

**NATIONAL DEVELOPMENT STRATEGY
(2001-2010)**

A POLICY FRAMEWORK

ERADICATING POVERTY AND UNIFYING GUYANA

A CIVIL SOCIETY DOCUMENT

ANNEX 20

TOURISM

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Equivalent Chapter in Core Document: Used as Background Material for Chapter 20

The Annexes to the National Development Strategy: An Explanatory Note

In June 2000, the National Development Strategy (NDS) of Guyana was formally presented to the President of Guyana and the Leader of the Opposition in the form of a core document, a 348 page distillation of the main elements of the analysis of the Guyana situation and the resulting strategy for action drawn from material prepared by 24 sectoral committees of the National Development Strategy Committee (NDSC). While Chapter 1 of the core document provides an outline of the origins of the NDS and the methodology of its preparation, the purpose of the present note is to explain the Annexes to the core document.

The Annexes are edited versions of the original drafts that the sectoral committees prepared, using a format that facilitated systematic thinking, though at the cost of some repetition. They are therefore longer than the corresponding Chapters of the core document, and also differ from them in other ways:

1. While the Annexes were individually edited in terms of their content, in the core document, disagreements or dissonances between Chapters were removed; for example, if the Chapter on the Private Sector proposed a strategy for Education that was in contradiction with a strategy proposed in the Chapter on Education, the two were rationalised.
2. While the core document was updated with the most recent data where possible, the Annexes generally retain their original data; for recent economic and social statistics, the attention of readers is particularly drawn to the recently completed *1999 Guyana Survey of Living Conditions*. In addition, again because of differences in when they were prepared, what was a Bill at the time of the original draft may have become an Act by the time the core document was being edited. This type of difference may be footnoted in the Annexes.
3. The treatment of the Annexes as historical documents occasionally produced another kind of difference, the main example of which is the Annex on Energy which was written before the privatisation of the Guyana Electricity Corporation, and whose strategy was largely preempted by that privatisation; while the edited Annex deliberately relied on the original material, new material was developed for the core document. These differences may also be footnoted.

It is worth noting that the updates found in the core document usually demonstrate the soundness and continued applicability of assessments made on the basis of earlier data or other information.

There are fewer Annexes than there are Chapters in the core document. For various reasons, some sectoral committee drafts were finalised in the same format as the Chapters of the core document, and there would therefore be little difference between the Chapter and the corresponding Annex. (Examples of this are the Macro-Economic Strategies and the Management of the economy; Sugar; Urban Development; Land; Housing; and The Family). The core document also includes Chapters for which there were no corresponding sectoral committee drafts; the first three Chapters of the core document (Origins and Methodology, National Objectives and Governance) are examples.

For those sectors where there are both separate Annexes and core document Chapters, the titles and numbering of the two correspond except in two cases: one, the corresponding Annex for the Chapter on Manufacturing is titled Manufacturing and Technology and includes material on Science and Technology that the core document had placed elsewhere; and two, the corresponding Annex for Chapter 4, Macro-Economic Policy, is Annex 4, Financial Sector Policy, because the material prepared for the Financial Sector Policy Annex was incorporated into the Chapter on Macro-Economic Policy.

The National Development Strategy was published in summarised form (the core document) for the practical reason that few people would have the time to read the over 700 pages represented by the Annexes. Yet the Annexes have a clear value. They include background information and assessments that were too detailed for inclusion in the core document, but which trace the process that shaped the strategy. Above all, they preserve for us and for posterity the earlier thinking, and the full range of thinking, of the women and men whose work provided the foundation of the NDS. In doing so, they honour the labour which the sectoral committees put into distilling their own work and life experience and the views of the public they consulted in the process. It is this foundational material that is now being published, making the National Development Strategy of Guyana available in both summary and extended forms.

TABLE OF CONTENTS

	Page
LIST OF ACRONYMS.....	20-ii
1. Basic Features of the Sector	20-1
A. Guyana's Current Tourism Product	20-1
B. Pertinent Characteristics of Visitor Travel to Guyana	20-1
C. The Opportunity.....	20-2
D. Types of Tourism.....	20-3
II. Policies of the Sector.....	20-6
III. Issues and Constraints.....	20-9
1. Lack of a Protected Area System.....	20-9
2. Marketing.....	20-10
3. Amerindian Involvement in Tourism Development.....	20-12
4. Expansion and Improvement of the Product Offered.....	20-13
5. Standards within the Industry.....	20-15
6. Investment.....	20-16
7. Education and Public Awareness.....	20-17
8. Partnerships in the Industry.....	20-18
IV. Sectoral Objectives.....	20-19
V. The Strategy.....	20-20
A. Mechanisms of Responsibility.....	20-20
B. Protected Areas.....	20-23
C. Amerindian Involvement in Tourism.....	20-25
D. Investment.....	20-26
E. Air Transport.....	20-27
F. Product Development and Improvement.....	20-28
G. Other Tourism Ventures and Networks.....	20-29
H. Visitor Security.....	20-29
I. Marketing Guyana as a Tourism Destination.....	20-30
J. Regulations and Standards within the Industry.....	20-33
K. The Wildlife Trade.....	20-34
VI. Legislative Changes.....	20-34
A. National Parks.....	20-34
B. Protection of Wildlife and Fisheries.....	20-35

C.The Environmental Protection Act.....	20-35
Appendices.	20-36

LIST OF ACRONYMS

CD-ROM	Compact Disc - Read Only Memory
CJIA	Cheddi Jagan International Airport
CTO	Caribbean Tourism Organisation
EC	European Community
GAC	Guyana Airways Corporation
GDP	Gross Domestic Product
THAG	Tourism and Hospitality Association of Guyana
UG	University of Guyana

ANNEX 20

TOURISM

1. Basic Features of the Sector

A. Guyana's Current Tourism Product

Tourism takes diverse forms, each with appeal to a particular class of tourist and with its own implications for the country's infrastructure and revenue earnings. Eco-tourism is currently the fastest growing segment of the tourism industry, its potential today paralleling that of the "sun, sea and sand" locations in the Caribbean when that tourism market was emerging forty years ago. However, eco-tourism is an entirely different industry, and Guyana is uniquely placed to take full advantage of it because of two basic comparative advantages. First, the diversity of Guyana's flora and fauna, its virgin rainforests and its vast array of waterfalls, rivers and creeks are unique factors that set her apart from her Caribbean neighbours who rely heavily on tourism. Guyana's natural endowments are in a virtually pristine state, on a scale that is rare in today's world. The second advantage is that Guyana is the only English-speaking country in the South American Amazon Basin. This advantage cannot be underestimated in terms of its appeal to markets such as Europe, the United States and Canada, the main markets connected with eco-tourism.

However, eco-tourism development must be pursued with extreme care and consideration for the natural environment. This is the eco-tourism challenge, to find a balance between exploiting a natural site for eco-tourism activities without destroying the very location that the activity depends on. Any eco-tourism venture undertaken has to take this into account.

B. Pertinent Characteristics of Visitor Travel to Guyana

The 1994 Visitor Survey of Guyana carried out by the Caribbean Tourism Organization in cooperation with the Guyana Statistical Bureau and the Ministry of Trade, Tourism and Industry provides many insights into the basic features of the sector.¹ The survey shows that the main distinguishing feature of the Guyana visitor profile is a relatively high proportion of business visitors and persons visiting friends and relatives. The peak season for northern visitors to Guyana is in the winter months (see Appendix 2a). Most other characteristics of visitor traffic reflect these basic facts.

A large captive tourism market associated with business travel already exists. At present, business travellers make up the majority of visitors to Guyana. This market can generally be divided into three categories: short-term, long-term and conference travel. The long-term

¹ *Guyana Visitor Survey, 1993/94*. Caribbean Tourism Organisation in Cooperation with the Guyana Statistical Bureau and the Ministry of Trade, Tourism and Industry. Published in 1995.

business traveller generally works in or around Georgetown during the week and has the weekend available for travel. The short-term business traveller generally has less time in the country and a less predictable time schedule. However, the country can only handle a small number of visitors at present. To cater to large markets, much more infrastructure is needed, and service has to be fast and efficient, with all necessary business and communication facilities available. For the moment, however, more tourists are needed to maintain present capacity.

Of the total of 112,751 non-Guyanese who visited the country in 1994, it is estimated that the overwhelming majority are Guyanese who have acquired other nationalities returning to visit family, business persons, international volunteers, members of NGOs, and visitors on official business. It is estimated that of the arriving foreigners no more than 2,000 come primarily for tourism, as the term is commonly understood. These persons spend, on average, the equivalent of a few hundred US dollars per stay, certainly less than US\$1,000. Therefore, in very approximate terms, it may be calculated that the sector at present generates between 1 and 2 million US dollars per year in foreign exchange earnings from leisure tourists. Given a total of 112,751 visitors, the total value of all forms of visitors to Guyana, and hence of the entire tourism industry, was conservatively in the region of US \$56 million (112,751 @ US \$500 per visitor) in 1994.

The potential of increasing the actual number of leisure tourists would be considerably enhanced with a systematic effort to improve the country's infrastructure and develop an appropriate tourism program.

C. The Opportunity

Some pertinent facts about tourism that demonstrate its potential impact are as follows:

1. The economies of other countries that are similar to Guyana have been transformed in short order by tourism.
2. Travel and tourism are on the brink of becoming the world's largest single industry.
3. Even in a highly developed economy like Britain's, with industries of vast size, tourism is the second biggest industry.
4. Worldwide tourism receipts are projected to grow by anything from 3 percent to 6 percent annually for the next ten years and the industry is estimated to be worth over US\$3 trillion in 1996.

The overall benefit of tourism is that most of the steps which a developing country needs to take in order to improve its standard of living, are exactly those which are required to develop tourism within a country. Some of the benefits of tourism are:

- A larger tax base for national development
- The generation of foreign exchange

- The provision of national employment
- The promotion of rural and interior development
- Human resources development

Properly managed, tourism is a non-depleting, non-consumptive industry that provides ever-increasing economic benefits in a sustainable manner.

