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**DELIVERABLE NO. 2: MARKET RESEARCH – SITE
ASSESSMENT OF THE CAHUITA-GANDOCA-BOCAS DEL TORO
TRANS-BOUNDARY REGION**

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**DELIVERABLE NO. 2(A): MARKET RESEARCH – SITE ASSESSMENT
OF THE CAHUITA-GANDOCA-BOCAS DEL TORO TRANS-BOUNDARY
REGION**

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CONTENTS

- Introduction: Project Background5
- Sustainable Tourism in Context5
- Site Assessment and Methodology6
 - Site Description 7
 - Infrastructure 11
 - Demand Characteristics 12
 - Overall Demand Analysis 14
 - Project Partners 15
 - Conservation Threat Assessment 25
 - Situational SWOT Analysis 28
 - Tourism Development Strategies 32
- Annexes
 - Annex 1: Conservation Threat Assessment & Conservation Awareness Campaign Project Activities 42
 - Annex 2: Conservation Threat Assessment & Enterprise Development Project Activities 43
 - Annex 3: Cahuita-Gandoca-Bocas del Toro Site Assessment Itinerary 44
 - Annex 4: Organizational Profile - Bocas Sustainable Tourism Alliance (BSTA)..... 46

INTRODUCTION: PROJECT BACKGROUND

The Management of Aquatic Resources and Economic Alternatives (MAREA) program, financed by the United States Agency for International Development (USAID) and implemented by Chemonics International, with Solimar International as a subcontractor, builds on previous projects in Central America to support and promote marine and coastal conservation through rights-based access and market-driven mechanisms in concert with local partners from both the private and public sectors. The MAREA program will achieve these goals with a focus on four key trans-boundary watershed areas and seven key focal species. The four trans-boundary regions are the Gulf of Honduras, the Moskitia Coast, Cahuita-Gandoca-Bocas del Toro, and the Gulf of Fonseca. The focal species for the MAREA program are divided into species with commercial importance: mangrove cockles, queen conch, grouper, snapper, and spiny lobsters; as well as two groups of endangered species: sharks and sea turtles.

The MAREA program will employ multiple strategies to positively affect its target species within its regional points of focus including the promotion of rights-based legislation, establishment of managed protected areas and no-take reserves, and by providing economic alternatives to local communities where research extraction threatens marine and coastal natural resources. Sustainable tourism will be employed as a strategy to provide economic alternatives to local communities. Tourism is the world's largest service sector industry and its growth outpaces all other industries. The World Tourism Organization estimates that tourism in 2008 represented nearly 10% of total world GDP at approximately US\$5.89 trillion and employed more than 22 million people.¹ The labor intensive nature of the tourism industry and the indirect economic benefits of extended interactions between visitors and the local economies they visit position sustainable tourism to play a crucial role in providing alternative economic opportunities.

SUSTAINABLE TOURISM IN CONTEXT

Sustainable tourism focuses on developing tourism in a way that benefits local communities with job creation and business development opportunities, while also benefiting surrounding ecosystems and local cultures. Sustainable tourism is based on four pillars: effective sustainability planning; maximizing social and economic benefits to the local community; reduction of negative impacts to cultural heritage; and reduction of negative impacts to biodiversity.² It incorporates elements of ecotourism, defined by The International Ecotourism Society (TIES) as *responsible travel to natural areas that conserves the environment and improves the welfare of local peoples*,³ and represents a new shift in the market for tourism products, that of experiential products. Consumers are searching more and more for *authentic experiences* as opposed to manufactured experiences in their travels. This is reflected in the high rate of growth of sustainable tourism outpacing tourism growth in general at 20-34% per year

¹ SNV Netherlands Development Organisation, *The Market for Responsible Tourism Products*, 2009

² Global Sustainable Tourism Criteria, "Criteria History and Background,"

(http://www.sustainabletourismcriteria.org/index.php?option=com_content&task=view&id=164&Itemid=348), Accessed: November 1st, 2010.

³ The International Ecotourism Society, "What is Ecotourism,"

(http://www.ecotourism.org/site/c.orLQKXPCLmF/b.4835303/k.BEB9/What_is_Ecotourism_The_International_Ecotourism_Society.htm), accessed: November 1st, 2010.

through the 1990's and predicted to comprise 25% of the total world travel market by 2012.⁴ And, though the global economic crisis has hit the tourism markets hard, responsible tourism operators are reporting that they are not seeing a decline in customers; though they may spend less and stay for shorter periods of time they are still traveling because it is a part of their lifestyle.⁵ As for tourism in general, the UN's World Tourism Organization (UNWTO) has stated that the tourism slowdown will not affect its medium and long-term growth projections and the world's travel market will remain on track for growth to 1.6 billion international arrivals in 2020, up from 1 billion in 2010.⁶ In fact, though the tourism industry experienced strong contractions in 2008 and stagnation in 2009, many destinations are experiencing record setting years in 2010.⁷ The Central American and Caribbean markets have lagged behind this recovery, though numbers are generally improving over the performance in the previous two years.⁸

SITE ASSESSMENT AND METHODOLOGY

The purpose of this document is to assess the current status of the tourism industry within the Cahuita-Gandoca-Bocas del Toro trans-boundary region, and to analyze the opportunities for further expansion of sustainable tourism products and services. The information contained in this document was gleaned from desk research of current literature as well as extensive interviews with key stakeholders in coastal and marine tourism actors in the region. Interviews were conducted over a 10-day period from the 15th to the 24th of September 2010 by Matthew Humke and Eric Lin from Solimar International with local business owners of hotels, restaurants, and tour operators, scientific organizations managing sea turtle projects, local organizations promoting sustainable tourism, and community members.⁹ The consultants also assessed tourism infrastructure and available services such as health services, roads and transportation, electricity, communications (telephones, internet, cellular service, etc.), and tourism information centers. The resulting site assessment will synthesize this information to provide a clearer picture of the potential for sustainable tourism development in the region.

