrivals are predicted to grow by an average of 4.1% a year over the next two decades…”(TIES, 2000).

In 2001, tourism witnessed the first decrease in the worldwide number of international tourist arrivals since 1982 due to the combined factors of poor economic performance in North America, Europe, and Asia, and the terrorist attacks on the United States on September 11th (WTO, 2002b). The slump resulted in a decrease of 4 million travelers world wide, or a mere –0.6%. Despite this loss, the WTO is still forecasting growth rates of 4.1%, which translates into over a billion travelers worldwide by the year 2010 (WTO, 2002b). “In addition to strong overall expansion, the development component of tourism is characterized by continuing geographical spread and diversification of tourism destinations” (WTO 2002).

The increase in the overall size of the tourism industry has also led to increased market segmentation as specialized tourism providers seek out niche markets to better

distribute their products and services. This was also emphasized by the WTO in its report to the 2002 World Summit on Sustainable Development held in Johannesburg:
"Some key qualitative development trends in tourism include: increased market segmentation; development of new forms of tourism, especially those related to nature, wildlife, rural areas and culture; and introduction of new programmes in traditional package tours." (WTO 2001,P 6-7) Included among these new types of tourism are sustainable and ecotourism, which seek to mitigate some of the adverse effects mass tourism can generate.

Like any other large industry, the size of tourism has generated negative impacts for communities, economies, and ecologies. The addition of tourists to an area exceeding the capacity of the area can generate some very serious negative impacts. Uncontrolled tourism can deplete local resources, forcing local populations and businesses outside the tourism industry to compete for scarce resources. A few of the major concerns identified by the United Nations Environmental Program (UNEP) include water resources, land degradation, the addition of air pollution, increases in solid waste and littering, sewage, and others. To highlight these concerns the UNEP makes the following points in its "Impacts of Tourism section" web site (http://www.uneptie.org/pc/tourism/sust-tourism/impacts.htm February 4, 2003):

- Globally, about 7% of total carbon emissions are attributed to air travel from tourism.
- In the US, tourism consumes 870 billion liters of water per year, produces 317 million tons CO_2 equivalent, and generates 11 million of suspended solids in sewage.
- Tourism pays 20% less than average employers in other areas, and 13-19 million children are employed in the industry.
- Increased ocean levels and disturbed weather patterns due to climate change will affect all major destinations in the world.

5.2 Tourism Performance in 2003

The first part of 2003 has been predominantly a continuation of this scenario with the long awaited economic recovery further delayed because of the prolonged high level of uncertainty due to the Iraq conflict. Some destinations, however, started the year with considerable growth (e.g. Caribbean, Asia, UK and South Africa), but mostly compared to rather depressed levels in the first months of 2002.

In response to the unfavorable climate, tourism businesses have maintained the strategy of giving priority to profitability over volume growth already put into action after 11 September 2001. The focus has been on a strict cost management, a reorientation of activities towards more profitable products and markets and a broadening of flexibility in supply in order to be able to respond quickly to the changing desires of their clients and the evolution of the market. The offer of open or modular packages has been increased as well as the use of other accommodation than hotels, this process has been accelerated by the growing weight of advanced information and communication technology as a source of information and sales, in particular the internet and call centers. Do-it-yourself' is becoming more and more common, particularly for the mature and experienced travelers, vigorously stimulated by the possibilities offered by low-cost airlines and the internet.

Action plans in several areas such as communication, promotion and marketing have backed the sector.

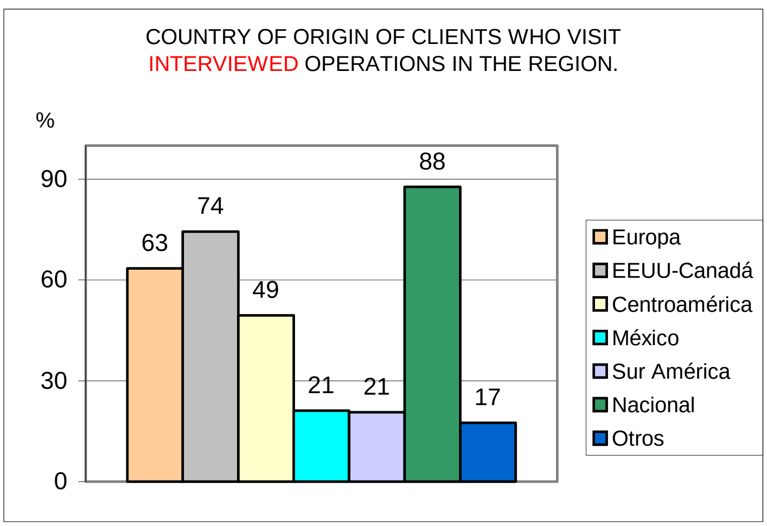
5.3 Outbound Tourism

Certain foreign nations were identified as key markets based on their relative importance to the target regions, confirmed by the results of the PROARCA/APM Diagnosis, and the availability of information on these foreign countries.
Establishing the relative importance of international markets within the target regions of Amistad-Cahuita-Rio Cañas and Gulf of Honduras partially identified which foreign markets this study should focus on. However, since precise inbound travel statistics are not available within the target regions, another means was needed to distinguish the relative importance of the various international markets. This was done by using aggregate data from each of the countries including the various regions added together in order to gain a sense of the tourism market for the entire region. The sums could then be examined for key international markets. Key international markets were identified as those that comprised the largest portions of the total regional market.

The outcomes of this method are supported by information contained within the PROARCA/APM Diagnosis, which included interviews with hoteliers to investigate the origin of tourists. The results of this investigation found that:

- 88% of the businesses interviewed mentioned the national market as their main clients
- 74% the United States and Canada
- 63% Europe
- 49% Central America
- 21% Mexico and South America and
- 7% mentioned others including Latin America, New Zealand and Australia (PROARCA/APM Diagnosis, 2002, 3-38):

Graphically, this was represented as:



(Source: PROARCA/APM, Diagnosis, 2002, 3-38)

These results can be used to create an ordinal ranking of regions visiting Central America that are mirrored by the national aggregate data. Market studies provided valuable information regarding the motivation of travelers, types of activities they participate in, and a host of other relevant information for this study. A comparison of customer profiles with the objectives previously stated, revealed certain markets as being particularly important for this study.

When all of these factors were combined, the nations that stood out as being especially well suited targets, were Germany, the United States, Canada, France, Italy, Spain, England, Honduras, Costa Rica, Guatemala and Panama.

In preparation for the International Year of Ecotourism, the WTO commissioned a series of special reports examining the travel motivations and key characteristics of ecotourists. The studies covered the United States, Canada, Germany, Italy, Spain, France and England. These studies each operated with a similar methodology and definition of ecotourism and were the main source of international information for this study.

5.4 International markets and customer profiles

5.4.1 United States

The United States tourism market is perhaps the most important market to access. International travelers from the United States spend more than other international tourists (WTO, Tourism Highlights, 2002) and are important to the Central American tourism market. Better understanding of American ecotourists can provide some valuable insights for the commercialization of tourism products and services offered by Central America.

The study of the U.S ecotourism market revealed several recent trends in the U.S travel market. Some of the more noteworthy highlights pertaining to ecotourism included:

- Baby Boomers (35-54 years of age) spend more than other travelers and generate the highest travel volume in the United States. This group tends to stay in hotels and motels and is more likely to fly.
- Mature Americans (over 55 years of age) are more likely to have longer trips and represent an increasing market. This group also has financial power and free time, representing an opportunity for the travel industry.
- Weekend Trips are becoming more popular for Americans, increasing 70 percent between 1986 and 1996 compared to a 15 percent increase in non-weekend travel during this time. While there is little seasonal variance, summer accounted for 28 percent of all weekend trips.

- Shopping trips account for one-third of all travels and remains the most popular travel motivation. Shopping is often mixed with visit to historical places or museums, outdoor recreation, and visits to National or State Parks.
- Adventure travelers tend to be young, single, and employed. They participate in a variety of hard activities. Ninety-eight million people have participated in this type of tourism over the last five years.
- Cultural and Historic tours are another popular sector of the travel industry. As many as 54 million adults visited a museum or historic site. Another 33 million adults attended a cultural event. These tourists have higher expenditures, visit more destinations, and tend to stay in hotels.
- U.S. travelers consider education travel to be important. Just under 20% of travelers mentioned in the past year mentioned that learning or improving a new skill, sport, or hobby was the main motivation for their trip. These travelers tend to have a household income of over US$75,000.
- With nearly 40 million Americans going on garden tours in the last five years, this type of tourism is popular for many travelers. About one-third of the garden travelers have a household income of about US$75,000.
- Use of the Internet continues to increase as a tool to make travel plans. Over 59 million used the Internet to make travel plans in 2000 of the 90 million people online. "Use of the Internet to actually book travel continues to increase, with 27 percent of all travelers now online having made travel reservations on the Internet during the last year. This is an increase of nearly 60 percent over 1999" (WTO 2000).

Profile of U.S Ecotourists

Income

	%1996 Ecotourists	%1996 All Travelers	% 1999 Ecotourists	% 1999 all Travelers
Under $20,000	5.1	4.9	3.0	4.1
$20,000-39,999	15.1	12.8	7.8	10.0
$40,000-59,999	20.1	16.3	14.4	15.4
$60,000-79,999	18.2	15.1	19.2	13.8
$80,000-99,999	10.6	12.2	12.7	12.3
$100,000-119,999	9.1	9.8	9.8	10.9
$120,000-139,999	4.3	6.6	6.8	6.6
$140,000-159,999	4.5	4.9	4.6	5.2

$160,000-179,999	2.9	2.5	1.1	3.2
$180,000-199,999	1.9	2.0	0.6	2.5
Over $200,000	8.4	12.9	20.0	15.3
Mean Income	$85,600	$96,000	$106,200	$102,600
Median Income	$70,700	$81,500	$88,600	$89,500

Source: (WTO, The U.S Ecotourism Market, p.42)

Income was considered to be important since it provides insights on the wealth of ecotourists. Demonstrating the wealth of ecotourists could prove useful in marketing the concepts of eco and sustainable tourism. The table shows and increase of the mean income of ecotourists, from $85,600 in 1996 to $106, 200 in 1999, representing an increase of $20.600 over three years. Over the same time period, the mean income of all other travelers increased from $96,000 to $102,600, a change of only $6,600. Comparatively, this indicates that the mean incomes of ecotourists are growing at a faster rate than that of other tourists.

Total Trip Expenditures (per visitor)

	% of Ecotourists	% of Nature Tourists	% of All Travelers
Mean Total Trip Expend.	$2,435	$2,737	$2,534
Mean Package Price	$2,687	$3,601	$1,871
Mean Expend. Outside U.S.	?	?	?
Per visitor trip	$1,097	$1,263	$1,167
Per visitor day	$66	$60	$84

(Source: WTO, U.S. Ecotourism Market, p. 45)

Expenditures can be used as another tool in marketing the concepts of eco and sustainable tourism. “Ecotourists have been more frequently described as higher-spending markets and had been identified as having a higher-than-average income”. (White, Pamela A., 2003) At first, the WTO study found that this might not be the case. Their data shows that the mean total trip expenditures are higher in other travelers than in ecotourists. Mean total trip expenditures of all travelers ($2,534), are slightly higher than those of ecotourists ($2,435). Also, the spending of ecotourists per day ($66), is lower than that of all other tourists ($84). However, without knowing the mean expenditures outside the U.S, this conclusion cannot be drawn.

Region-State of Residence of Ecotourists (1999)

	% of Ecotourists	% of Nature Tourists	% of all Travelers
New England	9.6	7.4	8.9
Middle Atlantic	20.5	17.1	22.5
New York (non-add)	(10.4)	(9.6)	(13.8)
East North Central	9.6	10.9	10.0
West North Central	3.1	3.5	2.9
South Atlantic	13.9	11.5	15.8
East South Central	1.1	2.2	1.8
West South Central	5.9	6.4	7.9
Mountain	7.6	9.5	5.9
Pacific	27.9	29.5	23.0
California (non-add)	(23.1)	(23.8)	(19.7)

(Source: WTO, U.S. Ecotourism Market, p. 45)

Most ecotourists come from: Middle Atlantic, New England, Mountain, Pacific, and California regions. This data suggests that there would be more marketing opportunities within these regions.

Main Destination of Ecotourists and All Leisure Travelers

Destination	% Ecotourists	% All Tourists
Western Europe	16.7	36.7
-Germany	2.0	4.6
-France	1.9	4.4
-United Kingdom	3.9	10.4
-Eastern Europe	0.5	1.7
Caribbean	12.4	14.5
-Bahamas	2.3	4.3
-Jamaica	5.1	5.1
South America	12.4	6.5
-Argentina	1.2	0.8
-Brazil	1.5	1.6
-Chile	1.5	0.4
-Ecuador	1.5	0.7
-Peru	3.9	1.1
Central America	30.9	21.7
-Belize	**0.8**	**0.1**
-Costa Rica	**4.0**	**1.0**
-Other (includes Mexico)	**25.8**	**19.4**
Africa	5.2	1.4

-Kenya	1.8	0.2
-South Africa	1.7	0.4
Middle East	2.7	3.0
Asia	9.6	3.0
-India	2.3	1.3
Oceania	10.0	2.6
-Australia	5.4	1.6
-New Zealand	3.9	0.8

(Source: WTO, U.S. Ecotourism Market, p. 35)

Comparatively measuring this information, there is a strong tendency for ecotourists to visit Belize (x8) and Costa Rica (x4) compared to all other travelers. Other countries of note include Kenya (x9), New Zealand (x5), and South Africa (x4).

Information Sources (1999)

	Eco-Tourists	Nature Tourists	All Travelers
Airline Directly	24%	26%	24%
Corporate Travel Dept.	2%	2%	10%
Internet	36%	31%	16%
Word-of-Mouth	22%	24%	16%
In-Flight Information	2%	1%	1%
National Tourist Offices	2%	1%	0.4%
Rented Auto	4%	5%	2%
Newspapers/Magazines	8%	7%	3%
State/City Travel Office	1%	3%	2%
Tour Company	17%	10%	4%
Travel Agency	55%	53%	54%
Travel Guides	18%	14%	6%
TV/Radio	1%	1%	0.6%

(Source: WTO, U.S. Ecotourism Market, p. 51)

To better focus marketing efforts, sources of information accessed by ecotourists, are of particular relevance. Travel agencies are the main source of information utilized by ecotourists, followed by use of the Internet. Other important sources of information included contacting the airline directly and through word-of-mouth. Less important resources for ecotourists are travel guides and tour companies. It is implied that ecotourists access more sources of information than all other travelers.

Marketing Channels Mentioned by Tour Operators

	Most Important	Next Most Important	Lesser Importance*	Ave. Rank
Word of Mouth	68%.	24%	9%	1.42
Brochures	41%	26%	32%	1.97
Mailings	29%	38%	32%	2.21
Internet	24%	32%	44%	2.45
Catalogs	26%	24%	50%	2.79
Affinity Groups	24%	26%	68%	2.79
Advertisements	3%	29%	68%	3.27
Travel Agents	12%	24%	65%	3.29
*Includes Rankings 3,4, and 5				

(Source: WTO, U.S. Ecotourism Market, p. 61)

By studying the promotional tools employed by tour operators, a sense of how to better market eco and sustainable tourism can be gained. The WTO found that word-of-mouth is the most effective promotional tool for tour operators in marketing their products, followed by brochures, mailings, the Internet, and others.

The International Adventure Travel & Outdoor Sports Show (IATOS), a major U.S international trade show, normally contains an ecotourism component. The WTO suggests this trade show as the most promising opportunity for foreign and U.S travel professionals to meet.

Percent of U.S Outbound Travelers Engaged in Various Leisure Activities in 1999

Leisure Activity	% Ecotourists	% All Travelers
Environmental Activity	100,0	4,2
Dining in Restaurants	85,4	85,2
Shopping	82,1	75,2
Visit Small Towns	67,9	42,1
Visit Historical Places	69,6	51,0
Touring the Countryside	69,0	34,9
Cultural Heritage Sites	63,2	29,3
Sightseeing in Cities	60,3	43,0
Water Sports/Sunbathing	56,1	26,0
Visit National Parks	45,5	8,4
Ethnic Heritage Sites	38,4	12,6

Guided Tours	38,0	16,4
Art Gallery/Museum	37,4	26,7
Nightclubs/Dancing	35,4	25,0
Camping/Hiking	29,6	4,7
Concert/Play/Musical	19,8	13,8
Cruises, 1 Night+	13,7	4,4
Hunting/Fishing	13,3	4,2
Amusement/Theme Parks	12,4	9,9
Golfing/Tennis	10,9	7,2
Casinos/Gambling	7,8	7,0
Attend Sports Event	7,5	3,9
Ranch Vacations	6,9	1,8
Snow Skiing	2,2	1,5

(Source: WTO, U.S. Ecotourism Market, p. 47)

Data from the WTO suggests that in addition to environmental activities, shopping, restaurants, and historical or cultural activities in rural or rustic areas are popular activities for U.S ecotourists.

5.4.2 Canada
Trends

Some trends within the Canadian travel market that are particularly relevant to this study include (Source: WTO, The Canadian Ecotourism Market, 2002):

- International travel is increasing.
- The growth of international trips by seniors is outpacing other age groups resulting in tour operators offering 'softer' services.
- The average trip length is becoming shorter.
- Target markets for ecotourists are 45-65 years of age, with high levels of education, above-average incomes, with women slightly outnumbering men.
- Activities of interest for travelers within Canada are much the same as those that visit international destinations.

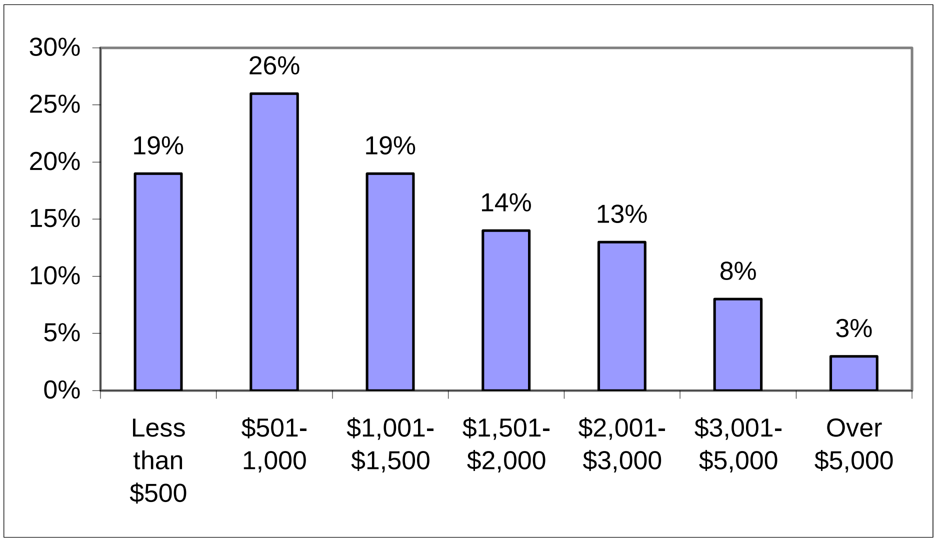
Income

Demonstrating the wealth of ecotourists could prove useful in marketing the concepts of eco and sustainable tourism. The level of household income was examined for Canadian ecotourists. A number of studies examining Canadian ecotourists have been performed in the past, each suggesting that most ecotourists who (between 19-37%

depending on the study) earn more than CD$70,000, have higher than average incomes (WTO, The Canadian Ecotourism Market, 2002, pg38)

Spending

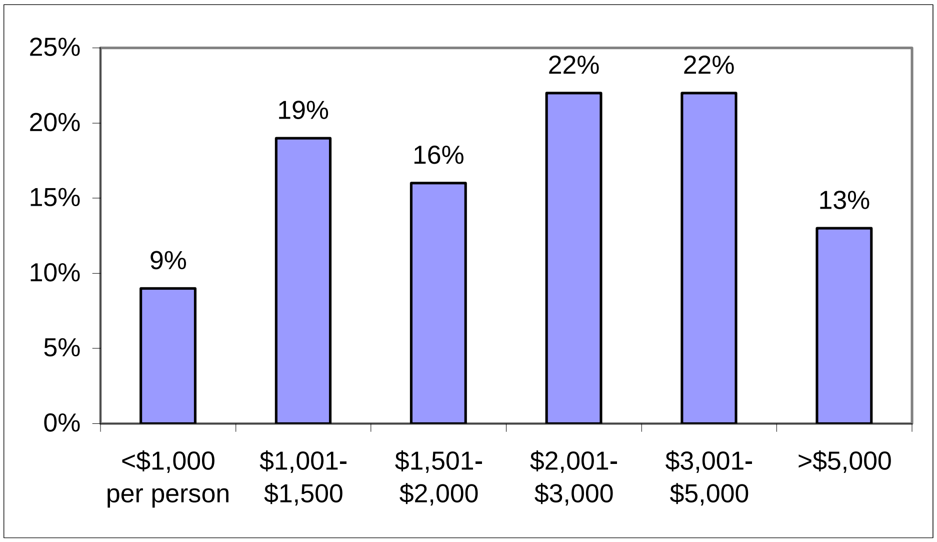
Canadian Ecotourist Willingness to Pay



(WTO, The Canadian Ecotourism Market, 2002, pg38)

Examining the spending habits of Canadian ecotourists, is implied that they are willing to incur and suggests how tourism products and services should be priced in order to be more attractive to this market. Information from the chart above suggests that most Canadians (27%) are willing to spend between $1,501 and $3,000 with only very few (3%) willing to spend over $5,000.

Average Cost of One-Week Package



(WTO, The Canadian Ecotourism Market, 2002, pg57)

The average costs of holiday packages provides further insight into the costs that Canadian ecotourists are willing to pay. Most tour operators responded that packages costing $2,001 to $3,000 (22%) or $3,001 to $5,000 (22%) are the most popular. The least popular were packages at either extreme, <$1,000 per person (%9) and >$5,000 (13%).

Destinations of Canadian Travelers

Canada	27%
US	12%
International	56%

(WTO, The Canadian Ecotourism Market, 2002, pg54)

Better understanding the destinations that Canadian ecotourism operators current offer services helps to identify whether or not they would be amiable to expanding operations into Central America. The chart above shows that more than half (56%) of current offerings are to international destinations (excluding the U.S).

International Travel Destinations

Total Trip Expenditures (per visitor)

	% of Ecotourists	% of Nature Tourists	% of All Travelers
Mean Total Trip Expend.	$2,435	$2,737	$2,534
Mean Package Price	$2,687	$3,601	$1,871
Mean Expend. Outside U.S.	?	?	?
Per visitor trip	$1,097	$1,263	$1,167
Per visitor day	$66	$60	$84

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Expenditures can be used as another tool in marketing the concepts of eco and sustainable tourism. "Ecotourists have been more frequently described as higher-spending markets and had been identified as having a higher-than-average income". (White, Pamela A., 2003) At first, the WTO study found that this might not be the case. Their data shows that the mean total trip expenditures are higher in other travelers than in ecotourists. Mean total trip expenditures of all travelers ($2,534), are slightly higher than those of ecotourists ($2,435). Also, the spending of ecotourists per day ($66), is lower than that of all other tourists ($84). However, without knowing the mean expenditures outside the U.S, this conclusion cannot be drawn.

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-Costa Rica	**4.0**	**1.0**
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-Kenya	1.8	0.2
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Visit National Parks	45,5	8,4
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Guided Tours	38,0	16,4
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Camping/Hiking	29,6	4,7
Concert/Play/Musical	19,8	13,8
Cruises, 1 Night+	13,7	4,4
Hunting/Fishing	13,3	4,2
Amusement/Theme Parks	12,4	9,9
Golfing/Tennis	10,9	7,2
Casinos/Gambling	7,8	7,0
Attend Sports Event	7,5	3,9
Ranch Vacations	6,9	1,8
Snow Skiing	2,2	1,5

(Source: WTO, U.S. Ecotourism Market, p. 47)

Data from the WTO suggests that in addition to environmental activities, shopping, restaurants, and historical or cultural activities in rural or rustic areas are popular activities for U.S ecotourists.

Means of Promotion

Tour Operator Evaluations of Media for Marketing

	Number of Responses (28 operations)					
	Importance Rating					
Methods to Reach Eco/Nature Tourism Clients	**1**	**2**	**3**	**4**	**5**	**Weighted Average**
Word of Mouth		2	3	5	14	**4.29**
Internet Site	1	2	2	10	9	**3.70**
Specific messages within your general brochures	2	3	4	5	9	**3.70**
Media releases	1	3	6	6	6	3.59
Target mailings	3	2	5	6	8	3.58
Special eco/nature brochures	1	3	5	7	3	3.42
Newsletters	4	1	4	7	5	3.38
Advertisements in specialized magazines	1	6	6	6	3	3.18
Travel Agents	4	2	6	4	3	2.85
Trade shows	8	3	6	4	1	2.41
Other presentations; canvas team; continuing education flyers with sponsoring university; in-house catalog with all programs; associations; FAMs						

(WTO, The Canadian Ecotourism Market, 2002, pg78)

During a survey, tour operators made it known that they consider word-of- mouth (4.29) as the most important marketing tool available, followed by Internet sites (3.7) and specific messages within general brochures.