D. Types of Tourism

Before any real and meaningful development of tourism can take place in Guyana, there must be a clear understanding of the type of tourism products that are both suited to and suitable for Guyana. Efforts to develop these products and Guyana's image as a destination must be made in accordance with what Guyana determines to be its needs, and with what it identifies as the most lucrative and sustainable product available to the country. This requires a precise definition of the types of tourism that are compatible not only with the product that Guyana has to offer, but also with what the country hopes to achieve from tourism development. It is also necessary to examine aspects of tourism which are undesirable for this country.

Some of the types of tourism which may be considered in an attempt to define Guyana's product are:

1. Nature Tourism

Nature-based tourism is a natural choice for Guyana for several reasons. First, Guyana's vast and pristine rainforest and savannahs, the abundant wildlife and spectacular natural attractions, make the country a prime attraction for eco-tourists. They are now looking for new, relatively untouched environments, and Guyana stands in a good position to take advantage of this as long as sustainable development techniques are used. Another signal advantage that Guyana has over many of its competitors in the region is that, as mentioned earlier, it is the only English-speaking part of the Amazon Basin.

Nature tourism is itself advantageous to Guyana because it endeavors to respect the natural environment and the different cultures. It is a type of tourism which tends to concentrate on small numbers of tourists paying relatively high prices, thus maximizing the economic benefits to the country (which is after all the major reason for tourism development), while minimizing the negative effects on the environment and society which are generally associated with traditional or mass tourism. To further assist the development of nature tourism, more lodges are needed around the country in key locations, along with better transport and improvements in public health. In particular, it is essential to drastically reduce the incidence of malaria in the interior. A system of national parks and protected areas also needs to be established, preferably around these key attractions.

2. Adventure Tourism

Adventure tourism is another rapidly growing segment of the global tourism market. The traveller interested in this type of tourism is seeking a holiday characterized by a number of specific "adventurous" activities, in stark contrast to one that has no organized activities. This

category of tourism can be divided into "hard" and "soft" adventure tourism. To many soft adventure tourists, simply seeing animals in their natural habitat, or in the wild, is adventurous. For the hard adventure tourists, the holiday should be characterized by more energetic activities such as whitewater rafting, rock climbing, cycling or mountain biking. Recent changes in modern tastes and lifestyles have made these types of holiday extremely popular, and with Guyana's undeveloped interior, there is enormous scope for the development of such a product.

3. Special Interest Tourism

Special interest tourism attracts visitors whose purpose in travelling is to experience one aspect of the destination, e.g., bird watching or turtle watching. This represents a " niche within a niche".

4. Eco-tourism

Eco-tourism represents a very small but expanding niche market. In the recently completed National Plan for Ecotourism Development, eco-tourism is defined as "... a form of travel for pleasure that is focussed on the natural and cultural environment. It is designed to have a low impact on that environment, give the visitor a better understanding of the unique qualities of the place being visited, contribute to the well-being of the local population and promote conservation". A basic element of eco-tourism is information and education. Most eco-tourists want to learn more about the environment, both physical and human, that they are visiting. On an international level this requires that adequate information be readily available and accessible to the potential visitor through literature (promotional and informational) as well as through existing and emerging technologies such as the Internet and CD-ROM. On a local level, the transmission of information necessitates highly trained tourist guides who can communicate and interpret nature in a way that is entertaining and educational. The eco-tourist is typically a well-educated, well-travelled professional (generally over 35-40 years old), with a high income and keen environmental, social and political awareness. He or she has probably travelled to several island destinations over the past 10 years and is now tired of the same routine. Eco-tourists are looking for new ways to escape the winter and big city pressures. At the same time, such persons easily see through operations that do not respect the environment or indigenous populations. If Guyana is serious about eco-tourism it needs to embrace overarching environmental policies and ethics, so as not to be perceived as a "fake".

5. Multi-destination Tourism

This is a growing segment of the tourism industry, as more and more holiday makers are spending more and travelling further distances on vacation and are therefore very amenable to visiting two or more countries. Given Guyana's distance from its main markets in Europe and America and its proximity to the Caribbean, joint destination packages make sense for Guyana, especially in the short term as Guyana builds and expands the products it offers. While eco-tourism is a natural tourism choice in itself for many people, the traditional form of "sun, sea and sand" tourism is still a major attraction for most tourists. Good flight connections to Trinidad, Barbados, Grenada and Curacao make these destinations suitable partners with which to team up

to market a joint destination package which would allow visitors to sample both the traditional Caribbean product and a more nature-oriented product on the same holiday.

6. Cruise ship Tourism

There is a lot of controversy regarding cruise ship tourism in the Caribbean, and there is a school of thought in Guyana which maintains that cruise ship tourism on a large scale is not compatible with eco-tourism and is not in the interests of Guyana. This kind of tourism does not increase hotel occupancy rates and therefore much of the tourist expenditure is not made in the destination country. Potentially, large numbers of day tourists can bring detrimental influences to the country, such as increases in pollution, crime, the drug trade and prostitution. In general, cruise ship tourism requires excellent shopping facilities, including duty-free shops, speedy customs and immigration clearance, effective security and short, well-coordinated tours. This type of tourism can bring revenue into the country in the form of a government head tax and tourist expenditure on craft and other consumer items. However, tourist expenditure is often minimal in comparison to the costs. There is a rough estimate that average revenue obtained by Caribbean countries from cruise ship tourism is about US \$5 per head. There is also no head tax at present on cruise ship tourists to Guyana.

Cruise ship tourism should not be ruled out, but it should be carefully monitored and controlled to ensure that the detrimental effects of mass tourism do not occur. Cruise ship tourists who are here specifically as eco-tourists should be encouraged; this kind of cruise ship tourist visits South America. It is important to note, though, that cruise ship tourism of the wrong kind can destroy the very thing that Guyana is trying to sell.

7. Heritage/cultural Tourism

There is room for the promotion of Guyana's historical sites for their historical and architectural value. Sites suitable for this type of tourism include Georgetown, Fort Island, Magdalenburg and Kyk-Over-Al. Amerindian culture is of potential interest to tourists, as well as African and Indian culture. However, at the same time, it is important to protect these cultures and communities, particularly the Amerindian communities, from the negative impact which tourism can have on their traditional ways of life.

There are other types of tourism that are possible, such as industrial and agricultural tourism, which show potential. Tourists have expressed interest in visiting mining and forestry operations and facilities for rum and sugar production. In the case of the first two, these can be tourist attractions only if carried out under strict environmental controls.

While it is hardly likely that many tourists will travel to Guyana specifically to see Georgetown, the beauty of the capital city should not be underestimated as an encouragement to tourists in Guyana to stay an extra night. This would have a positive spin-off for restaurants, taxi drivers, craft shops and other local businesses. Measures need to be taken to promote cultural offerings such as art exhibitions and presentations of traditional dance, and to preserve the traditional charm of the city, especially its rich architecture. The spate of concrete buildings

being constructed where old Victorian style buildings once existed can only be viewed negatively.

II. Policies of the Sector

There is little evidence to suggest that a tourism policy existed prior to the 1990s, either implicitly or explicitly. Several factors may have been responsible for this. First, the Government may have felt that Guyana does not possess what it takes to be a tourist destination. Second, the apprehension that impacts associated with tourism would exacerbate social problems may have discouraged its development. However, in recent years the emergence of eco-tourism as an alternative to resort-based mass tourism has generated an awareness of Guyana's potential for a more beneficial, less intrusive type of activity.

A. Tourism Policies from 1989 to 1992

In 1989, a study funded by the European Community (EC)² formulated a policy framework for the sector. The study recognized the importance of tourism in the generation of employment and the creation of income and made a number of recommendations, including:

1. The maintenance of effective consultation with all sectors of the tourism industry to create a harmonious relationship between the public and private sectors.
2. The provision of fiscal and other incentives to attract foreign investment and entrepreneurial skills to accelerate new development and to obtain a "critical mass" in the range of accommodation and attractions.
3. The identification and removal of obstacles and deterrents to new investment and the expansion of existing businesses with tourism potential.
4. The improvement of both internal and international airline connections.
5. The protection of the natural beauty of the country through legislative and other Government measures.

These recommendations were accepted and ratified by the Government, but most have not been translated into practice. Most of the recommendations remain applicable today.

B. Current Policies

In 1998, a project commissioned by the Government of Guyana and executed by consultants from the University of Guyana resulted in the production of a tourism policy document. The broad objective of this policy is:

² Kelly, E. (1989) *Developing Tourism for Guyana: Policy and Strategy Plan*

“To develop a sustainable tourism industry that produces maximum economic, social, cultural and environmental benefits, while minimizing negative impacts, as part of an integrated national development strategy through the optimum use of human resources and the provision of a product of the highest quality.”

The document was compiled with strong input from both the Government and private sector institutions in tourism. The specific objectives of the policy are:

1. Organizational Structure

To establish and maintain an institutional framework for Guyana that ensures effective management of tourism, and promotes harmonious collaboration and partnerships, among all sectors of the economy.

2. Role in the National Economy

To develop tourism as a major industry that provides the greatest possible socio-economic benefit for local communities, in addition to its contribution to the national economy in terms of foreign exchange earnings, tax revenue and employment.

3. Investment

To provide fiscal and other incentives to attract local and foreign investment and entrepreneurial skills, as well as to help existing tourism businesses to upgrade and expand services.

4. Human Resources

To develop and institute programs and certification for all skill levels in all sectors of the industry.

5. Local and Community Involvement

To encourage and facilitate the involvement and participation of local communities at all levels of tourism development.

6. Services

To develop and provide a range of services of a level of excellence that would provide a visitor with an experience of exceptional quality.

7. Marketing

To design and implement sound tourism marketing programs that effectively promote Guyana's tourism product and enhance its competitiveness in the global marketplace.

8. The Natural Environment

To encourage and promote sustainable uses of the natural environment, with an emphasis on the development of ecotourism, through the adoption of legislative and other measures that accord protection to selected natural areas.

9. Cultural Heritage

To enhance the appreciation, development and promotion of Guyana's cultural heritage as a tourism asset in ways that would increase the marketability of that heritage while safeguarding its integrity.

10. Tourism Awareness

To develop and implement programs aimed at increasing, at all levels of society, awareness of the broad range of tourism's benefits, and of the contribution Guyanese can make to the development of the industry and the quality of the visitor experience.

