

Tourism and Ecotourism Development in Guyana

Issues and Challenges and the Critical Path Forward

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Country Department Caribbean
Group

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Abstract

Guyana has high potential to develop a nature-based tourist niche market and help diversify its economic base, which now depends on the export of primary commodities. Despite many natural attractions, Guyana is still at a nascent stage of nature-based development relying on primary factors for tourism development as opposed to thorough planning, focused investments, and aggressive marketing efforts. Other segments of traditional tourism development—such as business and leisure—also are undeveloped and little studied. The tourism sector in general faces many constraints, such as high air travel cost, inadequate infrastructure, a slew of small-scale lodging properties that are not graded or certified, lack of marketing, and limited government budgetary outlays and incentives that would serve to stimulate development of the sector. Some important steps have been taken to improve competitiveness of the sector, but still a critical mass of interventions has not been realized that can lead to a dramatic transformation. This paper reviews the main issues and challenges and posits that critical path modeling, mathematical programming and spatial economic analysis could be used to identify two or three of the most binding constraints that should be addressed first given budgetary limitations and low levels of private sector investments.

JEL Classification: O25, M3, R1

Keywords: industrial policy, tourism, ecotourism, Guyana, economic diversification, planning, critical path.

“The journey of a thousand miles begins with one step.”

—Lao Tzu, Chinese philosopher

1. Introduction

Tourism is an important economic sector of activity worldwide. In 2014, travel and tourism contributed to 9.8 percent of global GDP (approximately equivalent to US\$7.6 trillion) and accounted for 277 million jobs (World Travel and Tourism Council 2015). The World Travel and Tourism Council estimates that in the 2015–25 timeframe, tourism GDP will on average grow 3.8 percentage points. As recovery from the financial crisis of 2008 strengthens, more people are expected to travel. The average holiday stay is expected to increase per year and result in the creation of 72.9 million new direct and indirect jobs. Most of the growth in tourism will emanate from outbound tourists from emerging economies such as Brazil, China, India, and Thailand (World Travel and Tourism Council 2015). Authorities in many developing economies would like to diversify and increase their percentage capture of the total amount of global expenditures on travel and tourism.

Policymakers in Guyana have declared tourism, and in particular ecotourism, a priority area, and present it as a means to diversify the base of the economy beyond extractive industries and agriculture. In previous Peoples Progressive Party/Civic (PPP/C) administrations, tourism was viewed as a means to “contribute to sustainable development by earning foreign exchange and providing job opportunities, while conserving the natural environmental and the multi-faceted culture of the country” (Heneghan 2006). The newly elected A Partnership for National Unity +Alliance for Change (APNU+AFC) administration in its 2015 Budget presentation requested a 25 percent increase for the Guyana Tourism Authority, albeit from a low base, and made further statements indicating plans to double the marketing budget and develop a National Tourism Strategy over the next five years.¹

Despite prioritizing the sector for development for more than a decade, the economic contributions of the tourism sector are still relatively modest. In 2014, international arrivals summed to 205,824, tourism expenditures accounted for an

¹ Source Guyana Times, “Hughes, Burton clash over Tourism Sector plans” August 20, 2015 newspaper edition. Available at <http://www.guyanatimesgy.com/2015/08/20/hughes-burton-clash-over-tourism-sector-plans/>

estimated 3.2 percent to GDP, and the sector generated 8,300 direct jobs. Dividing the international arrival number by the total population (747,880)—a measure of potential tourism pressure—results in far less than a one-to-one ratio, indicating that Guyana has much more carrying capacity. The figure for Guyanese tourists arrivals, moreover, is much less than many neighboring Caribbean states and far less than in Costa Rica, the leading nature based tourism destination in the Western hemisphere which recorded 2.4 million visitors in 2013.²

Over the past decade, many improvements have occurred in Guyana to bolster the sector, such as modernization of Cheddi Jagan International Airport (improvement of lounge and instrumentation); widening of the road between the airport and the capital; creation of the Guyana Tourism Authority, a regulatory body; creation of the Guyana Investment Office(Go-Invest), an investment promotion agency; construction of a modern cricket stadium associated with the hosting of the 2007 Cricket World Cup; successful recruitment of new air carriers Copa, Surinam Air, Dynamic Air, and INSEL; upgrading of the Lethem, Annai, Orinduik, and Kaieteur airstrips; upgrading of Lethem-Annai Road and Bartica-Linden Road; construction of two large hotels (Princess and Marriott hotels), and the opening of a casino (Princess). Despite the positive developments, a critical mass of improvements and reforms has not yet been achieved that would help to accelerate the growth and development of the sector.

Both general tourism (business³ and leisure) and ecotourism, a niche category of leisure tourism, in Guyana still remain rather undeveloped and very constrained. The majority of international arrivals are expatriate Guyanese visiting relatives and friends and they stay in private homes, dampening total expenditures on lodging and food/beverage. Moreover, the tourism product offerings are limited: accommodation capacity is relatively small; standards of service are subpar compared with international benchmarks; occupancy rates tend to be low, contributing to low profit margins or even losses; marketing in international markets is largely absent, and the amount of inbound expenditures minus tourist outbound expenditures suggests a negligible net economic contribution (see Tables 1 through 4).

The constraints include a weak enabling environment; still-limited and expensive

² For comparison, the following nearby countries' international arrivals statistics follow for 2013: Suriname: 249,000; Trinidad and Tobago: 434,000; St. Lucia: 319,000; St. Kitts and Nevis: 107,000; Dominica: 78,000; Jamaica: 2 million; US Virgin Islands: 570,000; St. Vincent and the Grenadines: 72,000; Saint Maarten: 467,000; Curacao: 441,000; Dominican Republic: 4.6 million; Cuba: 2.8 million. Source: World Bank 2015.

³ Business traveler is defined as a person who travels to a destination whose principal purpose is to conduct business and/or participate in training or educational exchanges.

airlift capacity; lack of appropriate infrastructure at the main attractions; lack of explicit legislation and policy framework for the sector; lack of effective tax and investment incentive policies; poorly trained hospitality service workers; high hospitality staff turnover; limited opportunities for hospitality education and training at university level and vocational training institutes; and absence of a well-funded, professional marketing campaign.

In short, the country is still in the infancy stage of tourism development where it relies on primary factors, namely the sheer beauty of natural attractions. However, these natural attractions suffer from access difficulties, and many elements of the tourist product are not competitive in price and quality compared with other nature-tourism destination markets. Moreover, little attention has been paid to the business traveler and Diaspora leisure visitor segment.

The challenge remains to develop a sustained and coordinated investment-driven strategy that will focus on destination marketing, product development, human resource training, and infrastructure improvement. Key stakeholders do not seem to have agreed upon a common roadmap; they seem to encounter difficulties mobilizing the necessary resources, and they wrestle with implementation problems. Actions to date have not been coherent and reinforcing. For example, previous administrations attempted to promote the sector and dedicated considerable effort and resources to relieving the international airlift constraint and the shortage of internationally branded hotel rooms that would cater to business and international leisure visitors⁴. but far less effort and resources were devoted to vital elements needed to develop the sector such as building hospitality training programs to address human resource constraints; providing tax incentives comparable to other Caribbean and Central American jurisdictions (i.e. exemptions or VAT reductions for all classes of hoteliers and uniform tax incentives for hotel/attraction development so as to enhance cost competitiveness); upgrading cultural/scenic attractions; beautifying areas likely to be frequented by tourists in main cities; improving ICT readiness; and engaging in sustained international marketing. Trade associations have advocated for policy changes, sponsored short-term training exercises, and started branding exercises, but to date, the goal of forging a genuine partnership between government, the university, and the private sector actors

⁴ A project to build a five-star hotel in the Kingston area of Georgetown started in late 2009 and was completed in April 2015. US\$36 million have been invested via an interest free loan by an autonomous government company, another \$15.3 million have been secured from a commercial bank, and the same autonomous government company made a US\$ 4 million equity contribution. Previous administrations had nearly constant discussions with air carriers attempting to entice them to enter the Guyana market or to add more routes.

seems to be elusive. The sector seems caught in a vicious circle of underdevelopment (see Figure 1). Coordinated action is needed on several fronts to break the cycle.

