Caribbean Regional Sustainable Tourism Development Programme

Project No. 8 ACP RCA 035

REPORT FOR CARIBBEAN SOFT ADVENTURE STUDY

FOR CARIBBEAN TOURISM ORGANISATION - LOT 1 RESEARCH CAPACITY

December 5, 2006

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1. FOREWORD

This report, *Soft Adventure Demand in the Caribbean,* was prepared under the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP) Project No. 8 ACP RCA 035 as part of technical assistance provided to the Caribbean Tourism Organisation (CTO), through the Research Capacity component – Lot 1.

The Programme is funded under the 8th European Development Fund (EDF) and coordinated by the Caribbean Forum of African, Caribbean and Pacific States (CARIFORUM). The beneficiaries of the programme are the fifteen (15) CARIFORUM member states: Antigua & Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts/Nevis, St. Lucia, St. Vincent & the Grenadines, Suriname and Trinidad & Tobago.

The CARIFORUM Tourism Programme Unit (CTPU) served as the contracting agency with responsibility for managing and coordinating the CRSTDP. The CTO served as the implementing agency and in that role provided technical guidance. PA served as the contractor with responsibility for the implementation of the component.

1. The Research Capacity and Report Writing component ran from July 21, 2006 to October 30. Additional editing and research was done in November and December 2006.

Dr. Rachel Dodds served as the principal consultant for the component and is the principal author of this report.

A draft report was submitted on September 20, 2006 providing the following:

1. Trends and demands for soft adventure.
2. Profile of soft adventure travellers.
3. Market potential for soft adventure development in the Caribbean.
4. Issues and constraints.
5. Recommendations for future development.
6. Priorities for development.
7. Marketing and Implementation guidelines.
8. A template for future development.

PA's long-term CRSTDP research adviser at the CTO, who is responsible for providing technical supervision of the assignment reviewed the report in October 2006 and suggested a number of revisions. These revisions pertained to clarifications of the main constraints for soft adventure tourism product development, inadequacy of research findings and general editorial errors as well as future recommendations for future development. The CTO then had a number of comments on the report, which were addressed in the second version of the report edited in November 2006. Revisions pertained to the clarification of European vs. UK data provided in the report as well as clarification on visitor profiles and market opportunities for soft adventure. The second revised report reflects the changes made to respond directly to the comments received in the correspondence dated October 20, 2006 and November 20, 2006.

2. EXECUTIVE SUMMARY

The adventure travel industry is growing at a rate of 10-15% per annum as stated by international tour operators and information compiled for this report. However, the greatest increase in soft adventure demand has come from world-class adventure destinations such as Kilimanjaro, Machu Pichu, and Everest base camp. The Caribbean, at the time of writing this report, is still predominantly perceived as a sun, sea and sand destination; therefore niche adventure operators do not see demand for soft adventure trips to most Cariforum countries. For the Caribbean region, the main visitor market is still in search of sun, sea and sand but these mass market visitors are looking for additional product offerings to augment their holiday experience and soft adventure products (horseback riding, bird and wildlife watching, hill walking and trekking, flat water (river) canoeing and kayaking, photo safaris, camping, hiking, sailing, skiing, diving, and cycling) are seeing an increase.

Over one hundred tour operators were contacted from the UK, mainland Europe and representative Cariforum countries for this report. The response rate was approximately 30% for European operators and over 90% for Caribbean operators.

From the interview responses, as well as secondary data collected for this report, current trends indicate that there is an interest in experiential travel, volunteer travel, learning holidays, health and fitness, shared activities for families, novelty thrills, and culture and meeting people.

The main demand for soft adventure in the Caribbean comes from the cruise market (both small and large ships) and international mainstream/mass tour operators. Although independent travel is increasing and the use of the Internet has seen a large growth in holiday bookings, soft adventure type activities are most often booked when clients arrive in the destination.

The profile of the soft adventure tourist is also changing. What was originally older, more affluent clients, is lending its way to couples ranging in age from 20-50, and a new sector of families that often combine nature and beach – which is the result of the 1960's backpackers now having families. The main visitor market for the Caribbean is still mainly North American, followed by the UK. This report recommends that further research be carried out to assess trends and demand by the US/Canada market so as to further explore soft adventure potential. Information for these types of activities is found on the Internet, however, bookings still mainly occur through operators and travel agents or when travellers arrive in their vacation destination.

In order for Caribbean countries to optimise development for the soft adventure market there are a number of elements that first must be addressed.

1. In order to capitalise on growing soft adventure demand, the marketing image of the Caribbean needs to shift to showcase its natural and cultural features in addition to its beaches. Currently, most European operators still see the Caribbean as 'sun, fun and rum' and niche adventure operators as well as many mainstream operators who have a growing demand for soft adventure activities do not believe that they can sell their clients the Caribbean as an adventure destination until this market image shifts.

2. Land areas for soft adventure activities must be protected. Activities such as horse back riding, river tubing, hiking and wildlife watching require pristine nature to attract visitors. Protected areas, building restrictions and conservation plans need to be outlined in policies and implemented.

3. Policies must be put in place for tourism development and implementation should involve all stakeholders to ensure maximum benefit.

Once marketing, image and development constraints have been addressed; opportunities for optimisation of this niche market are best described as four potential options for development:

1. Short term adventure trips - half day to one day trips

    a. This type of trip will have the quickest return on investment and provides the largest opportunity for the region as a whole. These activities comprise add-on soft adventure trips for countries that already attract sun, sea and sand packages or cruise ships. The most popular activities include: horseback riding, diving, canopy tours, river tubing, hiking (rainforest/volcano hikes).

2. Multi-day, multi-adventure trips

    a. There is potential to develop specific adventure activities in a multi-day trip format. Caribbean 'icon's, which operators feel have potential include: areas such as the Pitons in St.Lucia, Belize Cays, Blue Mountains in Jamaica and the waterfalls in Guyana. This type of trip is appealing to the independent traveller booking through niche adventure operators.

3. Volunteer / learning trips

    a. Multiple large scale operators, niche operators as well as many Internet based companies are now offering activities such as 'Learn to Sail' or 'Learn to Dive'. Many countries around the world offer this type of activity and there is potential to offer packages in the Caribbean. The most popular activities for 'learn to' holidays include diving, sailing and surfing. Most popular volunteer trips are wildlife monitoring and those that interact with the local community.

4. New Adventure trips

    a. Short and/or long term adventures could be developed for selected Caribbean countries, particularly the South/Central American countries (Guyana, Suriname, Belize). Interest is currently increasing in these countries as they are seen as 'new' or 'undiscovered'. Operators feel that these countries could be offered as part of a larger package with other Latin American countries.

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List of Acronyms

ABTA	Association of British Travel Agents
AITO	Association of Independent Tour Operators
DMC	Destination Marketing Company
CARIFORUM	Caribbean Forum of African, Caribbean and Pacific (ACP) States
CRSTDP	Caribbean Regional Sustainable Tourism Development Programme
CSQ	Customer Service Questionnaire
CTO	Caribbean Tourism Organisation
CTPU	CARIFORUM Tourism Programme Unit
EU	European Union
FTO	Federation of Tour Operators
IABD	Inter-American Development Bank
MICE	Meetings, Incentive, Conference & Events
PADI	Professional Association of Diving Instructors
PLI	Public Liability Insurance
SME	Small and Medium Sized Enterprise
TABA	Tourism Allied Business Association
TPDCo	Tourism Product & Development Corporation
WTTC	World Travel and Tourism Council

3. INTRODUCTION

This Draft Report outlines the findings of the research under the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP) Project No. ACP RCA 035, specific to the Soft Adventure Study for the Caribbean Tourism Organisation (CTO). The work for this report covers the time frame of July 21, 2006 to December 5, 2006. The study was undertaken as part of the Research and Development Component of technical assistance provided to the Caribbean Tourism Organisation (CTO), and implemented by PA Consulting Group, under the Caribbean Regional Sustainable Tourism Development Programme, which is administered by the CARIFORUM Tourism Programme Unit (CTPU) and financed by the European Union.

3.1 Project Summary

This document contains the final report, which reviews six main aspects for the development and demand for soft adventure in CARIFORUM countries. First, the report outlines the demand and trends pertaining to the European soft adventure tourism market with a view to advising CARIFORUM tourism entities on the prospects for realizing the full potential of that niche market. Secondly, this report outlines the type of client who participates in soft adventure activities as well as booking methods and motivations for soft adventure activities. Thirdly, it documents the constraints and obstacles at the marketing, regulation and operational levels for specific soft adventure and also specific islands. Fourthly, the report determines the potential for development of soft adventure activities in the Cariforum countries and outlines the product offering and interest of some Cariforum countries that were visited as part of this study brief. Fifthly, it outlines some marketing and implementation guidelines for Cariforum countries to develop soft adventure niche markets and finally, it sets out a template and methodology for future profiling of potential niche markets.

The Report has been prepared in response to a tender brief issued by PA Consulting Group, under the Caribbean Tourism Organisation's (CTO) component of the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP), which is administered by the CARIFORUM Tourism Programme Unit (CTPU).

3.2 Geographic Coverage

For purposes of this project the "Caribbean" is restricted to those member countries of CARIFORUM, which are: Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, the Dominican Republic, Jamaica, Grenada, Guyana, Haiti, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, and Trinidad & Tobago.

3.3 Relevance of Component

The Caribbean is perhaps the most tourism dependent region in the world. According to the World Tourism Organization (UNWTO), 808 million people travelled to a foreign country in 2005 and spent a total of US$682 billion[1]. International tourism receipts combined with passenger transport currently total more than US$ 800 billion - making tourism the world's number one export earner, ahead of automotive products, chemicals, petroleum and food. In the Caribbean (31 CTO member countries), the equivalent figures for 2005 are 22.5 million stay over arrivals, 19.8 million cruise passenger visits and about US$21.5 billion in expenditure. While this may seem small in comparison to the world total, the fact is that the region's tourism arrivals and receipts command a disproportionately larger share of the global total than do their share in the world's population and GDP; CTO member countries with only 1% of the world's population consistently attract about 3% of global tourism arrivals and world tourism expenditure.[2]

The reliance on mainly sun, sea and sand tourism by many countries has led to high competition and less than satisfactory economic benefit to the local community. The need for tourism products to focus on more than just this 3 S (sun, sea and sand) market to gain competitive advantage is partnered with the need for development of economic benefits to the local population as well as the protection and conservation of the environment in these destinations.

This report outlines the essential aspects of the demand for soft adventure activities by European travelers such as the demand for quality and uniqueness of product. The report also outlines issues and constraints for operation and development of soft adventure activities and outlines recommendations for overcoming such constraints. Much of the research found through interviews with international tour operators, travel providers and destination representatives, tourist boards, Ministries of Tourism and local ground operators is in line with recent Mintel, Delpy Neirotti and UNWTO Ecotourism reports as well as documented tourism policies and master plans from destinations, which outlined challenges or issues for development.