11. Safety and Standards

To foster the development and enforcement of the highest and the most appropriate safety measures in the tourism industry.

The document was finalised in July 1998, though the process of approval by Cabinet has yet to be completed. However, certain policy decisions have been instituted over the past 10 years to give guidance to the tourism industry. These, with comments where appropriate, are as follows:

a. Removal of the visa requirement for the major tourist-generating markets in Japan, North America, Western Europe, and Scandinavian and Commonwealth countries, as of 1993.

b. The introduction of a 10 percent room tax on all establishments with a capacity of 16 or more rooms. However, the funds raised from this tax are not channelled back into the industry.

c. The 1995 preparation of a tourism incentive package granting duty-free concessions to a number of items. However, investors have expressed total frustration at the bureaucratic bottlenecks in accessing these concessions. Further, in their present form, the concessions do not offer any meaningful incentives to the industry.

d. The Government's decision to commission the Organization of American States (OAS) to develop an Integrated National Eco-Tourism Development Plan of which a Management Plan for Kaieteur National Park is a component.

e. The promotion of 1996 as “Visit Guyana Year” with the aim of attracting 250,000 visitors to Guyana; again, however, this effort was seen by the industry as poorly conceived and premature, with no input from the private sector.

At the same time, Government has strengthened the Tourism Division of the Ministry of Trade, Tourism and Industry. There have also been attempts at enhancing the image of the Cheddi Jagan International Airport, Timehri and at sensitising Immigration and Customs officers to their new obligations in a tourist destination. Efforts are being made to educate the general population about the new tourism initiatives through the media and other initiatives such as the 1996 Tourism and Environmental Exposition.

III. Issues and Constraints

1. Lack of a Protected Area System

Costa Rica generates at least as much income from its 2 million ha of protected areas as the whole of Guyana’s GNP, and while Guyana cannot expect to match this within the foreseeable future, an industry generating 5-10 percent of Costa Rica’s ecotourism earnings within a decade seems feasible if all the right policy and incentive structures are put in place.

Guyana will never overcome the hard-sell factors while it remains the only Latin American country without an effective national Protected Area System. Neighbouring Suriname has in excess of 14 percent of its land area dedicated to protected areas, while Brazil has recently made a commitment to expand its rainforest protected area system by 50 million ha – twice the land area of Guyana. Guyana does, however, have the potential to have the best, most ecologically representative protected area network in the hemisphere. However, it needs to take action soon if it is to foster eco-tourism and protected market access for traditional industries such as those in the forest sector.

Protected areas are the cornerstone of any effective biodiversity conservation system. However, only a few countries have dedicated more than 10 percent of their land area to protected areas and, even here, the future of their biota will rarely, if ever, be totally secured just by their formal protected area network. Guyana is one of the few countries that can set a comprehensive, ecologically representative protected area network in a supportive matrix of well-managed forests, rivers and other ecosystems. Guyana therefore has the opportunity to secure the long-term survival of a full complement of its wildlife – an option that has been already lost in many other tropical countries. This is a key element of Guyana’s long and short-term comparative advantage for eco-tourism, and it is essential that Guyana’s forests, wild life and inland fisheries are managed to support rather than to threaten conservation objectives. A significant level of eco-tourism development is unlikely to develop unless Guyana becomes known as a country where high standards of environmental stewardship are applied to all aspects of its natural resource utilisation and management.

The design and management of an effective protected area network must be supported by a wide range of social actors. In Guyana, the involvement and support of Amerindian

communities and other people living in the hinterland is essential for the development of an effective park system that can attract and support significant eco-tourism. It is equally essential that social partnerships between Amerindians and private investors are encouraged and that Amerindian communities have access to capital to foster their own direct involvement in the industry.

Eco-tourists tend to be sensitive to social issues and the interests of indigenous people. They are unlikely to visit a country where land use and the park system's interaction with indigenous communities are in any way clouded by controversy. The tourism industry therefore needs to encourage the Government and Amerindian communities and their organisations to work together so that a community-based protected area system known internationally for its social sustainability can be developed. Only then will the park system be able to attract high-income visitors with high levels of political, social and environmental awareness. Direct income earning for Amerindian communities from user fees for protected areas and other visitor attractions will be an essential part of developing these partnerships.

Information and education are essential ingredients for effective eco-tourism. This requires access to printed and electronic information about the ecosystems and the natural and social history of Guyana. It also requires access to trained guides and rangers who can interpret the country's natural and social history so that visitors have a rewarding experience. For international environmental and scientific organisations to be encouraged to visit and to work in Guyana, they must be made to feel welcome and their visits must be facilitated with the minimum amount of bureaucratic control necessary to protect national interests and intellectual property rights. Equally, however, visiting researchers should be encouraged to work with local counterparts to develop ongoing scientific and educational partnerships that can more rapidly meet Guyana's urgent information and human capacity needs.

A single Minister responsible for Environment, Protected Areas and Amerindian Affairs has been proposed. However, while there is merit in linking protected areas and tourism under a general environmental Ministry, Amerindian Affairs involves a much wider range of issues and justifies a separate Ministry.

Institutionally, there are good reasons for keeping tourism, protected areas and general environmental regulation in separate organisations to avoid internal conflicts of interest between regulatory, line management and tourism promotion interests and responsibilities. There may therefore be considerable merit in promoting the formation of a Guyana Heritage Commission that would look after both the country's natural heritage (through management responsibility for protected areas) and the country's cultural heritage (through planning and, in some cases, management oversight for built heritage, botanical gardens, galleries, museums etc.). One could also argue for the Guyana Forestry Commission to have its mandate expanded to include wildlife and fisheries so that Guyana has a single, well-resourced Commission responsible for the effective regulation of all aspects of the use of its renewable natural resources.

2. Marketing

Marketing is the mainstay of tourism anywhere in the world. The international market for tourism is highly competitive, with almost every country offering itself as a holiday option, and as a result, enormous resources – financial and human – are expended by each country on creating an image as the perfect holiday destination. Guyana starts off as a difficult sell in the world of tourism. It has no image whatsoever as a tourism destination in the world travel market, and also has to cope with the negative image of Jonestown and the perception that it is a poor country with a fragile democracy. Compare this reputation to that of a West Indian island like Jamaica, with a history of greater political turmoil and violence, gun-crime and drugs; yet Jamaica, “where the nights are gay and the sun shines daily on the mountain top,” benefits from helpful romantic images in the international marketplace. In addition, Guyana is often confused in name with Ghana in Africa. Top priority will have to be given to filling the gap in knowledge about Guyana and working to erase the current negative images.

Tourism is an export product, but unlike other exports of Guyana, it is intangible. To sell tourism is to sell a dream or fantasy, and such a product cannot be weighed or put into a box. The customer buying the tourism product cannot sample it before buying, nor can he or she take it home after purchase. Tourism is a singular and highly personal experience that is slightly different for every visitor. Factors that contribute to a sense of satisfaction with a tourism experience are many, but chief among them are physical beauty (the environment wildlife, etc.), cultural experiences (authenticity of life, historical locations, etc), and a friendly, helpful population.

In marketing tourism it is also important to examine what the overseas market wants. At present, visitors to Guyana can be grouped into the following categories:

- Business people and official visitors with a few days to spare
- Expatriate Guyanese returning on holiday or business
- Expatriate workers based in Guyana
- Tourists coming over for a few days as part of a multi-destination holiday
- Tourists coming for nature, adventure or eco-tourism holidays

The first two categories plus international volunteers currently make up over 95 percent of all visitors to Guyana. The total number of visitors to Guyana, a little more than 100,000 annually, is small compared to other tourist destinations, but the potential for growth and resulting foreign exchange is large. Guyana could market itself as part of multi-destination packages, but this requires cooperation with operators from other countries and detailed planning, especially in the coordination of flights, so it may be best left to a later stage in the sector’s development.

Guyana’s lack of an image as a tourism destination, coupled with the lack of any serious efforts to implement a public relations and marketing campaign for the country, are possibly the biggest obstacles to the development of tourism. Marketing is a business, and cannot be accomplished through embassies, a past error common among those trying to promote emerging tourism. A visitor looking for a tourist destination spot will not visit every nearby embassy or

consulate and, in any case, Guyana does not have embassies and consulates in all of the major target cities. Professional representation in the markets that Guyana wishes to attract is vital. In marketing Guyana's tourism product, planners have to be prepared to spend money. Successful marketing is done through advertising, and by ensuring that Guyana is listed in all travel guides and books. In addition, since tourism is an export industry it should be eligible for benefits normally afforded to other industries in the export sector.

3. *Amerindian Involvement in Tourism Development*

Tourism is likely to benefit Amerindians if properly pursued. It presents Amerindians with an opportunity to build an indigenous industry which is labor-intensive and benefits the local communities.

For a start, English-speaking tourists, who make up the majority of visitors to Guyana, will find it easy to communicate with indigenous peoples in the interior. What could follow from this simple advantage is a best-case scenario for the involvement of Guyanese Amerindians in eco-tourism ventures. Guyanese Amerindians are unsurpassed by any other ethnic group in Guyana when it comes to knowledge of the interior and can be trained to deliver that knowledge in a systematic way to tourists. This will contribute to a high quality experience, resulting in positive word-of-mouth advertising, which should lead in turn to an increase in eco-tourist numbers.

Wildlife exploitation is a good example of how an extractive industry could be turned into a sustainable economic venture for Amerindians. The trade does not earn a lot for the trapper, who gets a fraction of the exporter's profits and generally engages in trapping as a monetary supplement to subsistence practices. Jungle wildlife viewing, in contrast, could involve the same trapper moving from a consumptive, probably unsustainable activity, to the non-consumptive, sustainable activity of photo or adventure tours. Amerindian bird trappers could convert to guides if the option were available and if it proved to be a better financial deal for them.

When established, the National Protected Areas System could involve Amerindians in its eco-tourism activities. Amerindians could be trained as park rangers and guides, since they have an unrivaled knowledge of the local terrain and its natural resources. Further, they are more likely to remain in these areas in the long-term than the average coastlander candidate filling such positions.