The elements of the destination considered within this site assessment are the following:

- **Site description:** A general overview of the region and its primary geographic and biological features.
- **Attractions:** The drivers of tourist demand, these are what the tourists will come to see or experience. Attractions can be natural, man-made, or cultural.
- **Infrastructure:** The means by which visitors can arrive to a destination and the services that will enable them to stay. Infrastructure will primarily include roads, rail, ports, docks, airports, water, health services, communications, lodging, and electricity.
- **Demand:** The profile of the current tourism market segments that visit the region.
- **Local partners:** Local groups and organizations that are able to assist in the implementation of marketing initiatives, awareness campaigns, conservation activities or the creation of new businesses. These local partners would also be candidates for technical assistance.

⁴ Ibid.

⁵ SNV Netherlands Development Organisation, The Market for Responsible Tourism Products, 2009.

⁶ United Nations World Tourism Organization, "Tourism 2020 Vision," (<http://unwto.org/facts/eng/vision.htm>), Accessed: November 1st, 2010.

⁷ United Nations World Tourism Organization, UNWTO World Tourism Barometer: Interim Update, August 2010, p. 4.

⁸ United Nations World Tourism Organization, UNWTO World Tourism Barometer: Interim Update, August 2010, p. 3.

⁹ For a complete list of interviews please refer to Annex 1

- **Conservation threat assessment:** An analysis of the known conservation threats and their causes that will help shape interventions tailored to the local context.

Site Description

Geography:



The Cahuita-Gandoca-Bocas del Toro region stretches along the Caribbean coast of Central America approximately 115 miles from Cahuita National Park in Costa Rica to Playa Chiriquí in the Ngöbe-Buglé Comarca of Panama. This trans-boundary region includes the city of Puerto Viejo and the community of Gandoca in Costa Rica, as well as San San Pond Sak Wetlands and the Bocas del Toro archipelago in Panama. This region is also where travelers will find La Amistad International Park. Cahuita and Puerto Viejo are the two major tourist hubs on the Costa Rican side of the trans-boundary region with Puerto Viejo playing the more lively and larger sibling of Cahuita. On the Panamanian side of the border the hub is located within the Bocas del Toro archipelago, primarily on Isla Colón.

The region is home to three wetlands listed under the Ramsar Convention on

Wetlands' list of Wetlands of International Importance: on the Costa Rican side lies Gandoca-Manzanillo and on the Panamanian side lie San San Pond Sak and Damani-Guariviara. Though not administered jointly, the Gandoca-Manzanillo and San San Pond Sak wetlands are geographically adjacent and cover an area along the border between Panama and Costa Rica running approximately 10 miles on each side. Damani-Guariviara is found inside of the Ngöbe-Buglé comarca along the Rio Caña. Cahuita National Park is another protected area along the coast.

Biodiversity:

The region contains a wealth of



biodiversity. In addition to the three Ramsar wetlands the Cahuita-Gandoca-Bocas del Toro region contains mangrove forests, reefs, beaches, estuaries, archipelagos, sea grass meadows, rain forest, and river deltas. These varied and rich ecosystems provide ample shelter for incredible biodiversity.

The region's marine and coastal ecosystems are home to many marine mammals. Manatees lumber around the wetlands of San San Pond Sak and Damani-Guariviara while bottlenose dolphins skip in play in the waves of the Caribbean and the pink tucuxi dolphin hides away in the rivers and estuaries. Inland one will encounter two and three-toed sloths and monkeys in the trees including white-faced capuchin monkeys, howler monkeys and the gregarious Geoffroy's Tamarins. Meanwhile predatory cats stalk the forests. One might see ocelots, though the jaguars and pumas are a less common sight.

Fish and invertebrates are also found in abundance within this region's warm blue waters including octopus, grouper, snapper, cockles, conch, oysters, lobsters and tarpon among others.

In terms of reptile life, the region contains important nesting sites for leatherback and hawksbill sea turtles as well as some green sea turtles. In Chiriqui Beach alone, over 5,000 leatherbacks and around 800 hawksbill sea turtles¹⁰ nest annually, making it the second most important nesting site in the Caribbean for leatherbacks after Trinidad.¹¹ Additionally, there are lizards, snakes, crocodiles and caimans, and freshwater turtles.

The skies are not left out: the region is also home to an incredible wealth of bird species with at least 358 species of bird in the Gandoca-Manzanillo National Wildlife Refuge alone and over 100 species within the Isla Bastimentos protected area in the Bocas del Toro Archipelago. The incredibly powerful harpy eagles hunt monkeys and sloths in the forests while frigate birds glide in the air currents over open bodies of water. Hummingbirds and parrots are also common sights.

Another sight the Bocas del Toro region is famous for are the red frogs that are the namesake of Red Frog Beach. Their cousins, the poison dart frogs and numerous toads, as well as the strange worm-like caecilians also inhabit this biodiversity rich region.

In addition to the species that make up the focal point for the Management of Aquatic Resources and Economic Alternatives program – grouper, cockles, queen conch, spiny lobsters, sharks, and sea turtles – the region is host to a wide spectrum of biodiversity that serve as the basis for the destination's reputation as an



Photo: Bocas Town and Isla Colon, Panama

¹⁰ Personal correspondence with Cristina Ordoñez, Sea Turtle Conservancy, November 1st, 2010.