[1] UNWTO, 2006
[2] Andrew, 2005 from www.onecaribbean.org

4. RESEARCH METHODOLOGY

4.1 Interpretation of the Terms of Reference for Soft Adventure Study

The overall objective of this study was to assist CARIFORUM and CTO member countries in enhancing their marketing efforts by better reflecting consumer demands and thus increasing their attractiveness and per capita visitor expenditures, while improving the returns on their marketing dollars.

The Terms of Reference required PA to:

- Review literature, including relevant studies, on the European soft adventure market, as well as the Caribbean's soft adventure tourism efforts, in order to obtain a sound understanding of the current situation.
- Conduct surveys via field visits, telephone and email with European tour operators and travel providers to determine trends, market potential and key requirements for optimization of the soft adventure market potential by Caribbean countries.
- Undertake a scoping mission: a site visit to a representative sample of four islands in the Caribbean to determine what exists regarding soft adventure products, development initiatives and good practice in order to ascertain what needs to be done to realize the full potential of the soft adventure market in relation to identified opportunities.
- Determine constraints and obstacles (marketing, regulatory and operational levels) for the development of specific soft adventure products and services in the Caribbean.
- Determine the most relevant products and groupings for soft adventure that could be utilized by interested CTO members.
- Develop guidelines for marketing soft adventure and for product development.
- Outline a template and recommendations for a workable business model.

4.2 Specific Activities and Deliverables

To fulfil the Terms of Reference, PA in consultation with CTO has determined that the research would comprise the following objectives:

Specifically the study would:

- Provide critical information to assist tourism decision-makers in formulating more effective marketing and product development policies;
- Assist in refocusing regional tourism marketing strategies from product based to consumer driven marketing;
- Facilitate the enhancement of the region's tourism product to better capitalize on profitable market trends;
- Assess the potential for development of key niches within the soft adventure tourism market in the Caribbean;

- Indicate the constraints and obstacles to the development of a profitable soft adventure tourism sub-sector in the region;
- Propose recommendations for the successful development of the soft adventure market in the Caribbean;
- Establish a template for effective profiling of niche markets, which can be used for future assessments of new and potential markets

4.3 Research Methodology for Study

The research methodology for this study included both primary and secondary research in a number of phases. The first phase consisted of an extensive literature review of existing reports on soft adventure, the Caribbean and consumer motivations and demands. In order to assess trends and potential growth of these markets, the consultant reviewed existing soft adventure, ecotourism and nature based literature as well as collected information from sources such as private sector agencies (tour operators, travel providers and ground handlers), agencies (national tourist boards, Ministries of Tourism), research institutions, national statistics offices and the Internet. This phase also identified European and international operators who offered the Caribbean and/or soft adventure products.

Phase two consisted of primary research interviews with international tour operators and travel providers to determine trends, motivations and constraints for product/tour development. In person, telephone and email surveys were undertaken. Names and companies were obtained from the WTO 2002 Ecotourism Market Study reports, consultant contacts, contacts provided by tour operators and contacts provided by Caribbean contacts/tourist offices. Ninety-two (92) European operators representing over 90% of European travel were contacted for this study (see appendix A). A response rate of 30 percent was obtained (28 operators/travel providers). Information was collected in July, August and September 2006. It should be noted that although a response rate of only 30 percent was obtained, the majority of tour operators are represented. Larger operators such as Kuoni, First Choice, My Travel and TUI collectively embody approximately 70% of the market share for overseas tour operators. In addition, these operators (as outlined in section 5.2) have acquired a large number of adventure niche operators in the past few years and therefore their market knowledge of trends and visitor profiles is representative. In addition, although the majority of contacts that appear in the appendix are from the UK, many of these are companies with Continental European offices as well as UK offices and visitor profiles for Continental Europe as well as the UK were obtained.

Phase three consisted of a scoping visit to four Cariforum countries (Barbados, Jamaica, St. Lucia, St Kitts and Nevis) to interview government officials, tourist boards, destination marketing companies and ground operators. Companies that had expanded organisations in other countries (Grenada, Bahamas, Dominican Republic, Belize) were also contacted to gain insights. In addition, tourist boards of all Cariforum countries were contacted to further determine product offerings, trends, product development constraints and potential opportunities. In total, 43 interviews (out of a total of 52 contacted) were completed with in-country contacts and a further six tourist board (out of 12 contacted) provided information. Information was collected in August and September 2006. See appendix B.

Phase four compiled all data to determine trends, themes and gaps. Trends, motivations, opportunities and constraints were then identified.

Phase five outlined market and marketing opportunities and recommendations for future development. Graphs, charts and tables were added for clarification purposes. Feedback from CTO and CTPU personnel was then gained in October before final recommendations were determined.

4.4 Limitations of Study

A number of limitations affected this study. The first limitation was lack of response by operators. Many European operators did not respond to this survey as the time frame for research collection was during brochure production for many tour operators. Operators were contacted by phone and email and two follow up calls and emails were undertaken to try to elicit a higher response rate. Second, many niche adventure operators do not currently offer the Caribbean as a product offering due to their perceived image of the Caribbean as only sun, white sand beaches and package holidays. Third, although many operators who do not currently offer the Caribbean were contacted by phone and email to ask what elements would be necessary for these operators to offer trips to this region, many operators were not interested in being interviewed due to time restraints and lack of perceived relevance of component.

4.5 Definition of Soft Adventure

While it is difficult to determine precisely what activities constitute adventure tourism, it is generally accepted that “adventure tourism” is a generic term for outdoor, active holiday activities. “Adventure tourism” is still very much an emerging product group, but the individual components have been around for quite some time, and with lifestyle changes that promote more physically challenging vacation activities, it appears to be holding a firm market trend with tremendous growth potential. Adventure travellers tend to indulge in outdoor activities that are hands-on, challenging and participatory.

In the absence of a universally accepted interpretation, adventure tourism, in its widest meaning, covers a range of outdoor activities that fall into two broad categories. At one end are the extreme, physically challenging and adrenaline pumping activities such as base/bungee jumping, off-road mountain biking, white water rafting and canoeing, rock climbing and hang gliding, which are classified as “hard adventure”. At the other end “soft adventure” includes horseback riding, bird and wildlife watching, hill walking and trekking, flat water (river) canoeing and kayaking, photo safaris, camping, hiking, sailing, skiing, diving, and cycling. For the purposes of this report, only soft adventure activities were examined.

5. TRENDS & DEMAND FOR SOFT ADVENTURE BY EUROPEAN MARKETS

5.1 Trends

5.1.1 General

Safety and security is increasingly a concern.

There is an increased awareness for health and fitness and a move to participate in related activities.

Destinations offering numerous activities, combined with opportunities for a cultural experience, and surrounded by natural beauty are likely to meet the desires of the ever more commonplace soft adventure tourists and their travelling companions.

There is an increased use of the Internet to decide upon and book travel destinations. Independent travellers increasingly request information over the Internet directly from ground operators.

5.1.2 Soft adventure

Demand from European travellers for 'soft adventure' pursuits is growing, and will continue to grow for the foreseeable future, outstripping growth in other overseas travel and domestic activity holidays.

There is an increase in 'thrill' or adrenaline type soft adventure (e.g. canopy/zip line tours).

'Soft adventure' tourists from Europe are increasingly of a mixed age, gender and demographic in general.

5.1.3 Tour operations:

Larger tour operators are diversifying their product to offer soft adventure type activities to their clients.

Tour operators are becoming more aware of social and environmental responsibility and are looking to operate more ethically responsible excursions within destinations.

Hotels are increasingly operating as tour operators, cutting out the need for the traditional tour operator's role.

5.1.4 Consumer trends:

The market for special interest groups and group travel is growing.

There is an increase in honeymooners and young families to the Caribbean.

High-end travellers more often demand culture and local 'flavour' (food, community interaction) in tour packages/activities.

High-end visitors to the Caribbean are less likely to join established travel/tour groups but prefer to organise their own private activities usually in groups of 2 – 8. They require high quality, in-depth interpretation on their activities.

Mainstream/mass market consumers are increasingly looking for activities to be included in their tour package price.

Mass-market consumers increasingly are interested in visiting new destinations. Fewer consumers return to destinations year after year.

Loyalty by consumers is decreasing and consumers are ever more price sensitive. Travel bookings are increasingly influenced by cost, value for money and product offering.

5.1.5 Awareness of outdoor and activity holidays:

The Caribbean is still known for relaxing beach breaks; however there is a growing interest of both cruise passengers and overnight hotel visitors for soft adventure activities.

- Cruise ships are increasingly offering opportunities to play golf and participate in snorkelling and water sports etc.[3]. 'Ocean Village Cruises' is one example of a company offering 'soft adventure excursions such as kayaking, cycling tours and swinging through tree tops' and is receiving a wider spectrum of travellers[4].

- Cruise ships are also demanding new soft adventure offerings from countries. Zip-line or canopy tours have been the most popular new activity although horseback riding along the beach is still the most popular cruise ship activity.

Better health and wealth and a wider interest in experiential travel coupled with faster and more frequent transport have created areas of potential growth in outdoors and activity pursuits.

Environmental awareness is important to visitors and they, especially Continental European travellers, are increasingly asking for environmental management/certification standards.

Today's visitor wants to discover the country they are visiting and tend to visit a destination only once before moving onto the next destination.

5.2 Demand & Growth projections

The Adventure Travel Society reports a sectoral annual growth rate of between 10-15%[5]. The demand, however for such activities has been found to be in destinations such as New Zealand, South Africa, Tanzania, Botswana, India, Australia and some South American countries.

[3] Delpy Neirotti 2003 p. 7
[4] Telegraph 2006
[5] Delpy Neirotti 2003 p.14, Responsibletravel.com interview

The total number of Europeans who used the four major tour operators for mainstream package holidays decreased by 17% overall between 2000 and 2005. However the growth of activity-based holidays sold by the same operators has increased dramatically over the same period[6].

Independently booked holidays are increasing at a greater rate than package holiday bookings. In response, tour operators are diversifying, offering tourists a wider range of activities.

Future interest in participating in particular activity holidays outstrips participation in every category (see table 1). The segments with the largest potential growth, according to this research are scuba diving, hiking, river canoeing, wildlife (including bird) watching and horseback riding. This is in line with tour operators' responses, which outline scuba diving, horseback riding and multi-activity trips as the highest potential growth.

Table 1- Base Numbers of Mintel 2005 Statistics

Activity	Percentage	Base No of Respondents
Any	35	694
Walking	13	258
Water Sports	9	178
Cycling	5	99
Horse Riding	5	99
Golf	4	79
Scuba	3	59
Multi-Activity	4	79

Source: Mintel 2005.