Operator Rating of Activities and Characteristics of Destination Experience

	Number of Responses (28 Operators) Importance Rating					
Feature or Attraction	**1**	**2**	**3**	**4**	**5**	**Weighted Av.**
Knowledgeable Guides		**1**	**2**	**7**	**17**	**4.48**
Interpretative/learning experiences		**2**	**5**	**8**	**12**	**4.11**
Wildlife viewing		**3**	**5**	**7**	**12**	**4.04**
Experiencing wilderness/remote areas	2	2	4	10	9	3.81
Outdoor activities	1	3	7	5	11	3.81
Discovering the exotic	1	4	6	8	8	3.67
Experiencing parks/protected areas	1	4	6	6	8	3.64
Discovering local cultures and foods	1	3	6	12	4	3.58
Socialising with interested people	3	1	9	8	8	3.56
Interacting with aboriginal cultures	1	6	8	10	3	3.54
Contributing to conservation		4	12	8	2	3.31
Contributing to local community development	5	8	12	5	2	3.15
Rest and relaxation in natural settings	1	10	6	7	2	2.96
Luxury accommodation	8	7	5	4	1	2.32
Other (authenticity of & "collectable" experience)					1	

(WTO, The Canadian Ecotourism Market, 2002, pg73)

The results of one tour operator survey suggest that knowledgeable guides (4.48), interpretive/learning experiences (4.11) and wildlife viewing (4.04) are of particular importance when promoting an ecotourism destination. The least important activities or features included luxury accommodations (2.32), rest and relaxation in natural settings (2.96), and contributing to local community development (3.15).

Potential Markets

Tour Operator Suggestions about the Destination

Category	Tour Operator Needs at the Destination
New, Unique or collectable Location	• Marketability of package desired
	• Chance to visit a new place
	• Highlights that can be packaged as a "collectable experience"
	• Unique and enjoyable destination/outdoor experience/nature product/viewscape
	• Tourist icons desired (e.g. polar bears, Machu Piccu, Galapagos) to "sell" to clients
Guiding & Interpretation	• Opportunity to learn conservation and natural history skills
	• Professional, knowledgeable subject guides - with university/wilderness education
	• Exceptional, organized, local guides and interpretive service
Wildlife	• Animal species of interest to conservation programs
	• Good opportunities to see animals in their natural environments
	• Unique and enjoyable wildlife
Habitat/ Environment	• Opportunity to learn more about biology and conservation status of habitat/species
	• Varied habitats/experiences at any one environment

Food	• Good quality food
	• Nutritious and very varied
Infrastructure	• Reliable and consistent infrastructure
	• Relatively easy access, flight connections
	• Efficient, reliable transportation
Activities & outdoors	• High experiential value
	• Access to nature and outdoor activities
Destination operators & operations	• Good ethical standards of inbound operators
	• Good buying power - well priced, and with good financial stability
	• Willingness to be flexible
	• Genuinely friendly service & staff
	• Chance to interact with local people
	• Locally owned amenities/services and key contact
	• Safety, to limit risk

(WTO, The Canadian Ecotourism Market, 2002, pg74)

Potential market opportunities can also be evaluated based on the suggestions of tour operators. Destinations with some or all of these characteristics have market potential in Canada and these strengths should be highlighted in approaching Canadian tour operators.

5.4.3 Germany

General Trends

The 32nd Reiseanalyse RA 2002 identified several developments and trends within the German tourism market. The most significant of these are as follows:

- Total demand experienced in 2001 was only slightly affected by terrorist attacks in the U.S.
- Germans are taking more overseas trips than in the past.
- Destinations tend to be in the South.
- Package tours and trips by plane did not experience any growth.
- Holiday planning 2002 is more timid than it was in 2001.
- Demand for all-inclusive, wellness/spa and fitness holidays is growing.

Many of these trends were echoed by a WTO study of the German ecotourism market, which also found several trends of particular importance to the ecotourism market:

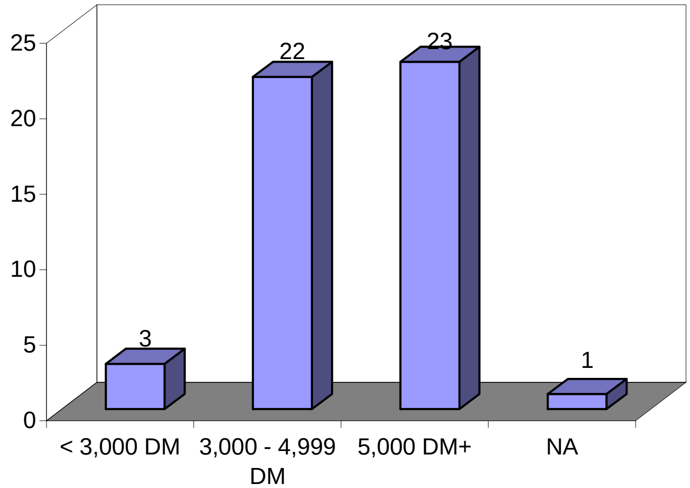
1. The share of long-distance travel is likely to increase from 7% to 10-15% in 2010.
2. Interest in long-distance journeys is growing continuously with estimates of an increase of 3.2% between 1999 and 2010. The number of air trips will likewise continue to rise.

3. Structural changes in socio-demographics will cause a shift towards new market groups due to a decrease in family size and the number of families. As a result, an increasing number of small families will want to travel together and the number of senior citizens will increase dramatically.
4. Price sensitivity will continue to intensify. Germans are able to distinguish between reasonably and unreasonable offers due to extensive international travel experience. Price transparency in the European travel market, which is important to Germans, has been improved since the introduction of the European common currency.
5. Germans, rather than taking part in many activities, are more likely to become somewhat more docile.

Other factors were identified by the WTO affecting the German travel market in general, ultimately effecting ecotourism however, these points were highlighted as being of particular relevance. Conclusions drawn from these trends have particular implications for the development and commercialization of ecotourism within Central America. Of particular importance is the opportunity for Central America to increase its market potential due to the growing number of trips abroad by Germans. Also, the tourism market in general will also have to adapt tourism packages offering good value for money and challenge tourists without overwhelming them.

Income

Monthly Net Household Income



(Source: WTO, German Ecotourism Market, p31)

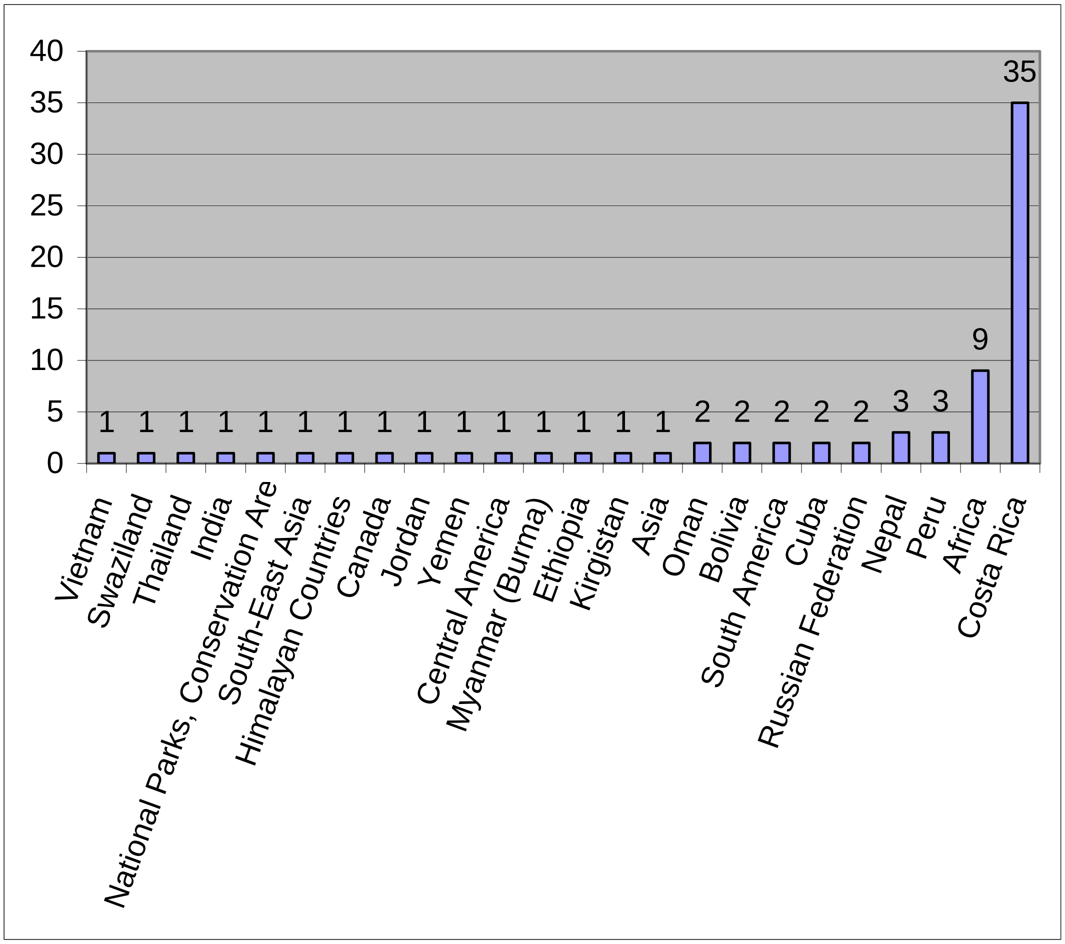
This factor was considered to be important since it provides insights on the wealth of German ecotourists. The table shows that the majority of Germans participating in ecotourism are relatively wealthy. Of those surveyed by the WTO only three had monthly net household incomes of less than 3,000 DM. Information was not available on one of the respondents and the rest earned 3,000- 4,999 DM (22) or more than 5,000 DM (23) making German ecotourists an attractive market segment.

Spending

Information regarding the amount that German ecotourists typically spend was not available. However, respondents to a survey conducted by the WTO indicated that price was not one of the most important requirements for travel destinations. Greater importance was placed on small accommodation businesses run by local people, hiking with good information, but without guides. Other expectations of note included local cuisine with local ingredients and pronounced hospitality.

Destinations

Most Popular Worldwide Nature and Ecotourism Destinations for Canadian Tour Operators



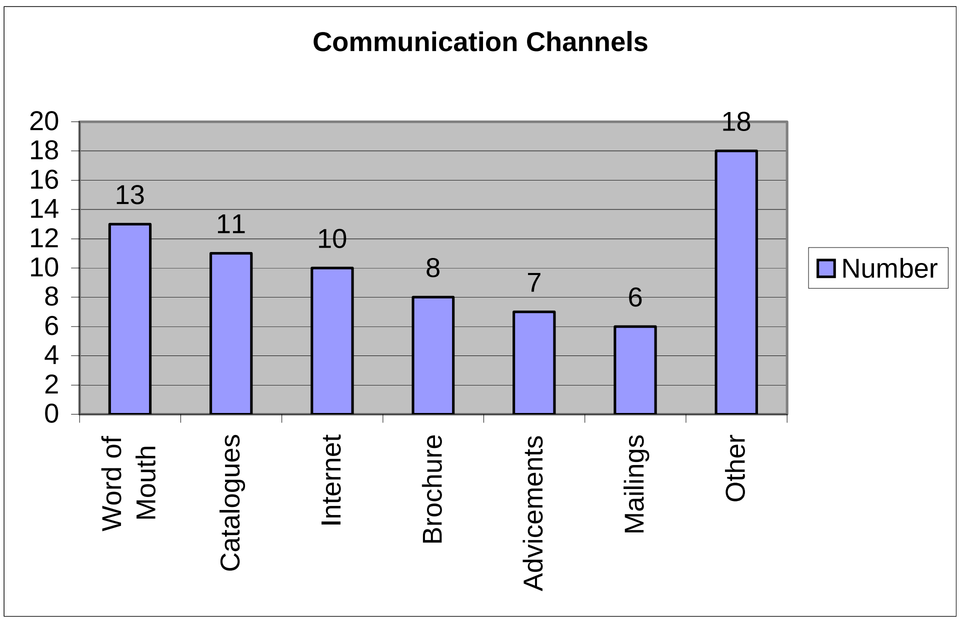
(Source: WTO, German Ecotourism Market, p48)

Germany was identified as a potential market opportunity based partially in a survey of German tour operators. When asked their opinion about the most popular worldwide nature and ecotourism destinations, an overwhelming majority mentioned Costa Rica (35). Central America, as a whole, was also mentioned by one of the respondents.

Information Sources

The sources of information German tourists use in order to learn about potential travel destinations was largely unavailable. A marketing study by Fomento al Desarrollo Sostenible Mediante Turismo en Centroamerica (FODESTUR) identified that 40% of German tourists obtained information from travel agencies. (FODESTUR, p 12)

Marketing Channels for tour Operators



(Source: WTO, German Ecotourism Market, p67)

The WTO found that word-of-mouth is the most effective promotional tool for tour operators in marketing their products, followed by catalogues, the Internet, and others.

Activities

Expectations at the Holiday Destination

		All those asked	Heidelberg Reisepavillon 2001	ITB Berlin 2001
		Base: N=200	Base: N=99	Base: N=101
Proportion in %				
Small accommodations run by locals	Yes	50.0	52.5	46.6
	No	50.0	47.5	53.6
High-quality accommodation with extensive furnishings	Yes	2.9	2.5	3.6
	No	97.1	97.5	96.4
Local cuisine with local ingredients	Yes	41.2	50.0	28.6
	No	58.8	50.0	71.4
High cleanliness and safety standards	Yes	13.2	7.5	21.4
	No	86.8	92.5	78.6
Interesting excursions with local guides	Yes	14.7	20	7.1
	No	85.3	80	92.9
Self-guided hikes with good information service	Yes	45.6	47.5	42.9
	No	54.4	52.5	57.1
Organized opportunities for encounters with locals	Yes	8.8	10.0	7.1
	No	91.2	90.0	92.9
Locally organized cultural events	Yes	20.6	22.5	17.9
	No	79.4	77.5	82.1
Opportunities to purchase local handicrafts	Yes	1.5	-	3.6
	No	98.5	100	96.4
Hospitality	Yes	41.2	32.5	53.6
	No	58.8	67.5	46.4
Price	Yes	10.3	12.5	7.1
	No	89.7	87.5	92.9
Other	Yes	7.4	7.5	7.1
	No	92.6	92.5	92.9

(Source: WTO, German Ecotourism Market, p37)

The specific activities that German tourists prefer to engage in were not available, however, information as to the travel motives and important requirements of a travel destination have both been researched.

Again, small accommodation businesses run by local people (50%), hiking with good information, but without guides (45.6%) were considered to be key characteristics of a travel destination. Other expectations of note included local cuisine with local ingredients and pronounced hospitality (41.2% each).

Significance of Ecotourism Travel Motives for Tourists

Share in %	1st Ranked Reason	2nd Ranked Reason
Sun, Beach, and Ocean	16.5	6.9
Relaxation	15.0	10.6
Fun with Friends	3.0	8.0
To get to Know Other Cultures	17.5	15.4
To see Other Landscapes	18.0	25.5
Wildlife Watching and Nature Experiences in an Undisturbed Landscape	8.0	6.4
For Adventures and Excitement in Nature	4.5	3.7
To Spend Time with the Family	5.5	9.6
Other	5.0	2.1

(Source: WTO, German Ecotourism Market, p27)

Top travel motivations included seeing other landscapes (18%) and to get to know other cultures (17.5%), followed by sun, beach and ocean (16.5%), and others. Central America offers all of these things in abundance and thus Germany can be considered to have good market potential.

5.4.4 England
Intelligence and promotional channels for ecotourism suppliers

1. The WTO recommends that ecotourism suppliers contact UK operators directly with new product offers. The way to do this would be to first research the operator and identify the features of their tours that are important to the operator's product range. This can be done through an analysis of the tour operator's brochure, website and itineraries offered.
2. Since most large and medium UK operators with operations in a range of countries rely on incoming agents based in destination countries, contact through the ground handler or incoming agent on the destination country is recommended.
3. Authors of guidebooks can influence both individual operators and the operators planning and selling tours. Therefore, writing to the guidebook editors informing them of new ecotourism products and services can be a valuable means of generating awareness of new products and services.
4. The World Travel Market in London (November) and ITB in Berlin (March) represent two major opportunities to meet with UK ecotourism operators. Access to these events may be obtained through the country's national stand.
5. The Association of Indepentant Tour Operators website (www.aito.co.uk) carries details of the 150+ companies in membership and can be a valuable source of potential partners.

6. The Community Tourism Guide is published through Tourism Concern and Earthscan. This compendium of community tourism products compiled by Mark Mann is available online at www.tourismconcern.org.uk and also contains possibilities for partnerships.
7. Responsibletravel.com (www.responsibletravel.com) also carries information about community tourism products and can be used to review the itineraries and policies of its tour operator members.

(Source: WTO, The British Ecotourism Market, 2001)

Spending

How much more money would package holidaymakers be prepared to pay?

2% Would be £5 on a holiday of £500	22%
5% Would be £10 on a holiday of £500	21%
10% Would be £25 on a holiday of £500	10%
20% Would be £50 on a holiday of £500	1%
Nothing	45%

(Source: WTO, The British Ecotourism Market, 2001, p27)

Increased willingness to pay for a guarantee of environmental or social responsibility can be used as another tool in marketing the concepts of eco and sustainable tourism. A survey conducted by Tearfund found that the majority (55%) of British travelers are willing to pay extra to ensure that tour operators included some level of environmental or social responsibility. This suggests that there is a strong market for Central American eco and sustainable tourism within the United Kingdom.

Which of the following would you be willing to pay more money for if they were guaranteed as part of your holiday?

Money goes towards preservation of the local environment and reversal of some of the negative environmental effects associated with tourism	35%
Workers in the destination are guaranteed good wages and working conditions	29%
Money goes to support a local charity	21%
None of these	41%

(Source: WTO, The British Ecotourism Market, 2001, p27)

Determining where extra money that package holidaymakers would be willing to spend should be allocated towards preserving the environment (35%), ensuring good wages and conditions for workers (29%), and donations local charities (21%) is also useful in determining Britain as a good market opportunity for eco and sustainable tourism. Programs of eco and sustainable tourism incorporate these activities further supporting the United Kingdom as a potential market opportunity.

Main Destinations

Overseas Destinations at the UK Market

	Frequency	%
Spain	292	38.6
Greece	113	14.9
Turkey	40	5.3
Other Europe	185	24.4
Europe Total	630	83.2
Outside Europe	127	16.8
	757	100.0

(Source: WTO, The British Ecotourism Market, 2001, p23)

The main destination for U.K. tourists is Spain (38.6%) and other parts of Europe. However, travel outside of Europe (16,8%), due to the overall size of the British travel market still accounts for a total of 27.25 million holidays (c.f. WTO, The British Ecotourism Market, p13). The tendency for the British to travel in general makes them an attractive market for Central America.

Information Sources

How did British book their last holiday package? (%)

	%
Through a travel agent	67
Direct through a tour operator/ other travel provider by telephone	18
Using Teletext	10
The Internet via a computer	3

(Source: WTO, The British Ecotourism Market, 2001, p25)

The majority of British holiday package users tend to book through a travel agent (67%) followed by directly booking through a tour operator or other travel provider (18%). The Internet (3%) was the least used means to book a holiday in the United Kingdom.

Tour Operator Marketing Channels

	Unimportant	Not Very Important	Quite Important	Important	Very Important	N	Index
Weight	1	2	3	4	5		
Through Word of Mouth	0	0	3	7	30	40	4.7
Advertising in Specialist Magazines	1	1	8	14	16	40	4.1
Specific Information in General Brochure	1	3	8	6	19	37	4.1
Direct Mail	4	4	8	8	16	40	3.7
Through the Internet	4	4	7	10	15	40	3.7
PR - Newspaper Coverage	7	4	9	12	8	40	3.3
Other Advertising	9	7	12	9	3	40	2.8
Through Affinity Groups	12	8	7	8	4	39	2.6
Faris/Promotional Events	16	4	6	7	7	40	2.6
Through Travel Agents	24	6	7	2	1	40	1.8

(Source: WTO, British Ecotourism Market, p 66)

The information above seems to indicate that Word of Mouth (4.7) is the most valuable marketing tool for British tour operators followed by Advertising in Specialist Magazines (4.1), and Brochures (4.1). The least useful marketing tool was found to be Travel Agents (1.8).

Main Promotional Events for Tour Operators

Independent Travellers World	January/February	www.itwshow.com	London
Destination 2002	January	www.destinations2002.net	London
Adventure Travel and Sports Show	January	n/a	London
British Birdwatching Fair	August	A	Rutland Water

(Source: WTO, British Ecotourism Market, p 65)

Important events where ecotourism products and services may be marketed were also listed providing an idea where local service providers looking to attract UK customers might go. The WTO identified four events shown above

Activities Sought by British Travelers

N=40	Unimportant	Not very Important	Quite important	Important	Very Important	Index
Weighting	1	2	3	4	5	Average 3
Being in Wilderness Areas	1	2	2	16	19	4.3
Viewing Wildlife	1	2	4	9	24	4.3
Meeting indigenous people, seeing their culture	0	6	5	18	11	3.9
Ornithology	3	9	9	10	9	3.3
Seeing rare species	4	8	8	14	6	3.3
Education and Learning	0	8	15	14	3	3.3
Relaxation	6	6	8	13	7	3.2
To take part in/contribute to Sustainable Tourism	5	10	15	7	3	2.8
Botany	6	18	7	6	3	2.6
Visiting Geological Sites	12	9	15	3	1	2.3
Sports	23	5	3	6	3	2.0

(Source: WTO, The British Ecotourism Market, p 59)

Comparing the activities sought by British travelers, and comparing this information to the offerings of the Central America make Britain appear to be a promising market.
Being in wilderness areas and viewing wildlife received the highest scores (4.3). Meeting indigenous people and seeing their culture also received a high score (3.9), followed by ornithology (3.3), seeing rare species (3.3), and others.

5.4.5 France
Quantitative Trends

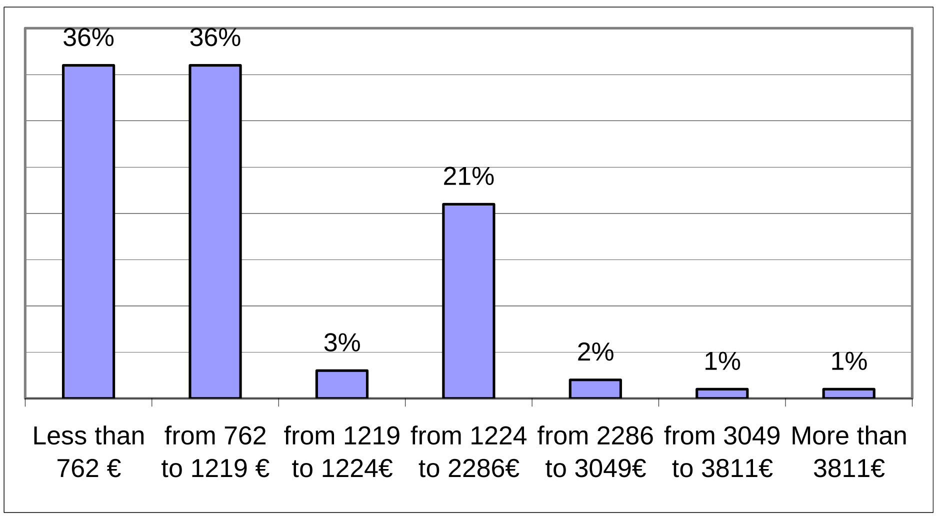
There are several quantitative trends within the French ecotourism market that are important for considering France as a potential market for local service providers within Central America (WTO, The French Ecotourism Market, 2002, Pg29):

- In 2000, the vast major (85%) of the French population spent time ranging from a few days to a few weeks on recreational travels. This is an increase of 16% from 1996. Overall, the French take holiday breaks 2.3 times in an average year, of which 1.7 holidays are spent in France.

- Nearly half (40%) of all holidaymakers that book their holidays with operators, of which those with senior or professional positions comprise a major share of the market (35%)
- Grandparents and their grandchildren holidaying together accounted for 7.5% of all holidaymakers in 1999. A growing number of single parent family holidays is also apparent in France and represented 10% of all tourists in 1999, compared to only 2% in 1998.
- There is a stable number of visitors (+0.6%) to non-commercial accommodation (holiday homes, parents or friends homes) compared to 1999 low rates. In comparison, the hotel industry and self-accommodation markets recorded a slight increase in overnight stays in 2000 (+3.1% and +0.2%). Campsites on the other hand, have lost some popularity experiencing a drop of 0.9%.

Pricing and Spending

Price that tourists are willing to invest in this type of holiday



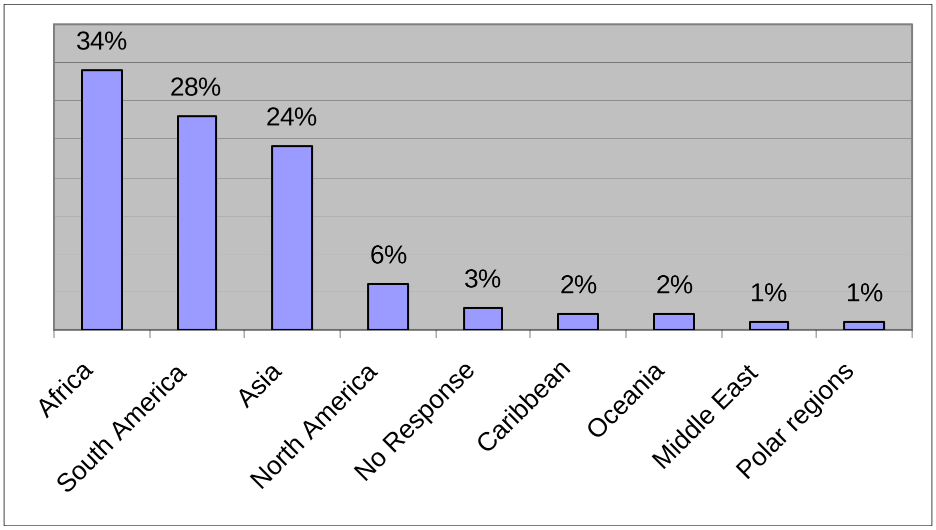
(Source: WTO, The French Ecotourism Market, 2002, Pg 73)

The willingness of travelers to pay for ecotourism holidays is another in selecting France as a potential target market for eco and sustainable tourism products and services within the two target sites. The majority of French ecotourists (72%) are willing to pay up to 1219€ with a large group (21%) willing to pay between 1224 and 2286€ for an ecotourism holiday.