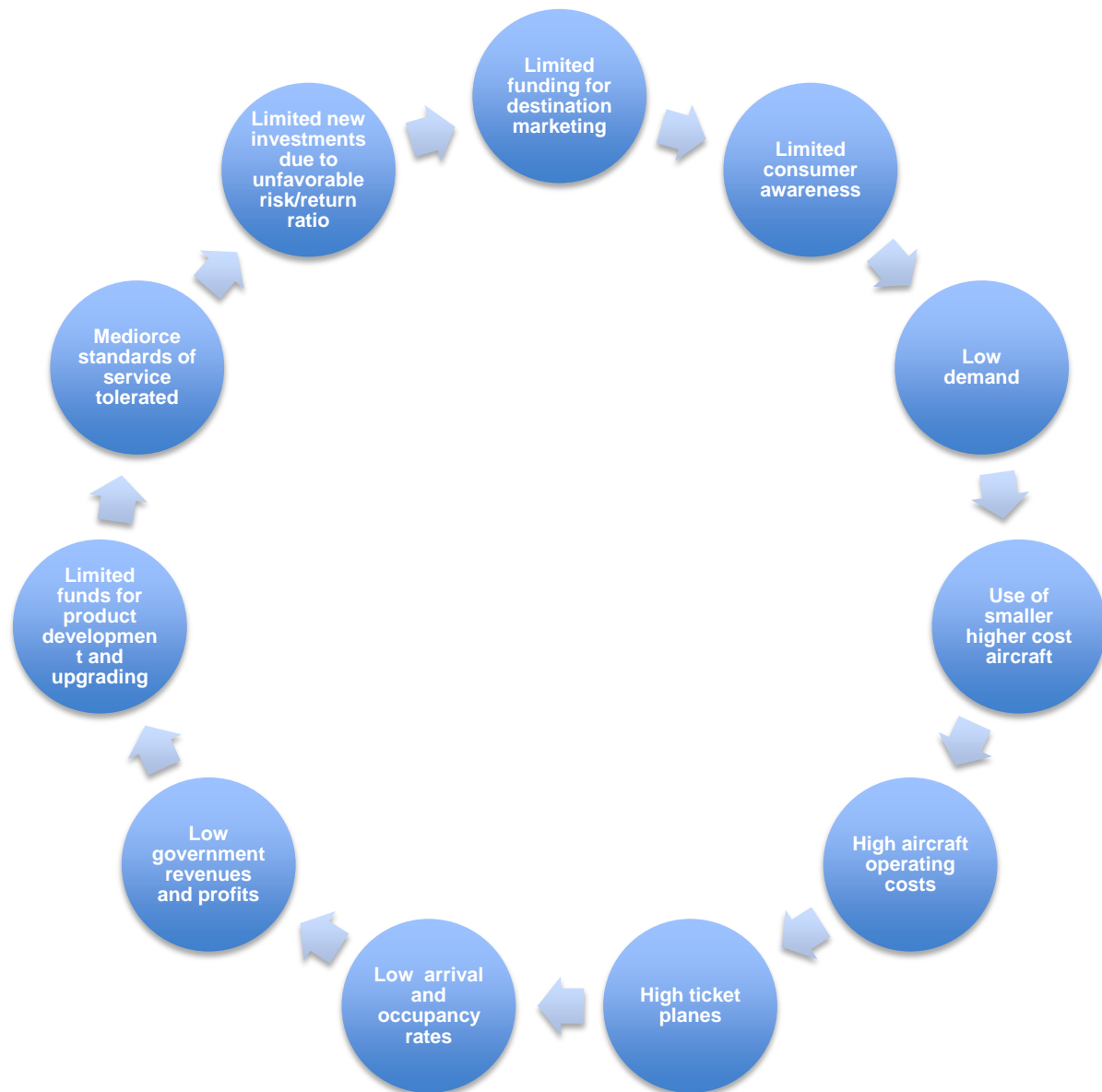
2. Objective

This paper aims to briefly review the issues and challenges confronting the sector and highlight fundamental first steps that should be taken on a presumably long journey to developing a viable broad tourism sector and a niche market for ecotourism. Despite many diagnostic studies and action plans over the years, some of the most basic steps have not been realized, and action to date has been disjointed.

3. Organization

The policy brief is organized in the following manner. Section 4 contains background information on Guyana's tourism sector—context, listing of main attractions, comparative advantage, core elements of the cluster, and accessibility to the main tourist attraction sites. Section 5 discusses the economic performance and effect of the sector on the basis of the most recent available disaggregated data. Section 6 introduces critical path mapping as a tool that can be used by stakeholders to identify the two or three most binding constraints and facilitate the development of a participatory tourism development plan. Section 7 concludes with a summary and recommendations.

Figure 1. Vicious Cycle of Tourism Underdevelopment



4. Background on Tourism in Guyana

What is Guyana's Comparative Advantage?

Guyana, a country of 83,000 square miles or 214,970 square kilometers, has natural comparative advantages in nature-based and adventure tourism relative to its neighbors in the Caribbean and South America. Ecotourism is defined as a nature-based form of

specialty travel defined by The International Ecotourism Society as “Environmentally responsible travel to natural areas which conserves the environment, has low negative visitor impact, and sustains the well-being of local people” (Walker and Walker 2012). Compared with the island states of the Caribbean, Guyana has much larger extensions of forests (77 percent of territory or 15,104,000 ha), many more waterways and waterfalls (32 major rivers and 70 waterfalls), and much more diverse flora and fauna.⁵

The Caribbean islands are well known for “sun, sand, and surf” tourism and only Belize, Dominica, St. John, US Virgin Islands, Bonaire, La Désirade and Petite Terre Islands (in the Guadeloupe island group), and Tobago in the twin-island nation of Trinidad and Tobago, have established themselves as nature-based tourism destinations that cater to persons who want to observe wildlife, hike, fish, camp, go kayaking/canoeing, etc.⁶ Many of the other islands in the Caribbean archipelago have some of the highest ranked beaches in the world according to various travel publications and websites, such as Travel and Leisure and Traveler’s Choice TripAdvisor. However, because of their very small size, they do not boast a high degree of land-based biodiversity. Nonetheless, some of these same “sun, sand, and surf” Caribbean islands are starting to market nature-based activities in an attempt to diversify their market segments (see Wilson, Segewan, and Calatayud 2014).⁷

Compared with its South American neighbors, Guyana has similar humid tropical forests but stands out as the only English speaking country on the continent. Since nature-based tourism attracts an older, highly educated, more affluent, environmentally conscious segment of the travel market, many of the potential travelers to Guyana are likely to hail from high-income English speaking countries since they are the ones likely to prefer locales that are English speaking, all else equal. However, it should be noted that ecotourism is a specialty market with limited demand and the standards required for international certification and branding are quite high. Box 1 contains a profile of the

⁵ In Guyana there are 1,263 known species of amphibians, birds, mammals, and reptiles and 6,409 plant species. Of the 786 documented bird species, 94 are rare. Of the 203 documented mammal species, 9 are vulnerable, 4 are near threatened, and 2 are endangered. According to an assessment by the International Tropical Timber Organization, forests in Guyana (total area forested in country 76.6 percent) can be broken down as follows: rainforest (36 percent), montane forest (35 percent), swamp and marsh (15 percent), dry evergreen (7 percent), seasonal forest (6 percent), and mangrove forest (1 percent).

⁶ This includes yachting, diving, and sport fishing.

⁷ The study compares how four jurisdictions are marketing “ecotourism products”—The Bahamas, St. Kitts and Nevis, Trinidad and Tobago, and Guyana. The definition of *ecotourism* is broad and amorphous and can vary in interpretation. It can cover a number of product subtypes—nature tourism (hiking, camping, boating), adventure tourism (mountain climbing, whitewater rafting, trekking, cave diving, mountain biking, cross country racing, car, dune buggy, and motocross rallies), wilderness tourism (hunting, fishing, bird watching, photographing/observing wildlife in their natural habitat), farm tourism (visiting working farms, ranches, and vineyards and attending agricultural festivals/fairs) and cultural tourism (visiting communities of indigenous or aboriginal peoples, attending ethnic/religious festivals, study or learning tours).

ecotourist.

Box 1. Profile of Ecotourism Tourists

Age: 35–54 years

Gender: 50% male, 50% female

Party composition: 60% couples; 17% families; 23% other

Education: 82% college educated

Trip duration: 8–14 days

Expenditure: US\$1,001–\$1,500 per trip (1994)

Principal activities: (1) wildlife viewing (2) hiking/trekking

Motivations: (1) enjoy scenery, (2) have new experiences

Source: Ecotourism Statistical Fact Sheet, The International Ecotourism Society (TIES) 2000.

What Are the Main Tourist Attractions in Guyana?