Tour operators across Europe have reported continual growth in the 'soft adventure' market since 2000. For example, Elegant Resorts noted such a demand that one of their marketing campaigns in 2005/2006 was aimed at this concept[7]. However, this has been mainly for destinations such as New Zealand & Australia, Africa and Latin America.

In their 2004 AGM, First Choice Plc announced that its, 'soft adventure businesses continue to experience strong growth with volumes currently 18% ahead of the same period last year'.

Holidaybreak Plc announced their Adventure segments half-year profits were up 67% in 2005, with cumulative sales up 77%, with 2006 predicted to be 'another excellent year'.

[6] Mintel 2005
[7] Interview with Elegant Destinations, August, 2006-08-23

Sandals Resorts offer all-inclusive holidays to the Caribbean for couples, with a variety of 'soft adventure' options. For example, in some resorts, scuba diving equipment is included, with two free dives daily for qualified divers. Unqualified divers can pay $70 for a 'resort qualification', or alternatively pay extra for PADI or NAUI certification. Other activities offered include sailing, water sports, snorkelling, kayaking, golf and rock climbing, reflecting the trend in a demand shift for adult oriented services with a la carte experiences on offer[8].

Virgin Holidays offer 'Adventures' to the Caribbean, including 'walking through rainforests and swimming in waterfalls' in Dominica, sailing in the Grenadines and nature trips involving canoeing in Trinidad[9].

Kuoni and First Choice Holidays noted an increase in customers interested in learning and volunteer holidays[10].

5.2.1 Acquisitions by tour operators – response to adventure demand

There are several examples over the last few years of the larger European tour operators acquiring smaller businesses specialising in adventure tourism. First Choice, the world's largest tour operator, has acquired five European 'soft adventure' operators including The Adventure Company and Caradona Caribbean Travels for £3.1 million each. The increase in numbers is shown in Table 2[11].

Table 2: First Choice Plc Activity Adventure Division Customer Numbers

	Customer Numbers
2002	17,592
2003	31,404
2004	52,215
2005	137,361

Source: First Choice Plc 2005 p. 11.

The Activity Adventure Division of First Choice Holidays Plc had an operating profit growth of 20% or £2.3 million in 2005. 'The rollout of added experiences, like mountain biking and health and fitness centres, resulted in a healthy increase in revenues'[12].

Holidaybreak Plc has also acquired some European 'soft adventure' operators, spending for instance, £15.7 million on Djoser, a leading Dutch operator. Holidaybreak's adventure divisional strategy is to broaden awareness of their services to a wider audience, develop

[8] Sandals 2006
[9] Virgin Holidays 2006
[10] Interview with First Choice and Kuoni, 2006
[11] First Choice 2004 and 2005
[12] First Choice 2005 p. 18

new products and achieve a 50% rate of on-line bookings by 2008, linking with the trend in booking patterns as mentioned previously[13].

5.3 Specific soft adventure demand

Detailed statistics on specific soft adventure product are difficult to find since many statistics are general in nature or outdated (e.g. sailing). There are few studies that specifically determine soft adventure trends and characteristics as studies often interchange characteristics of ecotourism, extreme adventure or general leisure with soft adventure. There are also limited economic figures available for particular soft adventure products and future primary research on these activities is needed in order to determine trends and growth rates.

5.3.1 Bird Watching

According to Surfbird, a bird watchers website, over 70% of birders take at least one out- of- state/county or out- of- country birding trip per year[14].

Bird watchers are not as focused on cost of trip; however, they expect high quality interpretation from guides.

Birdwatchers are generally more independent, focused and committed than other travelers. Birds take priority over comfort and many birders will stay in basic local lodging establishments in order to see the species of interest to them[15].

The high expectations of many birdwatchers, combined with their high average incomes, can result in large financial contributions to the localities visited.[16] For example, in 1999, the Costa Rican Tourism Institute (ICT) estimated that 41% of the US$ 1 billion tourism income for that year was from tourists who came to Costa Rica for bird-watching.

The average age for birders is estimated at 25-55 with an equal distribution of men and women. Income levels are generally high among birders. Given their education and high expectations, bird-watchers are more likely to make efforts to reduce their environmental impact, to appreciate the distinctness and significance of different ecosystems and to pay the required protected-area fees while traveling.

There has also been a substantial increase in bird related type holidays marketed on the Internet.

5.3.2 Diving

There are an estimated 5 to 7 million active divers worldwide[17].

[13] Holidaybreak Plc 2005
[14] www.surfbirds.com
[15] Sekerci, Oglu, C (2002)
[16] Sekerci, Oglu, C (2002)
[17] http://www.padi.com/english/common/padi/statistics/

Many Europeans are completing their classroom and pool training at home and then travelling to warmer more exotic locations to take their actual certification tests as an Open Water Referral[18]. According to figures from 1995, 55,000 divers were trained of which half were trained whilst on holiday. The diving tourist is offered and expects an adventurous experience with perceived risks, but in a safe environment[19]. According to the Professional Association of Diving Instructors (PADI) there were approximately 120,000 active divers in the UK in 2003, with the activity becoming 'the fastest growing activity holiday for British holidaymakers'. According to a 2005 Mintel report, 13% have a future interest in this activity.[20]

The most important considerations for divers choosing a dive destination were the quality of diving and the cost. A similar survey conducted found that the most important factor for choosing a dive operator was the operator's reputation.[21]

Divers tend to book their holiday based on dive site offerings and are more likely to visit a destination specifically for their product offering.

The average age of divers tends to be young (25-29 years of age) and predominantly male[22]. There is an increase in interest by older participants, and a greater interest from people with disabilities.

Within the UK, where specific data was obtainable, the Professional Association of Diving Instructors (PADI) estimated there were approximately 120,000 active divers in 2003, with the activity becoming 'the fastest growing activity holiday for British holidaymakers'. According to a 2005 Mintel report, 13% have a future interest in this activity.[23]

The majority of British divers take their hobby overseas; around 85% travel abroad to dive, with the opportunity of 'wreck-diving' being a major pull factor[24].

5.3.3 Hiking and Trekking

Hiking and trekking is an activity with one of the highest participation levels in the UK, with 12% of adults hiking at least once a week in 2004, up 3% from 2000.[25] Hiking is a very common pastime for British adults, with 77% taking a walk for pleasure at least once a month. Recreational walking is on the increase among UK residents of all ages[26]. In 2005, 11% of British residents interviewed had previously taken a walking holiday[27].

[18] Mintel (2003)
[19] Jennings 2003 pp. 140-142
[20] Mintel, 2005
[21] http://www2.scubadiving.com/feature/scubapoll/travel.shtml
[22] Jennings, 2003, PADI International and interviews
[23] Mintel, 2005
[24] Smith 2005
[25] Mintel 2005
[26] Ramblers Association 2006
[27] Mintel 2005

Hiking in Continental Europe is also common, with Scandinavian and German travellers participating in increasing numbers of overseas trips.

In accordance with the Mintel Report, Europeans as well as UK travellers who are interested in hiking and trekking holidays are mostly male (55%) and slightly older than average. 25% are families, 37% are pre-family or no family and 13 % retired.[28]

Forty two percent of people who had taken a previous walking/hiking holiday would be interested in a future walking/hiking holiday.[29]

5.3.4 Kayaking/Canoeing

Of those interested in water sports such as kayaking or canoeing, most are male (63%) and are younger than average with over 75% under 45.[30]

Although there is little hard data on kayaking and canoeing, many adventure operators noted the increased demand for sea-kayaking multi-day trips and river tubing as a single excursion or part of a multi-day adventure package (e.g. Belize).

5.3.5 Horseback Riding

In 2005, around 5% of British adults interviewed had taken a horseback riding holiday [31].

Nine percent of those interested in activity holidays would be interested in horseback riding. Forty three percent of active people on holiday who had taken a previous horseback riding trip would be likely to do so again[32].

Of those interested in horseback riding holidays, most are female (69%) and almost half are between the age of 25-44 years old. 33% are pre-family or no family, 34% have families and 6% are retired.

5.3.6 Wildlife Watching

The whale watching industry is estimated at about US$504 million, which has doubled since 1991[33].

Turtle watching is increasing in interest. For example, the St. Lucia Heritage Tourism Programme noted a 100% increase in one year for turtle watching tours. The operator noted a gain of US$27,000 in 2005 up from US$13, 500 in 2004.[34]

It should be noted that there are few figures for wildlife watching that are relevant to the Caribbean states although tourist boards have noted increased enquiries.

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[28] ibid and interviews
[29] Mintel, 2005
[30] ibid
[31] ibid
[32] ibid
[33] IFAW 1997 p. 3
[34] Interview with St. Lucia Heritage Tourism Program

5.3.7 Cycling

Growth in overseas cycle tourism is most likely to come from the Dutch, German, Scandinavian, and French markets in self-organized cycle touring holidays and holiday cycling. Where cycling is the main pursuit and the main form of travel, holidays now account for 2-4% of holiday trips and this is expected to double in the next decade.
In Germany, 25% of the population cycle while on holiday. (This compares to 3% in the UK)[35]. In Germany, over 2.2 million people participated in cycling holidays in 2003.

Dedicated cycle tourists are likely to be aged 40 - 55, travelling as a couple or in small groups, staying on average 3-4 nights. The second-largest age range for the dedicated cyclist is 20-29. For both age groups, most will arrange their travel and accommodation themselves, and do not book cycles in advance. A small minority will be interested in the inclusive cycle touring package. Cycle tourists spend as much as (and some studies indicate more than) other kinds of tourist[36].

Those interested in cycling holidays are 65% male and 35% female with a high representation of fewer than 34 years of age. Out of UK visitors who go on cycling holidays, 25% are from the capital city, London[37]. 55% are pre-family or no family while 20% have families and 7% are retired. In 2004, 11% of UK adults cycled at least once a week. In 2005, 5% of British adults had taken a cycling holiday in the past[38].

Eight percent of those interested in activity holidays would be interested in participating in a cycling holiday. Forty six percent of holiday-active people who had taken a previous cycling holiday would be likely to do so again[39].

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[35] http://www.cycletourism.com/9896DC_ff28.pdf
[36] http://www.cycletourism.com/9896DC_ff28.pdf

[37] Mintel, 2005
[38] Mintel, 2005
[39] ibid

6. PROFILE OF SOFT ADVENTURE

6.1 Profile of Visitors Interested in Soft Adventure

The majority of visitors to most of the Caribbean countries are still mainly from the USA, followed by the UK. Continental Europe is growing as a market, however, not by substantial amounts. This can be attributed to lack of awareness about Caribbean offerings as well as price, length of travel and air access/connections. There are a growing number of Caribbean nationals who are travelling and are increasingly interested in soft adventure activities.

The current market is made up of a mix of cruise ship market (depending on individual islands) and hotel market. Currently only about 2-5% of visitors to most Caribbean nations are independent travellers (this figure may be different for continental countries).

There are typically two types of soft adventurers and different Caribbean states attract different types of visitors although some countries attract both (Jamaica, Dominican Republic, Belize, etc.).