¹¹ World Wildlife Fund, "Chiriqui Beach – Panama,"

(http://wwf.panda.org/what_we_do/endangered_species/marine_turtles/lac_marine_turtle_programme/projects/chiriqui_beach/), accessed: Oct. 3rd, 2010.

undiscovered region perfect for nature-loving travelers.

Attractions

Biodiversity:

The region's biodiversity is its principal attraction. The pristine natural landscapes and the relative abundance of animals draws in many of the region's visitors and nearly all attractions incorporate some element of the natural environment: whether it is surfing, adventure tours such as zip lines, or even cultural attractions such as cooking classes or home visits, it is the natural environment and relative underdevelopment that draws visitors to the Cahuita-Gandoca-Bocas del Toro region. In a 2009 survey of visitors to the Bocas del Toro region 92% of respondents showed interest in natural experiences and wildlife. And, while over 50% of respondents showed interest in some kind of adventure activity, the sun and sea was a draw for 96% of respondents and snorkeling/scuba diving was a draw for 88% of responding visitors.¹²



Photo: Entrance to San San Pond Sak

Costa Rica is known as an ecotourism hot spot and Puerto Viejo is no exception. Most tours sold in the region are based on an interaction with nature. The most popular offerings are hiking tours, tours of Cahuita, Gandoca-Manzanillo, and La Amistad national parks, scuba diving and snorkeling, and wildlife viewing including sea turtles and sloths.

Sea Turtle Viewing:

One element of biodiversity viewing is the market for sea turtle experiences. With seven important nesting beaches within the Cahuita-Gandoca-Bocas del Toro region at Cahuita, and Gandoca in Costa Rica and San San Pond Sak, Long Beach, Bluff Beach, Zapatilla Keys and Playa Chiriquí in Panama, the region is home to some very well-developed research projects monitoring nesting sites of 6,000-7,000 leatherbacks and nearly 1,000 hawksbill sea turtles each year. At Gandoca-Manzanillo and Cahuita National Park the Wider Caribbean Sea Turtle Network (WIDECAST), and in San San Pond Sak wetlands the Asociación de Amigos y Vecinos de la Costa y La Naturaleza (AAMVECONA), both sponsor well-developed voluntourism programs to assist in scientific monitoring and research of sea turtles. These organizations have linkages to international volunteer placement operators such as EcoTeach, ISV, and ACTUAR among others. These sites



Gandoca Volunteer Field Station

¹² Solimar International, Bocas del Toro Tourism Market Study, 2009, unpublished raw data.

also receive some movement from tourists coming not to assist in research programs, but just to see turtles. However, the flow of tourists is extremely limited in comparison to the several hundred longer-term volunteers that come to each site.

The most developed sea turtle viewing site in the region remains at Tortuguero in the northern part of Costa Rica. This site, administered by the Sea Turtle Conservancy, receives nearly 100,000 visitors per year primarily for overnight stays to see sea turtles nesting during the months from February to October, though there is also a well-developed volunteer program at this site. The Sea Turtle Conservancy also operates well developed research programs at a turtle nesting beaches within the Bocas del Toro archipelago at Long Beach in the Bastimentos protected area in addition to their site at the 27 km long Playa Chiriqui within the Ngöbe-Buglé comarca. However, the sites are not currently well developed for either long-term volunteer programs or tourism visits.

In the Bocas del Toro archipelago there is also a research project for leatherback and hawksbill sea turtles in the Zapatilla Keys operated by Doctors Anne and Peter Meyland from the Wildlife Conservation Society, leaving only Bluff Beach on Colon Island without a well-developed research project. Bluff Beach is also the site of some recent local controversy as a reality television program was allowed to film its program on the beach during nesting season, putting the entire nesting population that year at risk.

Approximate Sea Turtle Nests Per Year by Nesting Beach: Cahuita-Gandoca-Bocas del Toro Trans-Boundary Region			
Site	Leatherback nests per year	Hawksbill nests per year	Hatchlings per year ¹³
Playa Chiriqui ¹⁴	5,700	900	418,800
Long Beach, Bastimentos ¹⁵	200	65	19,240
Bluff Beach ¹⁶	150	50-60	15,280
Zapatilla Keys ¹⁷	0	400	54,400
Soropta Beach ¹⁸	600	0	31,200
Sixaola Beach ¹⁹	475	0	24,700
San San Pond Sak ²⁰	400	5	21,480
Gandoca ²¹	400	25	24,200
Cahuita ²²		50-60	7,480

Table 1

Water Sports:

Linked to the area's biodiversity and rich ecosystems, snorkeling and scuba diving are among the chief attractions drawing tourists to the Cahuita-Gandoca-Bocas del Toro region. According to

¹³ Hatchling counts based on an average of 80 eggs per leatherback nest and 65% survival rate for eggs and an average of 160 eggs per Hawksbill and a survival rate of 85% for eggs

¹⁴ [2010 sea turtle nesting survey] approximated from unpublished raw data, Sea Turtle Conservancy.

¹⁵ [2010 sea turtle nesting survey] approximated from unpublished raw data, Sea Turtle Conservancy.

¹⁶ Estimated from incomplete surveys of sea turtle nesting

¹⁷ [2010 sea turtle nesting survey] approximated from unpublished raw data, Sea Turtle Conservancy.

¹⁸ [2010 sea turtle nesting survey] approximated from unpublished raw data, Sea Turtle Conservancy.

¹⁹ [2010 sea turtle nesting survey] approximated from unpublished raw data, Sea Turtle Conservancy.

²⁰ Ruiz, K. (November 2010). *Presentación MAREA Nov 2010* [PowerPoint slides]. Presented at a meeting with USAID Management of Aquatic Resources and Economic Alternatives Program staff, Changuinola, Panama.