It can also be noted that price is the main criteria when choosing a holiday.

Destinations

Foreign destinations sold by French tour operators



(Source: WTO, The French Ecotourism Market, 2002, Pg 66)

"South America is extremely popular with French customers, in particular tourists from the South of France," and represents 28% of travel sales.

Activities and Expectations

Most important elements for visitors when choosing a nature/ecotourism product destination.

The quality of the countryside and the conservation of the environment	91%
The discovery of civilizations, cultures and cultural heritage	80%
Complete immersion, direct contact with nature (walks)	74%
Accommodation immersed in nature ("lodge", forest hotel, camping-bivouac in the heart of the countryside..)	71%
Abundance of fauna and prospects for viewing nature	66%
The possibility of lodging with the owner/resident (guest houses)	62%
Immersion in indigenous or traditional communities	59%
The presence of national parks or private reserves	58%
Being accompanied by local guides from the country	44%
Involvement in cultural or religions festivals	38%

(Source: WTO, The French Ecotourism Market, 2002, Pg 75)

The most important elements for French when choosing a destination of a nature/ecotourism product include the quality of the countryside and the conservation of the environment (91%) and the discovery of civilizations, cultures and cultural heritage (80%). Aspects of lesser importance included being accompanied by local guides from the country (44%) and involvement in cultural or religious festivals (38%).

Means of Promotion

Although there is a definite market for ecotourism embodying all of its principles, use of the term ecotourism is not popular amongst the French and is widely absent in promotional materials. The term is considered to be pejorative and too scientific and confusing to potential customers. Additionally it is felt that prospective clients might not feel as though they are up to the standard of the proposed products. Thus within advertising, most operators make use of similar terms such as responsible, sustainable, or fair tourism. Likewise, scientific terms such as ornithology and astronomy are replaced with more appealing terms including whale watching and stars and sky (pg38).\

Most effective means of tour operators to promote nature tourism or ecotourism products.

Specific message in the general brochure	76%
Word of mouth	60%
Fairs and exhibitions	48%
Internet site	44%
Accompanying guides who encourage customer loyalty	44%
Regular journal	36%
Target mailing	36%
Inserts in specialized magazines	36%
Press articles	32%
Specialized associations and NGOs	24%

(Source: WTO, The French Ecotourism Market, 2002, Pg 87)

Most sales methods used by tour operators´ customers for Nature/Ecotourism products

Brochures/Post	34.6%
Internet Reservations	15.4%
Reservations made directly in office	38.5%
Reservations via agencies	11.5%

(Source: WTO, The French Ecotourism Market, 2002, Pg 83)

In promoting tourism in general, the media plays and important role as an influencing factor in the emergence of new destinations amongst the French.

New nature and ecotourism destinations can be created on the French market from one year to the next. Tour operators provide a lost of communication means that could be used to create new destinations or generate higher sales. They have identified the obstacles and setbacks that limit scheduling holidays in countries that receive little media focus or are not traditionally tourist-bound.

5.4.6 Italy

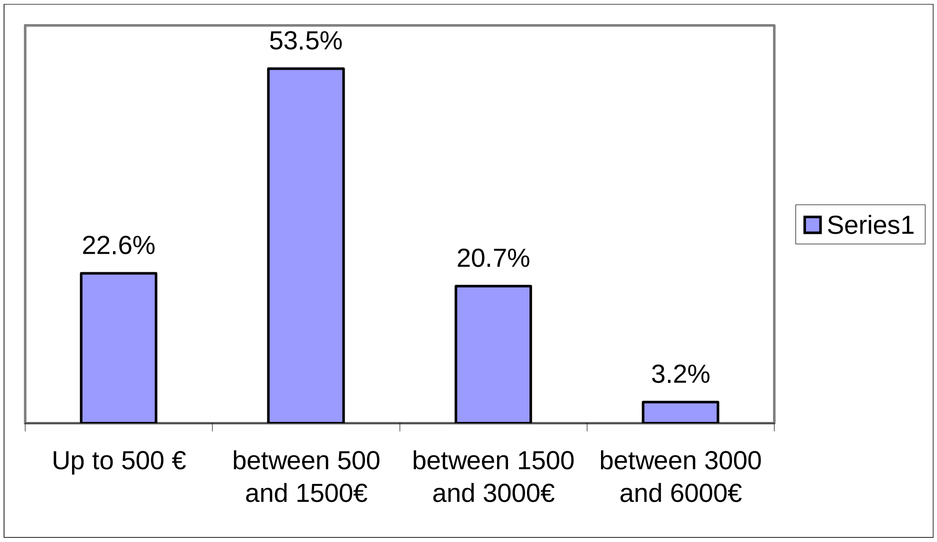
General Trends

The examinations of the Italian ecotourism market by the WTO revealed several possible trends including (WTO, The Italian Ecotourism Market, 2002):

- Italian ecotourism operators have a clear idea of the principles of ecotourism and work towards them. With the majority (87.5%) preferring local suppliers, more than half (57.5% financing or taking some in local environmental protection or development programmes, and several other endeavors related to the principles of ecotourism.
- Ecotourism is seen to be an already existing, growing market niche by the majority of tour operators.
- Ecotourism operators utilize a wide variety of promotional channels many of which are informal or unconventional. More mainstream forms of promotion are also used. The Internet plays an important role in the promotion of ecotourism although clients are likely to be approached through more traditional promotional means.
- The press is becoming increasingly an important promotional channel.
- Ecotourism holidays are less expensive than conventional ones and the majority of Italian ecotourists (53.5%) are willing to spend between 500 and 1,500€.
- Italian travelers consider a wide variety of factors when choosing their holidays. Among the most important requirements for destinations are opportunities to share time with local people (41.7%), local excursions with the option of being accompanied by local guides (37.8%), and local food produced with local ingredients (36.9%).

Spending

Average Expenditure for an Ecotourism Trip



(Source: WTO, The Italian Ecotourism Market, 2002, pg 47)

Examining the spending habits of Italian ecotourists provides an idea of how much Italians might be willing to spend on ecotourism holidays. Recent data suggests that the majority of Italian ecotourists (53.5%) spend an average of between 500 and 1,500€. A very slim minority (3.2%) is willing to pay large amounts for ecotourism holidays. The rest seem to be split between those that are budget travelers, spending up to 500€ (22.6%) and those willing to spend between 1,500 and 3,000€ (20.7%). The spending habits of Italians was one of the selection criteria for examining Italy as a potential target market.

Average Trip Prices for Brazil in Conventional and Ecotourism Packages

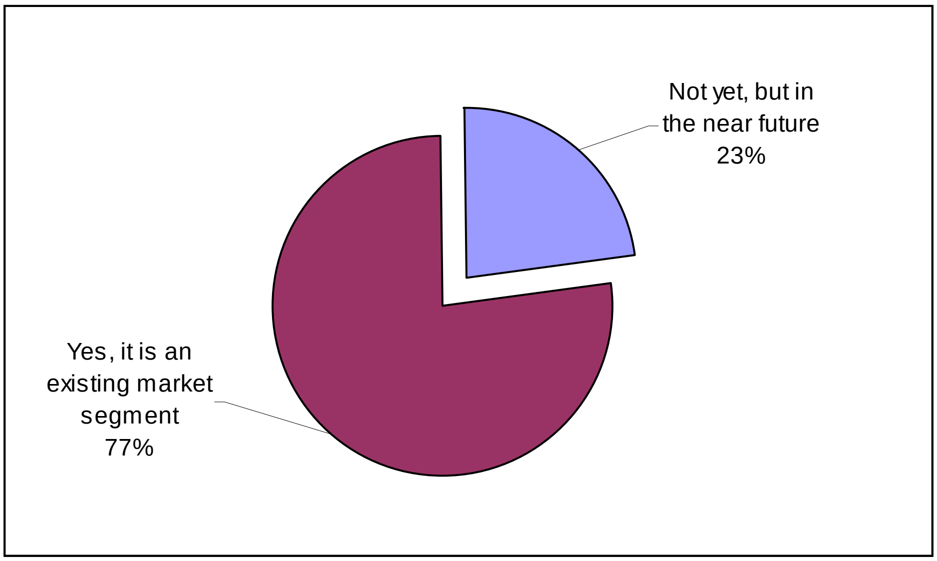
	High Season Average Price	Low Season Average Price
Ecotourism Package	€ 1,407	€ 1,325
Conventional Package	€ 1,926	€ 1,419

(Source: WTO, The Italian Ecotourism Market, 2002, pg 46)

Comparing the costs of ecotourism holiday packages with those of conventional packages further reveals the cost expectations of Italian ecotourists. A cost comparison of ecotourism and conventional packages was not available for Central America, but examining the data from Brazil still proves useful. From the chart above, ecotourism packages are less costly to Italian travelers compared to more conventional holidays in both the high and low seasons.

Future Demand for Worldwide Ecotourism Destinations

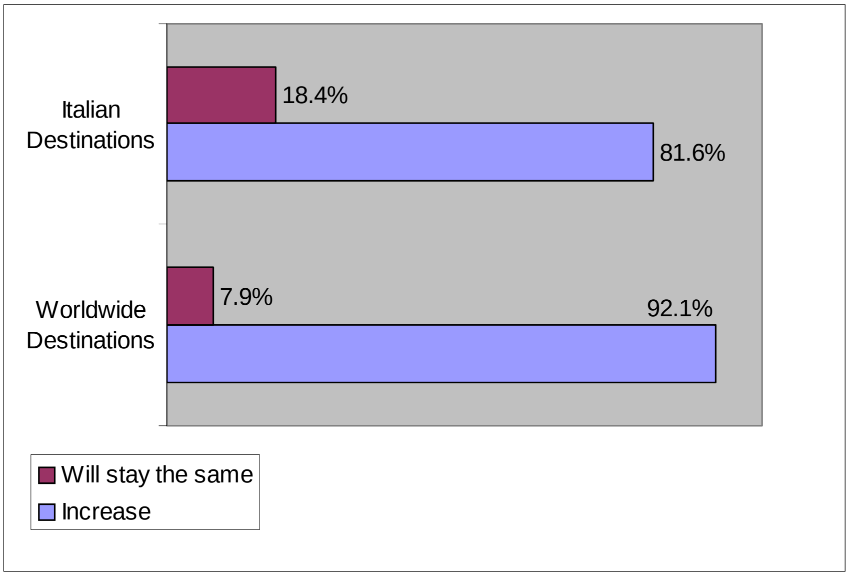
Ecotourism as an existing market niche



(Source: WTO, The Italian Ecotourism Market, 2002)

Investigating the existing status of ecotourism in Italy, the WTO found that the majority (77%) of tour operators already believe that ecotourism exists as a market segment. The concept of ecotourism possessed by Italian ecotourism operators incorporate the ideas of community development, and environmental protection, making Italy a good market opportunity for the target sites.

Ecotourism Market Evolution in the Next Few Years

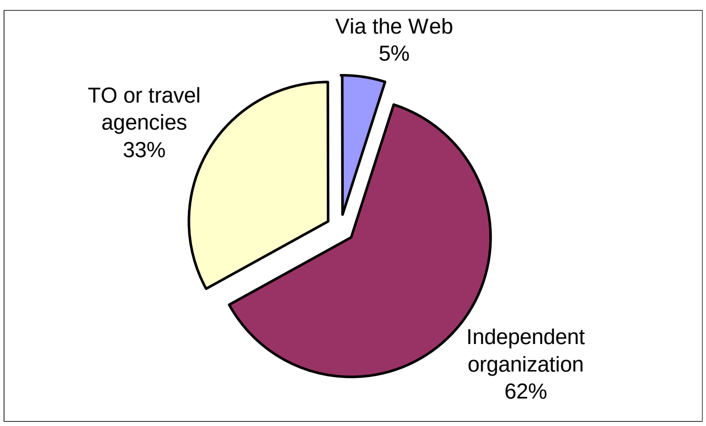


(Source: WTO, The Italian Ecotourism Market, 2002, pg 37)

Further examining the ecotourism market segment revealed that the future market potential for ecotourism is thought to increase. The image of an expanding market suggests that Italian tour operators will be looking to expand offerings in order to accommodate this perceived future demand. The possibility of a rapidly expanding marketplace makes Italy an attractive market opportunity.

Sources of Information

How do Italians organize their holiday?



(Source: WTO, The Italian Ecotourism Market, 2002, pg 57)

Information about how Italian travelers organize their holidays suggests which actors within the commercialization chain, if any, would be most effective as intermediaries. Data from a survey of 450 tourists suggest that the most popular means of organizing a holiday was through independent organizations (62%), followed by tour operators or travel agencies (33%). The Internet was the least utilized means of organizing a holiday (5%).

Promotional Tools

Most important promotional channels of tour operators for ecotourism and nature based products

	Non specialized			Nature		
	Count	% Within Category	Rank	Count	% Within Category	Rank
Internet	4	50%	2	10	76.9%	1
Brochures	7	87.5%	1	10	76.9%	1
Fairs	2	25%	3	8	61.5%	2
Newspaper coverage	2	25%	3	7	53.8%	3
Word of mouth	0	-	5	6	46.2%	4
Customer fidelity establishment	0	-	5	7	53.8%	3
Advertising in specialist magazines	1	12.5%	4	7	53.8%	3
Through associations	1	12.5%	4	1	7.7%	6
Information sheets	2	25%	3	2	15.4%	5
Through NGOs	0	-	5	0	-	7

	Ecotourism			**Total**		
	Count	% Within Category	Rank	**Count**	**% Within Category**	**Rank**
Internet	18	94.7%	1	**32**	**80%**	**1**
Brochures	12	63.2%	2	**29**	**75.9%**	**2**
Fairs	13	63.2%	2	**22**	**55%**	**3**
Newspaper coverage	11	57.9%	3	**20**	**50%**	**4**
Word of mouth	12	63.2%	2	**18**	**45%**	**5**
Customer fidelity establishment	9	47.4%	4	**16**	**40%**	**6**
Advertising in specialist magazines	4	21.1%	8	**12**	**30%**	**7**
Through associations	8	42.1%	4	**10**	**25%**	**8**
Information sheets	5	22.5%	7	**9**	**22.5%**	**9**
Through NGOs	5	26.3%	6	**5**	**12.5%**	**10**

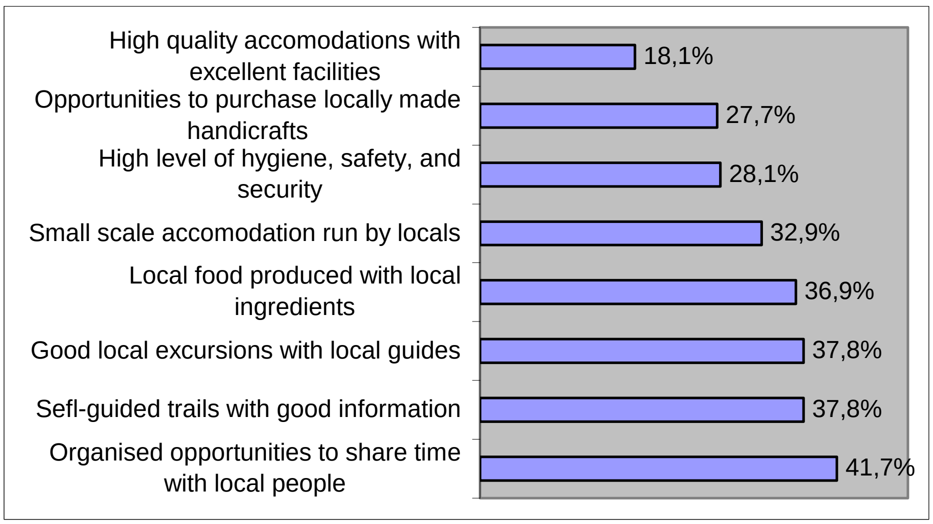
(Source: WTO, The Italian Ecotourism Market, 2002, Modified by Ty Gillies, 2003)

The WTO found that Italian tour operators specializing in ecotourism utilize a wide range of promotional tools. The most popular of these tools is the Internet (97.4%) followed by brochures and trade fairs (63.2% each). Italian tour operators also made use of NGOs (26.3%) in promoting their products, and are the only ones to do so.

The main tourism event catering to ecotourism in Italy is Ecotour - Borsa Internazionale del Turismo Verde ed Ambientale (BIT) trade show. (WTO, The Italian Ecotourism Market, 2002, pg 65)

Activities

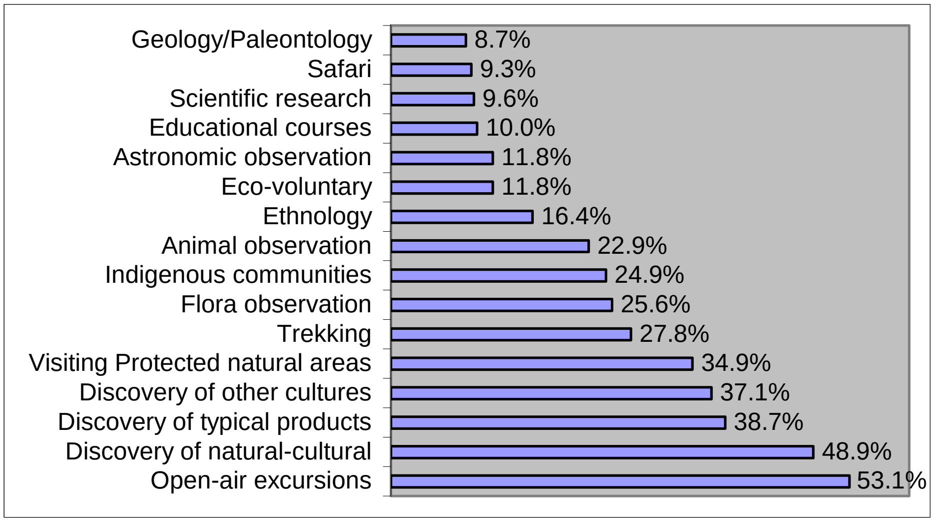
Most important requirements of Italian tourists at the travel destination



(Source: WTO, The Italian Ecotourism Market, 2002, pg 52)

Available data suggests that ecotourism products and services should contain activities that provides opportunities to share time with local people (41.7%), local excursions with the option of being accompanied by local guides (37.8%), and local food produced with local ingredients (36.9%). Tours should also consider incorporating small-scale accommodations run by locals, and a high level of hygiene, safety, and security.

Preferred activities by Italians when choosing a nature-based holiday

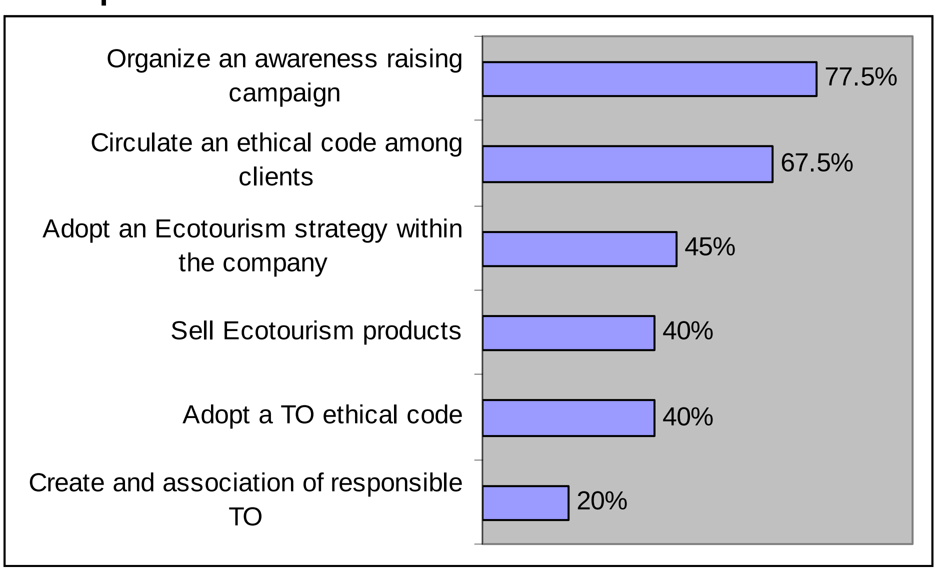


(Source: WTO, The Italian Ecotourism Market, 2002, pg 54)

Data on this subject suggests that activities such as open-air excursions (53.1%), discovery of natural-cultural heritage (48.9%), and the discovery of other cultures (38.7%) are the most preferred activities for Italian ecotourists. Geology/Paleontology (8.7%), safari (9.3%), and scientific research (9.6%) were not considered to be seductive activities when choosing a nature-based holiday.

Future Promotion of Ecotourism

Necessary steps to promote the development of ecotourism is the Italian marketplace



(Source: WTO, The Italian Ecotourism Market, 2002, pg 60)

Surveys indicate that the majority (77.5%) of tour operators feel that an awareness raising campaign is needed to further promote ecotourism within the Italian marketplace. Other popular ideas for promoting ecotourism in Italy include the circulations of an ethical code among clients (67.5%), and the adoption of an ecotourism strategy within the company (45%).

5.4.7 Spain
Trends

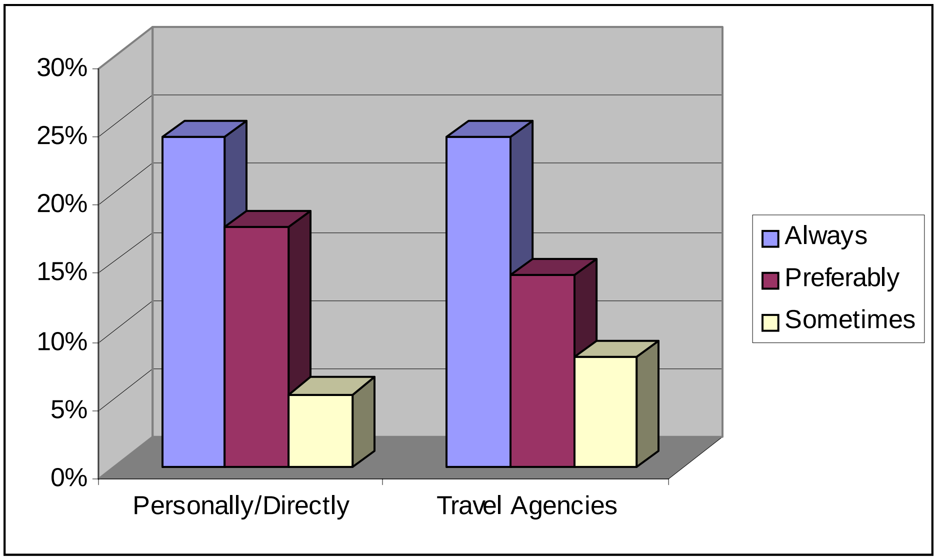
Studying ecotourism within the Spanish travel industry yields several trends:

- International travel represents a small sector of the total Spanish travel market.
- Ecotourism represents only a small portion of the overall international Spanish market.
- Ecotourism holidays tend to last longer than other holidays.
- There has been rapid growth among tour operators and travel agents offering ecotourism corresponding with the growth in demand for these services.

Income/Booking Patterns

Gathering information on the income of Spanish travelers was thought to be of value as demonstrating the wealth of ecotourists could be useful in marketing the concepts of eco and sustainable tourism. Information from the WTO indicates that salaries vary form 1,500 – 2,400 € per month (WTO, The Spanish Ecotourism Market, 2002, pg 63).

Booking Patterns

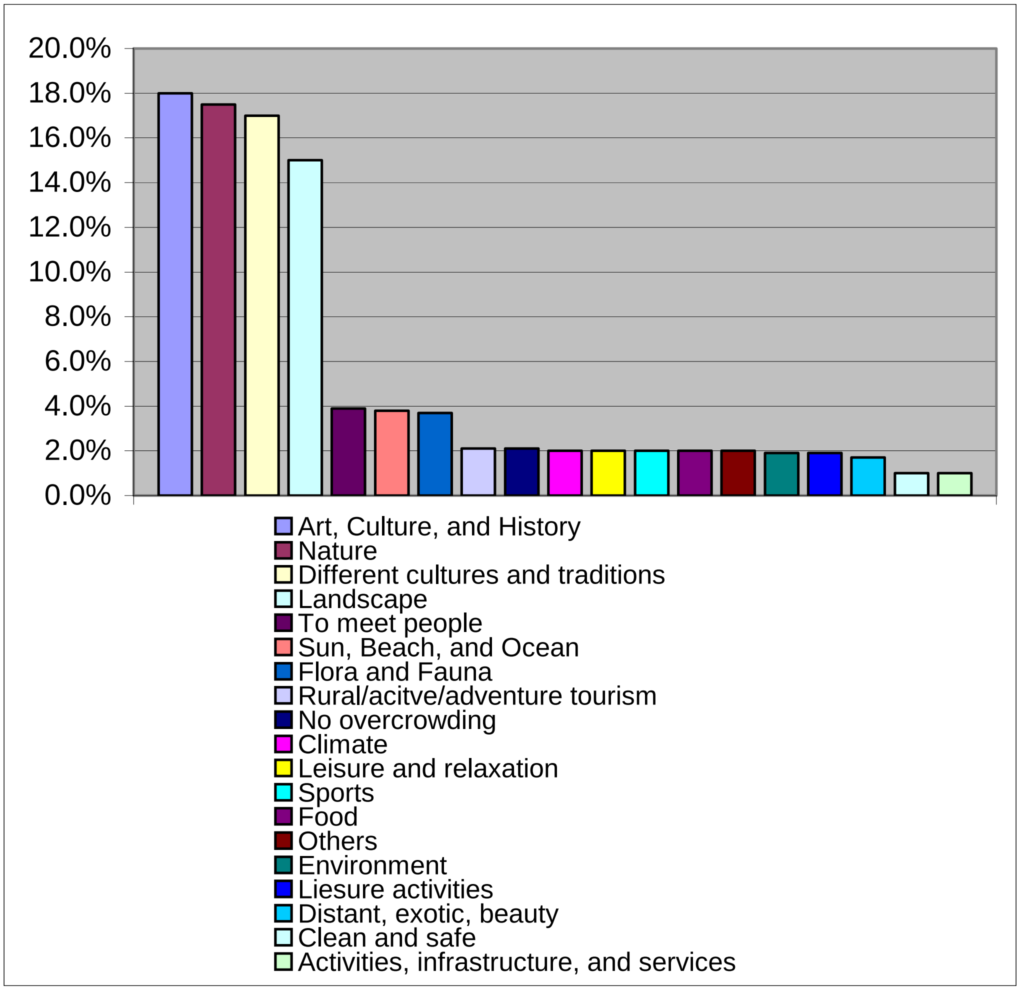


(Source: WTO, The Spanish Ecotourism Market, 2002, pg 37)

Exploring the propensity through which Spanish tourists make their travel arrangements provides information on the commercialization chain and the tendencies for Spanish travelers to book through their holidays through certain actors in the commercialization chain. In Spain, only a 25% of ecotourists and tourists make travel arrangements always through a travel agency, A 25% make their reservations directly or personally.