The impact of such measures on Amerindian communities can be significant, because the industry is labour-intensive and can provide jobs for large numbers of unskilled workers. The industry can also stimulate local economies through increased local demands for transportation, lodging, food, materials and nature interpretation. Thus, even a relatively small share of tourism revenues can provide an extremely strong boost to the local economy. New job opportunities would stem the flow from villages to the coast, Brazil and Venezuela. There is great potential income for women and other less mobile Amerindians from the sale of handicraft to tourists, promoted by demonstrations and explanations of the craft processes.

On the other hand, jobs linked to eco-tourism could be seasonal and subject to world economic conditions. While eco-tourism is meant to be small in scale, it has the potential to make local communities too dependent upon it. These communities are likely to suffer much more from a decline in the tourism sector than the country as a whole. Moreover, for small communities that depend upon agriculture and other primary activities, eco-tourism has the potential to draw labour out of those sectors. For example, in indigenous communities, the craft industry may thrive at the expense of food production.

The influence of foreign cultures may also impact upon communities in such a way that many traditional values may be lost. Some theorists feel that the commercialization of culture can lead to pseudo-culture, folklore specially devised for tourists, alteration of traditional crafts due to commercial pressures, and the replacement of traditional handicrafts by cheap souvenirs.

Before tourism can benefit Amerindians, therefore, there must be fundamental institutional strengthening. This requires a participatory approach that must be applied through direct discussion, education and practical training programs. Amerindian groups should be empowered to start their own tourist ventures in a small and manageable way. These can grow as experience is gained.

4. Expansion and Improvement of the Product Offered

A sudden shortage of fuel for internal aviation, which still occurs, means that a visitor's planned itinerary can be ruined. Unregulated or badly-managed access to prime sites like Kaieteur, or a failure to stop environmental degradation arising from mining in the wrong places, will destroy the assets on which the growth of tourism depends. Inadequately or inappropriately developed lodging facilities and attractions will send visitors home disappointed, never to recommend Guyana to their friends. Insufficient attention to the total quality of the experience that the market wants, from the moment of arrival to the moment of departure, will spoil the potential of tourism in Guyana.

It is obvious that there are a number of aspects of tourism that must be in place at the same time to make a successful industry. A failure of any one of the various requirements for the industry will mean the failure of the entire industry. If Guyana is going to be serious about tourism, all aspects must be working properly at the same time.

Product improvement should be centred on the following areas:

a. General information: At present it is extremely difficult for the would-be visitor to Guyana to find any reasonable country information in existing literature and guide books. There is a total lack of generic advertising of the country.

b. Easier access to Guyana and its interior: Only a few airlines serve Guyana and these only go to limited destinations. For example, in North America direct flights can only be made to Miami, New York and Toronto. In Europe, only London, Frankfurt, Zurich and Amsterdam are served through Trinidad or Barbados. Attention needs to be paid to upgrading facilities at the CJIA so as to attract American and European airlines. The process for obtaining

flight rights should be streamlined, so that the industry can work with airlines to develop new markets.

The current Guyana Airways Corporation (GAC) service to the interior is totally inadequate to the regular needs of Guyanese, let alone to the requirements of tourism. For example, many tour operators report being unable to obtain seats on GAC flights to Lethem, even though THAG holds six seats up to eleven days before flights. The number of locations served by GAC and the frequency of flights are not adequate for the development of the industry, and yet Government regulations restrict the number of commercial seats available on domestic flights. Coordinated efforts between private operators and GAC are required to ameliorate these problems, as well as a change in the regulatory framework³.

Because of the limited road infrastructure, the only access to many of Guyana's remote areas which are suitable for tourism is via light aircraft, and there is a shortage of such aircraft to meet the country's current and future needs. In addition, the costs associated with this kind of transportation are high and add to the overall price of Guyana's tourist product. These costs are exacerbated by the current high taxes that the private sector pays on aviation fuel, spare parts and aircraft (from which GAC is exempted). There is no level playing field between private airline operations and the Government-owned GAC. There is insufficient free competition in the market to properly develop the local airline industry. This makes tourism in Guyana uncompetitive with other destinations with better infrastructure and better access to their main tourism sites.

c. Improved Infrastructure: Of all the productive sectors of the economy, tourism depends most on the physical environment and other ambient conditions in the country. Infrastructure such as airport facilities, roads, water systems and medical facilities have to be improved to attract tourists. Tourists often wish to know that when they return from an exotic interior destination they will be comforted by the luxuries of a quality hotel in Georgetown. The importance of hot showers, quality restaurants, smooth roads and courteous airport officials, even to the most intrepid backpacking adventure tourist, cannot be underestimated.

d. Reliable medical and evacuation services: The nature of Guyana's industry is that tourists travel to remote areas, often under arduous and sometimes risky conditions. There will inevitably be accidents and the need for emergency evacuation. At present this resource is not available, nor are medical treatment and facilities of a quality that most tourists would consider adequate.

e. Professional product: Guyana's tourism product needs to be handled more professionally. This can be achieved through a number of changes such as regulation, monitoring, and developing provisions for prosecuting those who fail to comply with regulations and standards. It also requires further investment at both the private and public levels, especially in providing qualified and skilled staff and fostering a professional atmosphere that encourages a strong sense of commitment, pride and responsibility.

f. Security: Georgetown, in particular, is internationally seen as a dangerous city. In reality, it is probably safer than many cities around the world, but Guyanese over-emphasize the

³ GAC has since been privatised.

problem instead of taking corrective measures. Extra police and lighting are needed in principal tourist locations in the city and on frequently used walkways. Security needs to be increased in key tourism sites; the potential for illegal immigration and the movement of drugs and other restricted goods demands a tighter net of security in these places.

g. Streamlining the procedure for obtaining interior permits and visas: An interior permit procedure is standard policy to ensure that Amerindians are protected. However, the system should be streamlined so that applications to travel to the interior can be processed quickly. Tourists have only limited holiday time and will not tolerate sitting in a government office for hours; they will simply leave and visit a more organized country. To properly regulate visitation to the interior, permits should only be granted to tourism companies who have a proven track record and are willing to respect the communities they are working in.

h. Public liability insurance: International wholesalers and operators often inquire whether local operators carry public liability insurance; this often determines whether they will sell the Guyanese tourist product. Most local operators would like to carry such insurance but it is either unavailable or too expensive. This is an important area of concern, as the nature of Guyana's product means that there will always be a risk of accidents. In the absence of insurance, the operators themselves are subject to payment of claims made by tourists, in amounts which can severely damage a small-scale operation. Furthermore, the amount of compensation that would be awarded by a Guyanese court would not be internationally comparable. This can bring Guyana adverse international publicity and the country as a whole can be blacklisted as a high-risk destination.

i. Development of sites and attractions: A significant amount of resources needs to be sourced and invested in the development of sites and attractions for tourism. Many existing locations have excellent tourism potential; however, there is a dire need for these areas to be upgraded as tourist sites or attractions. Examples of these include Kyk-Over-Al, Fort Island, and Kaieteur Falls. The development of these and the many other sites with potential will enhance the overall attraction of the country as a tourist destination.

5. Standards within the Industry

Operators are strongly committed to building a good reputation for the forest industry in Guyana. This means that a degree of self-regulation could work to prevent rogue operators from damaging the reputation of others, especially when the industry is in such an early stage of development. The Tourism Association of Guyana can play a role in assisting a national regulatory agency to monitor the industry and indeed, it is currently developing standards for safety. There are also plans to develop guidelines to cover other aspects of quality control in the future. However, the Association cannot by itself function as a regulatory body; it can provide checks and send warning signals to relevant authorities, and it can help educate operators, but enforceable legislation and regulations are needed.

Areas in which standards and regulations are urgently needed include:

a. Standards for licensing tour operators.

- b. Regulations for building eco-tourism resorts.
- c. Standards for other customer servers such as taxis, boats, hotels, and restaurants.
- d. Land use.

The enforcement of these standards, which must be backed by stiff penalties compatible with the severity of the infringement, will be vital for a successful industry.

6. Investment

Eco-tourism is a business, and investors and bankers will only support the industry if the profit potential justifies the high financial risk. The key to its success is achieving high occupancy rates and filling tours. Policies that protect the environment and promote safety and the like, are irrelevant in the absence of policies that could attract investment.

As has been mentioned earlier, the Guyanese tourism industry is currently considered to be a high-risk business by investors and bankers: the country is simply not perceived as a good investment in tourism because of the multiple risks involved. In addition to the financial risks normally associated with tourism itself, there are problems peculiar to Guyana related to the fact that the country's democracy is still in a stage of consolidation, to the uncertain overall investment climate, to lack of information about Guyana, and to the reality that eco-tourism is still an emerging market. Investors are very skeptical: all things considered, the potential return often does not instill confidence, and investors would prefer to take their tourism investments elsewhere.

Relevant points for consideration when formulating investment policies for tourism are as follows:

- a. Guyana has no track record with respect to tourism.
- b. Eco-tourism is itself still an infant industry.
- c. After opening a resort or a tour operation, it takes between eighteen months to two years of extensive marketing efforts before customers can be attracted in significant numbers.
- d. Contingencies have to be built into each plan, providing for periods of low occupancy rates, delays before a profitable level of business is achieved, natural disasters, and so on.
- e. The investor has to periodically spend money to bring the press, tour operators, Caribbean owners or managers (for joint tours), and interested travel agents, and to prepare promotional material such as brochures and videotapes. These costs are considerably higher during the start-up period.

f. Lodges and tours for eco-tourism are generally small. Thus, there are high per capita overhead expenses.

g. Because of the high risk involved, investors need higher returns to satisfy the bankers' payback period of 5 to 6 years.

h. Twenty-five per cent of the gross selling price of a resort room has to be paid to the tour operator and used to service bank charges such as the use of American Express, while another 10 percent has to be devoted to cover advertising costs. The resort therefore has to cover operational expenses and make a profit with the remaining 65 percent.

i. Bankers would like to know that they can recover and transfer all property and land of an eco-tourism resort, as an adequate means of collateral in the event of a failed operation.