- **Historic Georgetown:** The central area of the capital has many fine examples of 18th- and 19th-century wooden buildings with interesting architectural designs, but most are in disrepair.
- **Kaieteur and Orinduik Falls:** Kaieteur is the highest single drop waterfall in the world (741 feet or 226 meters), and the conditions created by the falls support a unique microenvironment with some species endemic to the locale. Orinduik, near the Brazilian border, in contrast with Kaieteur, is a set of staircase falls with jasper beds. Both falls are very picturesque, and the environs around the falls are well maintained.
- **Rupununi:** This area is called the “Serengeti of South America.” It is a vast area of dry grasslands and wooded hills, divided into the North and South Rupununi by the Kanuku Mountains. There are scattered Amerindian villages and a few large cattle ranches. There are several community-run ecolodges in this area. The combination of savannahs, abundant fish in navigable rivers, and wide variety of wildlife that can be viewed, beautiful scenery, and indigenous peoples and cultures makes the Rupununi the premier spot for ecotourism and ethnotourism. Accommodations, however, are limited, with fewer than 100 rooms. The range of activities consists mostly of hiking, fishing, bird watching, visiting Amerindian villages, and purchasing handicrafts.
- **Kanuku Mountains:** The range is notable for its exceptionally diverse bird and mammal species—approximately 80 percent of the known species of mammals

in Guyana are found here. The Kanuku is bisected by the Rupununi River, one of the primary tributaries of the Essequibo. The mountains boast many trails and are very appealing to naturalists and hikers.

- **Iwokrama Rain Forest:** located in central Guyana, between the Essequibo, Siparuni, and Takutu Rivers and just north of the Rupununi savannah. Approximately 360,000 hectares of pristine rain forest have been set aside in a protected park. The park has a suspended walkway through the rainforest canopy that covers close to a half mile in length, 90 feet off the ground.
- **Bartica & Marshall Falls:** Bartica is located at the confluence of the Essequibo, Mazaruni, and Cuyuni Rivers and has great potential for the development of a yachting tourism product as well as ethnohistorical tourism. Not far from Bartica, past the ruins of the ancient Dutch Fort of Kyk-Over-Al and up the Cuyuni River, are the Marshall Falls. Once the seat of the Dutch government of the county of Essequibo, Kyk-Over-Al was built in 1616 to guard the junction of the Mazaruni and Cuyuni Rivers. Only the ruins remain.
- **Mainstay Lake:** A large recreational lake with resorts. Very popular with domestic tourists.
- **Shell Beach:** Extends for about 90 miles along Guyana's northwestern shore in the area between the Pomeroon and Waini Rivers. The beach consists of tiny shells, and four of the world's eight sea turtle species come here each year between March and July to dig nests among the shells, lay eggs, and return again to the water.
- **Mt. Roraima:** The mountain is the highest peak in Guyana at 2,180 meters and straddles the border with Venezuela. It is a spectacular tabletop mountain with a unique microclimate. It appeals to mountain climbers.
- **Ethnohistorical Sites and Cultural Events:** Guyana has a rich history, characterized by many cultures and races intermixing and coexisting—Indigenous, European, African, Indian, Chinese. Moreover, scattered around the country are touchstone sites relevant to each ethnic/racial group—Dutch fort and plantation ruins; the first settlement villages and churches built by freed African slaves (Victoria, for example), sites of slave rebellions (Cuffy Rebellion of 1763, the slave uprising of 1823 that started on the Resouvenir and Felicity plantations); sites relevant to the period of Indian indentured labor; memorial sites for former political leaders (Babu Jaan in Port Mourant), and the cattle trail

from the Rupununi to the Atlantic coast. In addition, there is a large number of Indo, Indigenous, and Afro-inspired cultural celebrations and festivals throughout the year. Unfortunately, there are no museums dedicated to any of the six peoples that populate the country. Despite the potential for cultural tourism, it has not been marketed to foreign visitors, only national tourists.

- **Shopping:** Tourists typically spend 25–30 percent of total holiday expenditures on goods, namely purchases of gifts, handicrafts, art, textiles, clothing, electronics, perfumes, leather, and jewelry. The main offerings of Guyana are handicrafts, wooden sculptures, jewelry, and award-winning rum (El Dorado). The majority of vendors are located in Georgetown (Stabroek Market, Sheriff Street, the downtown shopping district (Regent, Robb, Charlotte Sts.) and in Amerindian villages located in the interior.
- **Restaurants/Nightclubs/Conference Centers:** About 20–30 restaurants and nightclubs cater to tourists and an upmarket client. These establishments are concentrated in the capital. There is one international conference center, one cricket stadium, two cultural centers, and a handful of performing arts theaters and movie theaters; the majority of these properties are located in the capital city.

Figure 2. Main Attractions Around Guyana



Source: Heneghan 2006.

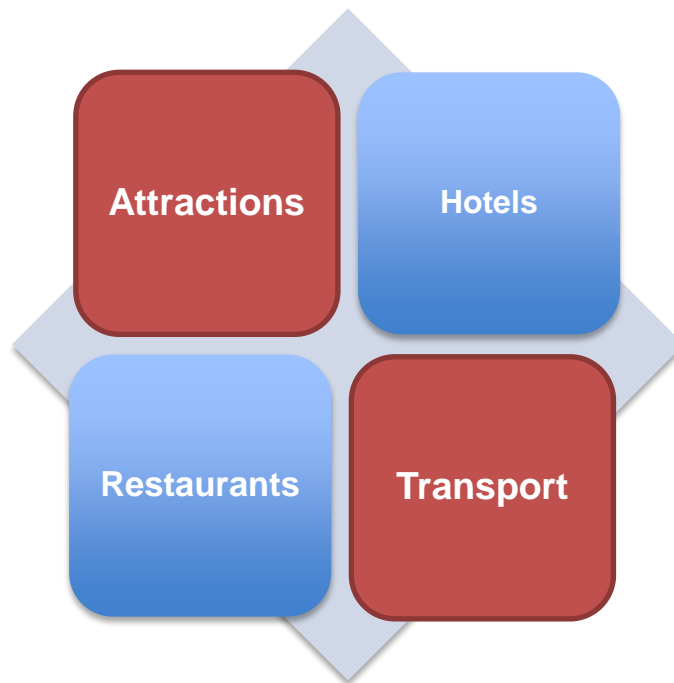
Access to Interior Attractions and Level of Standards

As can be seen from the list of attractions, the most interesting sites for a foreign visitor are outside of Georgetown, the capital. Because of a limited road network, travel to the interior is primarily by plane or boat, which can be expensive or time consuming. With few exceptions (among them Kaieteur Falls and Iwokrama), most sites in the interior lack interpretative signage, high-quality ancillary facilities, and a density of supplementary entertainment activities. Most nature sites are in raw or primary form. In short, the site has one or two features such as a waterfall, bird life, or Indigenous community life, but boasts limited dining and entertainment offerings (such as shows, dancing, and music).

In general, accommodations are basic and service standards are rudimentary. At present there is only a handful of three, four, and five-star establishments and they are located in the capital. The estimated number of room accommodations ranges from 720 according to the Caribbean Tourism Organization in 2010, to 1,180 according to Philip Heneghan in 2006, to 3,200 according to the government of Guyana in 2012. The recent opening of the Marriott Georgetown in April 2015 added another 197 rooms to the stock. Moreover, in the interior, telecommunications and electrical service can be intermittent, sourced by diesel generators for a number of hours per day. For example, most of the lodges in Rupununi and the central region have limited or no cell phone service or Internet connection. Subsequently, many of the ecolodges in the interior cannot accept credit cards forcing tourists to pay in cash or to make cumbersome arrangements with agents in the capital to pay by credit card or check.

According to tourism studies, the four core elements of the tourism cluster that determine growth and dynamism are attractions; hotels/lodging; restaurants/bars; and transport (all modes—air, rail, car, bus, boat—and all phases of outbound/inbound travel and internal travel). If these four core elements are not strong, seamlessly integrated, and mutually reinforcing, the other supporting elements (travel agents, tour operators, food suppliers, retail vendors, and so forth) will suffer. In the case of Guyana, the two critical core elements that need to be improved markedly are attractions and transport links. The current attractions seem to appeal to a small market but the cost of getting to the best sites can be prohibitive, further reducing the size of the market.