²¹ C. Quesada (personal communication, September 22, 2010).

²² C. Quesada (personal communication, September 22, 2010).

exit surveys conducted in Bocas del Toro in 2009, 88% of respondents reported that scuba diving and snorkeling was important, very important, or extremely important to their decision to visit the area.²³ According to interviews with hotel owners and managers in the Bocas del Toro region, virtually all visitors will take at least one boat tour including snorkeling during their stay.

Another principal draw of the region is the surfing. The region is home to dozens of surfing breaks and at least two world-class waves, one off of Bastimentos Island in Bocas del Toro dubbed “Silverbacks,” and another named “Salsa Brava” over the reefs just outside Puerto Viejo. It is the surfing, in fact, that put Puerto Viejo on the map as a tourist destination when intrepid surfers began to arrive over 30 years ago for a chance to surf Salsa Brava.

Hiking:

There are hiking tours of Bribri and Kekoldi indigenous areas in the Talamanca region of Costa Rica and wildlife hikes to see toucans and sloths in Cahuita and Gandoca-Manzanillo National Parks. Hiking tours in the Bocas del Toro region are much less developed, though there are trails winding around Isla Colon. The more developed hiking products in the archipelago exist in the Bastimentos Protected Area and are run by the Salt Creek community. This Ngöbe community has developed five tour products including a community tour with food and even traditional dancing if arranged ahead of time. Their guides will also take visitors to various points in the park including the intriguingly named “Bat Cave.”



Photo: Traditional dance in Rio Caña

Cultural Attractions:

The region is full of cultural attractions. Visitors can see traditional Ngöbe dances at Salt Creek in Isla Bastimentos, take cooking classes with indigenous

BriBri women in the Talamanca region of Costa Rica, and go on coffee and cacao tours throughout. Trips can also be organized through a couple of specialty tour operators to visit indigenous communities, and the towns of Old Bank on Isla Bastimentos and Cahuita in Costa Rica are traditional Afro-Caribbean settlements. In fact, in Old Bank you can get by speaking Spanish, but as the locals all speak Guari-Guari, an Afro-Caribbean dialect, you are better off speaking in English.

Infrastructure

Accommodations:

The region has a wide variety of accommodations generally segmented into groups of hostels, mid-range hotels and B&Bs, high-end eco-lodges and retreats, and vacation home and condo

²³ Solimar International, Bocas del Toro Tourism Market Study, 2009, unpublished raw data.

rentals. Currently, large mass-market all-inclusive hotels are rare. According to a 2008 figure from the Sustainable Development Strategy for Bocas the archipelago has 893 rooms and 3,270 beds spread among 105 hotels. The province of Bocas del Toro contains another 268 rooms with 720 beds among 24 hotels for a total of 1,161 rooms and 3,990 beds in the Panama side of the region.²⁴

Type of Accommodation	Description	Market Segment Served
Hostels	<ul style="list-style-type: none"> • Primarily bunk beds in dormitory-style rooms with shared bathrooms • Most provide access to a kitchen • Most have bars within the hostels • Some also provide hammocks 	<ul style="list-style-type: none"> • Backpackers • Gap-year travelers
Mid-Range Hotels and B&Bs	<ul style="list-style-type: none"> • Private rooms with private baths • Some will provide air conditioning • Most will include breakfast in the price of the room • Smaller establishments with 5 – 10 rooms 	<ul style="list-style-type: none"> • Middle-income experiential travelers
High-End Ecolodges and Retreats	<ul style="list-style-type: none"> • Luxury accommodations • Some offer packages including 3 meals a day with accommodations • Most are located outside of town in more remote areas • Some are tied to yoga and meditation practices or alternative health culture; others are linked to nature and cultural experiences 	<ul style="list-style-type: none"> • High-income experiential travelers
Vacation home and condo rentals	<ul style="list-style-type: none"> • Complete furnished living areas with multiple rooms and kitchens • Priced by the week or month 	<ul style="list-style-type: none"> • Expatriate residents • Travelers on extended stays • Experiential traveling families

Table 2

Transportation:

Reaching Puerto Viejo and Cahuita involves a 4-6 hour bus ride on paved roads from San José which leaves several times each day. Travelers can continue on to Bocas del Toro by bus to Almirante and then by water taxi to Bocas Town; this trip takes 2.5 – 3 hours. The entrance to the San San Pond Sak Wetlands lies just off the main highway between Almirante and Puerto Viejo. Travelers also fly into Bocas del Toro. The small airport receives daily flights from Panama City run by Aeroperlas (a Taca affiliate) and Air Panama. Nature Air also runs three flights a week from San José, Costa Rica.



Photo: Nature Air plane

Utilities/Services:

The two major tourist destinations in this region each have readily available amenities for visitors including running water, communications via Internet and telephone, electricity, health facilities, and stores.

²⁴ Programa de USAID para la Conservación de Cuencas Centroamericanas, *Cadena de Valor de Turismo y Naturaleza de Bocas del Toro (Isla Colón) y Archipelago*. (http://www.discoverbocasdeloro.com/bsta/images/stories/downloads/bocas_del_toro_value_chain_analysis_final_report.pdf) accessed: November 9th, 2010.

Demand Characteristics

Visitor Profiles:

Visitors to the region fall into four general categories: domestic tourists, backpackers/gap year travelers, experiential travelers, and expatriate residents.

Domestic Tourists:

Domestic tourists make up the smallest segment of the tourist population. This group of tourists represents mostly urban residents from Panama City and David that are seeking weekend and holiday destinations that offer natural experiences that contrast with their daily life. This market is the least understood and least marketed segment of the tourist market though they present an opportunity not only for growth but also to reach local populations with conservation messages.