7. Education and Public Awareness

a. The Tourists

The behavior of eco-tourists can be an important issue; people do not become environmentally sensitive and responsible simply by booking on to an eco-tourism holiday or day trip. Tourists should not only be educated about their responsibilities to the environment; they should also be educated about the environment. In fact, the latter is a major component of an eco-tourism vacation, with visitors having an opportunity to put their cameras down and engage in dialogue with their hosts. It is useful for native people in a host country or region to recognize the elements of the natural environment that may be new and of interest to the visitor. Native guides in particular should be alert for the "teachable moment" that creates a bond between host and visitor. A true eco-tourist is also an "anthropotourist", deriving pleasure and satisfaction from learning how the environment is viewed through the eyes of local people.

Local people also need to be educated about the expectations of visitors. While it is certainly important for them to take pride in their customs and culture, it is also important for them to have an understanding of the travellers' perspective on activities that may give rise to what is termed "culture shock."

b. The Guyanese Public

There are misguided perceptions about tourism among the wider Guyanese public that need to be dispelled; these perceptions include the following:

- Guyana lacks true beauty and has limited tourism potential. (On the contrary, the tourism product is not limited; rather, it is specialized.)
- The traditional image of tourism, largely based on the Caribbean model of sand, sea, and sun, is the only valid one.

- The tourism industry benefits only a few.
- The industry is one of servitude. (What needs to be understood is the important difference between servitude and professional service.)

An informed and trained citizenry is the backbone of any successful development process. Guyanese need to appreciate the great value that the interior of the country represents to the peoples of the densely populated urban cities of the developed world. A community that understands tourism is one that would be better able to benefit from it. The industry must be developed and fashioned in the best interest of both the visitor and the residents of the community. This can only be done by creating an appropriate attitudinal environment and educating persons within the local community to talk about tourism as a viable alternative in Guyana. This should eventually lead to a wider understanding of the benefits of tourism and the roles of the community in this new industry.

c. Resources for Training

NGOs can be a valuable source of funding and training of guides and other tourism-related staff. The Tourism Studies Unit at the University of Guyana could be strengthened to play an important role in educating the general public and disseminating accurate information. There should be continued development of tertiary level courses. Currently, there is an initiative at the Unit to upgrade and improve the quality of tourism and hospitality training and education in Guyana, by involving UG, Carnegie, Iwokrama, and industry entities in a 5-month program and curriculum review. However, attention should be paid to guarding against teaching a generic tourism product as opposed to teaching about the uniqueness of Guyana. Thus, the Unit should incorporate practical, on-the-job experience in its program.

The lack of skilled staff for the tourism industry is another major constraint to its development. The design and implementation of a program to upgrade the skills of personnel in the sector is therefore imperative. It is recommended that such a program be designed to operate as far as possible with an on-the-job training approach.

8. Partnerships in the Industry

a. The Tourism Division

At present, Government regulation and support services for the tourism industry are provided through the Tourism Division in the Ministry of Trade, Tourism and Industry. This division was created in July 1991, and emerged out of a reorganization of the Public Service in 1990. Its creation hinged on a policy decision to formally establish a tourism industry in Guyana. One of its major functions is to co-ordinate the activities of the industry.

This division is also responsible for:

- The execution of national policy related to tourism.

- The formulation and monitoring of tourism guidelines and regulations.
- The marketing of the country's tourism image.
- Human resource development for the industry.

The Tourism Division is also a member of the Caribbean Tourism Organization (CTO) and functions as the local coordinating agency for CTO activities. Much effort in the division has also focused on international marketing and development of the product and the required human resources.

Despite its best efforts, the Division of Tourism is understaffed and lacks the internal systems and structures for the smooth facilitation of programs and activities required for its work. It is affected by many of the same ailments that are prevalent in other Government departments, such as a shortage of skills, a lack of facilities and an absence of the legal mandate to perform many of the functions that are required of the department.

b. The Tourism and Hospitality Association of Guyana Limited (THAG)

The Tourism and Hospitality Association of Guyana represents its members' interests in a number of ways. It provides them with advice and assistance on marketing their products and makes available all information concerning the promotion of Guyana abroad. It also deals with inquiries about tourism and passes on information to its members and to interested parties abroad. The Association has also tried to promote the interests of its members by ensuring that high standards of safety and product quality are maintained throughout the industry. Plans are underway to certify all members meeting the required levels of safety and standards required by THAG but this cannot, and should not, replace government regulation of the industry, as THAG cannot by its very nature function as a national regulatory body.

There have been questions about THAG's membership and how well it represents all the interests associated with Tourism. The list of potential members is quite long, since tourism impacts on all sectors of the economy and the increase in tourist arrivals will ultimately benefit all business in Guyana.

IV. Sectoral Objectives

The broad objective for a tourism strategy policy for Guyana is as follows:

The creation of a sustainable and profitable dynamic tourism which will contribute to the national objectives of rapid economic growth, poverty alleviation, and employment creation, especially among hinterland populations, while conserving Guyana's environmental and cultural heritage.

Sub-objectives may be defined as follows:

1. Promoting an industry that makes appropriate use of what Guyana has to offer and takes full advantage of market trends in the tourism industry.
2. Developing the industry by prioritising the protection of its natural resource base through the use of sustainable practices.
3. Setting standards and practices that are appropriate to the market that is being targeted.
4. Developing an industry which ensures that its operations widely benefit the people of Guyana, in particular the Amerindian community.

V. The Strategy

The central thrust of these new policies for tourism is a focused and unambiguous strategy of pursuing high quality, up-market eco-tourism in controlled numbers that do not exceed scientifically determined carrying capacities of interior sites. All other policies will follow from this central thrust.

A. Mechanisms of Responsibility

1. Tourism is currently part of the Trade, Tourism and Industry portfolio. This portfolio is too wide and the development of tourism has suffered due to the natural concentration on trade and industry. Since the future of tourism will be heavily dependent on the protection and sustainable development of the environment, a Ministry of Tourism and Environment will be established. This restructuring is fundamental and will result in a single person being able to speak for the several related interests.

Tourism represents the core industry and must serve as the umbrella under which other agencies responsible for issues which affect the industry are assimilated in order to create a marketable product.

Because of the marketing activities required to sell a destination, the word tourism should be the first word in the name of the Ministry promoting the sector. Tourism must be viewed locally, regionally and internationally as the leader and not an add-on to another Ministry.

In the short term, transportation is critical both domestically and internationally to the success of Guyana's tourism product. It is therefore critical that the new Ministry have strong links to the Ministry responsible for transportation in Guyana.

Other major responsibilities of the new Ministry will be:

- a. To access international funding for tourism development.
- b. To establish the status of tourism in Guyana as a priority industry for

development.

- c. To establish the status of tourism as an export industry.

2. National Tourism Board or Authority

The idea of a National Tourism Board or Authority has been tabled for some time. The establishment of this Board/Authority will be undertaken urgently. Such a Board or Authority will replace the defunct Tourism Advisory Board and absorb most of the functions of the current Tourism Division of the Ministry of Trade, Tourism and Industry. Its main responsibilities will be regulation, marketing, research and product development.

The Authority will be established by an Act of Parliament as a body corporate with perpetual succession and a common seal, and power to:

- a. acquire, hold and dispose of real and personal property;
- b. sue and be sued in its own name; and
- c. do and suffer all such acts and things as bodies corporate may lawfully do and suffer.

Since the composition of the Authority is critical for its success, it will be composed of no more than seven persons, as listed below:

- The Permanent Secretary, Ministry of Tourism, and Environment
- The Permanent Secretary, Ministry of Regional Affairs
- 2 Persons from the Tourism and Hospitality Association
- 1 person from the Private Sector Commission
- 1 person from the Private Aircraft Owners Association
- 1 person from an Amerindian NGO

This will result in an Authority that is widely representative but not too large to manage the affairs of the industry. The Chairman of the Authority will be elected by the Board members of the Authority and appointed by the Minister. Membership of the Board will be staggered to maintain continuity and will be for a period not exceeding two years.

The funding of the Authority is of prime importance and suggested methods are as follows:

- a. Funding from private sector organizations. All organizations that fund the operations of the board will receive a tax credit of 150 percent of the value of their contribution.
- b. The 10 percent accommodation tax that is currently collected will be directed toward the Board.
- c. The Board could also raise funding by application to international funding agencies.

The investment by Government will benefit the country several times over in a short period of time through increased corporate and income taxes, the generation of employment, foreign exchange inflows, and the spin-off effects on other industries.

The functions of the Authority shall be to promote tourism worldwide, to exercise general supervision over and strategic direction of tourism in Guyana, and to assist in the overall facilitation and efficient development of the tourism industry. In particular, without prejudice to the broadness of these functions, the Authority will carry out the following functions:

- a. Design, encourage and implement suitable marketing strategies for the effective promotion of the tourism industry.
- b. Promote understanding of the implications, importance and benefits of tourism throughout Guyana.
- c. Promote and enhance provisions for increased and sustained air, sea and land transport services to and from Guyana.
- d. Encourage and facilitate the development of amenities and facilities designed to attract tourists to Guyana.
- e. Develop, recommend and implement training programs for persons employed in the tourism industry.
- f. Provide or assist in the provision of training facilities for persons employed or seeking employment in the tourism industry or for other persons providing services in tourism-related industries.
- g. Recommend and support standards of performance for all sectors of the tourism industry, particularly for institutions that provide training programs for persons employed or seeking employment in the industry.
- h. Conduct, collect, evaluate and facilitate research in tourism and related subjects.
- i. Obtain, collate and evaluate all such information as it considers necessary for the purpose of carrying out its functions under the Act.
- j. Compile and publish information relevant to tourism.
- k. Formulate and institute measures designed to enhance the role and image of Guyana as a tourist destination.
- l. Promote within Guyana an understanding of and appreciation for the importance of environmental protection, pollution control and conservation of natural resources.

- m. Advise and recommend integrated, complementary, sustainable land use practices and environmental strategies for the development of tourism facilities in Guyana.
- n. Advise the Government of Guyana on all aspects of tourism and matters affecting tourism.
- o. Generally, do whatever is necessary for or incidental to the carrying out of any or all of these functions under the Act.

A recommended organizational chart is at Appendix 3.