Figure 3. Core Elements in the Tourism Cluster

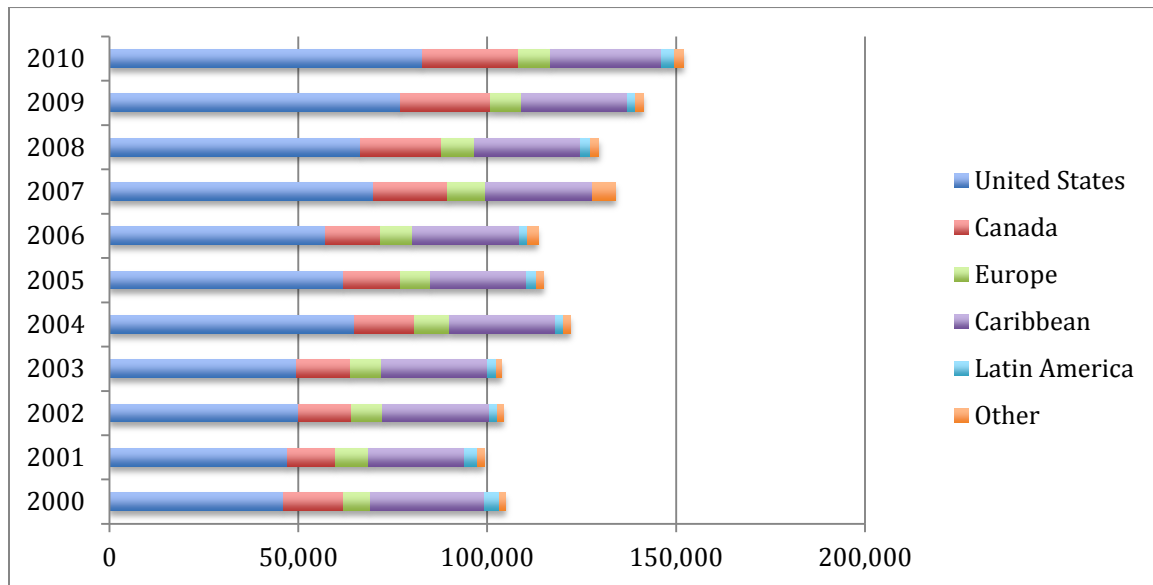


5. Economic Impact of Tourism in Guyana

Tourist Arrivals and Profiles

The number of tourists who arrive in Guyana has steadily increased during the period 1990 to 2010, except for the period 1997–99. In the year 2000, one hundred and five thousand visitors arrived and that number has grown to 151,000 in 2010, a 43 percent increase over the period (see Figure 3). The majority of tourists enter by air. No cruise ship arrivals were reported. Approximately 54 percent are from the United States, 19 percent from other Caribbean states, 17 percent from Canada, 6 percent from Europe, and 4 percent from the rest of the world. Flow of visitors from Latin America has declined as a share of the total over the period. Arrivals from other nonspecified countries outside of Europe, North America, Latin America, and the Caribbean, have increased dramatically by 36 percent from a low base in 2000. Most of the other country nationals are assumed to be Chinese, drawn to Guyana for business purposes (Caribbean Tourism Organization 2010).

Figure 3. Nonresident International Arrivals, 2000–10



Source: Caribbean Tourism Organization 2010.

According to the Caribbean Tourism Organization, in 2010⁸, most of the international arrivals stayed in private houses (85.2 percent), the second largest amount stay in hotels (13.7 percent) and the remainder in guesthouses/apartments (1 percent). The majority of tourists stated on their immigration forms that their purpose of visit is holiday or leisure (64.3 percent), whereas 10.9 percent stated that their purpose is business, and 24.8 percent stated other, with an average length of stay of 19.2 days.

Because the majority of visitors stay in private homes and the average length of stay is so long, it is likely that about 70 percent or more of the visitors are either expatriate Guyanese who hold foreign passports/permanent residency cards or their children who have been born abroad. Guyana has an emigrant stock of approximately 432,900 as of 2011,⁹ which is 58% of the total population of 747,884 according to the 2012 Preliminary Census Report. The peak season for visits are summer months when it would be most convenient for families with school-age children to travel to visit relatives. Most of these emigrants live in Canada, United States, and the United Kingdom.

⁸ This is the latest available date where disaggregated information was found on characteristics of travelers to Guyana. Entry/Exit Custom Forms do not capture much information and surveys of visitors/international arrivals are rarely conducted. In 2010 some analysis was done.

⁹ Source. Migration and Development: Perspectives from Small States, edited by Wonderful Hope Knonje. 2015

The expatriate visitor returns to Guyana to visit relatives and friends and/or attend important social functions such as weddings, funerals, and reunions. The expatriate generally stays in the home of relatives or—if traveling in a large group—may stay in an urban lodge or short-stay apartment. Accordingly, expatriate Guyanese visitors are assumed to make less expenditures on a per capita basis than the business or vacation traveler, because a large part of food and beverage consumption occurs in homes of relatives or friends. However, because there are many more Diaspora visitors, in the absolute, they generate the most expenditures. The estimated total inbound tourist expenditure ranged from US\$86 million–109 million between 2009 and 2010 (Caribbean Tourism Organization 2010).

Competitiveness of the Sector

Guyana has much to do to improve competitiveness in the tourism sector. As Table 1 shows, Guyana is only in the top 50 percent of countries in four reporting areas—international openness, price competitiveness (airport taxes), environmental sustainability, and air transport infrastructure. In 7 of the 15 categories, the country ranks in the bottom 25 percent of all reporting countries. Despite the prioritization of the sector for close to a decade (significant increase in budget allocation 2015 and prominently mentioned in the Low Carbon Development Strategy in 2009 and the National Competitiveness Strategy of 2006), the tourism competitiveness ranking for Guyana is low in the Caribbean subregion, surpassing only Haiti, and is three notches below Suriname. In the entire Latin America and Caribbean region, it ranks 22 out of 27. To improve in rankings, Guyana needs to dedicate more resources to the sub index areas where it scored poorly in Table 1. The current strategy of making a few selective investments may have to be revised.

Table 1: Travel and Tourism Competitiveness Index for Guyana, 2015

Index	Rank /141 Countries	Score 1-7 (best)
Overall	104	3.1
Business environment	70	4.4
Safety and security	111	4.6
Health and hygiene	99	4.5
Human Resources	113	4.0
ICT Readiness	108	3.0
Prioritization of Travel and Tourism Sector	98	4.1
International Openness	51	3.7
Price Competitiveness	25	5.3
Environmental Sustainability	62	4.2
Air Transport Infrastructure	49	3.2
Ground and Port Infrastructure	90	3.1
Tourist Service Infrastructure	135	2.2
National Cultural Resources	116	1.8
Natural Resources	101	2.4
Cultural Resources and Business Travel	129	1.1

Source: World Economic Forum: Travel and Tourism Competitiveness Report 2015

Economic Impacts

As Table 2 shows, tourism contributes to the general economy at modest levels in 2014. The direct contribution to GDP was 3.2 percent, and direct employment was 8,300 jobs or an estimated 3.4 percent of total jobs; capital investment was 2.4% of total capital expenditures. The outlook for 2015 is generally anemic according to industry professionals even though national authorities are expecting a 3 percent increase in arrivals over 2014. Drops in visitor exports and leisure spending and negligible growth in

capital investment are expected. Forecasted growth rates over the next decade (2015-2025) are also underwhelming. This suggests that a serious rethinking of the current approach to promoting and developing the tourism sector is needed.

Table 2. Estimates of Economic Impacts, 2014

Variable	2014 GYD billion (2014 constant prices)	2014, % of total	Forecasted 2015 Growth Rate (adjusted for inflation) (Percent)	Forecasted 2015-25 Annualized real growth rate (Percent)
Direct contribution to GDP	102.3	3.2	-.3	3.0
Total contribution to GDP	255.6	8.0	.5	3.2
Direct contribution to employment ^a	8.3	3.4	-3.8	-.8
Visitor exports ^b	81.0	5.3	-3.6	2.0
Domestic spending	127.0	4.0	1.9	3.5
Leisure spending	156.7	2.3	-.4	3.3
Business spending	51.3	.8	.2	1.8
Capital investment	19.3	2.4	.1	3.4

Source: World Travel and Tourism Council Economic Impact 2015 Guyana

a. Note unit change to '000 persons not currency value.

b. Visitor exports consist of spending within the country by international tourists for both business and leisure trips, including spending on transport, but they exclude spending on education.

The ratio of arrivals to the total population is relatively low, so there is much more room for expansion before sustainability issues arise (see Table 3). Inbound tourist expenditures are averaging 3.6 percent of GDP (nominal) for the period in question. When outbound tourist expenditures are factored in, the net positive contribution is quite low (see Table 5). The total estimated contribution to GDP is 3.6 percent.

Employment

The number of people directly employed in tourism in Guyana was estimated at 8,300 in 2014, which is 3.4 percent of total employment (World Travel and Tourism Council 2015). This includes employment by hotels, travel agents, airlines and transport services excluding commuter services. The number has grown in the last 8 years; it was estimated to be 2,300 in 2006 (Heneghan 2006). However, the forecast for 2015 is negative, a decline of 3.8 percent. Many of the jobs are part-time or shared jobs, especially in the interior. Many ecolodges in the interior have a small permanent core of employees and then allow others to work alternatively in 2-week stints to accommodate other gainful activities such as farming and fishing, or to work only in the peak season. The main employers are approximately 60–70 hotels/lodges/guesthouses/aparthotels, 20 tourist-class restaurants, 10–20 gift stores, 12–15 tour operators, and 10–15 airlines and travel agencies.