- Mainstream traveller interested in soft adventure:
    - Those destinations that attract cruise ship passengers attract younger travellers, honeymooners and families who are most likely to be fun loving, interested in low exertion thrill seeking soft adventure. This market is mainly from the USA and UK.
    - This market requires high levels of health and safety and is interested in high thrill, low exertion activities (e.g. canopy rides).
    - All-inclusive markets tend to focus on younger, more fun-loving couples that are interested in soft adventure type activities but usually on ½ or full day trips.
    - The age range of mainstream market is 25-50 years old.
    - This mainstream market, which is currently participating in soft adventure are looking for 'easy' soft adventure – defined as activities which are shorter in length, not overly physical and are possible for both families and less fit people –½ day to 1 day trips are most popular.

- High end soft adventures:
    - More affluent, mainly Continental Europeans who are more sophisticated travellers expecting higher quality, uniqueness, and higher levels of authenticity than their mainstream/mass traveller counterparts.
    - Europeans (excluding the UK) are more likely to explore while on holidays than their North American counterparts. This is partially due to the average length of

stay being 10-14 days versus 4-5 for North Americans and their increased holiday time.

- The age range of high-end soft adventurers is 40+.

- High-end soft adventurers who are more interested in nature-based tourism and longer soft adventure type trips are not currently visiting the Caribbean. European tour operators suggest that if awareness about soft adventure type activities were raised then it is possible that more travellers would be interested in visiting these regions. Currently, however, soft adventure interests by Europeans are focused on Africa, Asia and Latin America as this is where world class soft adventure attractions are located (e.g. Machu Pichu, Kilimanjaro, trekking in Nepal, horseback riding in Argentina and South Africa, cycling in Vietnam)

** See chart 2 for graph depiction of these two markets.*

New hotels often depict new adventure type clients:

- Development of large hotels in destinations increases the pool of visitors that could be interested in soft adventure activities

- The level of eco or small-scale accommodation directly relates to the number of independent travellers or nature/eco-minded travellers who are searching out this particular niche accommodation/experience.

Profiles of clients will vary from destination to destination as type of client is correlated with type of accommodation offerings. E.g. St. Lucia has mainly all-inclusive resorts, which are mainly couples and families.

6.1.1 Cruise Market

Cruise visitors on large ships (1500+ passengers) are not particularly loyal and passengers are constantly looking for the next ‘new’ trip. There is a constant need to keep the product fresh and new to attract visitors to destinations.

Smaller ships (100 – 500 passenger ships) have more focus on destinations that offer activity holidays since passengers tend to disembark ships to learn about the local area and participate in activities. For this market, hiking, cycling, wildlife watching and horseback riding are the most popular activities.

Cruise ship passengers are looking for popular easy soft adventure rather than activities that require high levels of physical exertion. These passengers, due to time restrictions in a destination are interested in half-day adventures.

6.2 Gender

Males outnumber females in most adventure sports apart from horseback riding, where over two thirds of participants were female[40]. This correlates with the Delpy Neirotti study, which suggests that female sports tourists are reportedly more interested in horseback riding as well as sailing than men[41].

6.3 Age

The average age for soft adventure type activities is younger than hard adventure seekers, ranging from 30 – 50 years of age. The larger mainstream tour operators see an average age of about 30 (being couples, honeymooners and young families), while specialist adventure operators have an average age of 40-50+.

Walking has the highest representation from those in the older age groups, whereas water sports seem to appeal to a younger demographic.

However, it is worth noting that operators suggested that all ages are participating in primary activity holidays and interest is growing by honeymooners as well as older adults (55+).

Delpy Neirotti also suggests that ‘sports tourists’ from the Baby boom generation are more likely to be interested in hiking, bird watching and photo safaris[42].

Although many activities may traditionally appeal to younger holidaymakers, older people have more free time and disposable income. If marketed appropriately the elder demographic are an appealing segment for the soft adventure market[43].

6.4 Attitudes / Motivations

Most European, UK and Caribbean based operators agreed with the 2005 Mintel study in that a large portion (37%) of holiday makers still prefer to rest on holiday (see table 3), showing that activity holidays are perhaps still a niche market. However, 30% agreed that activity holidays are a great way to escape the pressures of everyday life.

Some 28% agreed that activity holidays are a great way to socialise and make new friends while a further 25% agreed that they are ideal for families. The high response towards both of these statements highlights the group nature of activity holidays and shows that they are a good way of meeting people. This is further emphasised by the 15% agreeing that activity holidays are great for single people.

The Outdoor Industry Association’s “Top Line Retail Sales Report” offers socio-economic findings that help put some adventure information into perspective. Findings from this study outlined that there has been a shift in adventure travel:

[40] Mintel 2005 and interviews
[41] Delp Neirotti 2003 p. 15
[42] Delpy Neirotti 2003 p. 15
[43] Mintel 2005

- Aspiration vs. Inspiration - there has been a mindset shift from outdoor recreation participants being motivated by adventure and glory, to seeking peace and solitude in the outdoors[44]

Among the motivations for adventure holidays are that they are a great way to socialise and make new friends and they are ideal for families. Many clients for adventure travel are also single as they feel it is a good way to meet people[45].

Table 3: Attitudes towards activity holidays, May 2005

	All (%)
I prefer to go on a relaxing holiday rather than an activity holiday	37
They are a great way to escape the pressures of everyday life	30
Activity holidays are a great way to socialise and make new friends	28
Activity holidays are ideal for families	25
Activity summer camps would be great to get kids interested in sports	22
They are ideal if you want to improve your fitness levels/technique/skill	19
Activity holidays are great for single people	15
Activity holidays are difficult for couples unless both enjoy the activities	13
Activity holidays are too expensive	12
I would prefer a `wellness' holiday that combines health and fitness	11
Activity holidays are just for the fit and adventurous	8
Activity holidays are just for the young	7
None of these	12
Don't know	4

SOURCE: NOP/Mintel, 2005 (Base: 1,983 adults aged 15+)

[44] Xola Consulting, 2005
[45] Interviews, Mintel, 2005

6.5 Socio-Economic

All the activities share a similar split in socio-economic backgrounds. Most people who participate in soft adventure are university educated with above average income. Diving and sailing participants have a relatively higher income. Lower income clients tend to participate in horseback riding, jungle walks and zip-line canopy tours (although this may be due to the thrill seeking nature of these activities thereby making them more attractive to a wider audience).

6.6 Life-stage

People from the pre or no family life-stage group made up the majority of soft adventurers according to UK data. European Operators as well as Caribbean operators agreed with this finding, which also found that couples are underrepresented compared with groups of singles. This is due to the lesser likelihood of couples sharing the same interests in activities. It is noted that it is important for the industry to offer a range of activities available on the same holiday in order to cater to different tastes of members of the same group[46].

However, it should be noted that 'Soft Adventurers' are more likely to travel in couples and adult only groups[47], highlighting the difference between those who have an activity as a primary motive compared with those who participate in activities as a secondary component of a holiday. Soft adventurers are more likely to participate in a number of less strenuous activities and choose packages and destinations that can provide a variety of experiences to meet the tastes of all members of the travel group. The Sandals Group is an excellent example of a resort aiming to follow this trend and will be discussed further in the following pages.

6.6.1 Profile of UK Market

Research figures estimate that approximately 1.75 million people in 2002-2003 participated in an activity whilst on holiday[48].

The number of UK residents taking holidays, and multiple annual holidays, has been growing steadily since 2000, correlating with greater than ever disposable incomes. More and more British tourists are taking additional overseas activity based holidays as well as non-activity trips in the same year. It is suggested that those UK tourists who make these additional overseas activity trips are combining the activity with a cultural experience. At present, the UK activity tourism domestic market is larger than the overseas activity market. However, the overseas market is predicted to grow at a far greater rate in the near future than both the domestic activity market and overseas market in general[49].

The overseas activity holiday sector in the UK witnessed growth of 37% between 2000 and 2005, from 3.5 million to 4.8 million trips made[50]. Of the 2005 figures, there were 1.33 million UK visitors to the Caribbean[51].

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[46] Mintel, 2005 and interviews
[47] Delpy Neirotti 2003 p. 15
[48] ABTA, 2002 & National Statistics
[49] Mintel 2005
[50] Ibid, 2005

The number of British residents taking ‘Activity Holidays’ has been steadily increasing since 2000, and is also becoming a larger proportion of all overseas holidays taken rising from 9.5% in 2000 to 10.8% in 2005[52].

In a MORI poll for the Association of British Travel Agents, 8% of package holiday-makers had taken a holiday involving an ‘Activity (i.e. Water sports, cycling, skiing etc.)’ in the last 12 months, and 1% for a ‘Hobby related (i.e. plane spotting, bird watching, painting.)’[53].

The proportion of British holidaymakers buying package holidays has fallen for the last three years, reflecting the general shift of customers demanding more flexibility and choices[54]. Since 2003 British residents taking independent travel holidays have numbered more than those taking package holidays[55].

6.6.2 Profile of Dutch, French, Spanish and German Market

In 2005, the total European visitors to the Caribbean were 5.49 million. Of the total, 1.64 million were French visitors, 420,000 visitors from Italy and 395,000 from the Netherlands[56]. Markets from Europe are dependant on air links with European countries and therefore markets will shift according to which Airline/charter Company is operating to specific destinations. 33% of holidays take place in the winter season, from December to March.

According to 2002 ecotourism reports, the following profile of markets can be compared for soft adventure development purposes since many activities are similar (see table 4).

[51] CTO, 2005
[52] Ibid, 2005
[53] ABTA 2002 p. 3
[54] ABTA 2006
[55] Mintel 2005
[56] CTO, 2005

Table 4 – Profile of Ecotourism Markets

	SPAIN	ITALY	GERMANY
Age	20-39 (59% of market) majority are women	20-39 (38%) 55% are women	30-39 (17%) 40-49 (18%)
Income	57% earn 1,500-2,400 Euros/month	N/A	23% earn an average of 2500 Euros/month
Education	61% have university education	Majority have university of college education	Majority are university educated
Requirements of package	Artistic-cultural (18%) Nature (17.5%) Exp. Different cultures (17%)	Open-air excursions (53.1%) Natural/cultural heritage (48.9%) Discovery of local products (33%)	See other landscapes (18%) Experience other cultures (17.5%) Beach/ocean (16.5%)
Main activity	Visiting protected areas (29%)	N/A	N/A

Source: The German, Spanish and Italian Ecotourism Reports, 2002

As table 4 outlines, the average age ranges from 20-49 for the three markets. Most are university educated and have an interest in experiencing different cultures as well as natural attractions.

In relation to soft adventure, sports oriented travel has become more popular in the French, German and Dutch markets while demand for non-sports oriented travel has reached a plateau [57]. French tourists were found to be less likely to participate in sports activities while on holiday than their German and Dutch counterparts (see table 5).