B. Protected Areas

1. The creation of a Protected Area System, or at the very least, the according of special status to areas known to possess unique natural characteristics, is fundamental to the development of ecotourism. Several areas of Guyana fall into that category. Parliament will adopt the appropriate measures to give legal effect to the designations recommended below:

National parks

- Kaieteur National Park
- Kanuku Mountains National Park
- Pakaraima Mountains National Park

International parks/ sites

- Roraima World Heritage Site

Protected areas

- Upper Potaro Watershed Protected Zones (north and south)
- Kuribrong Watershed protected Zone
- Upper Mazaruni Watershed Protected Zone
- Iwokrama Rainforest Reserve
- New River Triangle
- Morabisi-southwest Puruni Biosphere Reserve
- Adelair – Upper Kuyuwini/ Kassikaityu Biosphere Reserve
- Wokomung Mountain Scientific Reserve

National Monuments

- Orinduik Falls National Monument
- Marabiakru Cliffs National Monument
- Ayanganna Mountains National Monument

Scenic Waterways

- *Upper Essequibo River Scenic Waterway*
- *Upper Rupunini River Scenic Waterway*
- *Cuyuwini River Scenic Waterway*
- *Barama River*
- *Upper Corentyne River*
- *Moruca River*
- *Waini River*
- *Upper Pomeroon River*

National Wildlife Sanctuaries

- Shell Beach Turtle Sanctuary
- Tiger Island Bird Sanctuary (Essequibo River)
- Dauntless Bank Mangrove – Leguan Island
- Wakenaam Island Mangrove Reserve

National Heritage Sites

- Georgetown National Historic District
- Fort Island
- Fort Nassau
- Kyk-Over-Al Island

2. A large percentage of tourists can be expected to visit National Parks and additional sites. Parks therefore need to be carefully regulated, and the lines of responsibility for them and must be clearly delineated. For example, responsibility for protected areas will be removed from the Ministry of Health and placed in the hands of the Ministry of Tourism and Environment, through the reorganization indicated earlier.

3. Criteria will be established for each protected area in the interest of tourism. Among these are definitions for the carrying capacity of each, and guidelines for visitation including specifications regarding the length of stay, requirements for trained guides, means of access, controls on the removal of flora and fauna and the taking of pictures and visitation by individuals or groups. Within the park itself, areas may be identified where absolutely no one is allowed to go, for protection of the area's biodiversity.

4. International organizations such as the World Wildlife Fund and Conservation International will be invited by Government to conduct additional scientific and other environmental studies in parks, along the lines of the ones that they are currently doing. The support and stamp of approval of these groups is important. These organizations should also be able to attract funds for the parks' maintenance and upkeep. In any case, realistic charges will have to be paid by tourists to enter the parks so as to provide sufficient revenues to cover all costs.

5. Lessors of large tracts of private land in the interior will also be encouraged to convert these into protected areas. In allocating land among sectors, priority will be given to eco-tourism for the simple reason that the land could be used afterwards for other extractive industries if the tourism venture proves not to be in the best interest of the country, while land that is used for extractive industries cannot be used for other purposes afterwards.

6. After the Guyana Rainforest Foundation is initiated (See Chapter 5 of the core document), linkages will be explored between its activities and programmes to support eco-tourism. The industry will significantly benefit from the development of such an institution, and therefore more attention will be paid to the work that needs to be completed for its establishment.

C. Amerindian Involvement in Tourism

1. In developing the tourism industry, every effort will be made to ensure that Amerindians are involved. Amerindian communities will decide for themselves on a project-by-project basis if eco-tourism ventures are sound and worth their involvement. They will also need to find ways to limit or mitigate the stresses of this new industry. To promote this process, a community development officer will be assigned within the staff of the Board of Tourism.

2. Tourism will be started at a slow and measured pace in Amerindian communities so as not to overwhelm local capacity and result in a sudden increase in social stresses. Aiming at once for state-of-the-art tourist lodges may not be the way to initiate eco-tourism ventures in Amerindian communities.

3. Due to the limited experience that Amerindians have with development projects, tourism ventures to be started and managed by Amerindians will have to be accompanied by the following:

a. The identification of a local group with the initiative and willingness to maintain the level of effort that an eco-tourist venture entails.

b. Intensive and extensive training of Amerindians in such related skills as business management and account-keeping.

c. Start-up capital that is affordable and accessible.

d. A commitment by central Government and funding agencies to work to sustain Amerindian ventures in the eco-tourist field.

e. The encouragement of partnerships among Amerindians, investors and nature and conservation NGOs in developing tourism sites.

f. Continuous information-sharing and consultation with Amerindians.

4. Clearly, neither Government nor the tourism industry can fulfil all of these requirements alone. Non-governmental organizations and others will have to play a role. Other aspects of the National Development Strategy with respect to Amerindian affairs have to be

incorporated. For example, given Government's fiscal constraints, it is unlikely that it can be depended on to provide subsidized loans. However, the establishment of an Amerindian Development Fund will provide a source of funding. Annex 24 of the National Development Strategy, provides more details on the proposed Fund.

5. With regard to tour operators entering Amerindian communities, guidelines will be established for gaining permits. An overall code of conduct will be developed between tour operators and the Amerindians that all tourists must follow. Such a code will provide guidelines for taking photographs, access to sacred sites, times of visiting, for example. It will be the responsibility of tour operators to educate tourists about these regulations before visiting Amerindian communities. Failure to do so could result in licences being revoked. Individual Amerindian communities may develop stricter codes. The collection of head fees by Amerindian communities will be legislated, and the responsibility for this placed within the proposed Board of Tourism.

D. Investment

1. Tax Concessions and Exemptions

Since tourism is essentially a private sector enterprise, the right conditions to attract private investment must be in place. Investors must feel a sense of security about investing in a country and a sector that are perceived as high-risk. At present, the 25 percent concession offered on some projects is insufficient to promote the development of the industry. In the absence of adequate concessions, the industry is stagnant and does not contribute as much as it could to the Government coffers.

An incentive regime will therefore be introduced that will make the industry attractive to investors. The regime will compare favorably with those of other countries developing tourism and will offer no less than the following:

a. A tax holiday of up to ten years for hotel and resort developments and tour operator enterprises.

b. Exemption from duty and consumption taxes for items to be used in the construction, expansion, refurbishment and equipping of licensed hotels or resorts and for the creation, expansion and equipping of licensed tour operator enterprises and tourism facilities as approved by the Board. This exemption will apply to all interior resorts, and to hotels in Georgetown of not less than 10 rooms.

c. Replacement and refurbishment for hotels, resorts and tour operators once every 5 years.

d. Accelerated capital allowances on the construction cost of the hotel or resort after the holiday period.

e. No depreciation charge during the holiday period and an allowance at 20 percent per annum to be allowed for five years after the holiday period.

- f. Tax exempt profits may be distributed tax-free by way of dividend.
- g. Bank loans for tourism development will not be subjected to government taxes, and banks will be obliged by law to pass on the savings to the developer.
The returns from granting these concessions should be quickly reflected in higher income tax revenues.

2. The Development of Lodges

- a. As a practical measure, the Lands and Surveys Department will first embark on a special project to eliminate the existing backlog of applications for land and institute mechanisms for the fast processing of land applications.
- b. It can generally be expected that there will be more potential investors than can be allowed, especially at places such as Kaieteur top. Therefore, mechanisms will be put in place for selecting those who will be allowed to build a lodge there. As a first step, minimum criteria will be set for these locations, such as the maximum number of units per lodge.
- c. A portion of the lease rates for tourism development will be turned over to the Amerindian Development Fund. This is an innovative approach because it places the Government, the investor and Amerindians on the same side: they would all like to see greater returns on the investment because they all have more to gain. At the same time, the Amerindians will have an incentive to protect the land because in the long-term it will represent a continuous source of income.
- d. In the second category of land, in which an investor identifies the land needed for setting up a lodge, the investor must again meet certain minimum requirements before being granted a lease or freehold title. Rights to the land will be given on a first-come, first-served basis, provided the minimum requirements are met. In this case, the lease will be offered at market rates or as a fixed percentage of the gross revenues, whichever is higher. Again, arrangements will be entered into whereby a portion of the lease payments is diverted for the benefit of the Amerindian Development Fund.
- e. In all cases, leases will be for 99 years, be freely transferable from one person to another, and be available for use as collateral. Banks will have the authority to repossess land and property on which a tourism site is built. Whenever possible, lands will be sold to investors in freehold.
- f. Guidelines will also be developed to mandate buffer zones around lodges, the distance between lodges, and so on.
- g. The Government will embark on a project to list all the sites in the interior that have been identified as desirable areas for the development of lodges. In a number of countries, tourism site investment listings have been highly successful in encouraging the type of investment suitable to the peculiarities and carrying capacity of the land identified.

E. Air Transport

1. Guyana's competitiveness as a tourism destination obviously depends to a great extent on the cost and ease of access to the country. At present, the lack of air access by recognized and accepted carriers into Guyana is a barrier to the expansion of the industry. Additional seats into and out of the country, that is, more competition on routes will lead to higher standards of service, as well as lower prices. The introduction of services by major carriers such as American Airlines and British Airways will also encourage more established tour operators in Europe and North America to market Guyana as a tourism destination. This strategy is dependent on the development of the Cheddi Jagan International Airport, Timehri, to meet (and exceed) international requirements.

2. Other critical policies will include attempts to incorporate tourism into the decision-making process of air transport and the development of Ogle Aerodrome as a municipal Airport.

3. Annex 8 of the National Development Strategy recommends for the development and implementation of an autonomous Air Transport Authority with direct responsibility for the development of interior and international air transportation for Guyana. It is important that the tourism industry be represented on the board of that Authority, perhaps by the Tourist Board.

F. Product Development and Improvement

Kaieteur Park

a. The boundaries of the Kaieteur National Park will be determined as a matter of urgency. Consultative mechanisms for incorporating representatives of local Amerindian groups in the decision-making process concerning the site will be developed.

b. All mining in the Kaieteur watershed and gorge below the Falls will be immediately stopped.

c. A comprehensive site and topography survey that will embrace the testing of soils and their bearing capacities, the examination of watershed characteristics, the location of significant site features, including types of flora and fauna and other biodiversity richness, and studies to determine any significant archaeological sites, will be undertaken.

d. The OAS proposal for the Kaieteur National Park will be opened for private sector, Amerindian and other civil society comment before its finalization and implementation. Key recommendations include the building of a lodge facility in Kaieteur Park, the extension of the trail system in the Park, the construction of a boardwalk in the Falls area, the establishment of ranger outposts and satellite camping facilities, and the razing of Menzies Landing and the erection of a security post.