Destinations/Attractions

Characteristics that make a destination attractive

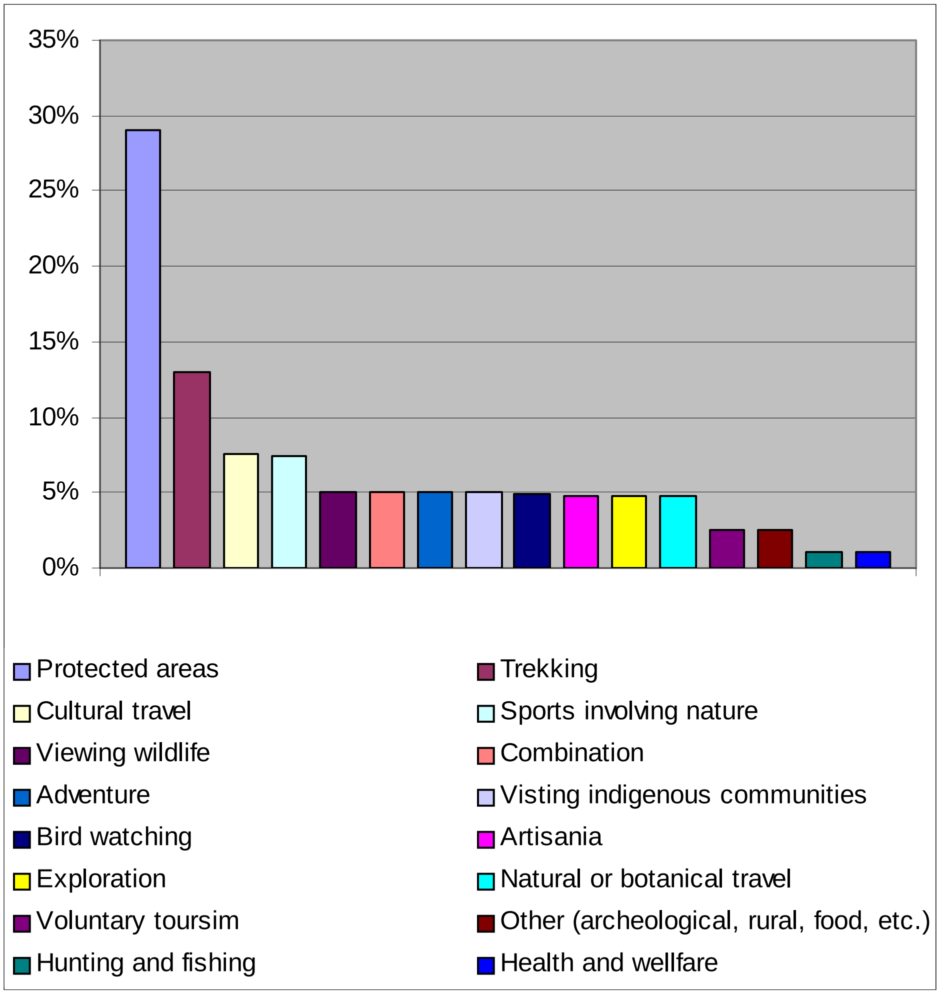


(Source: WTO, The Spanish Ecotourism Market, 2002, pg 57)

The graph above illustrates how Spanish travelers consider a number of features in an attractive destination. Art, culture, and history (18%), Nature (17.5%), Different cultures and traditions (17%), and Landscapes (17%), were considered to be the most attractive features for potential destinations.

Activities

Principle activities on an ecotourism holiday

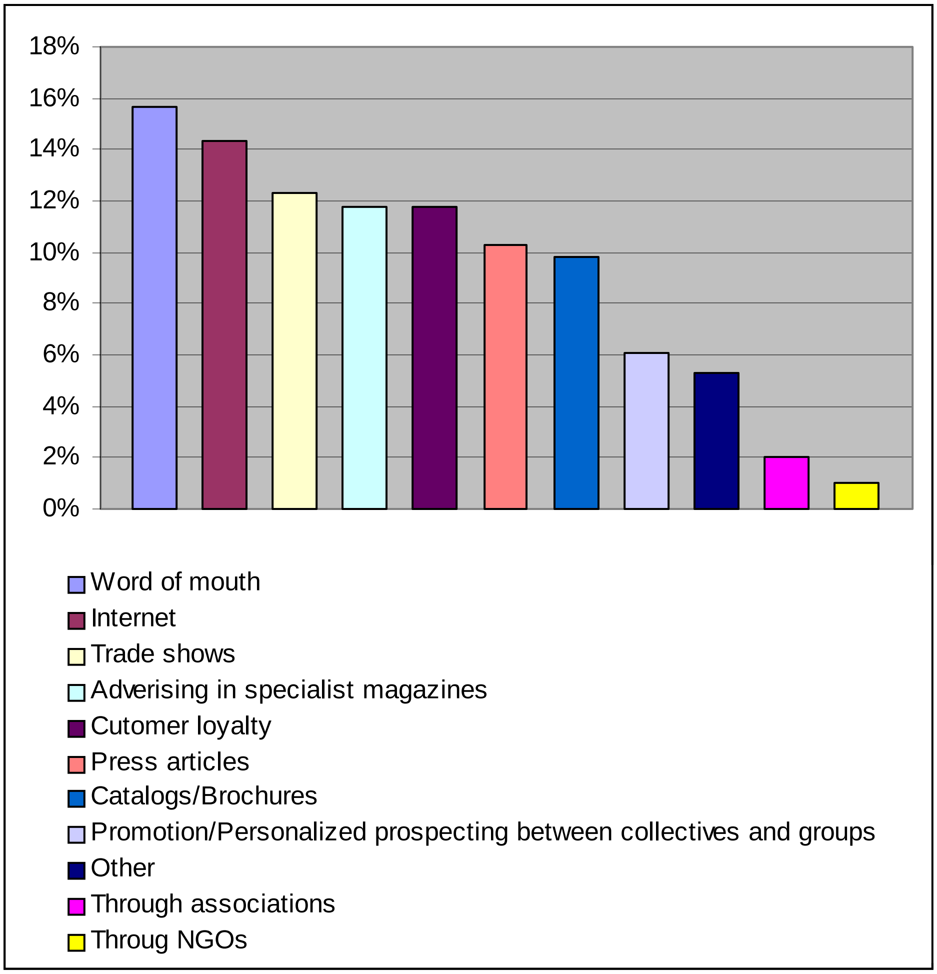


(Source: WTO, The Spanish Ecotourism Market, 2002, pg 60)

In addition to looking at what types of characteristics Spanish travelers find attractive in a destination, examining the main ecotourism activities these travelers engage in is also important for discovering potential market opportunities. From the graph above, access to protected areas is considered to be a key activity for Spanish tourists. Trekking, cultural travel and sports involving nature also ranked very highly.

Promotional Means

Means of tour operators for information/promotion of ecotourism products



(Source: WTO, The Spanish Ecotourism Market, 2002, pg 70)

Spanish tour operators seem to rely on word of mouth as the top means of promotion, followed by the Internet, and trade shows. The least used means included associations and NGOs.

5.5 Regional Overview

5.5.1 Amistad – Cahuita - Río Cañas

- **The Bocas del Toro Archipelago**

The archipelago consists of nine islands, 52 keys and more than 200 islets. The largest and most developed island is Colón Island, where the capital of the province, Bocas del Toro, is located. The Bocas region boasts clean, calm waters, huge tracts of virgin hardwood and rain forests. It is a last refuge for many endangered species. The diversity of birds, coral and aquatic life are rivaled by few other places in the world. More than a dozen coral reefs protect a marine environment un-equaled in most of the Caribbean because its remote location has insured that it has remained untouched; it is a protected zone for the endangered manatee and is a tarpon spawning ground.

Over the last few years the entire province has seen the beginnings of a tourist boom, with a number of middle range hotels and restaurants being opened in and around Bocas town.

People

The people of the province are made up of mainly indigenous tribes, many of which still live in small isolated villages scattered throughout the islands. Add to this, a healthy mix of people originally from Jamaica and you have an atmosphere that is more closely aligned to the islands of the Caribbean. The pace of life is slow and relaxed with nobody seeming to be in much of a hurry. Locals travel between the islands in dugout canoes, some with motors, but most without. These canoes, or pangas as they are called, litter the waterways and channels, especially in the morning when everybody is either going to the main island or the mainland. During this rush hour, most adults are traveling to the mainland to work in the banana fields and the children are going to the schools on Isla Colon.

- **Talamanca**

Geographic Focus

The Talamanca region is not only characterized by rich biodiversity, in part due to its distinctive topography; but also is recognized for its cultural mosaic, which resulted from an unique historical background.

Geographic profile and natural environment

La Amistad-Bocas del Toro Corridor is comprised of high mountains rising from the sea, and is perhaps the only example in the region of mountains that have retained their natural forest cover, continuing right to the coast. Costa Rica has extensive areas of legally declared protected areas within this region.

The region includes marine, coastal, and terrestrial areas. It is delimited by the Cahuita National Park, in Costa Rica, including the Talamanca-Caribbean Biological Corridor and Hitoy Cerere Biological Reserve, and it continues southeast across the Panamanian border until it intercepts the border of the Kankintu district, following the course of the Viento River to the mouth of the Cañas River. The region includes marine areas up to 50 meters deep between Isla Escudo de Veraguas, in Panamá, and Cahuita National Park. Other protected areas in this region are: Gandoca-Manzanillo Wildlife Refuge, the La Amistad International Park (PILA), the San San Pond Sak Wetlands, Isla Bastimentos National Marine Park and the Valiente Peninsula.

The coastal zone between Cahuita in Costa Rica and Punta Soropta on the Panamanian side has homogeneous characteristics: sandy beaches of importance for nesting sea turtles that alternate with rocky coasts, estuaries, wetlands, mangroves, lagoons and large rivers. In addition to patches of coral reef and sea grass beds, the area has pronounced beaches with strong waves and currents.

Socio-cultural situation

The social context of the area is comprised of several small population centers. Some of the most relevant communities in terms of number of habitants are: Cahuita, Puerto Viejo, Bri Bri, Manzanillo and Chiroles. The binational Talamanca-Bocas del Toro area is characterized by a diversity of human groups, including the Ngobes, BriBris, Teribes, Bugles, Afro-Caribbeans, mestizos and a significant population of foreigners. The presence of indigenous groups in the region has represented a positive factor for maintenance of forest cover, but the current pressures over their land and culture are eroding their presence in the zone, and conservation opportunities that could arise from there.

Economic Activities

The main activities sustaining the economy of the region are agricultural, such as the cultivation of bananas as the main export product from the region and one of the principal source of employment in Costa Rica. There are hundreds of cacao growers in the region, but this product has been devastated by the monilia disease. Cattle ranching is another important economic activity in the region. Traditionally, small-scale fishing and gathering has constituted one of the main economic activities in coastal communities, with an emphasis on red snapper, lobster (Panilirus spp), octopus and giant conch (Trombus gigas). These commercially valuable species are currently in a critical state due to overfishing and unsuitable fishing equipment that causes habitat alteration. Timber extraction is another important activity and is carried out by loggers who, although small-scale, engage in the intensive harvesting of such species as cedar, bateo, cerrillo, mayo, laurel and zapatero.

Tourism plays a significant role in the economy. It is one of the activities that will continue to grow in the coming years and change people's lives in the region. In Costa Rica, tourism is the main source of income in the country and particularly also in the province of Limón. In 1998, 48,000 tourists visited the Cahuita National Park, and in 1999, 53,750 people toured it. Each visitor paid a fee of US$20 for entrance, and spent approximately US$100 daily on other activities. According to Joseph (Ambientico, N.86, Universidad Nacional, Costa Rica, November 2000), 90% of the work done in this region is linked to tourism.

Climate

Talamanca has unique rainforest weather. rainfall averages about 100 in. (2.4m), which is actually below what is considered minimal to sustain legitimate wet rainforest. nevertheless, the forest is of extraordinary quality, and this is because it has the very best distribution of rainfall. many areas of costa rica get twice the quantity of rain, but due to arid dry seasons, lack the diversity of plants, amphibians, etc.

Statistically, the rainiest months are December/January, and July/August. The driest are September/October, and from the second half of February through April. However, it can be dry during the wet months and vice versa. It is very unusual for it to go 2 weeks without raining, but equally unusual for it to rain for more than a couple of days without seeing the sun and a blue sky. Rain can come in heavy downpours, often at night, followed by clearing. The temperatures are similar throughout the year. Typically the low might be in the low 70's (21-23c), and the high in the 80-85 (28-30c) range. Expect humidity and cooling breezes. The sun is very strong, so you won't normally see locals lying out at midday. Rejoice in the occasional rainy day, and use its coolness for some special activity

Puerto Viejo
Located in Limón near Cahuita. Puerto Viejo is a pleasant little town where you really feel the Caribbean atmosphere. The air is filled with reggae and salsa during the night. Afro Caribbean influenced. Puerto Viejo also has an excellent sheltered harbor, many beachfront restaurants, hotels, shops, and a pleasant, rustic atmosphere.

The pristine beaches at Puerto Viejo de Limón are some of the most beautiful in the country. The area is home to three different cultures: descendents of black farmers who grew coconut and cacao (until a blight in the 1980s ruined the cacao harvest), and speak English and afro Caribbean Creole called Mekatelyu. Indigenous people from the Bri-Bri and Cabecar tribes, and people of Spanish descent. Early morning bird-walks, night hikes, sea kayaking, snorkeling, back horse riding, biking and dolphin-watching trips are some of the activities in the area. Beyond the reef in Puerto Viejo is a famous surfing spot called Salsa Brava. Try some rice and beans cooked with coconut milk, sweet pan bon, delicious journey cake or other Caribbean cuisine while you are there.

- Services:
- Bank: At present there is a Banco Nacional in Bri-Bri only. Other banks and ATM in Limon.
- Churches: Baptist (in English on Sundays), Catholic and evangelic churches.
- Medical clinic: At the entrance to Puerto Viejo, 5 kilometers North at Hone Creek (El Cruce)
- Doctor: At the State Clinic in Hone Creek (5 kilometers from Old Harbor). There is also an office in Puerto Viejo open 6 evenings a week.
- Dentist**:** There is an office in Puerto Viejo open several days a week or by appointment.

- Public telephone: The public phones are "chip card" operated. Cards can be purchased at the ATEC office and at other sites around town. ATEC also will make "administrated" calls for you.
- Internet: The original "cyber service" is at ATEC. Other businesses have begun to offer Internet access also.
- ATEC: info, nature/cultural tours, fax, email, water bottle refills, internet, souvenirs, office supplies, nature books, film, cameras, etc.
- Post office: Correos de Costa Rica behind Marco's Restaurant
- Dollars and travelers' checks changed.
- Laundry service.
- Taxi

Cahuita

Cahuita is a sleepy Caribbean beach village and the first major tourist destination you'll reach heading south out of Limón. The boom going on in Puerto Viejo and the beaches south of Puerto Viejo has in many ways passed Cahuita by. This is one of the most laid-back villages in Costa Rica. The few dirt and gravel streets here are host to a languid parade of pedestrian traffic, parted occasionally by a bicycle, car or bus. The village traces its roots to Afro-Caribbean fishermen and laborers who settled in this region in the mid-1800s, and today the population is still primarily English-speaking blacks whose culture and language set them apart from other areas of the country. People come to Cahuita for its miles of pristine beaches which stretch both north and south from town. The sandy beaches lined with rain forest and the coral reef offshore are all part of Cahuita National Park. Due to pollution in the area, the coral reefs have taken a heavy toll, so you shouldn't expect the snorkeling to be world - class. But on a calm day, it can be pretty good, and the beaches are idyllic every day. It can rain almost any time of year here but the most dependably dry season is in September and October.

Cahuita National Park

Cahuita National Park was created on September 7, 1970, for the purpose of protecting the costal flora and fauna, in addition to the coral reefs and marine ecosystems. Cahuita's main attractions are its white sandy beaches, miles of coconut groves, tranquil clear seas and coral reefs. Cahuita Point is mostly swamp, with an abundance of coconut trees and the beach almond trees. The reef sits off Cahuita Point and fans out over 240 hectares. It is the only mature coral formation found along Costa Rica's Caribbean coastline. Among the coral species are the elkhorn and smooth brain, with Venus sea fans, sea urchins and numerous species of fish also inhabiting the waters; french angelfish, blue parrotfish, barracuda and queen angelfish. Other species present are the sea cucumber, lobster, white shrimp, green turtle and various crustaceans. The four identified species of crabs are also very abundant. The howler monkey, raccoon and white-nosed coati are widely found, as several species of swamp-forest birds, such as the green ibis, yellow-crowned night heron and Northern boat-billed heron.

Manzanillo

Located 73 kms from Limón via Cahuita - Puerto Viejo - Manzanillo. The eastern sector can be reached via Limón - Bríbrí - Margarita - Gandoca (106 km). Nature has prodigiously showered beauty and splendor on the forests, marches, coral reefs, beaches and almost white sands, dottet with coconut trees, that belong to the most remote and exotic site south of the 10th parallel. This is Gandoca-Manzanillo National Wildlife Refuge located in the southern Caribbean, a few miles from the border with Panamá. It protects 4,436 hectares of coastal waters, 15 kms of coastline, and 5,013 hectares of lowlands and hills 115 meters above sea level. The mainland sector is 65% tropical rainforest and the remainder grasslands and second growth. The tiny hamlets of Punta Uva Manzanillo, Punta Mona, and Home Creek form part of the refuge.

The forest of the hills and coastal plains is composed of very tall trees, very thick understoreys and innumerable palm trees, the most significant being the wild palm and mahogany, a species which inspired the Zambo Mosquito Indians to call Cahuita Point, Mahogany Point. The marshes are carpeted with holillo palm, which provides food for tapirs, and the tree species known as sajo. Cahuita National Park is located near Gandoca- Manzanillo National Wildlife Refuge.

The refuge protects a variety of wildlife, such as the crocodile, tapir, West indian manatee, cayman, tarpon, magnificent frigatebird, brown pelican, collared aracari, lineated woodpecker, chestnut-mandibled toucan, red-lored amazon, sulphur winged parakeet, and ornate hawk-eagle, among many other species. There are also approximatley 500 hectares of coral reefs that abound with brighly coloured fish, sea anemones, sea urchins, sponges, lobsters and other marine creatures.

5.5.2 Gulf of Honduras

Placencia, Belize

Placencia is a small village in the south of the Stann Creek District. It lies on the tip of a peninsula about 40 miles by sea from Dangriga in the Stann Creek District. It is a mainland costal fishing village. It is a short boat ride across the lagoon from Big Creek and a few other mainland villages. Like other coastal villages the temperature and climate are quite steady. The people of Placencia are creoles - descendants of African salves and European settlers. They like many people in this area descended from the workers brought in for the logging industry of a hundred years or so ago. Placencia is still primarily a fishing village, although recently it has become attractive to those who want both the adventure of an inland trip and the relaxation of the sea and the sun. From Placencia you can get to many diving and fishing sites near the barrier reef. You can also go inland to several Maya ruins and go on bird watching and ecological tours.

Punta Gorda, Toledo, Belize

The Toledo district is bordered to the west and south by Guatemala. Its terrain ranges from coastal swamp to rocky hills. It is very rainy and prone to floods. Land developed for agricultural purposes is mostly for rice and banana production. Toledo is strewn with small villages that rely on subsistence farming. The residents of Toledo are mostly Mayan Indians who are direct descendants of the great Mayan civilization, which collapsed several hundred years ago. There is an abundance of unexplored and undeveloped country for the adventurous traveler. There are also a number of unexcavated Mayan ruins such as Lubaantun and Nim Li Punit.

There are 35 lodging establishments registered. Most of them are micro and small lodges and cabins. Two years ago a big investment was made on a Marina (El Pescador) and there are other two medium hotels. Southern Belize is still undeveloped and visitors are mostly businessmen of Guatemala.

Major Town: Punta Gorda

Land Area: 1795 Sq. Miles

San Pedro Sula, Honduras

Located in the northern part of the country, San Pedro is only a few miles from the coast and has always played a major role in Honduran history. The city was founded the 27th of June, 1536 by Don Pedro de Alvarado himself. The Spanish conqueror founded it with the name of "Villa de San Pedro de Puerto Caballos" and within the next 5 years it was known as San Pedro Sula, with the name Sula deriving from the local dialect Usula, meaning "valley of birds".

Tap water is generally unsafe to drink in all of Honduras and San Pedro Sula is no exception. Most of the better restaurants and hotels treat their water, making it safe for you to drink. Purified water can be purchased at different places throughout the city. Another safe alternative is to stick to bottled soft drinks or beer. The dry season, or verano in San Pedro Sula is from December through April inclusive, with March and April being the hottest and driest months. The rainy season or invierno is from May through November and the wettest months are August and September.

Getting around San Pedro Sula. San Pedro is an easy city to get around in. It is divided into four quadrants following the old Spanish system of building cities: Northeast, southeast, northwest and southwest. All the streets are numbered, with avenues leading from north to south and streets east to west. Downtown is marked by the 1st Street. The most important commercial street is Third (tercera) Ave. Although there are plenty of public buses, you will find that taxis are plentiful and very reasonable.

The Guamilito market**,** within walking distance from the central plaza on between the 8a and 9a Avenidas and 5a y 6a Calles N.O. offers the most complete selection of Honduran handicrafts in San Pedro Sula. The market is also a good place for vegetables and flowers. When shopping at the market, always remember to barter, as prices here are not fixed and everyone barters the price down.

The Museum of Anthropology and History of San Pedro Sula is located at 3a Avenida corner with 4a Calle N.O. Entrance fee is Lps. 10.00 per person, open Monday through Satruday from 9:00 a.m. to 4:00 p.m.. (closed on Tuesdays) and Sunday from 9:00 a.m. till 3:00 p.m. Children and students with credentials pay Lps5.00 and elderlies pay only Lps. 2.00. A good tip, the first Sunday of every month entrance is free for all!

The Centro Cultural Sampedrano, where the public library is located, also hosts and organizes most of the cultural events going on in San Pedro Sula. With over 45 hotels, San Pedro Sula is a commercial destination. The hotel offer is varied from big chain hotels to family-owned bed and breakfasts. Only few tourists visit the city, and stayed only for one night in their way to the main tourist attraction of Honduras: Copan Ruins.

Omoa, Honduras

Located at west, on the highway leading from Puerto Cortes. Omoa is one of the oldest towns in Honduras and played an important role in the history of Honduras, especially during the colonial times. The paved highway leads west towards the town of Tegucigalpita, a village located only a few miles from the Guatemala border. This area of the country is of stunning beauty thanks to the impressive Merendon mountain range that serves as a backbone to this part of the cost. Along the road, you will pass the town of Omoa, where the Spaniards built the massive fortress of San Fernando de Omoa centuries ago.

Its purpose, to protect the coast and shipments of silver bound from the mines of Tegucigalpa to Spain from the continuous attacks of the British pirates. In effect, by the time it was finished, the pirates were a thing of the past. This structure is of such importance, that you would have to travel south as far as Cartagena de Indias in Colombia, or north as far as Campeche, in the Gulf of Mexico to find another fortress of equal importance.

After the independence of Honduras in 1821, the fortress was taken over by the local government, and was used for many years as a jail, and was later abandoned. Today, the fortress is considered a National Monument and is open to the public. The Honduran Institute of Archaeology and History is in charge of its maintenance. The fort, a mute testimony of Honduras colonial past, with its green gardens, humid rooms and massive walls will no doubt make your fantasies take you to a time in the past, when pirates still roamed the Caribbean Sea. The fortress is open from Monday to Friday from 8:00 a.m. to 4:00 p.m. and Saturday to Sunday from 9:00 am to 5:00 p.m. There is a small entrance fee charged on premises. You can purchase guide books or hire a guide if you wish.

Omoa is slowly, but surely becoming an interesting stop for the backpacker and budget traveler crowd. There are now several restaurants as well as a small hotel and several hostels in the area.

Official border crossings are now open with both customs and immigration services on both sides. In the Honduran side these are located within the town of Corinto, in the Guatemalan side they are located at Arizona. There is therefore no more hassles to get entry or exit stamps for those adventure travelers taking this route. Nearby is the Caribbean Cliffs Marine Club Resort and Marina. Here you can enjoy food at their restaurant, as well as take tours to the nearby Zapotillo keys in Belize or to the Punta Sal National Park in nearby Tela. In addition, there is a private ecological reserve called La Bambita, which can be visited by horse, Arrangements can be made at the hotel Acantilados del Caribe (Caribbean Cliffs Marine Club).