Backpackers/Gap-Year Travelers:

Comprised of students and recent graduates from North America and Europe, backpackers and gap-year travelers tend as a group to be young (18-30 years old) and interested in adventure activities, cultural exchanges, and “authentic” experiences. Drawn as much to the nightlife as they are to sustainable tourism products, these travelers are very budget conscious as they try to stretch often-limited resources to extend a trip for longer periods. These visitors will sometimes volunteer with local organizations or schools and find ways to engage productively with their surroundings. They will also try to learn local languages and stay at a destination for a week or more to take classes. The extended nature of their travels means that travelers in this group are likely to visit both hubs in the regions (Puerto Viejo and Bocas del Toro) with routes that generally go from north to south.

Backpackers are characterized by their independent style of travel, using word-of-mouth, the Internet, and guidebooks to plan logistics, and almost always adapting and modifying the trip as they go. They are less likely to be dissuaded from visiting a destination due to poor roads, crime, or rustic accommodations, but also less likely to spend more money for higher quality products.

This market segment presents great potential for volunteers at sea turtle research programs, and as the initial target segment for community-based products that offer very few amenities and rustic accommodations, in hard-to-reach locations. They also represent a market segment that is very fertile ground for conservation messaging. However, this market segment also presents challenges with respect to their budgetary constraints.

Experiential Travelers:

Experiential travelers do not neatly fall into the categories of ecotourists or cultural tourists. This market segment shares the tendencies of both groups in seeking out “authentic” experiences in their travels. They tend to be North American or Western European young professionals and baby boomers ranging in age from 30-60 years and travel as part of their lifestyle. These tourists tend to be more driven by valuable experiences than budgetary constraints, and are willing to pay more for higher quality experiences. They represent an incredible opportunity for tourism as a group that is interested in seeking interactions with nature and local communities and willing to pay enough to contribute toward economic development and wildlife conservation. They are more likely to participate in travel philanthropy programs and buy local artisan works.

This market is likely to plan a trip in advance relying on extensive research using guidebooks and Internet resources prior to arrival at a destination. Once at a destination this group will tend to use inbound tour operators to organize trips and excursions. They tend to stay from 4-7 days and are likely to stay within one destination.

Expatriate Residents:

There are an increasing number of expatriates living in the Cahuita-Gandoca-Bocas del Toro region. Primarily, in Bocas del Toro, but also in Puerto Viejo, there are a growing number of expatriates who either own vacation homes, or live and work in the region. They own businesses, or simply come to spend their retirement away from the cold. These expatriate residents are not a homogenous group and their diverse tendencies are difficult to generalize. However, they often serve as a catalyst that attracts friends and family from their home countries to visit, which can result in repeat visits. This group is relatively under-targeted as a market segment; however, they present a great opportunity to make lasting changes in the culture of the region and the overall mentality or personality of the region. Targeting this segment with awareness campaigns and conservation-focused messaging could effect a lasting change in behavior strengthened by the fact that many own tourism businesses. In fact, many expatriates are actively involved with current conservation initiatives.

Overall Demand Analysis

The tourism market in the Cahuita-Gandoca-Bocas del Toro region is demographically diverse but relatively homogenous in its overall tendencies with respect to sustainability and conservation. Most visitors seek out this region for its offerings in terms of wildlife, natural scenery, and interesting cultural heritage. The region is not weakened as other Caribbean destinations have been by a loss of identity and personality, allowing it to stand apart as a differentiated product. The result of this differentiation in the market is that it is able to promote itself on its individuality and its product offerings rather than entering into a price war with more established “sun and sand” destinations. This ability to compete on a product level rather than a price level presents opportunities for sustainable tourism to attract travelers that are more likely to support conservation initiatives and travel philanthropy programs; travelers would also be more likely to be receptive to conservation awareness messaging.

The weaknesses of the region are tied to its strengths. The preservation of an “identity” and a unique personality that attracts tourists based on product-level competition is dependent on a smaller-scale tourism economy. Businesses are small, meaning that they tend to create more jobs as an aggregate but as margins are often small, businesses are typically unable to contribute large amounts to conservation initiatives. Small and micro enterprises also are often faced with cash-flow difficulties that lead to partial or total shutdowns in cyclical downturns due to the seasonal nature of the tourism industry. This means that in providing economic alternatives to resource extractors and especially those that represent a threat to vulnerable wildlife, the tourism markets can only comprise part of the solution. The low margins typical of small enterprises also means that local organizations are often faced with a constant struggle for survival, making potential conservation initiatives subject to implementation in fits and starts as organizations shed personnel and drop activities in the absence of funding.

Project Partners²⁵

Interventions will need to enlist the support of local partner organizations in order to succeed. Potential partnerships can be formed with actors in the private and public sectors as well as with local NGOs, international NGOs and community-based organizations. The following list is not exhaustive, but includes major potential partners and the possible points of collaboration between the project and the organization.

Private Sector

Bocas Breeze:

The Bocas Breeze is a local publication circulated throughout the Bocas del Toro archipelago. It has an online portal that receives 250,000 hits per month and has printed distribution of between 3,000-5,000 issues a month. The publication is published in English and Spanish and ranges in topics including local and tourism news, and articles on conservation. The Bocas Breeze is also the premier source for lionfish information in the region. Allene Blaker, editor and chief contributor, is the organizational force behind the local lionfish roundups.