The airport will be provided with fully staffed tourist arrival and departure booths, and the Guyana Tourism Authority will have a presence at the airport. The departure booth will also

be a place for lodging complaints about Guyana that should be channelled back to the relevant authorities.

Other measures for improving the reception of tourists at the airport will be increased access to Duty Free Shopping, clean toilets, an official taxi rank system, the provision of luggage carts, and the establishment of a police presence outside the airport.

G. Other Tourism Ventures and Networks

1. Eco-tourism ventures in identified Amerindian villages will be developed with full Amerindian participation.

2. A network of small-scale eco-tourism lodges will be established at Kaieteur, Chenapau, Orinduik and near Marabiakru Cliffs.

3. An eco-tourism facility will be established at the Iwokrama Field Station near Kurupukari. This will be operated in partnership with the local private sector and with Amerindian community controlled ventures, in and around the Iwokrama reserve.

4. A circuit of eco-tourism facilities and activities will be put in place in and around Annai and Surama with linkages to Rock View and Karanambu Resorts in the North Rupununi.

5. In the Central and South Rupununi nature-based and eco-tourism ventures will be developed with Dadanawa Ranch, Savannah Inn, the Lethem Rodeo and other related enterprises, ranches, resorts and entities.

6. The border near Orinduik will be secured in order to prevent illegal incursions from miners who operate in Potaro and Mazaruni watersheds.

7. Strict zoning and building codes will be enforced in Georgetown. New buildings in the city will be made to conform to Georgetown's rich architectural heritage. Sections of the city represent significant opportunities for architectural preservation and the development of tourism sites. It is important therefore that building in the city be very carefully regulated and monitored to preserve the product before it is completely devastated by new developments.

8. Investors will be encouraged through tax incentives to develop small-scale inns in the style of the existing historic architecture of Georgetown.

9. The Botanical Gardens will be converted into a Biodiversity Park.

10. The National Museum, the Walter Roth Museum and the Nicholson Collection of African Art will be refurbished and expanded and a survey to upgrade and develop a network of other existing museums in Guyana undertaken.

H. Visitor Security

1. Visitor security will be an absolute priority throughout Guyana. This must be guaranteed on all levels simultaneously. In addition to education for the police force on dealing with tourists (see below), visitor protection will be achieved by educating the general public to look out for tourists and their safety and to discourage crimes against tourists within their own communities. This mindset already exists to some extent, as part of the genuine warmth and hospitality that most Guyanese have towards visitors, and will be enhanced through good public awareness campaigns showing how local Guyanese can benefit from tourism and visitor safety.

2. In relation to the police, enhanced visitor security will be addressed through training for the police force on interaction with tourists, a permanent police presence in the major thoroughfares of main towns and cities, and the posting of more police on the streets to deter petty crimes.

In the long run, consideration will be given to the development of "tourism police" - a division of police within the force who are specifically responsible for visitor security.

Procedures on crime reporting will be streamlined to enable the visitor to spend as little time as possible in police stations reporting crimes, and all efforts will be made to make the experience of crime reporting as hassle free and as comfortable as possible.

3. Due to the fact that certain areas of the interior are open to drug trafficking and other criminal activity (Kaieteur is a prime example), the efforts of the Guyana Defence Force, the police force and tour operators will be coordinated in these areas, and police stations will be set up in areas where tourist activity is high, in particular at Kaieteur Falls.

4. Street lighting in and around the city of Georgetown will be improved.

5. A national search and rescue operation that can deal with all eventualities will be established. This will include high-level detection methods, fast and effective evacuation procedures, and top level medical training and equipment, and will require an established mechanism between the private sector, the Government, the police and the army.

6. Tour operators will be required to have adequate safety equipment for the tours they conduct. Training in first aid and CPR will be mandatory for all persons/guides conducting or in charge of tourists, and adequate emergency evacuation plans and procedures will be set for all tour operations and resorts. These safety procedures and equipment will be linked to the licensing of these operations, and failure to comply with the minimum safety standards set for the industry will carry severe and enforceable penalties.

7. At present, many resorts, hotels and tour operations within the industry do not have public liability insurance. Steps will be taken to amend laws pertaining to insurance to give the industry access to adequate levels of insurance. In conjunction with this, adequate insurance for all resorts, hotels, charter airlines and tour operations will be made mandatory and linked to the licensing of these operations.

I. Marketing Guyana as a Tourism Destination

1. Guyana's lack of an image as a tourist destination is possibly the most significant barrier to tourism development. A comprehensive destination marketing plan will therefore be developed and implemented over a sustained period (minimum, 3 years) to allow the country to benefit from the rapidly expanding market for adventure and nature tourism globally.

2. The functions of the proposed Guyana Tourism Authority will include the worldwide marketing of Guyana as a tourist destination. The Tourism Authority will further the development of international markets by the use of innovative strategic initiatives to secure and maintain a globally competitive position and awareness of the destination in the selected niche markets.

Marketing objectives will be as follows:

a. To increase international awareness of Guyana as a tourist destination and therefore, the number of tourist arrivals in Guyana.

b. To present Guyana at all major international tourism industry trade conventions.

c. To be in direct contact with those responsible for booking and transporting tourists to this area, including travel agents, tourism industry executives, airlines and other carriers.

d. To print and publish any newspapers, periodicals, books or leaflets that may be desirable for promotional purposes.

e. To organize on-shore promotion trips for travel agents, airlines and press people.

3. Towards these objectives, a strategic marketing plan with a budget for the next 5 years will be developed, outlining all activities, action plans and due dates. This plan will address product development, target markets, data collection, public relations, collateral material, advertisement, representation offices, promotion, training, and visitor relations.

Specifically:

a. A definition of the product, its most marketable tourist attractions and the classification of tourist facilities will be prepared.

b. The primary markets for Guyanese tourism will be North America and Canada, the latter with a focus on Ontario and to a smaller extent Atlantic Canada and the provinces of Manitoba and Saskatchewan. Emphasis will also be placed on selected markets of Western Europe (the United Kingdom in particular) and Latin America.

c. Due to limited financial resources for mass advertising and public relations campaigning, research will continue to be seen as vital to the sound development of the marketing strategy, especially in the area of niche marketing. The Tourism Authority's use of data collected via the visitor arrival/departure card to measure and access current markets, future

trends in markets, and customer perception of the Guyanese tourism product, will be particularly important.

d. Since public relations affords Guyana the greatest opportunity to create market awareness at minimal cost to the Tourism Authority, the Authority will work closely with North American and European marketing representatives to ensure that travel writers develop positive news stories that fit within the strategic marketing plan.

e. Collateral materials such as brochures, maps, special market brochures, website and other sales aids will be used to support the marketing programme. Collateral materials with detailed information will help industry partners to promote Guyana effectively.

f. The Guyana Tourism Authority's limited funds will continue to restrict its ability to advertise in the mass travel markets; however, advertising will be undertaken for special interest markets targeting birdwatchers, hikers, naturalists, soft adventurers, knowledge seekers, educators, culturalists and outdoor enthusiasts, for example.

g. The Tourism Authority will handle two types of promotional activities: offshore and on-shore. For onshore promotions, the Tourism Authority will organize group familiarization tours and other promotional functions. For offshore promotions, Tourism Authority representatives in the major target cities will establish contacts with international travel industry partners, and combine efforts to promote Guyana in major markets of the world such as South America, Europe and North America. The Authority will also participate in trade shows and promotions that are best suited for the target markets.

h. The Tourism Authority will conduct a series of seminars with the operators of qualified tourist facilities to assist in developing and improving the tourism industry performance.

i. Visitors will be provided mechanisms for lodging complaints via a 24-hour visitor hot line or, in writing, via the visitor arrival and departure card. All visitors' complaints will be investigated and visitors will be given a follow-up response within 24 hours. This policy is of great importance due to the fact that a satisfied visitor is the best advertisement for Guyana.

j. The Ministry of Tourism and Environment will not be involved in marketing activities. The private sector will cooperate with the Tourism Authority in the execution of cooperative marketing efforts. Responsibility for tourism marketing will rest in the Tourism Authority to be established, which requires the ability to adjust quickly to the rapid and continuous changes and opportunities in the marketplace.

k. While more retail outlets, restaurants, hotels and tour operations in Georgetown are beginning to accept credit cards, this acceptance is still not widespread in the capital city, let alone nationwide. Travellers' cheques are accepted as reliable currency, but since many outlets must wait 28 days for reimbursement, this discourages their use. The Government will support efforts to solve these problems. All necessary steps will be taken to ensure that tourists can get

easy access to money and that facilities for changing foreign exchange and travellers cheques are widespread and convenient.

1. Since access to and the cost of visas to enter a country can play a significant role in the visitor's perception of the overall image of a destination, regulations will be designed and implemented to allow for the issue of visas on arrival. Information will also be more readily available for people who need visas. Staff of the Ministry of Foreign Affairs will be trained to provide specific information for visitors in a timely manner. Efforts will also be made to reduce the number of countries whose citizens require visas for entry into Guyana.

J. Regulations and Standards within the Industry

1. The Establishment of an Ecotourism Accreditation System

An ecotourism accreditation system will be established, with the Tourism Authority as the responsible agency. The Authority will carry out the following functions:

- a. Prepare an inventory of tourism establishments and operators to be graded.
- b. Establish a rating system and performance criteria. The fundamental guidelines and objectives that should be observed in the development of ecotourism projects and programs are as follows:

- Prior to their visit, international visitors should be informed and prepared to minimize negative impacts on the natural and cultural environment.
- By design, tourist groups should be kept small to prevent the accumulated impact of tourism on a particular location.
- Guides should be trained to lead groups in a manner that minimizes impacts.
- Visitors should be briefed on local regulations, park rules and acceptable conduct prior to arrival.

Rewards or sanctions will be developed in order to promote compliance with regulations.

2. Facility Design Standards

Minimum design criteria will be established to ensure that ecotourism facilities in Guyana meet international standards for visitor accommodation. The design criteria will also emphasise low impact design, appropriate use of local materials, and proper response to the local climate, maximizing comfort and efficiency. Special concern will be focused on fire prevention, exiting, and overall safety of visitors and staff. Wherever practical, attention will also be given to creating environments and facilities which are accessible to people with disabilities.