Capital Investment

Capital investment is estimated to be GY\$4 billion in 2014 compared to GY\$4.1 billion in

Table 3. Selected Economic Indicators for the Guyanese Tourist Sector, 2008–12

	2008	2009	2010	2011	2012
Carrying capacity (arrivals/population)	.17	.18	.19	.20	.22
Inbound tourism expenditures as a share of GDP (%)	5.1	2.8	3.5	3.7	2.2
Tourism balance (inbound tourist expenditures-outbound tourist expenditures as a share of GDP) (%)	0.6	–1.4	0.3	0.6	–0.6

Source: United Nations World Tourism Organization 2015.

2013. For 2015, the amount is expected to increase slightly to GY\$4.2 billion (World Travel and Tourism Council 2015). Since 2009, the amount of capital investment in nominal GY dollars has risen steadily from 3.2 billion, with one dip in 2010 (World Travel and Tourism Council 2015). The share of investment in the tourist sector compared with total investments in the economy is 2.4 percent in 2014.

Government Collective Spending

According to the World Travel and Tourism Council, estimated government collective spending on the sector has been low in nominal GY dollars. Over the period 2009–14, it has averaged GY\$4.1 billion per year or approximately US\$19.9 million (World Travel and Tourism Council 2014). This amount of government expenditure on the sector is miniscule compared to what other countries spend on tourism development.

Lodging Occupancy

As a result of the many of the aforementioned constraints, occupancy rates tend to be low, particularly in the interior (see Table 4). These low occupancy rates in turn place pressure on profit margins for owner/operators of lodging accommodations. The standard rule of thumb for profitable operations is an 80 percent occupancy rate. With low profitability, owners themselves have little surplus to invest in improvements.

Table 4. Occupancy Rates (%)

Location	Year-Round Average	Low-Season Average
Georgetown hotels	50	30
Georgetown inns and lodges	60	40
Interior resorts and lodges	25	10

Source: Heneghan 2006.

6. Critical Path: What Are the Most Binding Constraints in the Tourism Cluster?

To date, many of the tourism sector initiatives and interventions have been non-reinforcing and piecemeal in approach. A major push has been made to improve international airlift capacity and airport infrastructure, which are undeniably important. At present, eight carriers provide international service (CAL, COPA, Conviasa [suspended June 2015]¹⁰, Dynamic Air, GUMS, INSEL, LIAT, and SURINAM), the international airport is in the process of modernization, and some of the major interior airstrips have been upgraded. This is a major improvement over the state of affairs in 2005, when

¹⁰ In June 2015, Guyana suspended Conviasa flights due to nonpayment of a passenger bond. Earlier, Conviasa had settled a GY\$ 7 m debt for landing rights and operational fees. It is unknown if the new government will continue to waive certain taxes and fees as was the case in the previous administration. On June 10, one additional Conviasa flight was allowed to recover stranded passengers. Since May 27th, relations have soured between the two neighbors over a territorial dispute.

there were only three international carriers.

The other main initiative was the construction of a 197-room Marriott hotel between 2011 and 2015. The US\$51 million hotel opened doors in April 2015, but is running losses as would be expected for a newly launched property (see Kaieteur News 2015).¹¹ Nonetheless, occupancy in the first three years of operation is expected to range between 49-58 percent¹², which will still be lower than the typical industry range of 70-80 percent for a five star property. The nationwide averages for all hotel classes are in the 58-65 percent range across the globe.¹³ Guyana as a nascent tourism market has occupancy rates below world benchmarks (see Table 4) which tends to force owners/operators to cross-subsidize from other income sources or to depend on restaurants/catering/banquets/meetings/retail space rental to make their hotels profitable. In the case of the Marriott hotel project, a US\$8m entertainment complex offering a casino, nightclub and movie theaters was intended as the main revenue generating component, however the complex has not been completed yet, and plans for completion are unclear given the change in government. The business model of this luxury property seems to hinge more on ancillary services and not occupancy.

The key motivating factor for tourist travel is the quality of the attraction and a matching with psycho-social motivations, subject to ease of access and cost.¹⁴ The cost and convenience of schedules of transport links are very important factors, but they rank second in the decision-making process. Without compelling attractions (pull factors), an acceptable quality of service delivery and a modicum of public safety, a tourist is not likely to move to the next level of decision and consider the cost factor. Therefore, tourism stakeholders and national policymakers need to reassess how they are seeking to promote the sector given the slow progress to date. The main recommendation is to create a development plan for the sector based on empirical data, taking into account the limited budgetary resources of the public sector and the limited access to financial and capital markets faced by private sector tourism actors. The steps to be taken in

¹¹ Alleged losses in first 3 months of operation are US\$289,855 (GY\$60 million). Source: Kaieteur News August 16, 2015 edition, Available at <http://www.kaieteurnewsonline.com/2015/08/16/marriott-racks-up-60m-loss-in-three-months/>

¹² Source: HVS Feasibility Study on Proposed Marriott.

¹³ Source: Statista: <http://www.statista.com/statistics/266741/occupancy-rate-of-hotels-worldwide-by-region/>

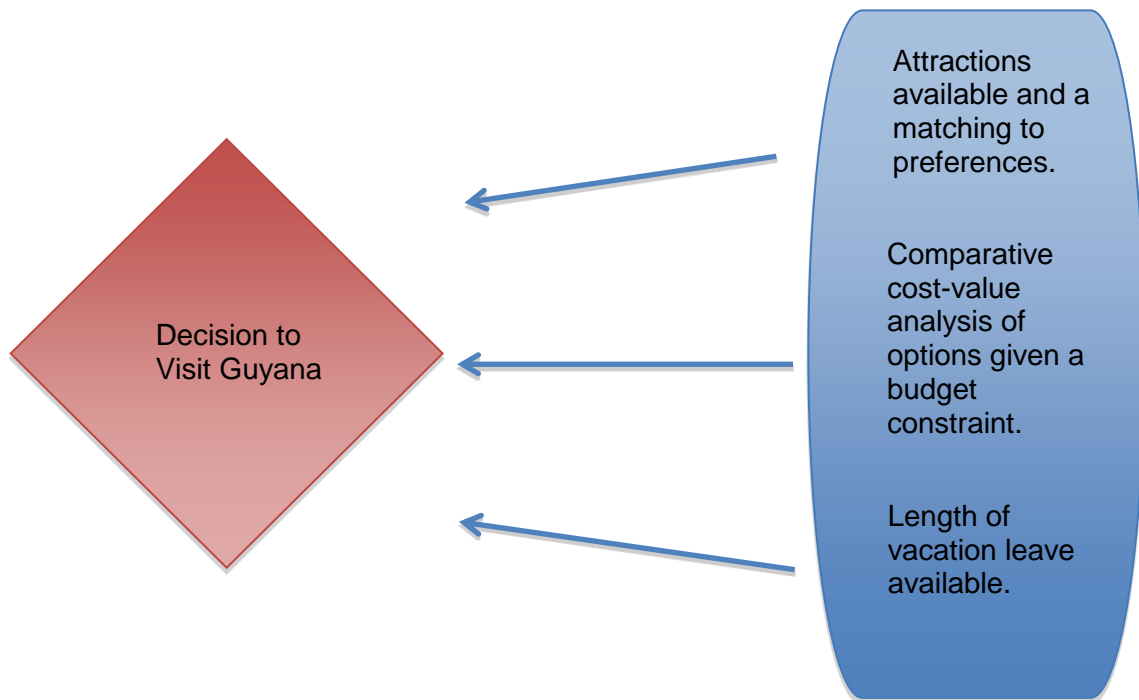
¹⁴ The extant literature on motivations for travel uses a conceptual framework of push-pull motives and product bundles to understand tourist behavior and in turn inform how destination marketers should design strategies. In brief, the literature has two strands of works, one that uses a set of socio-psychological or push motives (escape, self-exploratory, relaxation, prestige, regression, kinship, and social interaction) and two pull motives (novelty and education) (Crompton (1979); Yuan and McDonald's, 1990; Jang & Wu, 2006); there is another strand of work that purports a maximization of travel satisfaction occurs when there is a matching of demand factors (push-pull) with supply factors (ease of access, supply of tourism attractions, cost issues) or product bundling that occur in dynamic context (Swan and Combs, 1979; Oh et al., 1995; Jurowski et al, 1996; Baloglu and Uysal (1996); and McCabe, 2000).

order to develop an appropriate strategy/development plan are laid out below.