Potential points for collaboration:

- Marketing and awareness building
- Publishing conservation articles and press releases
- Assisting in publicity
- Logistical support for lionfish campaign implementation

Local Restaurants:

The area has a wide range of restaurants from beachside sandwich shops to community restaurants, pubs, cafeterias, and even a wide selection of ethnic foods – sushi, Thai, Indian, and Chinese. Most restaurants source at least some seafood from local fishermen.

Potential points for collaboration:

- Awareness campaign material placement
- Compliance with seafood guidelines

Local Hotels:

The region's hotels are the primary source of traveler information once visitors arrive. Hotel owners help to plan excursions and give advice to their guests on which operators and services to use. All hotels have some method for providing printed resources to clients: some use binders with brochures in a kind of catalog of tour offerings, others have bulletin boards for flyers and posters, while others have tables displaying promotional materials. The lack of large tour operators and charter flights mean that hotels are



Photo: Budget accommodations in Bocas Town, Panama

²⁵ For a full list of meetings please see Annex 1.

motivated to make recommendations based on service and product quality rather than on pre-arranged business-to-business agreements. The support of hotels in awareness campaigns and in recommending businesses that agree to comply with sustainability guidelines will be essential.

Potential points for collaboration:

- Awareness campaign material placement
- Providing information to guests



Boat Driver Unions:

The approximately 250 licensed tourism boat drivers of the Bocas del Toro archipelago have organized into five unions. While some specialize in providing transportation and tours to certain areas, most offer the same tour circuits. These boat drivers are often cited as contributing to ecological degradation, specifically when failing to maintain proper distances from dolphins and in anchoring on top of coral. One issue driving these threats is a lack of enforcement of regulations. Another is a lack of awareness among boat drivers. Apathy and indifference is also an issue though one not likely to be effectively addressed without more effective regulations.

Potential points for collaboration:

- Compliance with sustainability guidelines
- Campaign material placement
- Orientation of customers to reduce visitor impacts on ecosystems

Dive Shops and Local Tour Operators:

Scuba diving and snorkeling are among the region's most important attractions and dive shops have a vested interest in preserving reefs and dive sites in pristine condition. Local tour operators running hiking, biking, kayaking, and catamaran tours as well as visits with local communities are also invested in preserving the natural environment of the region. Most of these businesses are operated by foreigners who already actively participate in conservation projects.

Potential points for collaboration:

- Campaign material placements
- Contributions for campaign materials
- Orientation of customer to reduce visitor impacts on ecosystems

Bocas del Toro Tourism Chamber:

The Bocas del Toro Tourism Chamber is a private sector organization of approximately 35 businesses. The Tourism Chamber is mandated to promote tourism, address specific issues (roads, waste management, etc.) and involve local community groups in the tourism industry. They have undertaken negotiations to promote the destination in the low season (June to November) through a packaged deal with member hotels and Aeroperlas with lowered rates. The Tourism Chamber has also represented the destination in national trade shows. The organization has recently been trying to reorganize after years of inactivity.

Potential points for collaboration:

- Leverage support for campaigns and initiative among tourism businesses and liaising with government offices
- Assistance in destination promotions
- Facilitating contact with community groups

Public Sector

Autoridad Nacional del Ambiente (ANAM):

ANAM is Panama's environmental ministry. It is responsible for establishing regulations and administration of national parks and protected areas. It is also the body that administers the list of Panama's protected areas.



Potential points for collaboration:

- Declaration of Bluff Beach as an officially recognized protected area
- Controlling access to Bluff Beach at nighttime during sea turtle nesting season
- Licensing guides for turtle beaches
- Permission to post signage for regulations for use of beaches during turtle nesting season and posting signage in marine protected areas to inform visitors about how to limit impact

Autoridad de Recursos Acuaticos de Panamá (ARAP):

ARAP is the Panamanian agency in charge of aquatic resources including fisheries. They are responsible for licensing fishermen and enforcing fishing regulations. ARAP is also responsible for the administration of waterways for touristic uses.

Potential points for collaboration:

- Enforcement of regulations in marine protected areas
- Support in establishing content for the Boteros/MPA Awareness Campaign
- Hosting training workshops on minimizing visitor impacts with boat driver unions

Autoridad de Turismo Panama (ATP):

ATP is the national department in charge of managing tourism development. They are charged with brand management for Panama as a destination, and the use of tourism as a means for private sector development and job creation. In the Bocas del Toro region ATP has an



Bluff Beach, Panama

office on Isla Colon that primarily functions as a tourist information center. In addition to this function the local office also employs three tourism extensionists that make outreach and provide technical support to local communities in the archipelago that have community-based tourism microenterprises. These extensionists coordinate trainings with specialists from the national authority. Locally the office also helps to liaise with national headquarter offices in the capital to support tourism business registration, promotional campaigns, and training programs.

Potential points for collaboration:

- Long-term implementation of the tourism toolkit, with continued follow-up and support to local community-based tourism businesses
- Logistical support with awareness campaigns
- Cooperation and participation with marketing initiatives

Smithsonian Tropical Research Institute (STRI):

STRI is a part of the Smithsonian Institute dedicated to providing facilities for scientific research and study in Panama. STRI has a field station in Bocas del Toro and in addition to facilitating scientific study, the field station also interacts with local communities by engaging them in workshops, trainings, talks in schools, and free tours of the facilities.

Potential points for collaboration:

- Logistical support and assistance in development of school programs
- Political support for development of Bluff Beach product
- Sponsorship of awareness campaigns
- Facilitating access to scientific studies of local and regional biodiversity

Instituto Costarricense de Turismo (ICT):

The ICT is Costa Rica's Ministry of Tourism. The organization administers and oversees the tourism industry of the country, and among other programs it manages the Certification for Sustainable Tourism (CST) that rates businesses on their performance in sustainable management of natural, cultural, and social resources.