Further west the Merendon Mountain Range becomes ever more impressive. The Cusuco National Park has its northern boundaries within these mountains, with peaks reaching above 6,500 feet, and housing different habitats, such as beaches and mangroves, tropical rain forests and even cloud forests in the higher elevations. Just before Tegucigalpita lies the Garifuna community of Masca, and in the vicinity is the eco project of Eco Rancho. Here you can enjoy the rich flora and fauna of the area, with the breathtaking views of the coast and crystal clear rivers in the comfort of the luxury finca home, or if you are more adventuresome, camp in one of the campgrounds up in the mountains in specifically pre selected areas. Arrangements must be made in advance and all camping equipment is provided by Eco Rancho. Your experience and Eco Rancho can easily be one of your highlights of your trip to Central America.

Masca is a very interesting small town with a lot a folklore. Although not exclusively a Garifuna Community, there is an important presence of this interesting culture here. There is a brand new hotel in town that offers all the modern comforts located only a few feet from the beach. The hotel, called the Villa del Mar also offers a restaurant and bar. From Masca, you can enjoy a couple of nice hikes in the area. The first is to a small waterfall, located only a few hundred feet from the road leading from Masca to Tegucigalpita. To get there, take the road previously mentioned and follow it to the next river crossing, from there, follow the river. If you have any doubts, ask the locals, they are all familiar with this spot. The other hike is to a cave. Although I have not yet been there myself, I understand that the hike is about a half hour trip and that the cave is interesting. About 15 lodging facilities are located in Omoa, most of them also have restaurants –which is their main business-. The majority of Omoa's visitors are local people.

Puerto Cortés, Honduras

Founded as the Villa de Puerto Caballos in 1524, this port has become the most important port city in Central America. Through it, most of the goods that are imported or exported to the country are embarked. Located only 55 km from San Pedro Sula, it has become, together with this industrial city the most important economic growth area of the country. Today, Puerto Cortes is a bustling port, where you can see a lot of seafaring activity every day of the year. Puerto Cortes is connected to San Pedro Sula via a modern four lane highway that covers the entire route of 55 km between both cities. Travel time to Puerto Cortes is a short 45 minutes at the most if traveling by car and one hour if traveling by bus.

Puerto Cortes is however, a lot more that the leading port of Honduras. Around 20 medium-small lodging facilities -mostly used by port users and businessmen, are located in the area. Most of the tourist visitors arrived from Tegucigalpa and San Pedro Sula. Cortes is still a weekend destination for local people.   Following east along the shores of the Caribbean, you will arrive at the Garifuna communities of Travesia and Bajamar. These two are some of the most important Garifuna communities in the country, and reflect the interesting live culture of the these black people.

Heading west from Puerto Cortes, and following the coast towards the community of Cieneguita, you will pass the Coca Cola municipal beach. The name, which is obviously quite commercial, came to be as the local Coca Cola Depot is located very near to the beach. These are by far the most famous and popular beaches in the area, and are frequented by the locals as well as by people from afar during the weekends and holidays. During the week the beaches are quite quiet. You will find many different restaurants and bars along the beach where you can enjoy lunch or dinner.

Tela, Honduras

A sleepy coastal town, Tela has been slowly, but surely working its way to becoming an important beach destination. Located less than 90 km east of San Pedro Sula's International airport, and connected by an excellent paved highway, Tela is very easily reached from San Pedro Sula. If you are driving your own car, the driving time is under one hour from San Pedro Sula. If you are taking the public bus, make sure that you take one of the direct non stop buses to La Ceiba, and let the driver know you wish to get off at the entrance to Tela. From this point, you can easily catch a taxi to take you to the beaches, that have become Tela's main attraction.

Tela is located within the department of Atlantida, of which La Ceiba, located 100 km. east is the capital. Tela has become famous for its beaches, however, there is much more to Tela than beaches. The home base for the Tela Railroad Company for many years, owners and producers of the famed Chiquita bananas, Tela retains the air of a true banana town. About 30 hotels (medium and small) are located in the town. As other Honduras destinations, Tela is mostly visited by local people but also received tourist from USA, Canada and Europe. The Lancetilla Gardens is but one of the many assets left behind by the company that has since moved its quarters to La Lima, just outside of San Pedro Sula.

Tela offers the natural beauty of its beaches, its exuberant tropical vegetation in three distinct areas: Lancetilla Gardens, Punta Sal National Park and Punta Izopo Wildlife Refuge, as well as the cultural experience of the Garifuna Culture. Tela is well worth your time on your vacation in Honduras. Best of all, it is still unspoiled.

Izabal, Guatemala

The Department of Izabal is home to the beautiful Lake Izabal, the famous Rio Dulce and the Caribbean coasts in Guatemala. Pirates and Galleons fought for the supremacy of the Caribbean in this area during colonial times. Today the area is home to countless species of flora and fauna such as the Dolphin and Manatee, and to the amazing Garifuna people of African descent that inhabited the region 200 years ago.

Lake Izabal

On Guatemala's Caribbean coast, in the state of Izabal, visitors will see the country's largest lake, the old Spanish fortress of San Felipe or travel down a lovely jungle river bounded by lush tropical forest to a Garifuna village. Lake Izabal is Guatemala's largest kale, more than 45 kilometers long and covering about 590 square kilometers. It is surrounded by lush tropical rainforest inhabited by hundreds of bird species, monkeys and many other animals. Its waters are full of game fish, including tarpon. A few manatees also live in the lake with its tributaries.

The old Spanish fortress of San Felipe is found near the town of Frontera, where a bridge spans the the Rio Dulce. This small fortress was built in 1651-2 at the lake's mouth, to keep out marauding pirates. Later it served as a prison and was reconstructed as a historical monument in 1956. The Rio Dulce (sweet river) runs about 40 kilometers from Lake Izabal before it empties into Amatique Bay at Livingston. At its upper end there is the town of Frontera. Downstream, the river widens into an area known as Golfete, before flowing through a narrow, spectacular gorge and then on the bay. Boat tours begin in Frontera or in Livingston.

Livingston, a charming town located at the mouth of the Rio Dulce, is unique in Guatemala due to its Garifuna culture. Originally a mix between a native tribe, the Kalipuna's and slaves from Nigeria mixed in the 17th century and conserved their own language, music and religion. Livingston can only be accessed by boats traveling across the bay from Puerto Barrios or down the Rio Dulce from Frontera.

Puerto Barrios is a convenient base for tours in the region. Boats depart regularly from Barrios for Livingston and Belize. Puerto Barrios is also the capital of Izabal state and once was a busy place before the modern port of Santo Tomas de Castilla was built nearby. More than 40 hotels are located in the zone. (From international chain hotels to small bed & breakfasts). The site still being visited mostly by Guatemalans on weekends and holidays, but since the construction of the highway to Tikal is receiving more international visitors. Puerto Barrios, has a lot of businessmen and port users.

5.6 Ecotourism and Sustainable Tourism
5.6.1 Concept and Application

The concept of sustainable tourism is not a new idea.

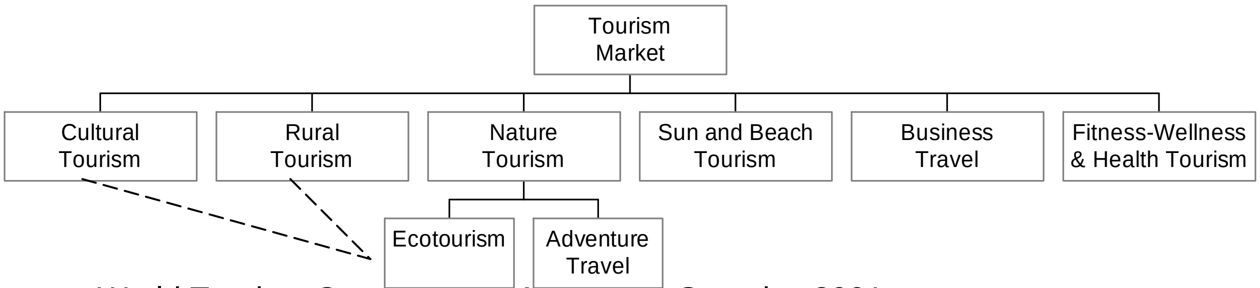
> "The principle of sustainable tourism was proposed as early as 1988 by the [WTO], with sustainable tourism 'envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems'" (WTO 2001).

Shortly after this report, during the Rio Earth Summit in 1992, sustainability moved to the foreground of development policies. Even though the WTO had already outlined plans promoting environmentally friendly and culturally sensitive tourism, including methodological approaches for implementation since the mid 1980s, this summit was fundamental in raising the awareness about sustainable practices in tourism at the level of government and among major groups (WTO, 2001).

The increasing level of awareness is apparent as nations around the world struggle with sustainable development policies, including those that involve tourism. From a survey of 50 nations reporting to the UN, several conclusions were drawn, including:

1. The need for a global environmental policy as a key to sustainable development of tourism.
2. A need to examine what the needs of the tourism sector are and the potential of the industry to contribute to sustainability.
3. An increase in awareness of sustainability among both the private and public sectors (WTO 2001).

Ecoturism as a Market Segment (Fig.1)



Source: World Tourism Organization Modified by Strasdas 2001

Tourism should have a positive impact and bring local economic development to benefit all members of society, especially the poor. Tourism development should consider poverty reduction criteria when making decisions regarding development and should also be included in the assessment of sustainability.

Tourism has the potential to grant, “cultural pride, a sense of ownership and control, reduced vulnerability through diversification and the development of skills and entrepreneurial capacity” (WTO 2002a). Tourism should be assessed objectively against other opportunities for pro-poor economic growth to ensure that tourism is the most suitable and advantageous activity in a particular community.

As a benefit of these components, ecotourism has proven to be one of the most effective means to support conservation because it provides alternatives for sustainable activities.

5.6.2 The Role of Eco and Sustainable Tourism as a Development Tool

IN PROGRESS

5.6.3 The importance of certification for eco and sustainable tourism services.

Eco and sustainable tourism around the world have boomed since the 1992 Rio Earth Summit. The boom has been especially pronounced in developing regions like Central America.Countries such as Costa Rica offer a rich level of biodiversity that continues to attract ecotourists. Costa Rica successfully markets itself as a premier ecotourism destination. The strategic vision of the Belize Tourism Board (http://www.belizetourism.org/policy.html, March 7, 2003) states that:

> Belize's vision is to develop the tourism sector as a national priority, with a primary focus on responsible tourism, aimed at marine activities, natural history, and adventure markets. Development and promotion of the industry will be carried out to encourage a strong "eco-ethic" to ensure environmental and socio-cultural sustainability, to promote equitable distribution of economic benefits, and to develop a strong, positive image for Belize.

Likewise, Guatemala has experienced success in ecotourism enriched by its cultural wealth and archeological attractions.

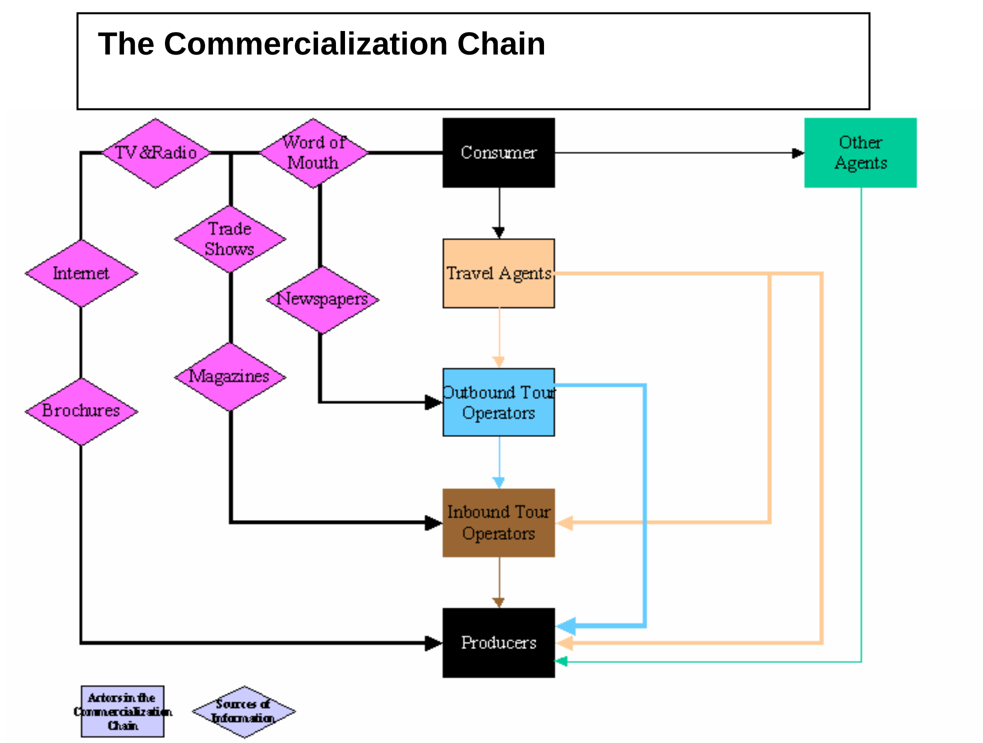
The rate of growth in tourism for Central America according to WTO estimates, was nearly 9% between 1999 and 2000, the highest in America. Despite the overall decrease in tourism in the year 2001, Central America was one of the few regions measuring positive growth. With an average increase of over 9% between1994 and 2001, Central America is the second fastest growing tourism destination in the world (WTO 2003) during this time period. Improperly managed, the increased visitation to sensitive areas, like those found in Central America, can be harmful to local environments, cultures, and economies. Tourism has proven to be a growth industry, not only geographically as tourists begin to venture to more and more remote areas, but also as the number of travelers increases.

"As a result of the rapid expansion of the tourism sector, traditional and emerging tourism destinations are facing increasing pressure on their natural, cultural and socio-economic environments"(Font and Buckley, 2001). A rising awareness of environmental issues by the environmentally committed, the travel trade markets, and general consumers, has also created an interest in tourism products that are environmentally sensitive or beneficial.

As a result, "some tourists are now demanding higher environmental standards from tourist services, as well as a greater commitment to local communities and economies" (Font and Buckley, 2001, P 7). This has led to the need for some means to distinguish mass tourism and unsustainable tourism from other forms of tourism that are more socially, cultural and environmentally sensitive. Certification programs provide a means to make that distinction as well as managing the negative impacts on the socio-economic and natural environments.

Certification strategies have been developed around the world. Certification within the tourism industry refers to a procedure that audits and gives written assurance that a facility, product, process, service, or management system meets specific standards that those wishing to become certified voluntarily adhere to. It awards a logo or seal to those that meet or exceed baseline criteria or standards that are prescribed by the program (Honey, 2002 , p 4). These standards are developed to establish a minimal level of environmental and socio-economic protection. Certified tourism operations, or those that commit to some level of environmental and cultural protection, can then be distinguished by consumers from those that do not. With the continued growth of tourism and increasing environmental commitment of consumers in general, a role for certification has emerged.

6. Commercialization Chain
6.1 Mapping of the Commercialization Chain



(Source: The Authors, 2003)

The commercialization chain of tourism products and services is complex and contains many levels and multiple channels. The chain outlines the interactions between the consumers and the local service providers. The many actors and sources of information involved in the commercialization chain create many paths between the producer and the final consumer. Rather than attempting to discuss the complete workings of the commercialization chain, it can be broken down into several components. Each of these components can be explained independently to better illustrate how all of them work together.

Essentially, the commercialization chain has two major components: actors, and sources of information. The actors are all the groups that play a role in the commercialization of tourism goods and services. These include the consumer, the local service provider, and any intermediaries between them. Some of these intermediaries include, travel agents, outbound and inbound tour operators. The position of each intermediary within the chain is relative to how many other actors are between the intermediary and the producer. That is to say, the addition of intermediaries between any given actor and the producer will make the chain longer, and will increase the relative position of the actor moving that actor farther from the producer.

For example, consumers always have the option of purchasing products directly from the producer. However, for reasons of convenience, economy, etc., the consumer may wish to purchase goods through an intermediary such as a travel agent. The addition of the travel agent increases the relative position of the consumer from the producer. In turn, the travel agent might purchase the goods from an outbound tour operator who can purchase the goods and services directly from the producers. Again, the addition of another intermediary will increase both the relative positions of the travel agents and the consumers who are now one more step removed from the producer.

Sources of information constitute another major component of the commercialization chain including all the means that producers and intermediaries use to promote and distribute information about products and services to other levels of the commercialization chain. These sources of information include: word of mouth, the Internet, brochures, advertisements in newspaper and magazines, etc. These sources of information help consumers and intermediaries choose which products and services they wish to purchase.

For example, a consumer planning a holiday might decide on purchasing tourism products and services based on something that was read in a newspaper, viewed on television, or researched on the Internet. A travel agent might learn about the offerings of tour operators at a trade show or exhibition, and likewise, a tour operator might learn about a particular hotel through some other form of media. The information based on these sources will affect the type of products and services carried or purchased at each level of the commercialization chain.

The information contained within these sources will also help to communicate the position within the market, promotions, etc., of the producers to consumers and intermediaries within the commercialization chain with similar tendencies. For example, producers that seek to attract a specific type of consumer such as adventure travelers or ecotourists, will be sure to include information relating to activities or practices that these types of consumers respond to. Likewise, tour operators specializing in these types of tours need to distinguish which producers are capable of providing products and services that fit within their market niche.

The concepts presented here follow from the model developed in the PROARCA/APM diagnosis. That diagnosis found that within the commercialization chain there are three routes through which tourism goods and services could be purchased:

1. Walk-in
2. Through domestic tour operators
3. Through foreign tour operators (PROARCA/APM, 3-36)

Along with identifying these routes of commercialization, the PROARCA/APM diagnosis also noted that there were advantages and disadvantages associated with each of these routes. The main advantage of walk-in consumers is that there are no leakages since purchases of products and services are made directly from the producer making them the most profitable route for tourism products. When tourism products and services are purchased through a domestic tour operator there is a leakage of 25-35%, as the producer must pay a commission to the tour operator, and payments can take up to 15 days to clear. This disadvantage can be balanced through the increase in the volume of sales. Other advantages cited are that payments are made directly to the producer, and that there is often direct and frequent contact between the tour operator and the producers. As for foreign tour operators, they often manage products from different parts of the world and thus offer the possibilities of very significant volumes. Language and cultural differences are concerns with dealing with foreign tour operators, as is the increase in operational costs due to international communications. (PROARCA/APM 3-36,3-37)

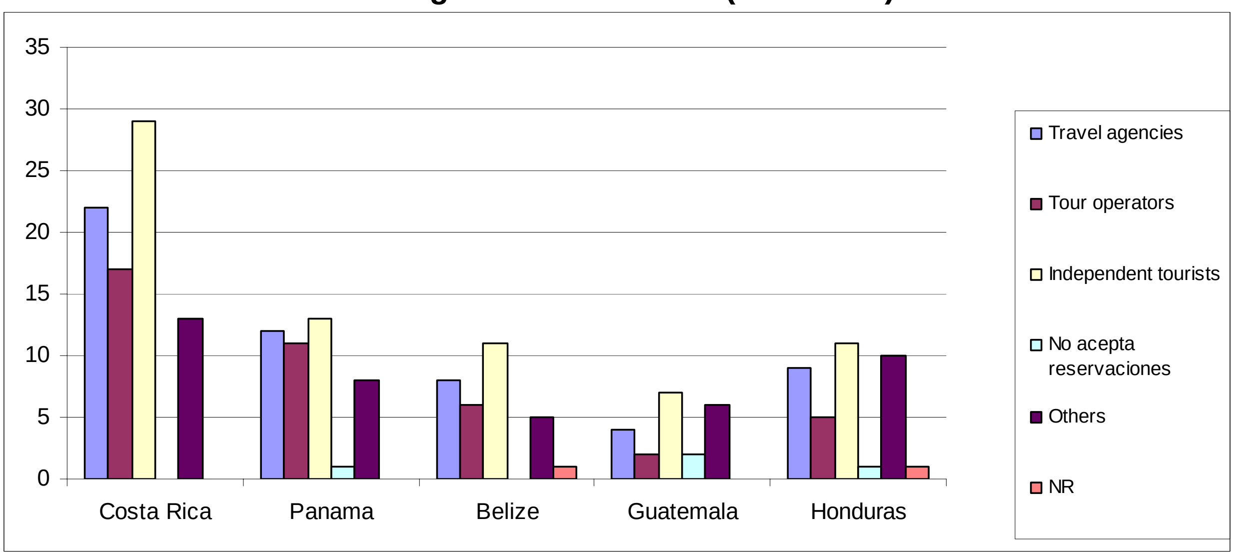
7. Results and Analysis
7.1 Hoteliers

Table 1
Percentage of reservations

	Travel agencies	Tour operators	Independent tourists	Others
Costa Rica	27,2	17,8	59,1	13,2
Panama	25,6	36,7	74,2	35,0
Amistad-Cahuita-Río Cañas	**26,4**	**24,1**	**61,8**	**19,0**
Belize	19,2	26,3	52,2	53,3
Guatemala	17,3	15,1	56,9	26,9
Honduras	16,8	10,4	54,0	18,9
Gulf of Honduras	**17,5**	**15,4**	**53,2**	**27,3**

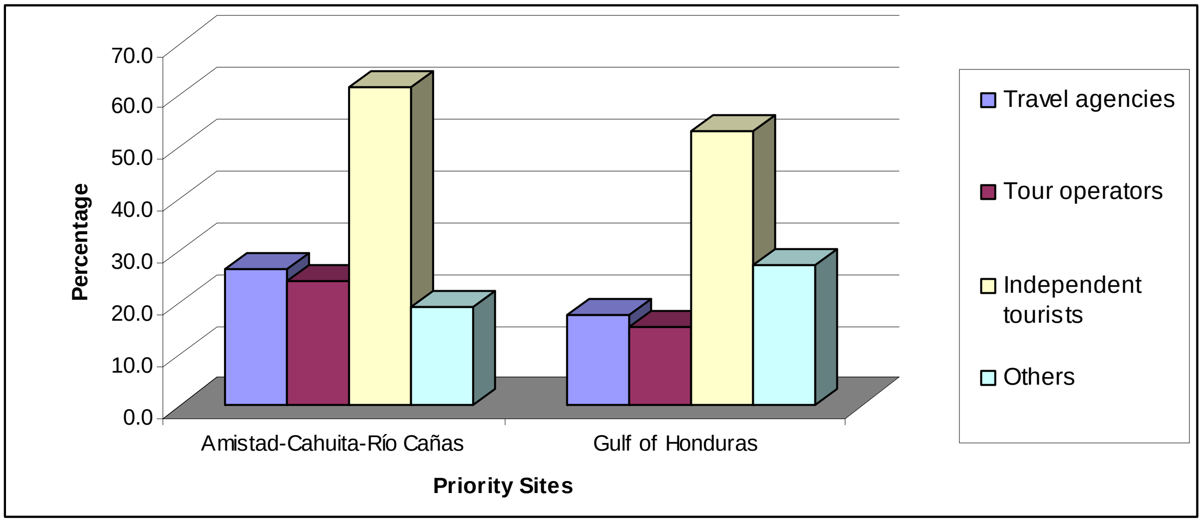
Source: Market Study, 2003.

Graphic 1.a
Percentage of Reservations (Countries)



Source: Market Study, 2003.

Graphic 1.b
Percentage of Reservations (priority sites)



Source: Market Study, 2003.

Accommodation providers can accept reservations from travel agencies, tour operators, independent tourists and others (Internet, NGOs, academic institutions, etc.)

The graphic 1.a shows the percentage of reservations that are made through the different groups. The results correspond to the countries of each priority site.

The greatest part of reservations in all target countries is made through independent tourists. The average percentages represented 59.1% in Costa Rica, 74.2% in Panama, 52.2% in Belize, 56.9% in Guatemala, and 54% in Honduras. It is important to notice that in table 1, the average percentage of reservations made through independent tourists is higher than the average of reservations of travel agencies and tour operators together.

In conclusion, as it is illustrated in the graphic 1.b, where the results of priority sites are shown, in Amistad -Cahuita-Rio Cañas, 61.8% of reservations are made through independent tourists and 53.2% in Gulf of Honduras.