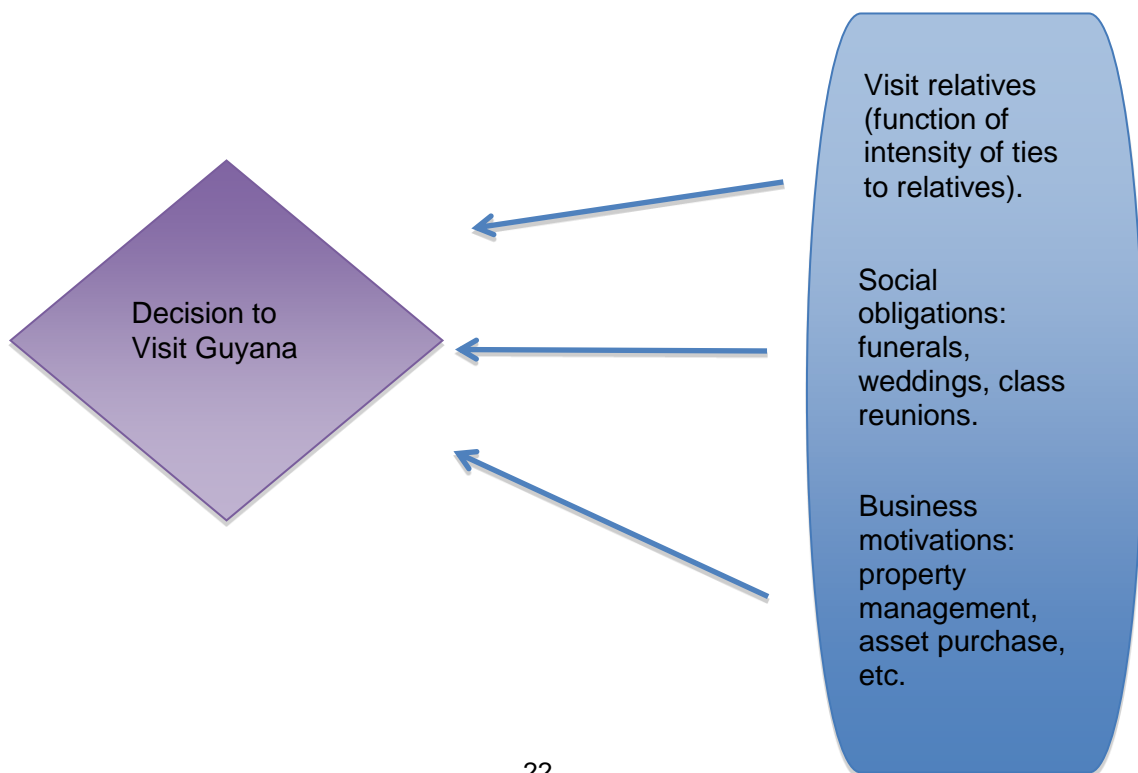
Step 1: Understand why people travel to Guyana

Below is a schematic that could be used as point of departure to understand the reasons why different types of travelers/tourists come to Guyana. Based on empirical data gathered from interviewing actual and prospective visitors to Guyana, tourism authorities would have a better understanding of travel motivations and cost factors. With this knowledge destination management will be more effective and the segments easiest to satisfy will be identified.

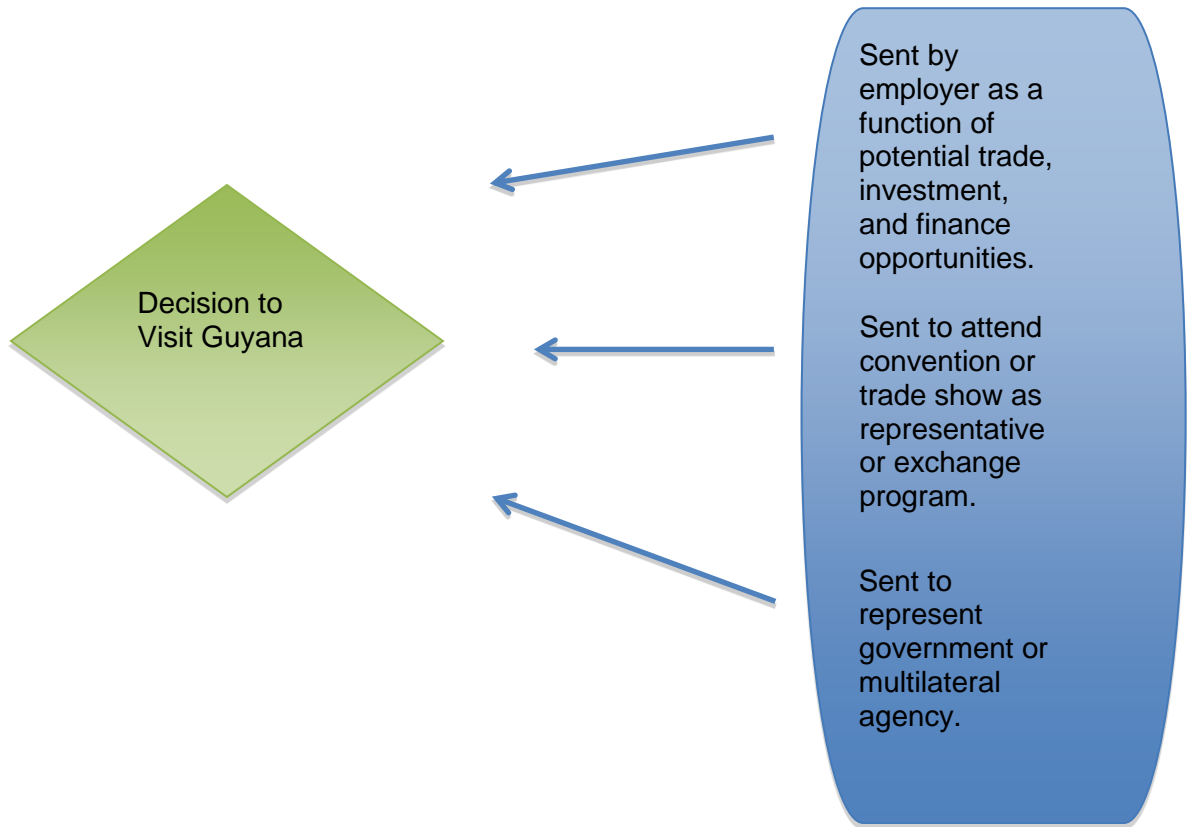
a. Foreign Leisure Tourist with no Connection to Guyana



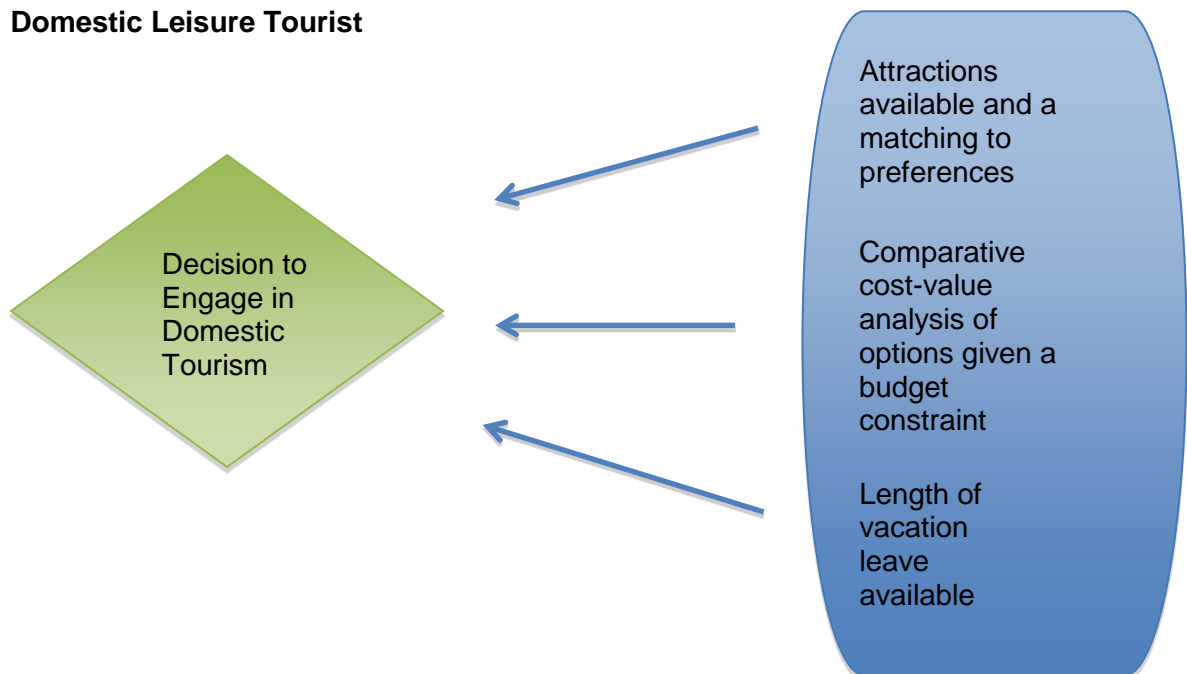
b. Foreign Resident Guyanese or Person of Guyanese Descent



c. Business Traveler



d. Domestic Leisure Tourist



Despite laudable efforts to increase airlift capacity, insufficient attention seems to have been paid by Guyanese stakeholders to other key areas in the tourism cluster. This results in a low value proposition for potential tourists and slows the pace of improvement in overall tourism sector competitiveness indices relative to other destination markets.