For German travellers, travel propensity was higher in the unmarried, under-40s segment, and amongst all elements of the 40-60 age group. Inclination was lowest amongst the unmarried, over-60s segment.

[57] Keller, 2001

Table 5 – Holiday preferences for European Travellers

Country	Holiday with sport activities	Holiday without sport activities
German	55%	45%
Dutch	52%	48%
French	23%	73%

Source: Keller 2001 p. 151

Of the sports oriented segment however, the French were more drawn to activities that involved the beach, swimming and snorkelling, whereas the Dutch and Germans leaned more towards countryside based activities such as hiking.

Sports oriented tourists from Holland spent longer at their destination, but had a lower per night spend than their French and German equivalents (see table 6).

Table 6 – Length of stay and per country spend

Country	Per night spend (€)	Length of stay (nights)
German	80	7.6
Dutch	51	11.6
French	97	9.4

Source: Keller, 2001 pp. 152-153

6.7 Booking Methods for Soft Adventure

The majority of visitors to the Caribbean come as package tours using one of the large tour operators who have operations in the UK as well as most Western European countries (Switzerland, Spain, Italy, Germany, France, Netherlands) (Kuoni, Caribtours, Virgin Holidays, First Choice, TUI, Thomas Cook). For these types of clients, soft adventure activities are booked through ground handlers or resort staff upon arrival. Soft adventure activities are usually ½ to 1-day excursions although in some cases 2-3 day packages have been offered (2 day package to St. Lucia from Barbados for example).

For soft adventure operators, the components of the trip are outlined in their brochure and focus on a combination of soft adventure, culture, history and local interaction. For these operators, trips are booked with the tour company overseas and clients expect a full itinerary focusing on activities and interaction with the local community as well as a mix of culture and heritage. Guyana, Cuba and Belize are the only countries currently offered as part of an adventure operator product. However, some operators are considering adding Suriname.

Approximately 5% of the current soft adventure activity participants book before arriving in the country. This is usually the independent traveller (see section 4.6.1). Seventy four percent (74%) of soft adventurers use the Internet to search for information about their holiday[58].

6.7.1 Use of the Internet

Small and medium enterprises (SME's) will greatly benefit from the use of the Internet; as the cost is low and potential reach is high, the Internet provides an opportunity to reach international travellers who are increasingly using the Internet to book their travel. Many smaller adventure operators use the Internet as their main marketing source to reach potential clients.

A survey conducted by SPA and Synovate for the European Interactive Advertising Association reports a 17 % increase in Internet usage in 2005. Europeans spend an average of 10 hours per week online and 24% of those surveyed spend over 16 hours per week. Adding Broadband to this survey increases the number of users who spend over 16 hours a week on the "Web" to 31 %[59].

Although Nordic countries traditionally have been identified as the most advanced Internet users, French consumers spend the most time online each week, logging about 13 hours (see table 7).

Table 7 – European Internet Usage

Country	Hours Spent Online Per Week	Spend More Than 16 Hours a Week Online (%)
France	13	32
UK	11	25
Spain	11	24
Nordics	10	23
Germany	9	25
Italy	8	15

Source: The European Interactive Advertising Association, 2005

[58] Mintel, 2005
[59] Burns, 2005

Consumers will benefit further in the future by improvements in the distribution of the travel product via the Internet.

In the next few years, there will be greater focus on direct sales, predominantly through the Internet, and dynamic packaging[60] and independent adventure travelers have a higher propensity to use this means than package holidaymakers. In 2002 10% of people polled booked their last package over the world-wide Web, compared to 3% in 2000, whereas the number using travel agents is much larger but is actually decreasing, from 67% in 2000 to 54% in 2002[61].

The tendency to use the Internet to book package holidays is increasing[62]. For example, Djoser, a leading 'soft adventure' operator in Holland receives 65% of its bookings online[63]. Independent adventure travellers have a higher propensity to use the Internet for bookings and as a source of information than package holidaymakers, and as the number of independent holidays increases so does the importance of the Internet[64].

6.8 Length of stay

For the European and UK traveller to the Caribbean the typical length of stay ranges from 7-14 days with the average length of stay being 10 days. UK travellers mostly come to the Caribbean for 7-10 day package tours while other European travellers are more likely to stay for two weeks. Although there are increasing instances of short breaks (4-5 days), the majority of holidays are at least a week due to the nature of flight times and prices. Operators who offer adventure trips to Belize and/or South America offer packages of 14-21 days and these companies usually offer multiple destinations (2-3 countries) within their trip duration. The average length of stay for mainstream operators is 10 days and packages are normally to one country only.

6.9 Preference of Individual vs. Combination Activities

Currently, individual activities are the most preferred by visitors who book with mainstream operators. Almost all trips are booked after arrival in a destination and trips usually last ½ day to 1 day and include one activity (such as a hike, rainforest experience canopy tour, horseback ride or dive).

Adventure operators offer combination activities on their tours including usually at least two types of activities e.g. hiking and biking, hiking and wildlife watching, etc. Trips for this type of holiday usually are from 7-21 days.

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[60] Mintel, 2006
[61] ABTA 2002 pp 6
[62] ABTA 2002 pp.6-8
[63] Holidaybreak Plc 2005
[64] Mintel 2005

6.10 Marketing and Distribution Channels

For the larger/mainstream operators, the majority of trips are booked via travel agencies.

International adventure operators receive the majority of their booking via direct phone.

Local tour operators do the majority of their distribution through representation companies (DMC's) and the Internet although some larger soft adventure companies advertise in tourist board promotions and brochures.

Additional marketing methods by ground operators include:

- Tour desks in hotels
- Trade shows (internationally and regionally)
- Advertisements in local country magazines / visitor information channels

Current marketing methods for soft adventure type activities by Tourist Boards and DMC's include:

- Brochures/information distributed as part of Tourist Board booth at:
    - Major trade shows (WTM, ITB, BIT, Caribbean Market Place)
    - Meetings & Incentive show
    - Cruise show
- Website
- Joint promotions with CTO to market Caribbean in general
- Cooperation with tour operators
- Familiarization trips to tour operators and travel providers
- Press trips for journalists

Increasingly, overseas operators are listing activities on their websites for clients to book before they arrive in the destination – the tour operators taking a commission as a booking agent.

7. MARKET POTENTIAL FOR SOFT ADVENTURE IN THE CARIBBEAN

7.1 Market Developments in the Caribbean

The Dominican Republic is receiving loans from the IADB for ecotourism development and is preparing further applications for future loans[65].

Grand Fond in Dominica has received US$60,000 from the EU's Ecotourism Development Plan and intends to 'carve a niche for itself in developing hiking trails'[66].

The Meetings, Incentive, Conference, Events (MICE) market is increasingly using resorts that offer a wide range of activities to build camaraderie, offer networking opportunities and provide a more comfortable environment to negotiate in[67]. Guyana has built a new convention centre recently to capitalise on this market, offering add-on tours and experiences to delegates and visitors[68].

First Choice has recently opened an adventure centre in Belize catering to soft adventure type activities for their clientele.

7.2 CARIFORUM Soft Adventure Product Potential

7.2.1 Learning, education and volunteer development potential

Soft adventure potential for Cariforum countries includes the development of volunteer and learning holidays. As the Caribbean region is already well known, development of these types of activities could be optimized. For example, a learn-to-sail holiday in Scotland or Greece can charge approximately US$2000 all-inclusive per person for a week. As there are already many all-inclusive sea front facilities in the Caribbean, they could add this type of activity to their offering. In addition, many larger operators (First Choice, Kuoni, etc.) are developing this type of product for their clients (e.g. a sailing school in Belize). See box 1.

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[65] Epler-Wood, no date
[66] CAST 2006
[67] Delpy Neirotti 2003 p. 5
[68] Guyana Office of Investment 2006

Box 1 – Responsibletravel.com

This increasingly popular website which is UK based but has users worldwide offers all types of adventure holidays with special sections including holidays focusing on volunteer, education and special interest.

E.g.Conservation in Peru: This volunteer project focuses on preserving the wildlife and nature of Peru. They are also great ways to immerse oneself in the Peruvian culture, as one works alongside local people to protect and enhance their natural environment.
From GB £925 (4 - 12 weeks) ex flights

http://www.responsibletravel.com/

Another option for development is educational or language schools. Travelling to learn a foreign language has become increasingly popular and many tour operators and local entities offer information to tourists on language schools. See box 2.

Box 2 – Language schools

Global Zoo, a German website, offers language learning opportunities worldwide, including a listing for Barbados.

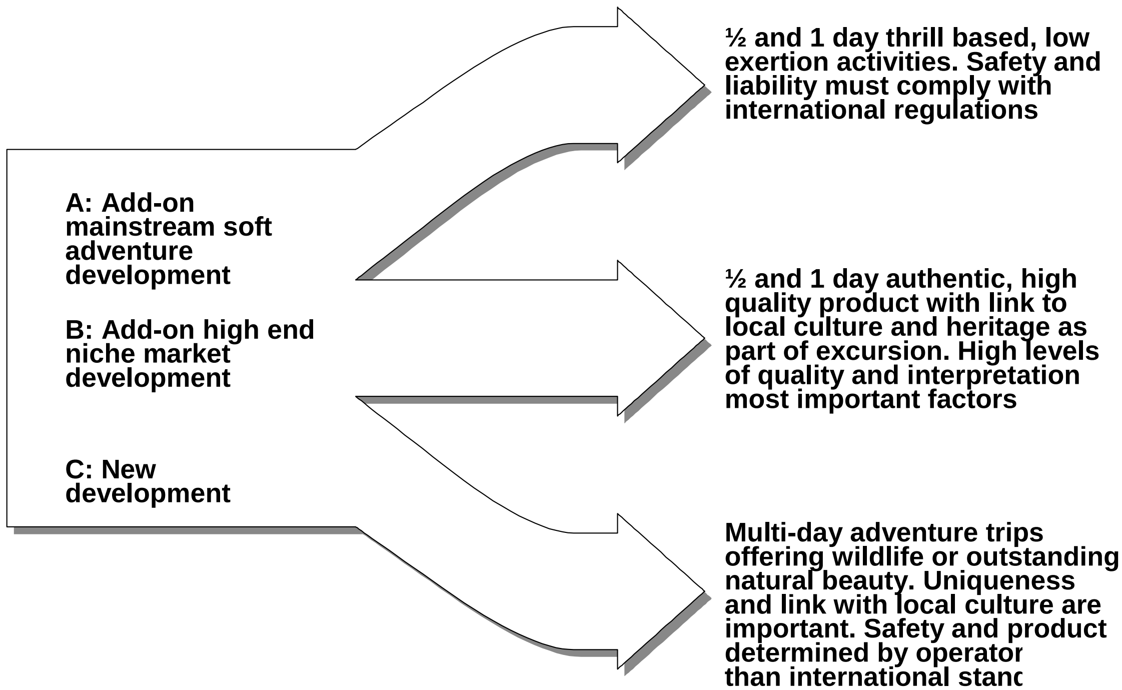
http://www.globalzoo.de

7.2.2 Product/activity development opportunities

Although this report has determined that the demand for soft adventure is growing, not every Caribbean country has the capacity or product offering to take advantage of this trend. Based on secondary research, scoping missions and interviews with tourist boards, international tour operators and travel providers, government officials and destination companies, table 8 outlines the activities that may have the most potential for activity development.