Tour operators, Travel Agents and other Organizations used by Hoteliers from the Target Sites

<table>
<tr><th>Country</th><th>Tour Operators</th><th>Travel Agents</th><th>Other Organizations</th></tr>
<tr><td>Costa Rica</td><td>▪ 2 Rios Rafting
▪ CAP
▪ Costa Rica Expeditions
▪ Cultourica
▪ Ecodestination
▪ Ecotech
▪ Explonatura
▪ Internacional Individual
▪ Panorama Tours
▪ Puerto Viejo Tours Rios Tropicales
▪ Schulze
▪ Senderos de Costa Rica
▪ Shawade
▪ Tierra Verde
▪ TUI
▪ Vida Yoga Vacations
▪ Destinos T.V.com</td><td>▪ Arno Tours
▪ Ara Tours
▪ ASV Olimipya
▪ Barcelo Viajes
▪ Camino Travel
▪ Costa Rica Adventures
▪ Costa Rica Travel
▪ Destinos
▪ Explonatura
▪ Explorer Costa Rica
▪ Flor de Liz
▪ Grayline Tours
▪ Horizontes
▪ Intervac
▪ Latti Express
▪ Learning Trip
▪ Mitour S.A
▪ Nature Escape
▪ Pactus Tours
▪ Rainforest Tours
▪ Savith Tour
▪ Swiss Travel
▪ TAM
▪ Tierra Verde
▪ Top Tour
▪ Turismo Colon
▪ Valle Dorado
▪ Vessa Tours
▪ Viajes 2000
▪ Viajes sin Fronteras</td><td>▪ Camara Costarricense de Turismo
▪ Independent Agents
▪ Professional Associations
▪ CATIE
▪ Employee Cooperatives
▪ EARTH
▪ Schools/universities
▪ Tourist Guides
▪ Churches
▪ OET
▪ Ecologic Organizations</td></tr>
<tr><td>Panama</td><td>▪ Bocas Trip
▪ Chadwick
▪ Expediciones Tropicales
▪ Grayline
▪ Holbrook Travel
▪ Pazants Tours
▪ Ecocircuito Futura Travel</td><td>▪ Ancor Expeditions
▪ Explore Costa Rica
▪ Gamboa Tours
▪ TUUR
▪ UNA
▪ Viajes Florencia</td><td>▪ Universities
▪ Instituto Panameño de Turismo (IPAT)</td></tr>
</table>

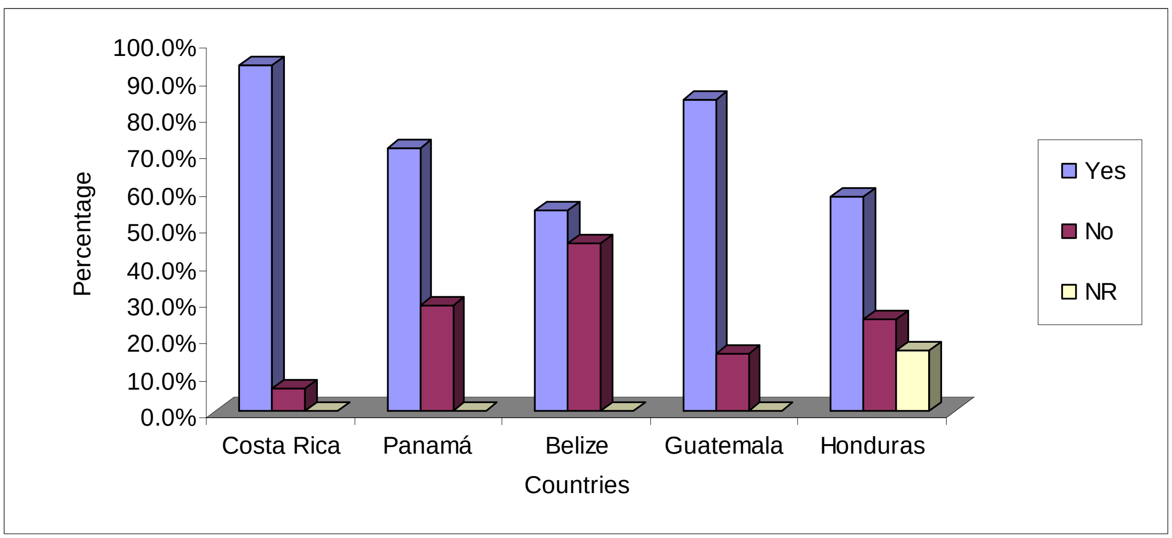
Belize	▪ Tours Aventura ▪ Trade Tours	▪ Local of Placencia ▪ TIDE Tours	▪ ONGs ▪ Belize Tourism Board ▪ Belize Tourism Industry ▪ Tourism Association ▪ Toledo Ecotourism Association ▪ PACT ▪ Resort Condominium International
Guatemala	▪ Kim¨arrin ▪ Orvitour ▪ Tucan Travel ▪ Nuevas Fronteras ▪ Clark Tours	▪ Espace Travel ▪ Sin Fronteras ▪ Guatours ▪ INTECAP	▪ Comité Local de Turismo Rio Dulce ▪ Comité Local de Turismo CAMTUR ▪ Centro de Información Maya Paradise ▪ INGUAT ▪ ITECAP ▪ FUNDARY ▪ Fundación Defensores de la Naturaleza ▪ Comité Local de Turismo
Honduras	▪ MAC Tours ▪ Turtle Tours ▪ Mesoamerica Mayan Caribbean ▪ Cano Gran Tour ▪ Columbia Tour ▪ Maya Tropitours ▪ Honduras Travel Inn ▪ Hade Tours ▪ Explore Honduras	▪ Ocean Travel ▪ Best Western ▪ Turavia ▪ Trasmundo ▪ ISEL	▪ Cámara de Turismo de TELA ▪ Boureau de Convenciones y Visitantes ▪ Cámara de Comercio e Industria ▪ Grupo Taca ▪ Fundación Mundo Maya ▪ Honduras Trips ▪ Revista Hondureña Tips ▪ ONGs ▪ Instituto Hondureño de Turismo

Table 2
Need for Technical Support
(Priority Sites/Countries)

	Yes	No	NR
Costa Rica	93,5%	6,5%	0,0%
Panama	71,4%	28,6%	0,0%
Amistad-Cahuita-Río Cañas	**86,7%**	**13,3%**	**0,0%**
Belize	54,5%	45,5%	0,0%
Guatemala	84,2%	15,8%	0,0%
Honduras	58,3%	25,0%	16,7%
Gulf of Honduras	**69,0%**	**26,2%**	**4,8%**

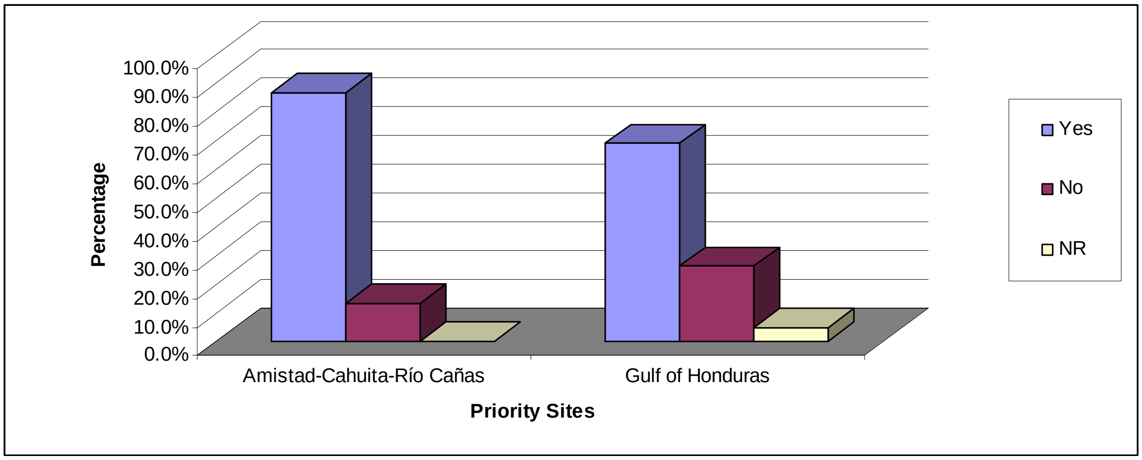
Source: Market Study, 2003.

Graphic 2.a
Need For Technical Support
(Countries)



Source: Market Study, 2003.

Graphic 2.b
Need For Technical Support
(Priority Sites)



Source: Market Study, 2003.

For the development and implementation of activities related to eco and sustainable tourism, most accommodation providers expressed their need for technical support in communications, waste management, energy efficiency, water conservation, wastewater and effluent, development of local initiatives, contribution to conservation and environmental education for employees.

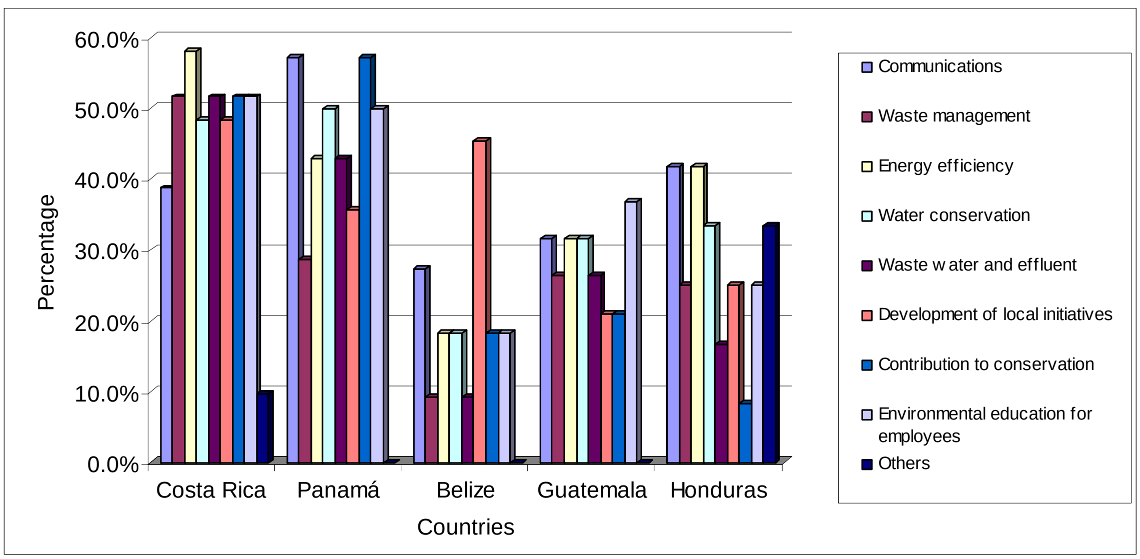
Results obtained for Costa Rica show that 93.5% considered it important, and in Panamá a 71.4%, representing a total of 86.7% in Amistad-Cahuita-Rio Cañas. The remaining 13.3% in this region was not interested in receiving technical assistance in any of the areas mentioned. Belize, Guatemala and Honduras were also interested in receiving technical support in different areas (54.5%, 84.2%, 58.3% respectively), yielding a total of 69% for the Gulf of Honduras. In this region a 26.2% was not interested in technical assistance. A 4.8% did not respond to the question.

Table 3
Areas of Technical Assistance

	Communications	Waste management	Energy efficiency	Water conservation	Waste water and effluent	Development of local initiatives	Contribution to conservation	Environmental education for employees	Others
Costa Rica	38.7%	51.6%	58.1%	48.4%	51.6%	48.4%	51.6%	51.6%	9.7%
Panamá	57.1%	28.6%	42.9%	50.0%	42.9%	35.7%	57.1%	50.0%	0.0%
Amistad-Cahuita-Río Cañas	**44.4%**	**44.4%**	**53.3%**	**48.9%**	**48.9%**	**44.4%**	**53.3%**	**51.1%**	**6.7%**
Belize	27.3%	9.1%	18.2%	18.2%	9.1%	45.5%	18.2%	18.2%	0.0%
Guatemala	31.6%	26.3%	31.6%	31.6%	26.3%	21.1%	21.1%	36.8%	0.0%
Honduras	41.7%	25.0%	41.7%	33.3%	16.7%	25.0%	8.3%	25.0%	33.3%
Gulf of Honduras	**33.3%**	**21.4%**	**31.0%**	**28.6%**	**19.0%**	**28.6%**	**16.7%**	**28.6%**	**9.5%**

Source: Market Study, 2003.

Graphic 3.a
Areas of Technical Assistance
(Countries)



There is a general interest in the countries studied for receiving technical assistance in all the areas proposed in the questionnaire. Energy efficiency represented a 58.1% for Costa Rica, being the most important among the options presented, followed by waste management, waste water and effluent, contribution to conservation and environmental education for employees. (51.6% each one). Panama showed its highest percentage for interest in communications and contribution to conservation with a 57.1% each, followed by water conservation and environmental education for employees with a 50% each.

Belize considered the development of local initiatives as the most important aspect representing a 45.5% followed by 27.3% in communications.
Environmental education for employees was the area in which Guatemalans believed they need more technical support (36.8%). Communications, energy efficiency, and water conservation are also important (31.6%). Lastly, Honduras ranked communications and energy efficiency as their priority with a 41.7%, however, water conservation and others, were mentioned as important.

Benefits of Potential Tourism Certification

It was important to learn about the hotelier's perception on the benefits of certification. By examining some of the answers given by entrepreneurs in the four priority sites, it can be noted that some of them do not have a clear understanding of the concept of certification and its potential as a marketing tool. Some of them expressed to be confused about the term "certification"; it was necessary to give them a brief clarification before they could give an answer. Some of them did not have any knowledge about certification until after the interviewers gave a more detailed explanation. Certification was a relatively new concept among the accommodation providers surveyed.

Within the more mentioned benefits that accommodation providers in Costa Rica believe a certification can offer, include the awareness, contact with nature without contaminating the environment, a better image, added value and promotion for the hotel, increase in tourists with greater demand for certified operations and a prove of quality guarantee. Other less mentioned benefits include that certification can facilitate the decision making of tourists, improves current environmental impact, and that it is good for safety. Some people could not give an answer to this question, and some hoteliers believe certification is an unnecessary cost for them to incur.

For Panamanians, the fact that clients would be more relax in a place where a better service is given was an important perceived benefit. They also expressed the increase in the hotel's occupancy and the protection to the environment as benefits of certification. Less mentioned benefits were the hotel's prestige, easy to sell, and more tourism development. People with no interest in certification expressed that their clients want to pay less for accommodation, implying that obtaining a certification is expensive.

They also mentioned that certification would not be possible until basic service standards are implemented in the region.

Half of the interviewed accommodation providers in Belize did not respond to this question. The other fifty percent of the people communicated that there were benefits for a potential certification, without providing an explanation or a reason why.

In Guatemala, the increase of clients, energy savings and the contribution to conservation were the three benefits that people mentioned the most. Less cited benefits were: more profit, safety, product differentiation, competitiveness and added value. Some people did not respond to the question. The following benefits were mentioned by accommodation providers in Honduras: more economic benefits, less contamination, energy and water savings, client satisfaction, hotel image, materialization of the intangible service, and development of the human resource.

Among other reasons entrepreneurs are not interested in certification are the following:

- Long and costly process
- Very small operations to involve them in certification processes
- The CST is very technical and expensive for small enterprises. There are simple solutions less costly.
- Standards set by CST are not considering existing reality and there is no objectivity or impartiality in the evaluation of standards.
- Lack of knowledge of ICT/CST programs

Packages for Nationals and Foreign.

Most accommodation providers do not use special tourism packages as part of their promotion strategies. However, they are starting to give some preferentiality to national tourists by offering special rates and packages to nationals. This happens especially in the low season, when less international travelers visit the region and entrepreneurs can balance their occupancy rate.

Most accommodation providers in **Costa Rica** do not offer special rates for nationals nor foreign. Few of them offer:

- Special prices for students and seniors (15-25% discount).

- Families with children under 15 (50% discount).
- Special packages with meals included.
- Low season discounts.
- Two-day stay or more, (15% discount).

In **Panama**, the majority of accommodation providers do not differentiate their packages for nationals and foreign. However, few of them have some special rates for national tourists. The types of packages were not mentioned.

Very few accommodation providers in **Belize** offer special packages. These include:

- Specials for nationals including breakfast.
- Discounts for groups.
- Discount for nationals (20% discount).

None of the hoteliers in **Guatemala** mentioned to offer special rates for tourists.

The majority of hoteliers in **Honduras** do not have any specials for their clients. Few of them mention to have:

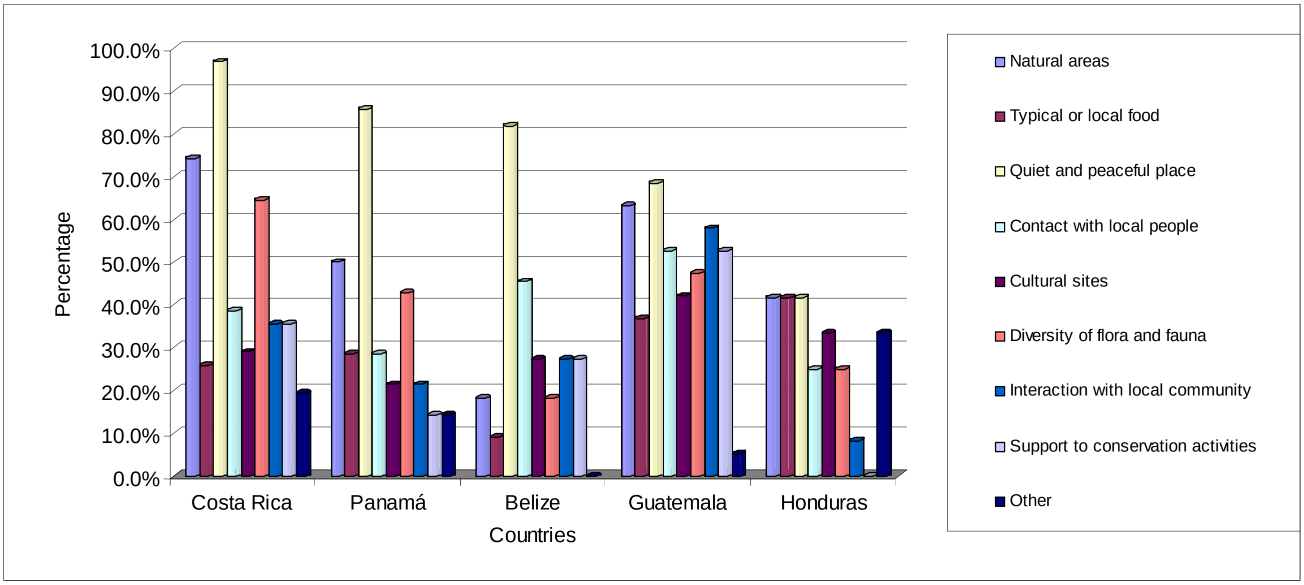
- Special discounts that apply to individuals and groups of national tourists.

Table 4
Approach on promotional efforts

	Natural areas	Typical or local food	Quiet and peaceful place	Contact with local people	Cultural sites	Diversity of flora and fauna	Interaction with local community	Support to conservation activities	Other
Costa Rica	74.2%	25.8%	96.8%	38.7%	29.0%	64.5%	35.5%	35.5%	19.4%
Panamá	50.0%	28.6%	85.7%	28.6%	21.4%	42.9%	21.4%	14.3%	14.3%
Amistad-Cahuita-Río Cañas	**66.7%**	**26.7%**	**93.3%**	**35.6%**	**26.7%**	**57.8%**	**31.1%**	**28.9%**	**17.8%**
Belize	18.2%	9.1%	81.8%	45.5%	27.3%	18.2%	27.3%	27.3%	0.0%
Guatemala	63.2%	36.8%	68.4%	52.6%	42.1%	47.4%	57.9%	52.6%	5.3%
Honduras	41.7%	41.7%	41.7%	25.0%	33.3%	25.0%	8.3%	0.0%	33.3%
Gulf of Honduras	**45.2%**	**31.0%**	**64.3%**	**42.9%**	**35.7%**	**33.3%**	**35.7%**	**31.0%**	**11.9%**

SOURCE: MARKET STUDY, 2003.

Graphic 4
Promotional Efforts



Source: Market Study, 2003

Most hotels surveyed in all the target sites are promoting their operations as quiet and peaceful places in the region. Amistad-Cahuita Rio Cañas accounts for a 93.3%. Specifically, Costa Rica represents a 96.8% and Panama an 85.7%. In the Gulf of Honduras, 64.3% of accommodation providers emphasize the same characteristics in their promotional efforts. An 81.8% corresponds to Belize, 68.4% to Guatemala and 41.7% Honduras.

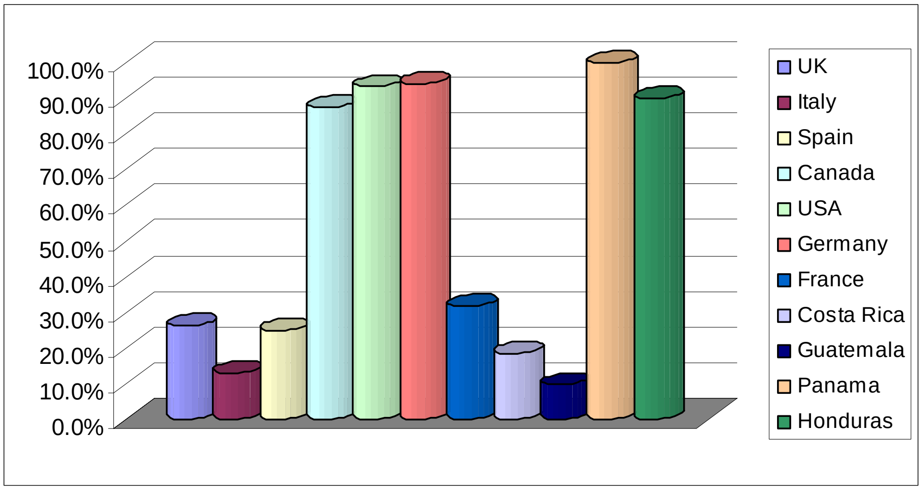
In Amistad Cahuita-Rio Cañas, 66.7% of the hoteliers promote their operations as places located in natural areas. Costa Rica represents a 74.2% and Panama a 50%. Different opinions were gathered in the three countries of the Gulf of Honduras. Forty five percent of hoteliers in Belize promote their hotel as a place in which tourists can have contact with local people, in Guatemala a 63.2% is emphasizing natural areas. On the other hand, Honduras employs its local food and natural areas as promotional tools to market the place. (41.7% each one).

Workshops/Trade fairs/Other activities in which hoteliers have participated.

Costa Rica	▪ Bandera Azul ▪ Tourism Chambers ▪ Congreso Nacional de Ecoturismo ▪ Expotour ▪ Expohotel ▪ Expohore ▪ Ferias Internacionales (Mx,USA,Alemania, Inglaterra) ▪ FERTUR ▪ FITUR ▪ Futuropa ▪ IATOS ▪ ICT ▪ INA ▪ INCAE ▪ London Trade Mark ▪ Workshops
Panama	▪ Local seminars and workshops ▪ Feria David ▪ Conferences ▪ Feria del Mar
Belize	▪ BTEX ▪ BTIA ▪ BTB ▪ AARP Convention (San Diego)
Guatemala	▪ Local workshops ▪ Local tourism committee ▪ Training for employees
Honduras	▪ International fairs ▪ Expo Honduras-Mexico ▪ Ruta del Maíz ▪ FITUR ▪ Travel Mart Latin America ▪ Feria Juniana

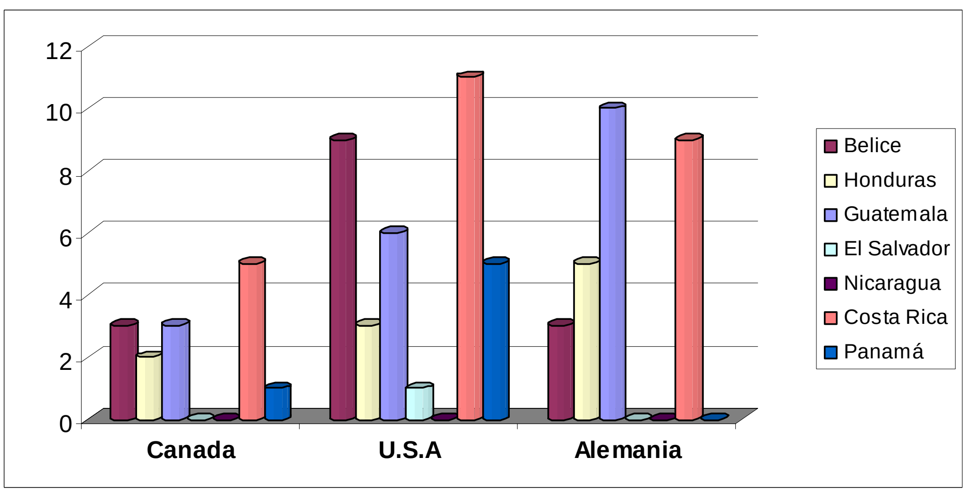
7.2 Tour Operators

Tour operators with destination in Central America



Source: Market Study. 2003

Main Tour Operators and their destinations in Central America



Source: Market Study. 2003

The results show that the main tour operators prefer Costa Rica, Guatemala and Belize as travel destinations in their packages.

Canadian, German and U.S Tour Operators with operations in Central America

Canada	▪ Great Canadian Travel Company ▪ Fresf Tracks Canada ▪ Country Walkers ▪ Worldwide Ecolodges ▪ Hibiscus Tours International Ltd. ▪ Best Way Tours & Safaris ▪ The Adventure Travel Company ▪ Active Journeys Inc.
Germany	▪ Albatros-Tours ▪ Aventoura-Reisen & Begegnung ▪ Baumeler Wanderreisen ▪ Chamaleon Reisen ▪ Delphin-Seereisen ▪ Hauser-exkursionen international GmbH ▪ Hinundweg (FTI) ▪ Ikarus-tours ▪ Intercontact Gesellshaft fur Studien-und Begegnungsreisen mbH ▪ Meier´s Weltreisen ▪ Miller-Reisen GmbH ▪ Natours Reisesn ▪ PalmiSol Reisen ▪ Santana Travel ▪ Studiosus Reisen MunchenGmbH ▪ Thomas-Cook Reisesn ▪ Tourismus-Schiegg
U.S	▪ Costa Rica Horizons ▪ Quiksilver Travel ▪ Tour Tech International ▪ Wildland Adventures ▪ Go Nomad ▪ Adventure Life ▪ Iguana Tours USA ▪ Travel Exchange ▪ Maya Tour ▪ Far Horizons ▪ Austin Lehman Adventures ▪ Slickrock Adventures ▪ Holbrook Travel ▪ Great Trips ▪ Nature Tours

Tour operators from Canada, U.S, and Germany are the ones who include more Central America in their travel packages. However, some of the sites of interest for this study are not included. The target places within Honduras and Belize were found to be included in tour operators´ packages. As previously mentioned, a more in depth investigation is recommended to discover reasons why tour operators are not interested in promoting specific places within the target sites.

The supply in these places is composed of many small and medium enterprises and tour operators generally look for sales volume through business with larger hotels. In addition, some of the places of interest for this study are not considered a priority in the governments´ tourism promotional strategies.

Other factors that could make tour operators select other places for their travel arrangements include the following:

- Poor infrastructures including bad roads, lack of road signs, waste management and safety issues
- All-included packages offered in larger hotels located in more crowded areas.
- Some of these other vocational areas offer a bigger variety of beaches and are close to other attractions and touristic places.

Partnerships can be created with local tour operators to provide them with information, training and capacity, negotiation strategies, etc., so they can better promote the target areas among outbound tour operators.