3. Life Safety and Security Standards

A comprehensive plan to enhance life safety and security for visitors will be implemented, addressing issues of air, land and sea transport, hotel accommodations and trail safety. Certified ecotourism operators will employ staff trained in first aid and life safety techniques, and training and certification programs for all categories of workers in the sector will be provided. Medical facilities will be enhanced in proportion to the growth in tourism activities. The Tourism Authority will collaborate with relevant agencies and the tourism sector in developing, implementing and enforcing standards for all components of the tourism product. A mechanism will be developed for the monitoring of standards and the compliance with regulations.

4. Hotel Green Management

A detailed green management policy will be required for approval for new and existing facilities to qualify as ecotourism establishments. The policy will address management purchasing procedures, along with staff and visitor responsibilities.

5. Training/Education Standards

There will be on-going training/ education programs designed to create a skilled work force attuned to international travel industry standards. Special training/ educational emphasis will be placed on interpretive skills and guide training as well as hospitality training.

K. The Wildlife Trade

The wildlife trade will be very carefully monitored and controlled to ensure the long-term prospects of tourism and economic development. Wildlife farming will be encouraged so that only farmed wildlife is exported; this farming should be characterised by the breeding of animals in a carefully controlled and managed environment for export. Severe restrictions and legislation governing the removal of wildlife from Guyana's forests and other environments will be implemented.

VI. Legislative Changes⁴

A. National Parks

Legislation covering the establishment of National Parks and Protected Areas will be developed as Guyana moves to establish a Protected Areas System. The new law will replace the Kaieteur National Park Act (Cap. 20:02) and the National Parks Commission Act (1977-23). The powers of the Guyana Forestry Commission "to identify, establish, maintain and manage

⁴ For this section, reference is made to Guyana Tourism Legislation Project, November 1995, by A. Ralph Carnegie and Ainsley M. O'Reilly, published by the Caribbean Tourism Organisation and the Guyana Ministry of Trade, Industry and Tourism.

forests including national parks, wildlife areas, and natural reserves" will be removed from the Commission and placed under the authority established to regulate National Parks.

Adequate enforcement will be developed for the National Trust Act (Cap. 20:03), which provides for the protection of national monuments.

B. Protection of Wildlife and Fisheries

The Fisheries Act (Cap. 78:01) and accompanying Fisheries Aquatic Wild Life Regulations and the Wild Birds Protection Act (Cap. 71:01) allow for some protection of fisheries and birds. The scope of the Fisheries Act is not confined to fauna but is wide enough to include the protection of both marine and fresh water aquatic floras, as the result of the amendment of the Act in 1977. However, in both these Acts, four-footed wildlife is excluded. The Wild Life Protection Bill of 1987, which would have remedied this situation, will now be enacted.

C. The Environmental Protection Act

The recent enactment of the Environmental Protection Bill will be followed expeditiously by the drafting of suitable regulations for the implementation of its various prescriptions.

APPENDIX 1a. Typical Offerings in the Guyanese Tourism Industry

RESORTS

COMPANY	BARAKARA ISLAND	BAGANARA ISLAND	KARANAMBU	ROCKVIEW	SHANKLANDS	TIMBERHEAD
RESORT LOCATION	Mazaruni River	Essequibo River	North Rupununi	Annai, North Rupununi	Essequibo River	Pokerero River
LAND AREA (ACRES)			125 square miles	+/- 3	96	15
LAND TENURES			25 year lease from Lands & Surveys	Amerindian or State has permission from both	Transport Land	Lease from Santa Amerindian Reservation
ACTIVITIES	Swimming, volley ball, jet skies, jet boat tours to surrounding nature spots. Caters for groups, individuals, conference facilities	Swimming, Boats, fishing, water sports, walking, bird watching, table tennis, conference facilities	Boat trips, bird watching, trekking, fishing, Amerindian villages	Pony trekking, bird watching and nature tours, fishing, Amerindian villages, visit to Iwokrama	Jungle walks, water sports, boat tours to surrounding areas, croquet, golf	Day & Evening jungle walks and boat tours, cayman watching, bird watching, canoeing, swimming, volleyball and badminton.

COMPANY	BARAKARA ISLAND	BAGANARA ISLAND	KARANAMBU	ROCKVIEW	SHANKLANDS	TIMBERHEAD
COST ALL INCLUSIVE	G \$9 500 (Day trip)	US \$ 85 (day trip) US \$ 155- 245 o/n	US \$ 120	US \$ 95 – 115	US \$ 125	US \$90 (Day Trip) US\$145 (Overnight)
TARGET GROUP	Overseas Business and holidays, local	Overseas, local and overseas business persons. Experts based in Guyana	not specified	Guyanese, Brazilian, Overseas	Overseas and Local	Mainly overseas business persons and tourists, some local tourists
START DATE	1995	1998	1989	April 1993	May 1992	May 1991
CAPACITY	10	15	10	8	16-25	20
EXPANSION PLANS			No	Yes, up to 20 persons	Yes - more cottages	Yes
PRIMARY LAND USE	Tourism	Tourism	Cattle ranching	Ranching and Farming	Tourism	Tourism
GOVERNMENT LIAISON	Min. Of Trade & Tourism Lands & Surveys	Min. of Trade & Tourism Min. Of Finance	Min. of Trade & Tourism	Min. of Trade & Tourism	Min. of Trade & Tourism	Mins. of Trade & Tourism, Finance, Foreign Affairs
AMERINDIAN INVOLVEMENT		No	Yes, employed on site and visit Amerindian villages	Yes, employment, support from council	None, except support local schools and help out in emergencies	Yes, employment and close links with villages of Santa

APPENDIX 1b. Typical Offerings in the Guyanese Tourism Industry

HOTELS

HOTEL	Ariantze	Cara Lodge	Cara Suites	Embassy Club	Park Hotel	Campala Hotel	Pegasus Hotel	Queenstown Inn	Hotel Tower
LOCATION	176 Middle Street	293, Quamina Street	176, Middle Street	Pere Street	37, Main Street	10, Camp Street	Seawall Road	65, Anira & Peter Rose	74-75 Main Street
ROOMS	8	14	15	22	45	22	134	6	56
FACILITIES	1,2,4,5,6,8,10	1,2,4,5,6,7,8	1,2,4,5,6,7,8	1,2,3,4,5,6,7,8,9	1,2,5,6,7,4,8	1,2,5,6	1,2,3,4,5,6,7,8,9	1,2,5,6	1,2,3,4,5,6,7,8,9
TARGET GROUP	Corporate	Business, leisure	Business	Business	Business/ Group Delegations	Business	Corporate/ Business	Business/ Locals	Business
COST	\$55	\$ 85-130	\$87- 145	\$80-130	\$ 40- 60	\$61- 82	\$ 110-260	\$55-80	\$85- 160
START DATE	1991	1996	1995	1994	1893	1988	1969	1994	circa 1866
EXPANSION PLANS	Rooms 3-4 Rooms	Rooms 2 Executive Rooms	None	Create an interior resort	Yes	Upgrading facilities	None	None	14 Deluxe Rooms
GVT. LIASION	Min. of Trade	Min. of Trade Min. of Finance	Min. of Trade Min. of Finance	Min. of Trade	Min. of Trade Min. of Finance	None	Min. of Trade Min. of Fin. Min. of F. A.	Min. of Trade	None

Services and Facilities

1. Private Bath/ Shower
2. Air Conditioning
3. Swimming Pool

4. Restaurant
5. Telephone
6. Television

7. Business Centre
8. Bar
9. Gym

10. Night Club

Company	Cattelya Rainforest	CORTOURS	Discover Tours	Shell Beach Adventures	White Water Adventures	Wilderness Explorers	Wonderland Tours
GROUP SIZE Min- Max	2-12	3-15	8- no maximum	4 - no max.	15-40	Minimum 1 person. No maximum	2-60
EXPANSION PLANS	Resort site in Santa Mission	Building camps in Manituba	Great falls	Not Immediately	More Cabins (private) on island	Nature resort and itineraries to new areas	Shell Beach Overland Kamarang & area
GVT. LIAISON	Min. of Trade			Min. of Trade/ Min. of A.A.	Min. of Trade	Min. of Trade; Min. of Amerindian Affairs	No liaison
AMERINDIAN INVOLVE- MENT	Amer. Boat guide; family inside mission, also overseas site	Very little, other than visiting settlements	Work sites run by Amerindians	All Amerindian involvement - family full time at Shell Beach - guides, drivers etc.	Amerindian staff on site and in Georgetown	Partnership with some Amerindian communities to conduct tours. Others employed for tours as necessary.	Interior - hired on freelance basis

Appendix 2a: Visitor Arrivals by Country of Origin 1992 – 1994

Country	1992	1993	1994	% Share 1994
USA	34566	57269	42143	37.4
Canada	13976	no data	17668	15.7
Europe	6763	7892	8104	7.2
Caribbean	14427	19514	21916	19.4
South America	5149	20553	20904	18.5
Other	no data	1899	2016	1.8
Total	74881	107127	112751	100

Appendix 2b: Monthly Arrivals of Visitors 1992 – 1998

	1992	1993	1994	1995	1996	1997	1998
January	4562	6251	7513	7261	5502	5788	3928
February	5463	7039	7322	6595	6391	5693	4927
March	4994	7567	9330	8317	7483	6890	4209
April	5990	8189	7974	9519	8116	6207	6154
May	5122	6953	6629	6362	6257	5328	4509
June	5261	8323	8278	7920	7087	6183	5625
Total	31392	44322	47046	45974	40836	36089	29352
July	9699	13972	14760	13172	13325	11232	9337
August	9136	12345	14692	12024	10465	5146	8612
September	4594	7233	7550	7103	6227	5227	4691
October	4538	7058	6715	6501	5486	5007	4487
November	5127	7238	6924	7692	5837	4530	2126
December	10395	14959	15137	13070	9795	8501	8501*
Total	74881	107127	112824	105536	91971	75732	67106

• This figure has not yet been computed – the same figure for December 1997 has been inserted
 Source – National Statistics Bureau