In addition, the type of soft adventure product should also be determined. Outlined in Chart 1 are the three potential niches for development within Cariforum countries and Chart 2 looks at the type of adventurer.

Chart 1: Soft Adventure Product Development Opportunities



Types of adventurers should also be considered when developing new product. Chart 2 outlines the two distinct groups within the soft adventure market.

Chart 2: Groupings for soft adventurers

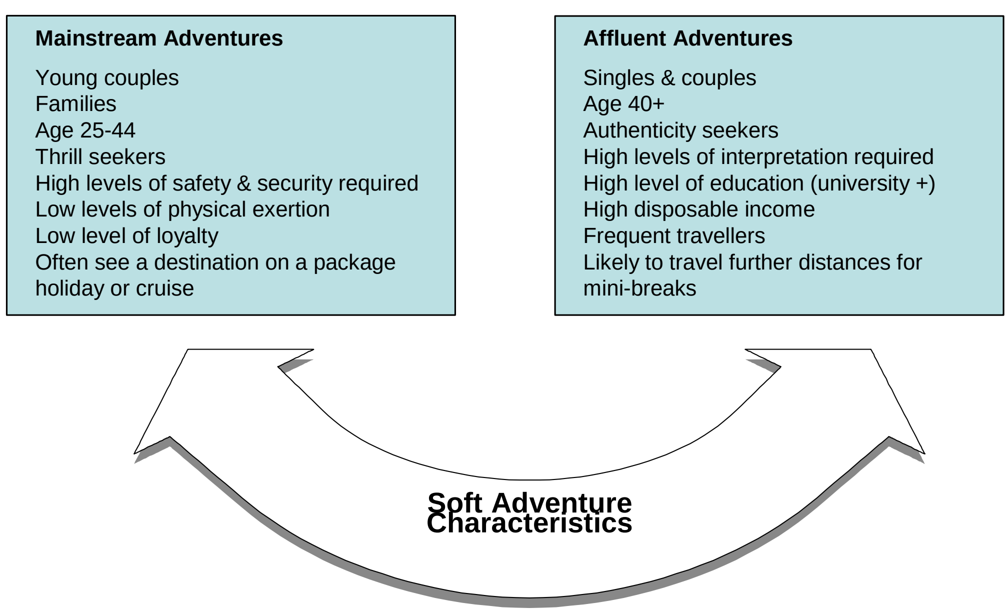


Chart 1 outlines three potential development options that can be combined with Chart 2:

- Option A is an add-on ½ or full day tour for the mainstream adventure (Chart 2) – those who come to the Caribbean on a sun, sea, sand package holiday but are hoping to see and do something in addition to the beach. This type of product corresponds to the mainstream soft adventurer that is looking for low exertion and fun. Adrenaline products such as canopy tours or river tubing are popular with this group. This market is the mainstream tourism market that usually visits destinations as part of a mainstream tour. Safety and security regulations by international cruise and tour operators are strict. This group is not loyal and is continuously seeking the new or different product. Example of option A: canopy tour in Jamaica, rainforest hike in Dominican Republic.

- Option B involves add-on ½ day or full day trips developed for the higher end of the market - the affluent adventurer (Chart 2). This group has higher expectations on quality and interpretation and is more interested in learning something about the local environment and culture. Although safety is still very important, superb quality and individual or tailor made trips are more common for this group. This group is made up of highly affluent individuals or high-end tours such as small boat sailing trips. Example of option B: rainforest day hike in Nevis, sailing excursion in Grenadines.

- Option C is development for countries such as Guyana or Belize where clients seek out multi-day trips often to multiple destinations. This type of client wants unique and 'icon' type attractions and demands local interaction, culture and heritage as well as adventure. This group usually travels with established adventure tour operators. The type of client is usually the affluent adventurer for this type of product. Example of option C: waterfall visit in Guyana, multi-day hike in Dominican Republic or kayaking trip in Belize.

As only an initial scoping visit was done to just four countries, it is recommended that countries seek to do a more in-depth analysis of development potential.

Specific multi-day product development potential, which was mentioned by international operators, includes:

- Sea kayaking trips in Belize or around larger Caribbean islands/countries

- Sailing trips combining a number of islands/countries with stop-off points for horseback riding, hiking, waterfalls, etc.

- Diving/sailing trips

Table 8 – Development potential for soft adventure by country

	Birding	Cycling	Hiking Trekking	Horseback Riding	Canoeing Kayaking	Sailing	Wildlife Watching	Diving
Antigua & Barbuda	x							x
The Bahamas	x			x			x	x
Barbados								x
Belize				x	x	x	x	x
Dominica			x		x		x	x
Dominican Republic		x	x	x			x	
Jamaica	x	x	x	x	x		x	
Grenada						x	x	
Guyana			x				x	
Haiti							x	x
St. Kitts & Nevis			x	x (Nevis)		X		
St. Lucia		x	x			X		x
St. Vincent & the Grenadines			x (St. Vincent)			x (Grenadines)		x
Suriname			X		x		x	
Trinidad & Tobago	x		X		x		x	x

The activities marked with an 'x' denote destinations that offer potential outstanding or unique product niches (e.g. endemic birds in Jamaica, volcano treks, unique or endangered wildlife, and high quality dive sites). The table above indicates areas where there is potential to develop product due to possible quality and/or natural value. However, this does not necessarily preclude any country from developing the key requisites that would enable them to expand or develop particular niches not identified as having immediate potential in the table. It should be noted that in some instances, other external, infrastructural or operational factors may inhibit this development and that a further product development strategy and plan should be implemented and tested with operators before marketing efforts are made.

Soft adventure demand for particular product can be directly linked with accommodation variety in a destination. Destinations who wish to develop the independent traveller market should consider eco or smaller scale/affordable accommodations.

8. ISSUES & CONSTRAINTS FOR SOFT ADVENTURE DEVELOPMENT

8.1 Technical and Regulatory Requirements

All international mainstream operators and cruise ships have strict health, safety and operational requirements. The majority of regulations are based on the Federation of Tour Operators (FTO) guidelines. The FTO has developed standards for outdoor and soft adventure type activities as well as vehicle safety and accommodation standards.

Destination marketing companies (DMC's) are usually issued requirements by international operators and cruise lines, which they in turn pass down to country based tour operators.

All operators must have public liability insurance (PLI). Increasingly, international operators and cruise lines are asking for US $5 million in PLI. Often DMC's will also hold PLI in addition to individual tour operators.

Product standards and quality are often monitored by customer service questionnaire (CSQ) whereby for larger operators at least a 60% satisfaction rating must be gained for the continued use of a particular ground operator or establishment.

For the adventure operators, health, safety and other regulations are not as strict and are issued by the companies themselves and through established relationships with suppliers. CSQ's are a main benchmark for product satisfaction.

There are a number of issues and constraints for soft adventure development which include the following:

8.1.1 Awareness

- There is a perceived lack of understanding and awareness by government officials of environmental protection and conservation, which is directly linked to the development of soft adventure. Many adventure operators believe that there is a need for increased awareness about the fragility of the environment as many soft adventure activities depend on natural, undeveloped sites and locations for tour development (e.g. river canoeing, horseback riding along pristine beaches, rainforest hikes, wildlife watching) and there is a need for protection and conservation of these sites in their pristine condition, without encroachment from buildings in order to optimise future development opportunities.

8.1.2 Environment

- Environmental destruction: e.g. pollution of rivers, streams and marine areas, poaching of turtle eggs/turtles, deforestation, illegal dumping on land and sea is negatively affecting soft adventure quality and development.

- Development into natural areas may encroach on pristine land needed for soft adventure activities.

8.1.3 Marketing

- Image: Caribbean has traditionally been seen as sun, sea and sand and this image in the consumers mind makes soft adventure development very challenging.
- Safety & Security: Jamaica, Trinidad, Haiti, Dominican Republic, Guyana as well as increasingly St. Lucia have safety and security issues. E.g. many tour operators do not feature Jamaica due to consumer's perception of the island being unsafe. The situation in Haiti has stabilized since the elections in 2006; however, travel advisories are still in effect for many European countries. Increasingly, Guyana is facing safety and security issues. For the Dominican Republic, many perceive the interior or areas outside of resorts to be unsafe. While this may not be entirely true, the perception persists.
- Caribbean brand: the Caribbean is still marketed as one brand and tour operators as well as local country interviewees emphasised that the marketing image of the Caribbean is still perceived as white sand, palm trees and rum. Countries that have the best brand recognition remain Bahamas, Barbados, Cuba, Dominican Republic and Jamaica. Many of the smaller or less popular islands do not yet have adequate exposure/recognition of their unique offerings in the international marketplace.
- Government overlap: many government departments overlap in their duties and there is a lack of communication between sectors (e.g. Ministry of the Environment with Ministry of Tourism).
- Competition between operators: In some nations, tour operators in destinations compete to market their product rather than marketing the destination as a whole.

8.1.4 Regulatory

- Public liability insurance (PLI): the cost of public liability insurance is very expensive, especially for small adventure operators (approximately US$9000 per operator per year). Increasingly, cruise and overseas mainstream operators are demanding US$5 million per year PLI, therefore making it prohibitive for many small operators.
- Many Caribbean destinations do not have standards or regulations established for soft adventure activities. All mainstream and large operators require strict health and safety standards as well as specific standards for water and land adventure activities. WTO and FTO regulations are the most comprehensive, however some individual tour operators have additional standards that ground operators must adhere to.

8.1.5 Operational/logistical

A. PRODUCT

- There is not enough soft adventure product developed in many destinations to attract international tour operators to offer tour packages focusing on activities and sun and sand. Or in cases where there is, it is not marketed sufficiently to attract attention by international operators.

B. QUALITY

- Lack of customer service and quality standards: customer service and quality standards are not adequately enforced in many CARIFORUM destinations. Efficient, well-trained staff needs to be standardised across destinations.

- Lack of consistency: efficiency and consistency in delivering the product to the same level of service each time is increasingly important. Poor consistency has been identified by other studies and plans done for the Cariforum nations. For example, in the St. Lucia 2005 national tourism strategy, 81.6% felt that continuous training was needed to improve product quality[69]

C. CRITICAL MASS

- Airport size. It is difficult to achieve critical mass necessary for many tour operators to operate in some regions due to airport and aircraft size (e.g. Caribbean Star and Liat have maximum 40 passenger seat planes). Only small aircraft can land on islands such as Dominica and only at night.