Potential points for collaboration:

- Potential source of counterpart funding for materials production
- Logistical support in campaign material placement
- Adoption of selected training curriculums
- Sustained support for awareness campaigns

Ministerio de Ambiente, Energía, y Telecomunicaciones (MINAET):

MINAET is the Costa Rican Ministry of the Environment, Energy and Telecommunication. Its mandate is diffuse, but it includes the administration of waterways, protected areas, and biodiversity. The ministry uses traditional strategies including permitting and protected area management, but also employs innovative strategies such as payments for environmental services where downstream users of resources transfer economic benefits upstream to communities in exchange for sustainable use of that resource.

Potential points for collaboration:

- Potential source of counterpart funding for materials production
- Logistical support for campaign material placement

Municipalities:

Local municipal governments are essential partners in conservation. Though budgets are limited they often have high degrees of autonomy in budgetary appropriations and are more directly involved in local issues. Local authorities are also involved in organizing infrastructure development and public interest campaigns as well as environmental issues and park management. On Isla Colón in Bocas del Toro, Bluff Beach is one of five officially declared municipal reserves under administration of the local government. In practice, municipal governments have had a checkered past with respect to conservation and sustainability. Limited resources often mean that municipal reserves are placed under the administration of local communities without substantial official supervision. Allegations of indifferent management and at worst outright corruption are not uncommon; however, this strengthens the need to engage them more in conservation initiatives in order to strengthen capacity for monitoring and control as well as to boost public image of these offices. Without strong support from municipal authorities any gains can be undermined.



Potential points for collaboration:

- Potential source of counterpart funding for materials production
- Permission for campaign material placement in public spaces
- Access control for Bluff Beach at nighttime during sea turtle nesting season
- Enforcement of existing regulations regarding fisheries and protected areas

Photo: Municipality of Talamanca, Costa Rica

NGOs

Asociación de Amigos y Vecinos de la Costa y la Naturaleza (AAMVECONA):

AAMVECONA is the community-based organization that manages the San San Pond Sak Wetlands. The group engages in scientific research and monitoring of sea turtles, including a volunteer program that uses long-term visits from international travelers and students to support research and conservation. These programs are carried out by trained community members under the supervision of naturalists. They also support recycled handicraft weavings by a women's group within the community, providing an economic alternative that simultaneously removes a threat to sea turtles by using recycled plastic shopping bags. The organization also provides guided tours of the wetlands and to view manatees. This group receives support from the Wider Caribbean Sea Turtle Conservation Network (WIDECAST).

Potential points for collaboration:

- Support with content development of sea turtle related awareness campaigns
- Support with sea turtle campaign signage and messages

- Access to document successes and lessons learned for sea turtle conservation programs involving tourists and volunteers
- Technical support in training on weaving handbags from plastic shopping bags

Bocas Sustainable Tourism Alliance²⁶ (BSTA):

The BSTA is a nascent destination management organization (DMO) with 30 members in the Bocas del Toro region. Their members are private sector tourism enterprises, and their stated mission is to support sustainable tourism development, promote responsible travel, and give incentives for travelers to understand and protect the local culture and environment they are visiting. The BSTA leads beach cleanups, supports farmers markets for local community members, provides visitor information on sustainable and experiential excursions, and supports conservation efforts.

Potential points of collaboration:

- Support for content creation on awareness campaigns
- Campaign implementation in Bocas del Toro
- Leveraging support for campaigns among local businesses
- Long-term implementation of sea turtle tourism toolkit and model
- Assistance in leveraging support of public sector actors

Talamancan Association of Ecotourism and Conservation (ATEC):

ATEC is an incorporated grassroots non-profit organization made up of Talamancan residents representing the communities of Puerto Viejo, Manzanillo, Cahuita, and BriBri. ATEC is based in Puerto Viejo and promotes rural community tourism projects throughout the Talamancan region of Costa Rica. Most products supported by the association are inland focused in forests and mountain attractions, though they do promote tours in Manzanillo and Gandoca. ATEC also helps to organize some tour products such as Caribbean cooking classes taught by local community members. The association also facilitates training for members to improve operations and sustainability.

Potential points for collaboration:

- Assistance in campaign content development
- Campaign implementation in Puerto Viejo
- Long-term implementation of the tourism toolkit and conservation model
- Leveraging support of local actors for sustainability initiatives

Alianza Bocas:

Alianza Bocas is a non-profit association of public and private sector entities in Bocas del Toro Province that promotes local sustainable development. Alianza Bocas is involved in many initiatives including solid waste management, environmental education, and sustainable tourism development. The main contact is Angel Gonzales who also runs Bocas.com, a website promoting tourism businesses in Bocas del Toro. Angel is currently trying to push for an official organization of boat tours in the region. This would include buoy use, the establishment of

²⁶ For more information regarding the Bocas Sustainable Tourism Alliance, see Annex 4

regulations, and their enforcement. The organization did not originally focus on conservation activities, though it is becoming more engaged in environmental issues.

Potential points for collaboration:

- Support for Boteros/MPA Campaign
- Logistical support for campaigns
- Leveraging support among local enterprises for awareness campaigns
- Placement of campaign materials on bocas.com

The Sea Turtle Conservancy (STC):

STC is a subcontractor on USAID's Management of Aquatic Resources and Economic Alternative program. STC currently is involved in sea turtle monitoring and research projects in the region. They oversee nesting sites at Long Beach in Bastimentos National Marine Park and Chiriqui Beach near Rio Caña in the Ngöbe-Buglé comarca. The principal contacts in the region are Dr. Emma Harrison and Cristina Ordoñez. Regionally, STC also oversees the highly successful sea turtle project at Tortuguero National Park. Within the Cahuita-Gandoca-Bocas del Toro region, STC is a key conservation partner in all aspects of sea turtle conservation. The years of work have also built up a high level of trust with local communities. This trust is the basis for the research projects that use local community members to collect data under the supervision of naturalists.