- Hotels located in the target areas need more promotion to try to compete with the traditional areas advertised by tour operators.
- Sales volume is vital for tour operators, who generally look for large hotels. The majority of the tourism operations located in the target regions are small and medium enterprises with a small physical capacity.
- Most accommodation providers do not know the difference between a travel agency and a tour operator. They are more familiar with travel agencies, and do not know how a tour operator do business. This could be keeping hoteliers from doing business with both travel agencies and tour operators.

Areas promoted within Central America by Examined Tour Operators

PANAMÁ	
Anton Valley	Los Pueblos
Baru Volcano	Los Quetzales
Bastimentos National Park	Mesoamerican Biological Trial
Bocas del Toro	Panama Canal
Cerro La Vieja	Panama City
Chiriquí Cloud Forest	Portobelo's Isla Grande
Chocoe Indian Community	Punta Patiño Natural Reserve
Colon Free Zone	San Blas Islands
Contadora Island	Santa Catalina
Dolphin Island	Sierra Blanca
Embera Village of Mogue	Soberanía National Park
La Amistad International Biosphere Reserve	Taboga Island
GUATEMALA	
Aguateca	Petexbatun Lagoon
Antigua	Quetzaltenango
Chichicastenango	Ruta Maya
Coban Market	Saint Maximon
Dos Pilas	Tikal
Flores	Totonicapan
Guatemala City	Xelaju
Lake Atitlán	Bonampak
Pacaya	Yaxchilan
Panajachal	Solola
	Flores
	Livingston
	Rio Dulce
	Puerto Barrios
	Quirigua
Petén	Monterrico Beach
NICARAGUA	
Chocolero National Reserve	Matagalpa
Granada	Mombacho Volcano Natural Reserve
Managua	Montelimar
Masaya Volcano National Park	
HONDURAS	
Cayos Cochinos	
Copan	Punta Izopo National Park
Cortés	Punta Sal National Park
Guanaja	
La Ceiba	Roatán
	San Pedro Sula
Los Micos Lagoon	Tegucigalpa

Source: Market Study. 2003

Corcovado	Punta Islita
Drake Bay	Punta Leona
Flamingo Beach	Quepos
Gandoca	Rainforest Aerial Tram
Grecia	Reventazón River
Guanacaste	Rincón de la Vieja
Hermosa Beach	San Carlos
Herradura Beach	San José City
Irazú Volcano	Sarapiquí River
Isla del Caño	Sarchí
Isla del Coco	Savegre
Jacó Beach	Selva Verde Private Reserve
La Catedral	Simón Bolivar Zoo
La Fortuna	South Pacific Coast
La Paz Waterfall	Tabacón
Langosta Beach	Tamarindo Beach
Lankaster Gardens	Tambor Beach
Lapa Ríos	Tortugero
Liberia	Turrialba
Mal País Beach	Turtle Island
Manuel Antonio National Park	White Water Rafting
Mid Pacific Coast	
BELIZE	
Ambergris Caye	Jungle Rainforests
Belize Barrier reef from Placencia Crooked Tree	Macal river
Belize City	Mayan ruins
Belize Zoo	Mayflower Waterfall
Blue Hole	Mountain Pine Ridge
Caribbean Beach and Reef	Orange Walk
Cayo	San Pedro
Chumpiate Pottery Cave	St. Herman's Cave
Clarissa Falls & Cahal Pech	Stann Creek Toledo
Cockscomb Basin Wildlife Sanctuary (Jaguar Reserve)	Turneffe Islands
Coral reef in the Western Hemisphere	Wildlife Santuary
Corozal	Xunantunich
Glover´s Reef	
Hamanasi reef	

Source: Market Study. 2003.

Trips offered by International Tour Operators in Central America:
(* Top 5)

UK
Challenge
Family
Heritage
Nature

ALEMANIA *
Adventure
Beach
Cruises
Cultural
Deluxe
Ecotourism
Hiking
Language
Ornitology
Sports
Study
Trecking

SPAIN
Culture
Diving
Expeditions
Multiadventure
Nature
Trekkings
Weekends

CANADA *
Adventure
Biking
Ecological
Family
Hiking
Kayak
Multiadventures
Natural Adventure
Rainforest Adventures

USA *	
Adventure Sport	Horseback riding
Archaeological and Cultural	Jungle Adventure
Beach	Kayak
Biking	Paddle
Bird watching	Rainforest Canopy Tour
Caving	Sailing
Eco tours	Scuba Diving
Expeditions	Shopping
Family	Snorkeling
Fishing	Volcano Tours
Hiking	Whitewater rafting
Honey Moon	

FRANCE
Beach
Cruise
Expeditons
Family
Nature
Safari
Volcanoes

BELIZE
Adventure
Beach
Canoeing
Cruises
Culture
Islands
Scuba Diving
Snorkeling

HONDURAS *
Adventure
Archeology
Beach
Business
Canopy
Culture
Eco Adventures
Ecological
Educational
Expedition
Hiking
National Parks
Nature
Rafting
Reef
Scuba diving
Spiritual

PANAMA *
Adventure
Beach
Bird watching
Boat Expeditions
Canopy
Canoying
Cave exploration
City
Diving
Eco - adventure
Ecotourism
Fishing
Hiking
Honey Moon
Land
Mountain biking
Nature
River rafting
River tubbing
Scuba diving
Shopping
Trekking

ITALY
Adventure
Archeology
Beach
Culture
Diving Ecotours
Ecotourism
Family
Fauna
Nature
Sports

GUATEMALA
Archeology
Beach
Bird watching
Culture
Ecotourism
Extreme
Helicopter
Nature
Private
Rafting
Shopping
Volcano

COSTA RICA
Adventure
Beach
Canopy
City
Cruises
Family
Fishing
Flexi Drive
Golfing
Honey Moon
Kayaking
Mountain
Nature
One day
Rafting

7.3 Tourism Industry Entrepreneurs

Personal interviews were conducted with six Costa Rican tourism professionals that manage inbound tour operators, hotels, and other organizations within the tourism industry:

- Michael Kaye – Costa Rican Expeditions
- Amos Bien – Rara Avis
- Tamara Budowski – Horizontes
- Glen Jompol – Finca Casa Blanca
- Aurora Gamez – Almendros y Corales
- Ana Gabriela Alfaro – Chamber of Hotels

The purpose was to gather insights and opinions of ecotourism trends, possible advantages of certification, and the role of NGOs in increasing sustainable tourism awareness.

Those selected for an interview were first asked if there is a growing trend in tourism towards more environmentally friendly products and services. Of those interviewed, only one could say with confidence that there is a growing trend towards environmentally friendly products and services as consumers are looking for healthier environments. However, most identified a growing trend in environmental awareness. This is evident in both the industry and among travelers, especially among the more educated and affluent. One of the pitfalls in identifying trends in green products and services, as mentioned by those interviewed, included the falsification of information.

Tourism professionals gave their recommendations to NGOs such as the Rainforest Alliance on how to increase awareness of sustainable tourism through alliances with the private sector. The general feeling was that NGOs can play a role but differed in their opinion of what that role would be. Two of the interviewees considered that accessing the press through mainstream or specialized media would be the most effective means for NGOs to increase awareness. Guidebooks were singled out in one interview as the most accessible forms of media for NGOs. One of those interviewed suggested several opportunities for NGOs to become involved. This included pressuring various levels of government to provide more financial support for those interested in adopting costly, environmentally friendly practices. Another recommendation was for NGOs to work within the existing industry structures to better reach players within the market. It was also suggested that NGOs could provide education and technical support. Additionally NGOs can support the CST with ideas and increasing recognition of existing certification strategies. Negative comments addressed concerns that NGOs can be bureaucratic and inefficient and sometimes create false expectations within the community. They are also unable to influence the actions of consumers.

When asked about the advantages of certification and how these advantages could be better marketed, a variety of answers were received. One professional identified that certification could provide a set of guidelines or rules for sustainable practices, cost savings in water, energy, and other resources, as but lacked market advantages. Another felt as though there were marketing advantages and that pointing out these benefits to interested parties would be one means to raise participation. One mentioned that there was a future for certification, but there is a need to first raise awareness among consumers and members of the industry. Others were less supportive of certification believing that there were no benefits or that certification strategies were corrupt and confusing.

Tourism professionals seemed to have differing opinions about where efforts should be focused or what opportunities were available to create linkages within the tourism industry. Answers to this question varied. Some were not able to provide any insight on this issue. Others felt that any effort to raise awareness of certification among consumers and the industry in general would be beneficial. Guidebooks, the Internet, and other forms of mass media were mentioned as possible focal points. Other means of raising awareness mentioned included partnering with other NGOs, both international and domestic as well as targeting specialized tourism operations. One professional mentioned that efforts should be focused wherever there are multiple effects or a greater impact.

When asked to name some of the top ecotourism destinations in Costa Rica, the results were:

- Monteverde
- Tortuguero
- South Caribean
- South Pacific
- Arenal
- Manuel Antonio
- Sarapiqui
- Osa Peninsula

Some recommendations suggested from the results of the interviews:

- Consumer behavior research should be considered to discover the importance given to environmental friendliness in choosing tourism products and services, in other words, their buying decision process.
- NGOs should engage mainstream and specialized media to further increase environmental awareness in tourism.
- NGOs should try to compel governmental agencies to provide financial assistance to those making an effort towards sustainability.
- In order to avoid false expectations within the community, NGOs should specifically outline the outcomes of training programs.
- Focus should be given to marketing benefits and certification cost savings potential.
- Professional organizations that support sustainability provide direct access to a large portion of the travel market and should be involved in efforts to increase awareness within the industry.
- Focusing efforts on previously mentioned top ecotourism destinations could prove effective for certification.

8. Conclusions

When possible, a generalization of the study results by target site was done. Results from the PROARCA/APM Diagnosis revealed that both sites present similar characteristics such as a diversity of resources and natural attractions, efficient communication means, hotels implementing best management practices and interest for joint marketing programs among others. These characteristics make these two sites as potential regions for the development of eco and sustainable tourism. However, it is important to consider that the target areas in the five countries studied present different features in terms of infrastructure and economic development. Additionally, the hotels in each of the areas have unique characteristics; they vary on infrastructure, pricing, positioning in the market place, etc.

1. The study results show that local tourists, who are the ones traveling more to the target sites, make their own travel reservations. The means through which most local tourists are booking reservations include the Internet, walk-ins, and reservations by phone.

The following assumptions may contribute to the lack of use of travel agents and tour operators by local tourists:

- Travel agencies charge a service commission to the final consumer between $10 and $25. The consumer prefers to book reservations themselves and avoid this fee.
- Taking into consideration that most tourists traveling to the target sites are local, they can easily access information on their own country to make their travel arrangements.
- Tourists feel in control when deciding and organizing a trip by them.
- Service providers such as hotels, cruises, lodges, and airlines are making advertising efforts tailored to the final consumer to avoid commission to intermediaries.
- The lack of dissemination of information on the two priority sites can be producing a very low or no impact in outbound tour operators. This issue can lead tourists to search travel information through other means and make reservations personally.
- The fact that travel agents could offer tourists an expensive travel package to increase their commission, make travelers work independently.

2. The foreign market, especially from the U.S, Canada and Germany do use travel agents and tour operators when booking a reservation. Foreign tourists rely more on travel agents and tour operators who can provide travelers with all essential information and good tour options on the desired destinations.

3. Accommodation providers in the target areas are in great need for technical assistance in the following areas: communications, waste management, energy efficiency, water conservation, waste water and effluent, development of local initiatives, contribution to conservation, and environmental education for employees.

4. Even though financial assistance was not presented to hoteliers in the questionnaire as one of the areas for technical assistance, conversations with them revealed their need for it. They mentioned the importance of a better orientation on business development tools.

5. Most entrepreneurs are not differentiating their rates between locals and foreign tourist as a promotional strategy. However, some of them apply lower rates for locals. This could justify the fact that most tourists are local.

6. In general, interviewees do not have a clear understanding of the certification concept nor its potential benefits as a marketing tool. Some answers reflected knowledge on certification, however they were from entrepreneurs that are already implementing responsible practices.

7. The tour operators from Canada, Germany and the U.S were found to be the ones offering more travel packages to Central America. However, the areas of interest are not their main destinations.

8. Most entrepreneurs have attended different local and international fairs.

8.1 Market Opportunities for Eco and Sustainable Tourism Products and Services.

As it was previously mentioned in the study, there is an increase in awareness of sustainability among both private and public sectors (WTO 2001), with a tendency in ecotourists to travel to uncrowded areas, and wanting to learn more about the natural environment. This rising in awareness of environmental issues has also created an interest in green tourism products and services. The hotels analyzed within the target sites emphasize natural areas as well as quiet and peaceful places as their major tourism attractions, providing a good setting or scenery for the development of eco and sustainable tourism. However, as previously mentioned in the analyses, the fact that tourism operations are surrounded by nature, and near protected areas, does not make them sustainable operations. They need training and capacity building on how to operate their businesses applying responsible practices. They need to do business in harmony with their environment, culture and community. If the target places are to be promoted locally and internationally as environmentally friendly, where tourists can find a wide range of sustainable operations offering sustainable products and services, the area as a whole should reflect that.

Canada, Germany and the U.S represent the tour operators that are giving more emphasis to Central America in their tourism packages. However, places such as Bocas del Toro in Panama is barely promoted by these tour operators, and Talamanca is not included in their destinations. On the other hand, Honduras is the country where most tour operators are offering tourism packages.

Potential market opportunities were discovered by first identifying tour operators that already had operations within the target sites. Surveying hotels in the target areas revealed this information. Marketing channels utilized by accommodation providers were identified through a similar process. The fact that tour operators were surveyed through a web search, it was not possible to obtain information on which travel agencies are working with these operators.

Central America maintained a constant growth in international tourists' arrivals during the last 12 years, registering 1.9 million in 1990, and 4.7 million in the year 2000.

Central America, as a tourism destination shown a 6.4% growth from the year 2001 to 2002, compared to a decrease in North America of a 3.3% during the same years. This decrease is a consequence of the September 11th attacks in 2001, among other factors.

The growth projection for the year 2020 in America will be of a 3.9%. However, statistics broken down for the Americas is not available.

The area of Central America is considered a potential market opportunity for eco and sustainable tourism. In general, most of the operations in the Gulf of Honduras and Amistad –Cahuita-Rio Can have the potential to become sustainable. There is interest from entrepreneurs and other organizations in these areas for protecting the environment and to apply responsible practices. Strong awareness and promotional efforts are necessary to bring more international tourists to the target areas, as well as contact with tour operators interested in promoting tours with a sustainable tourism approach. Training and capacity on BMPs and certification guidelines as well as contact with key tour operators should be managed simultaneously.

8.2 Implications for Certification

Based on the study results, there is a potential for certification in the target sites, however, there is much to do in these areas before the majority of tourism operations can obtain a certification. Entrepreneurs need more environmental education.

Many of them do not visualize or understand how the implementation of BMPs can represent a step or process that can eventually lead them to obtain a certification. They see BMPs and certification as separate concepts.

It is fundamental to make entrepreneurs see the benefits of certification and how it can represent a marketing tool, before they can be convinced to invest in it. A clear understanding of BMPs and certification can help entrepreneurs to better market their services and avoid confusion among intermediaries and consumers. Many hotels in the target sites are advertising their places as “green” or sustainable solely because they are located near a natural or protected area. This could be happening due to the entrepreneurs’ lack of knowledge on ecotourism principles, practices and policies.

9. Recommendations

1. Tour operators offering packages to Central America, including those promoting the areas of interest should be contacted to inform them as much as possible about ecotourism activities, attractions and tourism operations implementing sustainable practices. Tour operators’ feedback and general impressions on the target areas are important in order to fulfill their expectations and try to increase demand.

2. Contact with travel agencies directly is also important to strengthen information dissemination efforts.

3. Work in conjunction with accommodation providers to:
    a. Inform general audience about site features (infrastructure information, accessibility, services, natural attractions),
    b. promote the region as an ecotourism destination and
    c. try to increase the influx of tourists with an interest for sustainable tourism.

4. Development of promotional material with key information on the target sites as well as on tourism operations implementing responsible practices:
    a. Compact disc displaying site general information, photo gallery (natural attractions, ecotourism operations), maps, etc.
    b. Brochure featuring tourism destination's characteristics.
    c. Touristic Guide containing information on travel agencies, local tour operators, lodging, hospitals, restaurants, real state, marine taxis, banks, maps, etc.

It is important to follow up on the impact that these products could have on tour operators and the final consumer.

5. A classification of tourism operations for training workshops in BMPs and certification based on the aspects mentioned below could result in a much more productive experience for entrepreneurs, and help trainers to better address their needs.
    - Physical capacity of the operation, average of tourists per year that visit each operation.
    - Yearly income; it is important to have a categorization of tourism operations' income per year to be realistic with their investment capacity for BMPs.
    - Main services offered; needs for training in BMPs and certification can also be better addressed if the main services offered are given special attention.
    - Level of knowledge in BMPs and certification. This is an important issue, since operations that are at a higher level can receive more advanced training

based on their needs. However, it is important that entrepreneurs who are initiating in BMPs and certification learn from operations that are already implementing responsible practices.

6. Along with training and capacity building in BMPs and certification, it is also important to:
    - Examine laws and regulations in force such as regulations on land ownership, land utilization rights, conditions and controls for authorizing tourism facilities and infrastructural measures, etc.
    - Provide hoteliers with statistical data on the development of ecotourism.
    - Provide hoteliers with guidelines or general criteria to develop tourism projects. Some of these criteria can include feasibility, participation of local groups, equal distribution of benefits, gender, marketing, impact control, and institutionalization and organizational strengthening.
    - Improve cross- sector coordination, especially between institutions of tourism and environment and nature conservations organizations.
    - Follow up and monitoring becomes necessary to:
        - Develop indicators to measure impact of training workshops.
        - Establish mechanisms to collect, register and analyze the information.
        - Define frequency in which the information will be collected.
        - Operations performance reports and recommendations to entrepreneurs are recommended.

7. Financial resources result necessary for small and micro enterprises and community-based operations as a means to implement more sustainable practices. Sources of information about financing possibilities are of extreme importance for operations seeking to become sustainable.

8. Partnerships with other conservation organizations and NGOs can strengthen the promotional efforts for the target sites. For instance, these organizations can display information on their websites, including data on hotels and community based operations that are implementing best management practices. In addition, information and awareness campaigns can be designed in conjunction with other conservation organizations and NGOs.

9. A strong communication strategy tailored to both, the supply and the demand is recommended in order to create a greater awareness among public authorities, the private sector, the society and consumers regarding ecotourism capacity to:
   - Enhancing the conservation of the natural and cultural heritage;
   - Improving the local community standards of living in rural areas and in the surroundings of protected areas; and
   - Encouraging a better knowledge of, and respect for nature, indigenous cultures, and their diversity.

10. In order to help hotels to better market their operations within the local and international market, the following recommendations are proposed:
    - Creation of training manuals for local product developers where advice on market information is provided, information on how to produce a tourism package, orientation on best pricing strategies, negotiation, management guidelines, characteristics of good ecotours, demographics of ecotourists, etc. All this information can represent an instrument for hoteliers to define target markets and design appropriate marketing strategies based on the realities of their operations.
    - Hotels in the target sites should join different "green servers" or green databases, which can help to add the supply of sustainable products worldwide.
    - Participation in key travel fairs is important to promote the target sites and inform tour operators looking for more sustainable products.
    - Create new or adapt existing national image and marketing programs as a by-product of the strategic goals of the sustainable development of ecotourism.
    - Educational programs are necessary to teach tourism operators about sustainability and try to increase their environmental awareness. For example, tour operators should:
      - Work with the public sector to make sure that nature touristic services meet internationals standards.
      - Select local guides and use local products in all nature tourism services

- Conduct environmental education for tourists and participate in training of guides.
- Contribute a portion of tourism profits to the management of protected areas visited.

11. The importance of adequate marketing is widely recognized within the overall tourism sector, as today the tourism market has become increasingly segmented, and means of communication to reach consumers have multiplied and diversified.
12. Tourism boards in each of the target countries should provide more support for promotion campaigns to help increase the influx of tourists in the areas of interest.
13. It is important to build up a strong relationship with key local and international media to create strategic alliances and try to disseminate information through their communication means.
14. Relationships with already existing promotion initiatives in the region such as FODESTUR and the promotion agency in Spain are vital. Also the Asociacion Centroamericana de Operadores de Turismo can represent a good relation to promote sustainable tourism in the target areas.

It is fundamental to use all information available to understand market targets, select the right tour operators, and select the appropriate promotional means.

Joint marketing and promotion of ecotourism products and destinations, including community projects, is extremely important. Shared marketing by neighboring destinations brings economies of scale and creates awareness among tourists and foreign tour operators about the wider range of attractions in the area, and the cost of marketing can be shared by ecotourism providers. The Internet undoubtedly has vast potential as a tool for marketing and promotion of ecotourism for its capacity for the massive dissemination of information. It also facilitates direct transactions between suppliers and consumers, and this is especially relevant for small suppliers.

10. Glossary

Adventure Tourism is nature tourism that involves a degree of risk taking (Honey, 2002).

Best Management Practices: The Rainforest Alliance helps define and promote the use of best management practices that are a series of principles and concrete recommendations that can be implemented by different land-use sectors. These practices are based on the outcomes of impact assessments, scientific research, pilot testing projects, adaptation to local realities and multistakeholder discussions. These best management practices can be used as the basis for the development of policies, codes of conduct and public awareness materials, and for the implementation of technical assistance, training and certification (Source: Rainforest Alliance).

Best Practice(s) is used to designate highest quality, excellence, or superior practices by a tourism operator. The term is widely used in many award and certification programs, as well as academic studies, to designate the best in a particular class or a leader in the field. "Best," however, is a contextual term. There is no set standard of measurement, and the term is often loosely or ill defined (Honey, 2002).

Certification is a voluntary procedure that assesses, monitors, and gives written assurance that a business, product, process, service, or management system conforms to specific requirements. It awards a marketable logo or seal to those that meet or exceed baseline standards, i.e., those that at a minimum comply with national and regional regulations and, typically, fulfill other declared or negotiated standards prescribed by the program (Honey, 2002).

Commercialization Chain is a map of the direct and indirect interactions between consumers and local service providers including all intermediaries, sources of information, and means of communication (Honey, 2002).

Cultural Tourism is travel for the purpose of learning about cultures or aspects of cultures (Honey, 2002).

Ecolabeling describes a scheme in which a product, company, service, or destination may be awarded an ecological label on the basis of its "acceptable" level of environmental impact. The acceptable level of environmental impact may be determined by consideration of a single environmental hurdle or after undertaking an assessment of its overall impacts. Ecolabeling sometimes refers to the natural environment only; sometimes it takes into account social and cultural environments as well. An ecoquality label marks the state of the environmental quality, such as water quality for beaches or quality of wildlife in national parks (Honey, 2002).

Ecotourism is defined as by the International Ecotourism Society as, "responsible travel to natural areas that conserves the environment and sustains the well-being of local people (TIES website, March 6, 2003). A more comprehensive definition is travel to fragile, pristine, and usually protected areas that strives to be low impact and (usually) small scale. It helps to educate the traveler, provides funds for conservation, directly benefits the economic development and political empowerment of local communities, and fosters respect for different cultures and for human rights (Honey, 2002).

Ecotourism "lite" involves a business adapting sensible but small, cosmetic, and often cost-saving practices that are typically marketed as major innovations (Honey, 2002).

Greenwashing is a term used to describe businesses, services, or products that promote themselves as environmentally friendly when they are not (Honey, 2002).

Stakeholders are, in the context of this report, all actors within the commercialization chain (Honey, 2002).

Sustainable Development is that which "meets the needs of the present without compromising the ability of future generations to meet their own needs. It entails using, conserving, and enhancing the community's resources so that ecological development processes, on which like depends, are maintained and the total quality of life, now and in the future, can be sustained (Honey, 2002).

Sustainable Tourism is, according to the World Tourism Organization, "envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems" (Honey, 2002).

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12. Anexes
12.1 Hoteliers Questionnaire

Contact Information

Full Name:____

Position:____

Phone No.________________ Fax No. ____________________

E-mail____

Organization Information

Name of Organization:__________________________________

Phone No.________________ E-mail:________________

Fax No.________________ Web site:________________

Address:__________________________________

________________ ________________

P.O. BOX:________________ City:________________

State/Departament:________________ Country:________________

1. Does your hotel accept reservations from:

- ☐ Travel Agencies
- ☐ Tour Operators
- ☐ Independent tourists
- ☐ Other organizations
- ☐ Does not accept reservations

If your answer is no, please go to question No. 3.

2. What percentages represent the options you marked in the previous question?

- ☐ Travel Agencies__________%
- ☐ Tour Operators __________%
- ☐ Independent Tourists __________%
- ☐ Other organizations __________%

3. Does your hotel receive groups from Tour Operators? If your answer is yes, please indicate the names of the tour operators you worked with and if they are local or international.

- ☐ Yes____

____

- ☐ No

4. Does your hotel promote tourism through travel agencies? If so, please prove the names of the agencies you worked with and if they are local or international.