- Currently large flights (Virgin, BA, American, etc.) and charter flights (consisting of 200+ person jets) require large airports to land and therefore are restricted to islands/countries that have international airports.

- Many tours currently available by smaller operators do not have the capacity for large cruise ship or large tour operators due to location or type of activity provided (e.g. a tour operator offering horseback riding may only be able to cater to the individual traveller or group sizes not suitable for larger ships).

D. ACCESS

- The majority of Cariforum nations are still dependant on current airlift schedules, which are not managed by the individual country (with notable exceptions such as Jamaica [Air Jamaica], Trinidad & Tobago [BWIA] {now Caribbean Airlines}.

E. COST

- Critical mass: Virgin Holidays can operate charter type flights on a scheduled service, therefore price cutting many other operators. Larger operators such as First Choice, TUI

[69] St. Lucia Tourism Strategy, 2005, p 11

and Thompson operate their own jets and therefore can undercut other individual operators who are trying to develop packages (making the trips prohibitively expensive).

- Import costs: cost of importing technical kits and product can be quite high even with fiscal incentives available to ground and international operators for tourism imports including furniture, fittings and equipment.

- For horseback riding operators, the cost of feed is high and finding areas to provide enough grazing is becoming difficult and costly.

- The airfares to many Caribbean destinations are relatively high.

    - Many operators cannot make sufficient margins on their tours due to high airfares.

    - The Caribbean is often not considered by European travellers due to cost of transport. Many soft adventure activities can be found closer and for better value for money (e.g. hiking in France or Spain).

    - Trends are moving towards having activities as part of holiday packages. Currently most activities are booked after arriving in the destination.

F. INFRASTRUCTURE

- Cariforum countries, especially less developed nations, depend on adequate and good quality infrastructure for optimal tourism product development. A number of particular elements relating specifically to soft adventure product development were outlined as immediate priorities in order to pursue or expand products:

    - Roads in many countries are in poor condition and are often not repaired in a timely manner. This issue was mentioned by a number of large operators who would stop operating a tour due to the time it took to reach the activity location.

    - Protected areas and/or marine parks have not been established in some destinations.

    - Signage for trails, especially for hiking and interpretive routes, is not always in existence.

    - Often there are no established toilet and rest facilities for tourists in natural areas.

* Some infrastructure issues were not seen as an obstacle for Adventure Tour companies as often it adds to the experience.

9. RECOMMENDATIONS FOR SOFT ADVENTURE DEVELOPMENT

There are a number of recommendations for the development of soft adventure product/activities in the CARIFORUM countries. They can be grouped into awareness, operational/logistical, product development and marketing proposals.

9.1 Awareness

- Awareness raising of the 'other' side of the Caribbean: Caribbean nations are diverse in both land formation and soft adventure product offerings and this is not currently known by many European travellers, who still perceive the Caribbean as only a sun, sea and sand destination. Many adventure and mainstream operators noted that if awareness of product other than sun, sea and sand was promoted, then demand for such activities and potential for adventure operators to develop trips to include these aspects might increase. Therefore increased marketing and partnerships with tour operators and cruise lines about these activities are needed.

- The marketing of 'must see' or 'icon' attractions: icons or unique attractions such as St. Lucia's Pitons, Dominican Republic's mountains, Jamaica's Blue Mountains or wildlife in Guyana may increase demand for these regions. Ensuring that products are first 'market ready' is imperative to ensuring success and protecting the brand.

- Proper infrastructure must be in place before marketing takes place: Road conditions, rest stops/toilets/trail access and maintenance and a high level of product quality and consistency needs to be ensured for market success.

- Work more closely with local community: There is a need to work more closely with local communities to raise awareness about the tourism industry and its potential benefits. In addition, community involvement in tourism is directly related to safety and security issues.

9.2 Operational / Logistical Recommendations

- Standards: Standards for health, safety, guide training, etc are needed to ensure product quality and guidelines should be standardised for compatibility. This report suggests using the existing FTO standards as a guide for country regulations/standards to be developed. See box 3. Standards should be developed, implemented and monitored on a regular basis.

- Environmental/sustainability management: Established conservation areas, national land and marine parks should be established and managed to protect, conserve and promote the areas where soft adventure activities take place.

- Countries must have a master plan and implementation plan for the development of tourism. Specific conservation/protection sites should be designated within plans.

- Planning/Policies: There is a need to integrate tourism plans into the countries' national strategies to ensure that environmental and social considerations are reflected in other areas of development. Tourism master plans should outline specific areas for soft adventure development that are integrated into a holistic management plan for the development of sustainable tourism.

- Carrying Capacity: There is a need for carrying capacity or limits imposed for soft adventure activities to ensure protection and management of the natural environment.

- Guide training: There should be a mandatory guide training/certification program for guides to ensure a minimum standard is achieved. Training should incorporate environmental considerations. It is recommended that this is organised through the Tourist Board or Ministry and a certificate or diploma is awarded. A unified approach, which is consistent across the CARIFORUM countries, would enable ease of training and operations with international operators.

Box 3 – Federation of Tour Operators – Standards

The Federation of Tour Operators (FTO) has developed a number of guidelines specifically for soft adventure products. At the time of writing this report, the FTO was considering making available their activity guidelines for the Caribbean for ease of future operations between European Operators and the Caribbean.

The FTO has also developed a preferred code of practice for specific health, safety and hygiene standards. Further information can be found at http://www.fto.co.uk/responsible-tourism/sustainability-guidelines/

Guidelines are available to all hotels/suppliers/excursion providers by registering on the following website. All of the codes currently focus on health and safety. In time, the codes currently being developed specifically aimed at responsible/sustainable tourism will be added to the site.

Additional codes for other higher risk excursions such as kite surfing, canyoning etc. are currently being considered. Once they are finalised, they too will be added to the site.

Please see http://infocentre.suppliers.kuoni.co.uk/ for information and access.

9.3 Product development

- Further research: There is a need for further research on the numbers of travellers who participate in soft adventure travel. Although this report outlines the demand and type of consumer, further research is needed to differentiate this market from the 'ecotourist' or solely nature lover.

    - In addition, as the majority of visitors to the Caribbean are from North America (mainly the USA), it is recommended that countries wishing to develop product in soft adventure activities, undertake further research and feasibility analysis of this market.

- Public liability insurance: Due to the cost of public liability insurance for small operators, it is recommended that umbrella public liability insurance is offered through the Tourist Board or Ministry for small operators. [The public sector cannot reasonably be expected to undertake the insurance needs of private enterprises. This perhaps can be offered through an Association of SA operators or through the respective Hotel & Tourism Associations] This will enable indigenous and local operators access to market and maintain relationships with cruise and larger tour operators who are increasingly asking for US$5 million in liability coverage.

- Adaptive development methods: As each country has it own unique culture and product potential, it is recommended that individual differences for each country and each market are adjusted accordingly for activity/tour offerings.

- Awareness to tour operators of the concessions for new development. As these concessions are understood to be provided under tourism fiscal incentive legislation, concessions for the following should be promoted to ground operators:

    - Construction: concessions for erection, alteration , renovation, refurbishment, reconstruction, extension, conversion and upgrading of a tourism product

    - Customs duty: concession of duty of Customs chargeable under any law on goods on importation, purchase or exportation

    - Concession of duty for international tour operators to bring activity kits and equipment for special adventure activities.

- Establish demand: There must be established demand for new soft adventure type products. A feasibility study and pilot should be carried out before making the product available to market.

- Quality: Guides should be trained in first aid, customer service, emergency procedures, country history and culture as well as environmental awareness/responsibility.

- International best practice research: In order to ensure that good practice is implemented and bad practice potentially avoided, it is recommended that operators and tourist boards visit other international examples of soft adventure activities. In addition, operators should test their newly developed products with representation/DMC services who will sell the adventure product BEFORE finalising product for market.

9.4 Marketing Recommendations

- Domestic & international marketing: Market to the domestic market as well as international since the domestic market may sustain business in the off-season months and also raise awareness about environmental/soft adventure issues/potential. There should be a concession rate for domestic vs. international travellers to account for wage differentials.

- Decide on market before you start marketing: Individuals or adventure operators who require uniqueness; smaller capacity and higher levels of interpretation vs. main stream operators or cruise ships who require greater capacity, stricter health and safety requirements. See box 4.

- Marketing concessions: Discounts for special soft adventure promotion by tourist boards or groupings of soft adventure type products to the consumer is suggested (e.g. specialised website).

- Direct marketing: For multi-adventure offerings, market directly to the tour operators that offer this type of product. See appendix D for specific magazine, website and tour operators.

- Collaboration: Tour operators in destinations need to work together to promote the destinations as a holistic product, thereby gaining greater return on investment. See box 5 for example of marketing consortium on Nevis.

Box 4 – Chukka Caribbean Adventures

Chukka Caribbean Adventures offers tours for the mass market/mainstream tourist (cruise ship and tour operators clientele). Having outlined this specific market and undertaken research to determine consumer demands, Chukka has experienced consistent annual growth and now has operations in Bahamas, Belize, Jamaica and the Turks & Caicos.

Starting in 1983 with its signature tour – horseback ride and swim, the company has expanded to offer swimming with stingrays, canopy tours, river tubing, ATV safari, jeep safari, sea-trek, mountain biking and cultural and heritage tours. Chukka in Jamaica has a capacity of up to 10,000 clients per month, mainly to the cruise ship business. The company claims its success is due to its quality through training and the passion and people oriented-ness of staff.

Marketing successes have been:

- Special 'Chukka Days' where the operation sponsors a cocktail (e.g. Stingray Drink) or product give-aways (e.g. t-shirt, cap, bandana, cup holder) to hotel guests to raise brand awareness.
- Hosting trade booths at cruise ship events
- Offering hotel staff and DMC representatives comp tours to experience their product first hand
- Hosting journalists/press trips
- Radio talk show contributions
- Developing relationships with hotel and DMC staff
- Having tour desks at hotels where permitted

Box 5 – Tourism Allied Business Association (TABA)

Set up in Nevis in 2001 for small businesses that were not benefiting from (or could not afford to join) the Hotel & Tourism Association, TABA is an alternative marketing group. Now hosting 34 members, TABA offers a low joining fee, a monthly newsletter which is distributed to international press, travel agents, distribution companies, hotels and interested individuals. The Association also offers joint promotion, advertising and meetings for press/international operators. TABA has also increased awareness among independent travellers and is featured on sites such as Definitive Caribbean in the UK. The current distribution is now approximately 3000 and the association's members have been featured in magazines such as Conde Nast, Travel & Leisure, Adventure Travel Magazine, Geo, Geographic, Carib Adventure Magazine, Islands and National Geographic.