Analysis of Decision Calculus Matrix and Implications

At present, Guyana is offering natural attractions that are high priced and do not compare favorably with other “natural attraction” competitor markets in Asia, the Pacific, and Central America, and even competitors in the Caribbean (Dominican Republic, Dominica, Guadeloupe, Suriname, Trinidad and Tobago, USVI-St. John) in terms of service and cost. For example, the range of costs for a visitor to stay in Annai or Iwokrama, some of the most developed ecotourist sites in the Rupunini area, ranges approximately from \$1,100 to \$1,400 for 4 days for a party of two, with two to three excursion packages during their stay, and includes ground transportation and round-trip airfare originating from Georgetown to the closest airstrip to the site. This compares to \$850 for a camping stay in a national park in US Virgin Islands St. John for a family of four, including meals for 5 days and taxi/ferry transport; \$600–\$750 for a 3-day ecolodge stay and 2-3 activities river excursion package for two persons, including transport between the capital and the ecolodge site in Suriname (by land/river), a neighboring country with almost identical landscape, flora, and fauna.¹⁵ To truly appreciate the price competitiveness gap, the average daily expenditure is US\$71 by ecotourists in Costa Rica, the leading and most mature ecotourism destination in the region, while the average in-country ecotourism daily expenditure in Guyana is US\$175.¹⁶

To be competitive, the product can be expensive if the attraction is unusual and the surrounding travel experience is superior to outstanding. To make the travel experience superior, the quality of service at all levels in the tourism value chain must be consistently above average. No empirical or systematic study of service standards in the Guyanese sector has been conducted, but anecdotal evidence from owner/operators exists, and the high demand for hospitality training made manifest to the Tourism and Hospitality Association of Guyana (THAG) suggests that owner/operators would like to improve on this account.

¹⁵ Author's travel expenses and review of websites (see Cinnamon Bay Campground St. John USVI 2014; Orange Suriname 2012).

¹⁶ Author's calculations for Guyana and for Costa Rica figure (see Budget Your Trip 2015).

Step 2: Understanding profiles, preferences, and expenditure patterns, and build a consensus on what segments to focus on and what should be priority investments

In Guyana, there is a lack of disaggregated tourism-related statistics. The Guyanese expatriate tourist segment is presumed to constitute the largest proportion of international arrivals (65-70 percent), but their profiles and preferences are unknown. The business traveler segment is also presumed to be significant but it is unknown how this segment compares to the nature-based foreign tourist segment in terms of numbers, expenditures, and length of stay. Moreover, it is not known how many business travelers stay on and add excursions or spend extra time in country for leisure purposes. With regard to domestic tourists, there is a complete dearth of information. Yet, domestic tourists could be a less demanding segment that could be cultivated and allow service providers to improve capacity and quality of service with a less discriminating and more tolerant segment. Thus, three “low-hanging fruit” segments, Diaspora,¹⁷ business, and domestic, may be in the process of being ignored in pursuit of a niche market that approximately represents 5 percent of visitors and that would require significant investments and upgrades in service standards to increase the size of this segment.

Thus, a key first task from a rational economic point of view is to determine which attractions are favored by each of the segments and the typical expenditure patterns for each segment—domestic leisure tourist, member of the Guyanese Diaspora, business traveler, foreign general leisure, foreign nature-based. The second task would be to determine what cost effective improvements could be made to the most popular attractions that would yield maximum increase in tourist expenditures. Once feasible upgrades are identified, the task will be to reduce transport costs.

Once the data on tourist profiles and preferences have been gathered and analyzed, all stakeholders need to be informed and discussions held on how to develop a focused plan of improvements with limited government resources. To supplement the data on tourist profiles, a comprehensive land-use mapping exercise should also be contemplated and information layered in a geographic information system; mathematical optimization techniques and economic spatial analysis should be applied. The government should facilitate and create an enabling environment that encourages private actors to innovate and invest. Because government budgetary allocations are

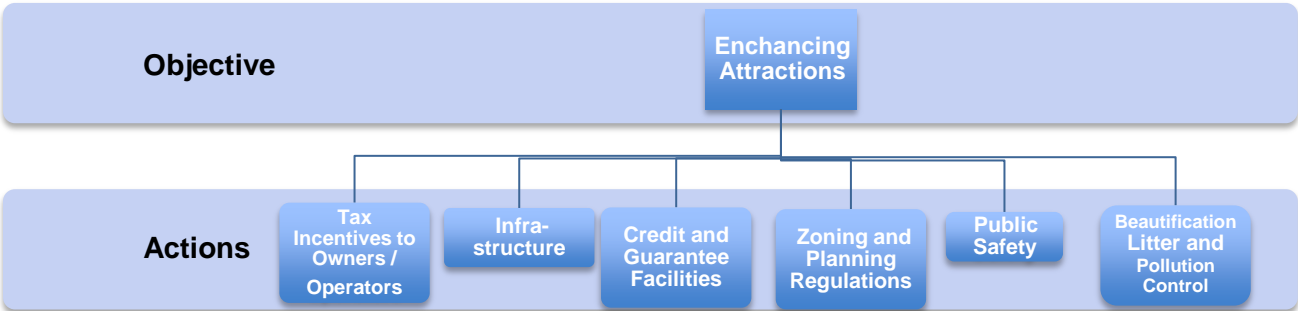
¹⁷ See Roberts, 2012 for discussion of the potential of the diaspora tourism market.

scarce, the most binding constraints should be relieved first and government resources should be used with the aim whenever possible of leveraging and crowding in private investments and financing. A likely output should be a master tourism development plan that has an economic rationality and broad support.

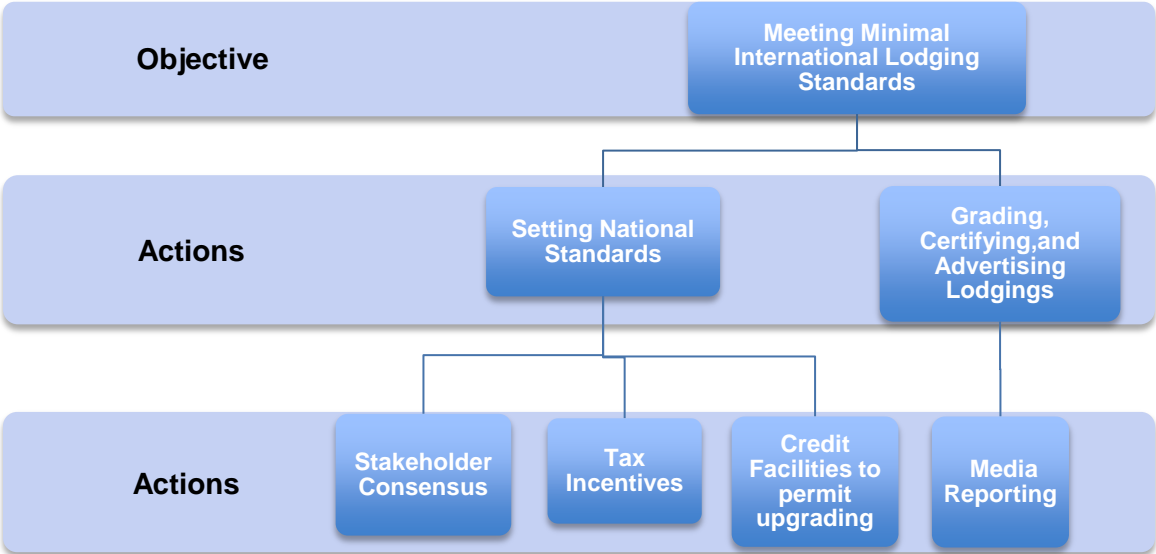
Step 3: Develop the core elements in the Guyanese tourism cluster because these are the drivers of growth and competitiveness

The core elements in a tourism cluster are attractions, hotels, transport, and restaurants. For simplicity, restaurants will not be discussed because they are the easiest element to upgrade and they tend to face the same constraints in nearly every marketplace. Below are schematics that enumerate some the interventions that can be pursued to improve the other three core elements in the tourism cluster—attractions, accommodations, and transport.