- ☐ Yes
- ☐ No

____

____

5. Do you know if there are other organizations -besides travel agencies and tour operators- that promote tourism in your region? Please provide the names of them, if you gave an affirmative response:

____

____

6. **Do you think your hotel needs technical support for the development and implementation of activities related to eco and sustainable tourism? If so, please marked the areas from the options below:**

- ☐ Yes ☐ No

Areas of Technical Assistance

- ☐ Communications
- ☐ Waste management
- ☐ Energy efficiency
- ☐ Water conservation
- ☐ Wastewater and effluent
- ☐ Development of local initiatives
- ☐ Contributing to conservation
- ☐ Environmental education for employees
- ☐ Others: ______________________

____

7. **Do you consider your hotel would have tangible benefits through a tourism certification? Meaning to accomplish and exceed the standards established by the certifier.**

____

____

8. **Please explain the reasons why your hotel will not be interested in being certified:**

____

____

____

9. **Does your hotel offers different packages for national and international visitors? If your answer is no, please go to question number 11**

- ☐ Yes ☐ No

10. **Please describe your product offer.**

____

____

____

____

11. **Please provide the names of the trade fairs, exhibitions, workshops or other promotional activities you have participated:**

____

____

12. **From the options below, please mark those in which you are focusing your promotional efforts**

- ☐ Natural Areas
- ☐ Typical or local food
- ☐ Quiet and peaceful place
- ☐ Contact with local people
- ☐ Cultural sites
- ☐ Diversity of flora and fauna
- ☐ Interaction with local community
- ☐ Support to conservation activities
- ☐ Others (specify) ______________________

____

12.2 Personal Interview Questions

PROARCA/AMP es una iniciative de la Comisioin Centroamericana de Ambiente y Desarrollo (CCAD), asistido financieramente por la Agencia para el Desarrollo Internacional de los Estados Unidos (USAID). Esta iniciativa de cinco anos (2001-2006) esta siendo ejecutada por The Nature Conservancy (THN), el Fondo Mundial para la Naturaleza (WWF) y Rainforest Alliance (RA). Su objetivo principal es contribuir al manejo ambiental mejorado en el Corredor Biologico Mesoamericano (CBM), con emfasis en cuarto sitios prioritarios:

- Golfo de Honduras (Belize, Guatemala, Honduras)
- Golfo de Fonseca (El Salvador, Honduras, Nicaragua)
- La Mosquitia (Honduras y Nicaragua, definidas a nivel operativo dos areas distintas)
- Amistad-Cahuita-Rio Canas (Costa Rica, Panama)

Rainforest Alliance, Coordinador del Sub-Componente de Turismo Sostenible, esta elaborando un estudio de Mercado con el fin de examinar posibles oportunidades de meracado para eco turismo y turismo sostenible. La informacion que usted nos brinde sera de valiosa ayuda para el cumplimiento de nuestros objetivos. Agradecemos de antemano su colaboracion.

1. Your organization does a good job of communicating an environmentally friendly image. Do you perceive that there is a growing trend in tourism towards more environmentally friendly products?

2. What would be your recommendations to NGOs, such as the Rainforest Alliance, that are interested in partnering with the private sector to increase awareness of sustainable tourism?

3. We are committed to the idea that certification has the potential to affect concrete changes by impacting the business practices of key sectors of the tourism industry. If you perceive any advantages to certification what are they and how do you think we could better convey to other businesses the advantages of certification systems to increase the level of participation.

4. You were recommended for this interview because of your success and commitment to environmental issues, and your ability to effectively convey that to your customers. In our minds, this makes you a marketing expert. As an expert of marketing sustainable tourism products, for our study of the commercialization chain, where do you think that we should be focusing our efforts? Or where do you think the most opportunities for creating linkages within the tourism market exist?

5. What do you see as the top five destinations in Costa Rica for ecotourism?

12.3 International Fairs 2003

January:

7 – 12 VANKANTIEBEURS – HOLANDA www.vakantiebeurs.com
22 – 26 BTL, LISBOA – PORTUGAL www.fil-btl.com
29 – 2 feb. FITUR – MADRID, ESPAÑA www.fituronline.com

February:

15 – 18 BIT – MILAN ITALIA www.expocts.it/bit
20 – 23 INT. ADVENTURE & OUTDOOR SHOW – Chicago www.iatos.com
24 – 26 ANATO – BOGOTA, COLOMBIA www.anato.com.co

March:

1 – 4 CARNAVALES
1 – 2 NEW YORK´S ADVENTURE TRAVEL SHOW www.ny-adventuretravelshow.com
7 – 11 ITB – BERLIN, ALEMANIA www.messe-berlin.de
13 – 15 MITM LATINAMERICA – Yucatán México www.gsamark.com
24 – 26 TREX – San Salvador www.trexca.com

May:

26 – 30 EXPOTOUR – 2002 San José Costa Rica www.expotur.com

September:

4 – 6 LA CUMBRE – USA – Miami www.lacumbre.com
25 – 27 TOP RESA – DEAUVILLE – Francia www.topresa.com
26 – 27 BOLSA TURÍSTICA DE MEDELLÍN - Colombia www.geocities.com/medellin_bolsa_turistica
25 – 27 TRAVEL MART – Quito Ecuador www.travelmartlatinamerica.com
24 – 26 ITME – Chicago, USA www.motivationshow.com

October:

19 – 22 FIT – Buenos Aires, Argentina www.fit.aaavyt.org.ar
22 – 26 ABAV – RIO DE JANEIRO Brasil www.abav-com.br

November:

11 – 14 WORLD TRAVEL MARKET – LONDRES INGLATERRA www.reedtravelexhibitions.com/
25 – 26 ACH MART – SANTIAGO – Chile www.achmart.cl

12.3.1 Panama 2003 Fairs Calendar

ORGANIZACIÓN FERIAL	ENE	FEB	MAR	ABR	MAY	AGO	SEP	OCT	DIC
Feria de las Flores y el Café – Boquete, Chiriquí	10 - 19	.	.	.	.		.	.	.
Feria Agropecuaria de Tanara – Chepo, Panamá	15 - 19*	.	.	.	.		.	.	.
Feria de San Sebastián de Ocú – Ocú, Herrera	16 - 20	.	.	.	.		.	.	.
Feria de la Chorrera - La Chorrera, Panamá	22 - 2		.	.	.		.	.	.
Feria de la Candelaria – Bugaba, Chiriquí	23 - 3		.	.	.		.	.	.
Feria de la Naranja – Churuquita, Coclé	30 - 2		.	.	.		.	.	.
Feria de Santa Fe – Veraguas	30 - 2		.	.	.		.	.	.
Feria de Veraguas en Soná – Soná, Veraguas	.	12 - 17		.	.		.	.	.
Feria de Santa Fe – Darién	.	.	13 – 16*	.	.		.	.	.
Feria de Internacional de San José - David, Chiriquí	.	.	13 - 23	.	.		.	.	.
Feria de La Chitra en Calobre			14 - 16						
Feria de la Orquídea – Boquete, Chiriquí	.	.	.	3 - 6	.		.	.	.
Feria Nacional de Colón – Colón	.	.	27 - 6		.		.	.	.
Feria Internacional de Azuero – Los Santos	.	.	.	24 - 4			.	.	.
Feria de Capira en Villa del Rosario* - Panamá	.	.	.	.	15 - 18*	.	.	.	.
Feria Intl. del Mar – B. del Toro/Isla Colón	.	.	.	.	.		17 - 21	.	.
Feria de Río Tigre - San Blas	.	.	.	.	.		.	16 - 19	.
Feria de Penonomé – Coclé	.	.	.	.	.		.	.	5-8
Feria de Tierras Altas - Volcán, Chiriquí	.	.	.	.	.		.	.	10-14
Federación de Clubes de Jardinería	VARIOS EVENTOS								
* Fechas sujetas a cambio									

12.4 Central American Newspapers

Belize	• Belize Times • Reporter • San Pedro Sun
Costa Rica	• Costa Rica Today • Nación • Tico Times
El Salvador	• Diario de Hoy • Prensa Gráfica
Guatemala	• Guatemala Weekly • Hora • Prensa Libre • Siglo Vientiuno
Honduras	• Honduras This Week • La Prensa de Honduras • Tiempo • Tribuna
Panama	• Diario el Universal de Panama • Panamá América • Prensa • Siglo
Nicaragua	• Ciberdario de Nicaragua • Noticias de Nicaragua en Sintensis • Prensa

12.5 Consejo Centroamericano de Turismo (CCT)
Central America Tourism Ministers Organization

BELICE
Honorable señor Mark Spat
Ministro de Turismo y Medio Ambiente
Level 2, Central Bank Building
P.O. Box No 325
Belize City, Belize
Telef. (501) 231913, Fax (501) 231943
E-mail: vision@btl.net

GUATEMALA
General Luis Felipe Miranda: Director General INGUAT
7ma. Avenida 4-17, Zona 4
Centro Cívico,
Guatemala, Guatemala
Telef. (502) 3311333, Fax (502) 3314416
E-mail: direccion@inguat.gob.gt

EL SALVADOR
Lic. Manuel Avilés; Presidente CORSATUR
Boulevard del Hipódromo 508, Colonia San Benito
San Salvador, El Salvador
Telef. (503) 2437835, Fax (503) 2430427
E-mail: 3prescorsatur@salnet.net

HONDURAS
Lic. Thierride Pierrefeu, Ministro, Secretaría de Turismo de Honduras IHT
Edificio Europa, Colonia San Carlos 3er piso del Centro Comercial Los Castaños.
Tegucigalpa, Honduras
Telef. (504) 2224002, Fax (504) 2382102
E-mail: presidencia@iht.hn

NICARAGUA
Licda. Leda Sanchez, Presidente INTUR
Hotel Intercontinental 1c. Abajo 1 1/2 c. Al sur
Telef. (505) 2281238-2281337, Fax (505) 2281187
Managua, Nicaragua

E-mail: presidencia@intur.gob.ni

COSTA RICA
Ing. Rubén Pacheco Lutz, Presidente Ejecutivo ICT
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San José, Costa Rica
Telef. (506) 2339605, Fax (506) 2235107
E-mail: ictpresi@sol.racsa.co.cr

PANAMÁ
Licda. Liriola Pitty , Gerente General IPAT
Edificio Atlapa
Panamá, República de Panamá
Telef. (507) 2263167, Fax (507) 2265043
e-mail: ggral@ns.ipat.gob.pa

12.6 Italian Press Contacts Attending BIT Trade Show

EDITUR LATINOAMERICA
www.editur.es/latino

SPIC
www.revista-spic.net

TRAVEL WEEKLY
www.travelweekly.co.uk

Address:	Quadrant House,	**Tel:**	020-8652 3799
	The Quadrant,	**Fax:**	020-8652 3956 (Editorial)
	Sutton,		020-8652 3873 (Sales)
	Surrey SM2 5AS		

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Fax : + 33 1 41 29 97 95
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www.iktissad.com
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Al Iktissad Wal Aamal Group
P.O. Box 113-6194
Hamra, Beirut 1103 2100 Lebanon
Tel: +961 1 780200
Fax: +961 1 780206
e-mail: **info@iktissad.com**

TOURINFO
www.tourinfo.ru
Appears to be a Russian magazine.

TRAVEL WORLD NEWS
www.travelworldnews.com
Travel World News, 50 Washington Street, South Norwalk, CT 06854 USA
Phone 203-853-4955 Fax 203-866-1153
Charles Gatt, Jr., Publisher, e-mail charlie@travelworldnews.com
Peter Gatt, Associate Publisher, e-mail pgatt@travelworldnews.com
Sara Weir, Editor, e-mail editor@travelworldnews.com

TOURISTIK REPORT
www.touristikreport.de

Verantwortlich
TVG Touristik Verlagsgesellschaft mbH
Dieselstrasse 36
D-63071 Offenbach

Tel.: +49 (0)69 / 98 19 04 - 41
Fax: +49 (0)69 / 98 19 04 - 44

USt.-Id Nr.: DE811179006
HRB Offenbach Amtsgericht 11608

Geschäftsführer
Dirk Tertilt
Tel.: +49 (0)69 / 98 19 04 - 40
Fax: +49 (0)69 / 98 19 04 - 44
E-Mail: D.Tertilt@touristikreport.de

12.7 Spain Press Contacts – From FITUR

Activex-Soft S.L.
Octavio Vicent, 3 esc. 1, pta. 1
Valencia 46023 VALENCIA (SPAIN)
Tel. 34 963 372 237 / Fax. 34 963 372 042 / e-mail: comercial@activexsoft.es

Actualidad Hostelera y Turística, Rev.
Loeches, 6 bajo C
Madrid 28008 MADRID (SPAIN)
Madrid, Comunidad de. Dir. Gral. Turismo

Ados/Turismo Natural, Revista
Pº de la Castellana, 210 - planta 12ª
Madrid 28046 MADRID (SPAIN)
Madrid, Comunidad de. Dir. Gral. Turismo

Agencia EFE, S.A.
Espronceda, 32
Madrid 28003 MADRID (SPAIN)
Tel. 34 913 467 366 / Fax. 34 913 467 153 / e-mail: donascimento@efe.es

Agencia de Noticias Europa Press
Pº de la Castellana, 210
Madrid 28046 MADRID (SPAIN)
Tel. 34 917 030 268
Madrid, Comunidad de. Dir. Gral. Turismo

Agent Travel, Revista/Grupo Jaguar
Laurel, 23 - 1º
Madrid 28005 MADRID (SPAIN)
Tel. 34 914 741 140 / Fax. 34 914 744 074
Madrid, Comunidad de. Dir. Gral. Turismo

Aire Libre - Grupo Arthax
Pº Marqués de Monistrol, 7 - 2º
Madrid 28011 MADRID (SPAIN)
Tel. 34 915 268 080 / Fax. 34 915 261 012 / e-mail: airelibre@airelibre.com

Aire Libre, Revista/Grupo Arthax, S.L.
Pº Marqués de Monistrol, 7 - 2º
Madrid 28011 MADRID (SPAIN)
Tel. 34 915 268 080 / Fax. 34 915 261 012
Madrid, Comunidad de. Dir. Gral. Turismo

Al Día, Revista - Europe Correspondent
Francisco Silvela, 87 - 4º P. 5
Madrid 28028 MADRID (SPAIN)
Madrid, Comunidad de. Dir. Gral. Turismo

Altaïr
Agusti Duran i Sanpere, 1
Barcelona 08001 BARCELONA (SPAIN)
Tel. 34 935 056 200 / Fax. 34 935 056 231 / e-mail: ctrunyo@descobrir.com
Edícola 62

12.8 Tourism Associations in Panama

ASOCIACION PANAMEÑA DE AGENCIAS DE VIAJES Y TURISMO (APAVIT)
PRESIDENTE: AIDA QUIJANO
DIRECCION: CALLE 51, BELLA VISTA AL LADO DEL REST. LAS TINAJAS (MARGO TOURS)
APARTADO: 55-1000, PAITILLA
TELEFONO: 264-4001/264-5355

ASOCIACION PANAMEÑA DE HOTELES-APATEL
PRESIDENTE: CÉSAR A. TRIBALDOS
DIRECCION: SUITE 115, HOTEL PLAZA PAITILLA INN, PRIMER PISO
APARTADO: 2134 PMA 7
TELEFONO: (507) 269-1122
FAX : (507) 269-1122
CAMARA DE TURISMO : 211-3542

ASOCIACION PANAMEÑA DE OPERADORES DE TURISMO APOTUR
PRESIDENTE: MARCO A. GANDÁSEGUI
DIRECCION: CALLE ELVIRA MÉNDEZ, Nº 24, (ANCON EXPEDITIONS OF PANAMA)
APARTADO: P.O. BOX 0832-1509 WTC, PANAMÁ, REP. DE PANAMÁ
TELEFONO: (507) 269-9413/14/15
FAX: (507) 264-3713

ASOCIACION DE LINEAS AEREAS-ALAP
PRESIDENTE: GLORIA CLAVEL DE VELÁSQUEZ
DIRECCION: HOTEL CONTINENTAL, OFICINAS DE ESCAL, (HORARIO DE 9:00 A 12:00 M).
APARTADO: 1891 ZONA 1, PANAMA, REPUBLICA PANAMA
TELEFONO: (507) 269-6139
FAX: (507) 269-0830

ASOCIACION FEMENINA DE EJECUTIVAS DE EMPRESAS TURISTICAS-AFEET
PRESIDENTE: MARIA JOSEFA DOVAL
DIRECCION: TORRE IBC- PISO 9
APARTADO: 6-6020 EL DORADO
TELEFONO: (507) 265-1300
FAX: (507) 265-0029

ASOCIACION DE RESTAURANTES Y AFINES DE PANAMA-ARAP
PRESIDENTE: RINO TAMBURELLI
DIRECCION: EL DORADO PARTE ATRÁS DE DON LEE (TUMBA MUERTO)
APARTADO: 55-1444 PAITILLA, PANAMA ,REPUBLICA DE PANAMA

TELEFONO: (507) 236-7066
FAX: (507) 223-2726

ASOCIACION NACIONAL DE ARRENTADORES DE VEHICULOS
PRESIDENTE: EDUARDO MARQUEZ
DIRECCION: VÍA ESPAÑA DIAGONAL IGLESIA DEL CARMEN
(THRIFTY CAR RENTAL)
APARTADO: 8-32-1161 WTC, PANAMA,REP.DE PANAMA
TELEFONO: (507) 214-7677/264-8932 FAX: (507) 264-7419

CÁMARA DE TURISMO DE PANAMA
PRESIDENTE: LUIS ARGUEDAS
DIRECCION: APARTHOTEL COSTA DEL SOL, VIA ESPAÑA Y FEDERICO BOYD
APARTADO: 8572 ZONA 5, PANAMA,REPUBLICA DE PANAMA
TELEFONO: (507) 206-3333 EXT. 510
FAX: (507) 206-3399

CÁMARA DE COMERCIO INDUSTRIAS Y AGRICULTURA DE PANAMA
PRESIDENTE: JOSÉ JAVIER RIVERA
DIRECCION: EDIFICIO CAMARA DE COMERCIO,AVENIDA CUBA
APARTADO: 74,ZONA 1, PANAMA,REPUBLICA DE PANAMA
TELEFONO: (507) 227-1233/227-4186
FAX: (507)225-3653

SINDICATO DE INDUSTRIAL DE CONDUCTORES DE TAXIS DE TURISMO DE PANAMA
SECRETARIO GENERAL: EFRAÍN PALACIO
DIRECCION: FRENTE A LAS ACACIA EDIFICIO REPUESTOS CENTRAL
OFICINA No 37
TELEFONO: (507) 220-8572
FAX: (507) 220-9165

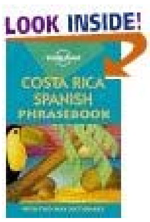
12.9 Guidebooks

1. 

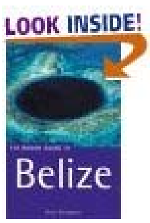
[Lonely Planet Costa Rica (Costa Rica, 5th Ed)](#)
by Rob Rachowiecki (Paperback -- October 2002)
Avg. Customer Review:

2. 

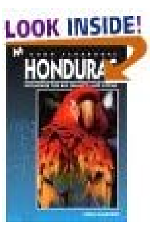
[The New Golden Door to Retirement and Living in Costa Rica (12th Edition)](#)
by Christopher Howard (Paperback -- June 2002)
Avg. Customer Review:

3. 

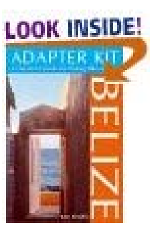
[Lonely Planet Costa Rica Spanish Phrasebook (Phrasebooks)](#)
by Thomas B. Kohnstamm (Paperback -- June 2000)
Avg. Customer Review:

4. 

[The Rough Guide to Belize: Includes Tikal and the Bay Islands (Belize (Rough Guides))](#)
by Peter Eltringham (Paperback -- September 6, 2001)
Avg. Customer Review:

5. 

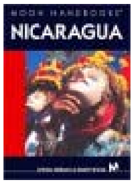
[Moon Handbooks: Honduras 2 Ed: Including the Bay Islands and Copan](#)
by Chris Humphrey (Paperback -- September 28, 2000)
Avg. Customer Review:

6. 

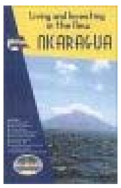
[Adapter Kit: Belize: A Traveler's Tools for Living Like a Local](#)
by Lan Sluder (Paperback -- September 9, 2001)
Avg. Customer Review:

7. 

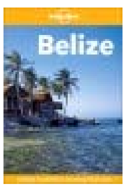
Frommer's(r) Costa Rica 2003
by Eliot Greenspan (Author) (Paperback -- September 13, 2002)
Avg. Customer Review:

8. 

Moon Handbooks Nicaragua
by Josh Berman, Randy Wood (Paperback -- December 2002)
Avg. Customer Review:

9. 

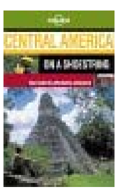
Living and Investing in the New Nicaragua
by Christopher Howard (Paperback -- May 31, 2001)
Avg. Customer Review:

10. 

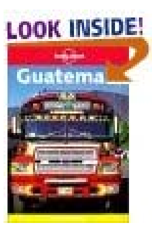
Lonely Planet Belize (Belize, 1st Ed)
by Carolyn Miller Carlstroem, et al (Paperback -- May 2002)
Avg. Customer Review:

11. 

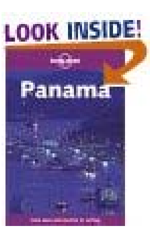
Fodor's 2003 Costa Rica (Fodor's Costa Rica)
by Fodors (Editor) (Paperback -- October 1, 2002)
No customer rating available.
Be the first to review it.

12. 

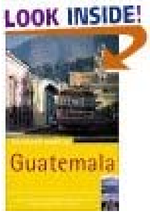
Lonely Planet Central America on a Shoestring (Central America on a Shoestring, 4th Ed)
by David Zingarelli, et al (Paperback -- June 2001)
Avg. Customer Review:

13. 

Lonely Planet Guatemala (Guatemala, 1st Ed)
by Conner Gorry (Paperback -- February 2001)
Avg. Customer Review:

14. 

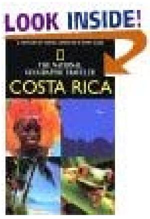
Lonely Planet Panama (Panama, 2nd Ed)
by Scott Doggett (Paperback -- November 2001)
Avg. Customer Review:

15. 

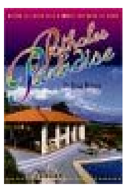
[The Rough Guide Guatemala (Guatemala (Rough Guides))]
by Iain Stewart (Paperback -- February 28, 2002)
Avg. Customer Review:

16. 

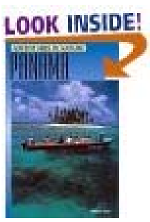
[In Focus Guatemala a Guide to the People, Politics and Culture: A Guide to the People, Politics and Culture (Guatemala, 1999)]
by Trish O'Kane (Paperback -- February 1999)
Avg. Customer Review:

17. 

[The National Geographic Traveler Costa Rica (National Geographic Traveler)]
by Christopher P. Baker (Paperback -- October 2000)
Avg. Customer Review:

18. 

[Potholes to Paradise: Living in Costa Rica - What You Need to Know]
by Tessa Borner (Paperback -- July 31, 2001)
Avg. Customer Review:

19. 

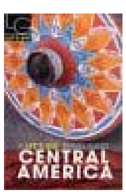
[Adventures in Nature Panama (Adventures in Nature Series)]
by William Friar, Bill Friar (Paperback -- March 30, 2001)
Avg. Customer Review:

20. 

[Footprint Central America and Mexico Handbook 2003]
by Peter Hutchison (Paperback -- November 2002)
Avg. Customer Review:

21. 

[The Surfer's Guide to Costa Rica]
by Mike Parise (Paperback -- December 28, 1999)
Avg. Customer Review:

22. 

[Let's Go 2003: Central America]
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1	Sergio Velásquez	Boletín FODESTUR	Regional
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4	Axela Zelaya	Cámara de Turismo	Panamá
5	Ena López	Cámara de Turismo	El Salvador
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7	Ron Mader	Planeta (Foros Yahoo)	Internacional
8	Equipo de Redacción	El Diario de Hoy	El Salvador
9	Redacción	La Prensa Gráfica	El Salvador
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11	Gastón Gremier	Red Desarrollo Sostenible	Honduras
12		Garifuna News	Honduras
13	Redacción	Heraldo On-Line	Honduras
14		Tiempos del Mundo	Guatemala
15	Mariana Maza	Prensa Libre	Guatemala
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17	Nacionales	Al Día	Guatemala
18	Opinión	La Hora	Guatemala
19	Jefe de Redacción	Nuestro Diario	Guatemala
20	Corresponsales	El Periódico	Guatemala
21	Corresponsal	ACAN-EFE	Guatemala
22	A. Hernández	Associated Press	Guatemala
23	Información General	Diario de Centroamérica	Guatemala
24	Redacción	La Prensa	Honduras
25	Información General	La Tribuna	Honduras
26	Buzón de Opiniones	El Tiempo	Honduras
27	Eduardo Ulibani	La Nación	Costa Rica
28	Redacción	La República	Costa Rica
29	Opinión	El Mundo	El Salvador
30	Director de Redacción	El Faro	El Salvador
31	Edmungo Dolphy	El Siglo	Panamá
32	Información	El Nuevo Diario	Nicaragua
33	Emilio Zambrano	La Prensa	Nicaragua

Name of Magazine	Web Site
American Express SkyGuide	www.sky-guide.com
American Way - American Airlines	www.americanair.com/away/
Belize First	www.turq.com/belizefirst/
Best Fares	www.bestfares.com
Big World	www.bigworld.com
Business Travel News	www.btnonline.com
Caribbean Travel & Life	www.caribbeantravelmag.com
Conde Nast Traveler	www.concierge.com
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Dive Travel	www.divetravel.com
El Planeta Platica: Eco Travels in Latin America	www.planeta.com
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Hemispheres - United Air Lines	www.hemispheresmagazine.com
Historic Traveler	www.thehistorynet.com/HistoricTraveler/
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InsideFlyer	www.insideflyer.com
Islands	www.islandsmag.com
Journal of Travel Medicine	www.istm.org/jtm.html
Lighthouse Digest	www.lighthousedigest.com
Maiden Voyages	www.maiden-voyages.com
Meetings & Conventions	www.meetings-conventions.com
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Monk	www.monk.com
National Geographic Adventure	www.nationalgeographic.com/adventure/
National Geographic Traveler	www.nationalgeographic.com/traveler/
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Sky - Delta Air Lines	www.delta-sky.com
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Travel & Leisure	www.traveleisure.com
Travel Holiday	www.travelholiday.com
Travel Matters	www.moon.com/travel_matters/
Trips: A Travel Journal	www.tripsmag.com
Two-Lane Roads	www.two-lane.com
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