9.5 Sustainability

Soft adventure must be linked to sustainability measures. For example, hiking trails, dive sites, horseback-riding trails must all incorporate the protection of the natural environment and carrying capacity limits should be set and maintained so as to maintain the long -term attractiveness of the product. The protection of the Caribbean environment is essential for the development of soft adventure as well as all other forms of tourism, as these markets heavily depend on the preservation of the environment for their attractiveness as well as marketability. Losses of water quality and habitat degradation (deforestation, overuse of trails, etc.) represent direct threats to soft adventure longevity and development.

10. PRIORITIES FOR SOFT ADVENTURE DEVELOPMENT

With the appropriate development of products and shift in marketing focus for the awareness raising of international operators, there would be a positive development in the market. To ensure that this potentially profitable niche is optimised, five overall recommendations are put forth:

1. The marketing image of the Caribbean needs to be adjusted to raise awareness of other products such as soft adventure offerings (as well as ecotourism, culture and heritage, which are increasingly seen as parts of the region's overall tourism product).

2. Policies and tourism plans should establish strict environmental protection measures as well as social and cultural inclusion. Community involvement should not be omitted in these strategies.

3. Regulation for soft adventure activities needs to be consistent and standardised. Using the FTO regulations as a benchmark is recommended across the board.

4. Training for guides regarding customer service, consistency, product quality, the environment as well as culture and history needs to be standard and compulsory across all destinations. This should include areas for strengthening the human resource base for tourism.

5. Concessions and tax breaks, where not already in place, need to be established and offered to new and existing adventure business operations to facilitate growth.

11. MARKETING AND IMPLEMENTATION GUIDELINES FOR SOFT ADVENTURE

11.1 Marketing Methods: Main Stream Operators

Research findings showed that dollars spent in marketing support to tour operators and direct contact with the tour operators was potentially the most successful way of raising awareness for new products. The following marketing options and recommendations are listed in no particular order.

Marketing methods to be used to reach European operators:

- General tourism trade shows to raise awareness of new product: WTM in London, ITB in Berlin, BIT in Milan to both trade and consumers
- Specific adventure shows to showcase new soft adventure product development: Adventure Show (London), Dive shows, Green Travel Market (Germany), Reisepavillion (Germany)
- Directly with ground operators
    - Offer discounts for soft adventure operators to attend trade shows or events to profile specific products
    - Offer discounted advertising in country brochures
    - Direct links from Tourist Board websites to soft adventure operators
- Directly with tour operators
    - Marketing dollars to showcase specific product in stand-alone brochure
    - Logistical support – discount promotions/cooperation with airlines
- Joint promotions with the Caribbean Tourism Organisation
- Joint promotions with other islands for island hopping tours (e.g. Dominica with St. Lucia and Barbados, St.Vincent & The Grenadines, Grenada with Tobago etc.)
- Fam trips to tour operators to showcase new soft adventure products

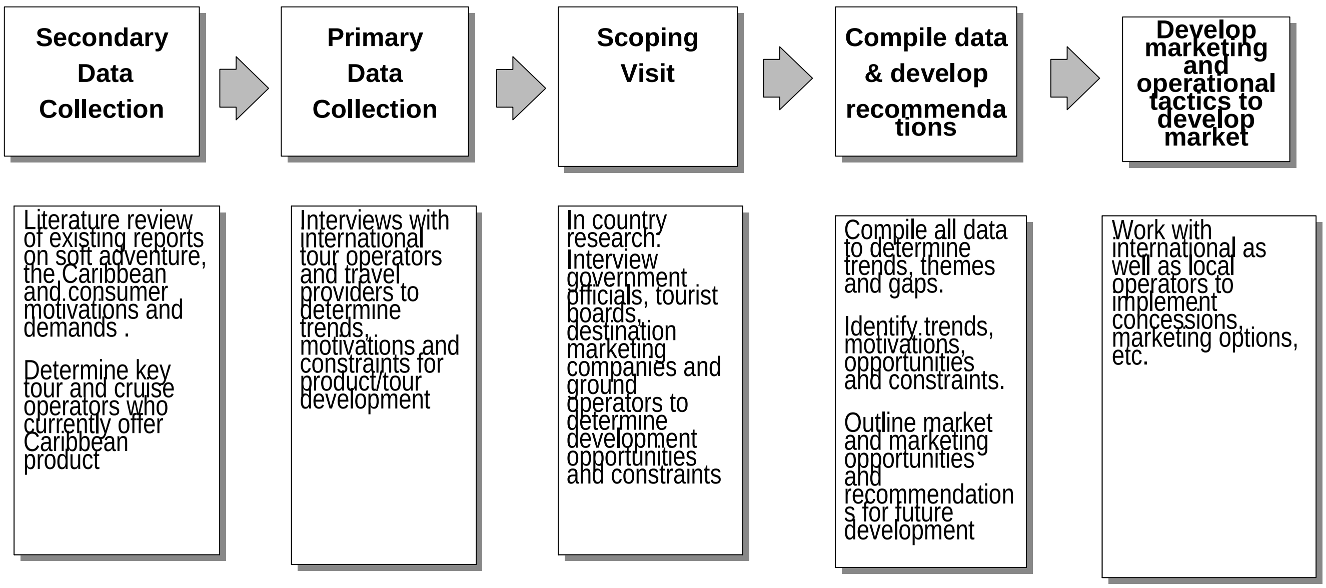
11.2 Marketing Methods: Specialised Soft Adventure Operators

- Fam trips to tour operators to showcase new soft adventure product
- Direct marketing with tour operators
- Direct marketing to magazines and websites that specialise in birding, sailing, etc.
- Use of the Internet
- Marketing efforts with National Tourist Boards to maximise advertising dollars

12. TEMPLATE FOR FUTURE DEVELOPMENT OF SOFT ADVENTURE

This report recommends that due to the majority of visitors to the Caribbean coming from North America that further research is done on American preferences, demand and booking methods. The following model outlines the method needed to further determine market potential for individual countries.

Chart 3 – Template for future development of soft adventure



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APPENDIX A:

TOUR OPERATORS/TRAVEL PROVIDERS CONTACTED

The Association of Independent Tour Operators (AITO) (Representing over 100 independent tour operators from the UK and Continental Europe) UK 44 20 8744 9280	**TUI UK** (on behalf of TUI worldwide) UK 44 870 165 0079	**Responsibletravel.com** (representing tour operators in the UK and Continental Europe) UK 44 1273 600030
My Travel (on behalf of My Travel in France, Germany and Scandinavia)	**Kuoni (on behalf of UK and Switzerland)** Switzerland UK 44 1306 742222	**Airtours Holidays -** part of the MyTravel Group (on behalf of UK and Europe) UK 44 871 664 7988
Neilson Active holidays (on behalf of Neilson worldwide) UK 44870 333 3356	**Complete Caribbean** (on behalf of UK & Europe) UK 44 1244 355 550	**Crystal Vass/Crystal Dive/Crystal Active Beach/Crystal Active Mountain** UK 44 870 405 5025
Adventure Company UK 44 142 054 1007	**Accor tours** UK 44 145 38 84 52	**Abercrombie & Kent** UK 44 845 0700 600
Adventure Travel International web based	**Association of British Travel Agents (ABTA)** UK 44 20 7637 2444	**British Airways Holidays** UK 44 191 490 7901
Barefoot Traveller UK 44 208 741 4319	**Blue Planet Travel** UK 44 1425 611596	**Discover-the-World** UK 44 1737 218802
Cox & Kings Latin America UK 44 1235 824404	**Dive worldwide** UK 44 845 130 6980	**Elegant Resorts Ltd** UK 44 1244 897555

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Sherille Pink Marketing Development Officer Jamaica Tourist Board Jamaica	Carrole A.M. Guntley Director General Ministry of Tourism, Entertainment and Culture, Jamaica
Deanne Keating Campbell Product Quality Manager Tourism Product Development Co. Ltd Jamaica	Wendy Thompson Incentive, Strategic Planning Department Ministry of Tourism, Entertainment and Culture Jamaica
Marilyn Burrows Managing Director, Dolphin Cove & President, Association of Jamaica Attractions Ltd. Ocho Rios, Jamaica	Janice Allen Destination Marketing Manager Jamaica Tourist Board Jamaica
Paul Norman Marketing Manager Chukka Caribbean Adventures Jamaica	Robert Kerr Director Sunventure Tours Jamaica
Vaughan Turland Director Reliable Adventure Tours Jamaica	Eileen Paul Director St. Lucia Hotel & Tourism Association St. Lucia
Debbie Melchoir Acting Manager St. Lucia Tourist Board, London, UK	Maria Thom Director Spice Travel St. Lucia

Judith Crane – St. Hill Deputy Permanent Secretary Ministry of Tourism St. Lucia	Maria Fowell Director St. Lucia Tourist Board St. Lucia
Pauline Bernard Managing Director St. Lucia Rep Services St. Lucia	Joycie Medrick Executive Director Heritage Tourism Association of St. Lucia St. Lucia
Sharma Benjamin Manager Palm Services (& Rainforest Canopy Tours) St. Lucia	Nigel Mitchell Program Coordinator St. Lucia Heritage Program St. Lucia
Anne- Margaret Xavier Director of Product Development Ministry of Tourism St. Lucia	Sharon Eugene Group & Incentive Manager Barefoot Representatives St. Lucia
Eleanor Rae VP Tourism Cox & Company St. Lucia	Florida Phillip Owner International Pony Club St. Lucia
Jennifer Hensley, St Kitts Tourism Authority London, UK	Christine Walwyn Director St. Kitts Tourist Authority St. Kitts
Greg Pereira Owner & Director Greg's Safaris St. Kitts	Kenneth Samuel Owner Kenneth Dive Tours St. Kitts
Clarita Richards General Manager KanTours St. Kitts	Elkin Richardson Director Tropical Tours St. Kitts
Austin Coker Owner Jungle Bikes St. Kitts	Terrence Williams Owner Terry Taxi Service St. Kitts
Kira Purcell Marketing Associate St. Kitts Tourism Authority St. Kitts	John Gilbert Nevis Equestrian Centre Nevis

Jim Johnson Owner Top to Bottom Hikes President Tourism Allied Business Association Nevis	Ann Marie Williams General Manager St. James Travel & Tours Antigua Ltd
Albert Williams Tour Operator Yute Expedition Belize	Rudy Neil Operator Pacz Tours Belize
Nova Alexander Account Manager (UK, Ireland, Holland & Scandinavia) Trinidad & Tobago Tourist Board London, UK	Cait Good Guide Island Expeditions Belize
Felix Jimenez Owner Dominican Republic Tours Dominican Republic	Sarah Almonte Assistant Director Dominican Republic Tourist Board, London, UK
Carol Hay Antigua and Barbuda Tourist Office	Alison Gillian Representation Plus Representatives for Grenada
Michael Brotherson 1st Secretary Guyana Tourist Office	Tracy Panton Director of Tourism Belize Tourist Board
Marylyn Alexander Acting Director of Tourism Dominica	