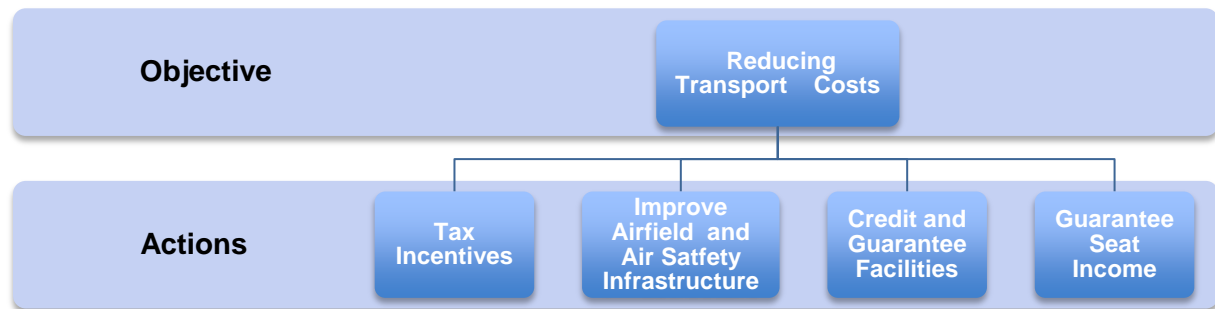
Improve Attractions



Improve Accommodations



Improve Transport Links, Especially Air Transport both Internationally and Internally



Step 4: Develop a marketing plan and branding campaign

Once the improvements have started, they need to be heralded in a variety of media so as to generate traffic. It is more risky to invest in a marketing and branding campaign when product quality is low or very uneven. “Overselling” can lead to a loss of credibility and generate a backlash among overseas reservation and booking agents, tour agents, marketing and sales executives, and travel writers who are very important in building image and reputation.

7. Summary and Conclusion

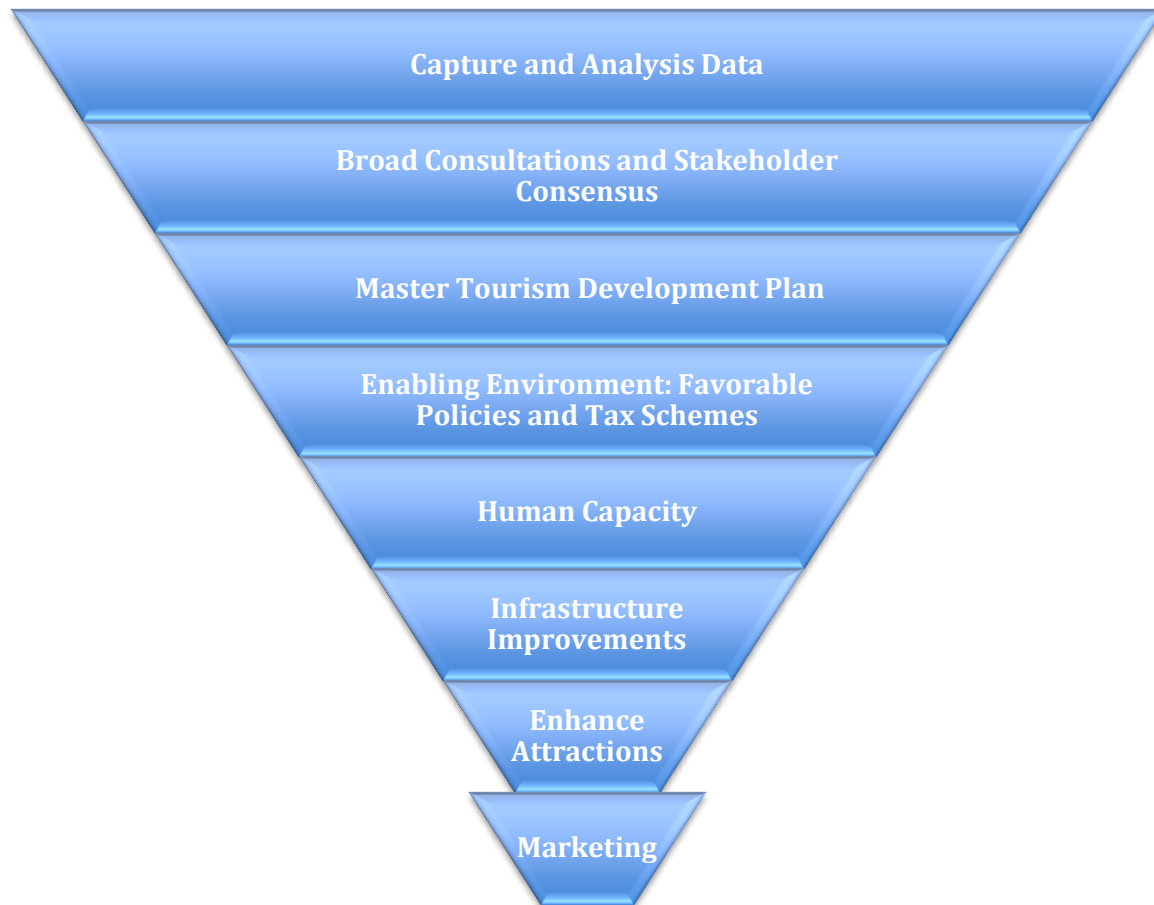
Guyana has potential to create both a general leisure tourism product that would appeal to national and diasporic segments, and a niche nature-based tourism product that would appeal to foreign, diasporic, and national tourists. However, broad-based and concerted action is needed in a number of areas—infrastructure, attraction enhancement, marketing, training, policy framework, reform—to spur higher levels of capital investment, realize upgrades, and increase the economic impacts of the sector. To date, the country has made some notable strides, but growth prospects are still constrained, unless more coordinated action and a higher level of resource mobilization occurs. Some of the fundamental areas for action and a rough sequencing for their implementation emphasized the use of evidence-based analysis to (1) better understand tourist profiles, preferences, and expenditure patterns, (2) subsequently obtain stakeholder consensus on what tourism market segments to prioritize, and lastly (3) determine which interventions would be more efficacious to match the supply of attractions to the demands of tourists.

A sequential path was suggested that could be used to build a competitive tourism destination market and set of products, but it is premised on using data and mathematical optimization techniques to guide the use of scarce resources.

- The first imperative is to gather and analyze data so that informed strategies and policies can be developed. Tourist authorities in Guyana must know their clients. They must purposefully gather disaggregated data. At present the level of disaggregation and depth prevents the shaping of sound strategies and policies.
- The second imperative is to reach a consensus with stakeholders through broad consultations and craft a master development plan based on social, economic, and financial analysis. Many analytical tools such as geographic information systems, cartographic modeling, mathematical programming, and statistical analysis of factors such as expenditure, sites visited, and length of stay patterns for each traveler segment could be employed to determine which attractions and which transport links to focus on for priority upgrading.
- The third imperative is to create a logical and coherent legislative, regulatory, and policy framework. Guyana does not compare well with other jurisdictions in terms of taxation and incentive schemes. Differential incentives may be needed based on location and popularity. A genuine partnership between the private sector tourism owners/operators and the government must be built.
- The fourth imperative is to build core capacity (human resources), improve and classify lodging infrastructure, and upgrade and strengthen the entire tourist value chain. A guiding principle for early interventions, however, should be aimed at assisting the broadest possible number of stakeholders in the value chain and not just a few, and should focus scarce resources on the most binding constraint. The hospitality industry is notorious for high turnover rates, so emphasis will have to be made on putting scarce training resources to best use.
- The last imperative is to market well and work continually on improving price competitiveness and value propositions. Guyana needs to know what visitors find attractive and popular and build upon these initial strengths. A focused marketing approach that clearly differentiates between various segments of potential travelers to Guyana may yield more return rather than a broad based general campaign based on perceptions and assumptions.

The activities at the top of the pyramid in Figure 4 would need to be the first step in order to set the stage and guide the other activities. The activities at the bottom of the pyramid (training, infrastructure improvements, enhancing attractions, and marketing) would need to be conducted on an ongoing basis.

Figure 4. Inverted Action Pyramid



Many of the actions could be simultaneous and some, such as marketing, would be constant. For the probability of success to be increased, the high order tasks should be satisfactorily completed first and then marketing occurs. Marketing, for example, without addressing the fundamental issues of transport and quality of accommodations, would not be very effective in the long run because tourism is largely about repeat business, positive word of mouth, and social media referrals. Negative reviews on social media can be quite difficult to undo by positive public relations and advertising campaigns because customer reviews have a higher order of authenticity than hired marketing agents.

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