Photo: Eric Lin of Solimar International speaks to Cristina Ordoñez of the Sea Turtle Conservancy

Potential points for collaboration:

- Recipient of toolkit
- Support with development of model
- Coordination for community enterprise development
- Training for guides
- Point of contact with community leaders

The Wider Caribbean Sea Turtle Network (WIDECAST):

WIDECAST is a network of sea turtle conservationists that work internationally to conserve sea turtles and their habitats. WIDECAST manages the sea turtle research projects in Cahuita and Gandoca-Manzanillo in Costa Rica and they give technical and financial assistance to the research activities of AAMVECONA at San San Pond Sak wetlands in Panama. WIDECAST runs volunteer programs, trains local artisans in arts and crafts production to provide economic alternatives, and advocates for legislative changes to enhance sea turtle protection and conservation. Regionally the main points of contact are Claudio Quesada and Didiher Chacon; both work out of WIDECAST's regional offices in San José, Costa Rica. Recently, WIDECAST has faced conflict with a local community group in Gandoca resulting in MINAET's decision to physically divide the beach in two, giving WIDECAST control over a portion and the local community group control over the other portion. WIDECAST uses community members as assistants for research and guides.

Potential points for collaboration:

- Support with development of model and toolkit
- Assisting in information gathering
- Assistance with distribution of signage at turtle beaches
- Collaboration in the distribution and application of toolkit and model

Asociación de Mujeres Microempresarias Agropecuarias de Gandoca (ASOMIPAG):

ASOMIPAG is a women's group of community members in Gandoca, Costa Rica. This group is currently experiencing conflict with WIDECAST within the community and have just been awarded control over a portion of the beach by MINAET. They have very few resources currently and are able to function thanks to a grant from the Ministry of Labor which pays for salaries to the members of the group who assist in beach cleaning, and running monitoring and research patrols. The group also provides accommodations and food services to volunteers who assist in turtle monitoring. The group lacks formal training, though they do have a desire to diversify their incomes by engaging in conservation activities.

Potential points for collaboration:

- Logistical support with placement of signage for sea turtle visitation guidelines
- Adoption of toolkit and model

Interamerican Convention for the Protection and Conservation of Sea Turtles (IAC):

The IAC is a regional intergovernmental treaty that provides a legal framework for the protection and conservation of sea turtles. The treaty has a secretariat that organizes two working groups, and the activities of the treaty organization. The treaty has 15 signatory countries and 20 official observers from among the NGO community. This convention has international legitimacy as all but one signatory have ratified the treaty through their legislative bodies.

Potential points for collaboration:

- Input and consultations on content of the sea turtle tourism conservation model
- Endorsement of sea turtle tourism conservation model
- Political support behind toolkit and model
- Facilitate contact with actors in the sea turtle conservation field within the public sector and the NGO community

Community and Other Stakeholder Profiles

Both during and following the initial site assessment visit, the Solimar team conducted a series of in-depth interviews with community leaders, local conservation partners, and NGOs active within the communities found along the coast of the trans-boundary region. The economic profiles presented are representative of communities in the region. These



Photo: Eric Lin of Solimar International speaks to Doña Gladys Rojas of ASOMIPAG

communities are often populated by indigenous groups living in extreme poverty. They are geographically located within or very near national parks and protected areas. There is a general lack of economic alternatives to resource extraction (fishing, lobster diving, cutting mangroves, and poaching sea turtles and sea turtle eggs); coupled with the extreme levels of poverty, communities are faced with hard choices between survival and conservation, a struggle in which conservation always loses. Anecdotal evidence suggests that local fisheries are overfished as fishermen need to travel further and further to find productive fisheries when decades ago they hardly needed to travel at all. Though there is some knowledge of conservation within the communities, local customs and traditions are deeply embedded and more education is needed in order to facilitate a cultural change. Local awareness of environmental issues is also not necessarily accompanied by an understanding of specific connections between local behavior and the global impacts of those behaviors.

Chiriquí/Río Caña:

The Chiriquí/Río Caña region lies within the Ngöbe-Buglé Comarca and its inhabitants are all members of the Ngöbe-Buglé indigenous group. The town of Río Caña Abajo has about 1,600 inhabitants while the surrounding region is home to about 50,000 people. Primary economic activity is focused on subsistence agriculture with primary crops being rice, yucca and plantains. Artisanal fishing is also done on a subsistence basis. Trade occurs in a very limited scope among different villages and almost none of the fish or produce is exported to markets outside the comarca.



Photo: Río Caña community

The cash economy is limited to an estimated fewer than 1% of the community and primarily consists of boat drivers, shopkeepers, and community members who monitor and patrol the beach for the Sea Turtle Conservancy research project. Household cash income is estimated to average approximately \$400 per year. The community does receive cash transfers from government programs as well as assistance with public goods, for example each household received an installed solar panel and batteries so that the community could have lights after dark.

Nearly all of the community members under 40-50 years of age are literate thanks to a big push by the government, which has resulted in nearly 90% of children finishing primary school. It is estimated that about 50% of children finish up to 9th grade though virtually none reach the university level.

The community receives virtually no tourists, though there are occasionally some volunteers who come to assist in the sea turtle research project. Less than 10 people have experience working in tourism. There is interest in the community to start developing tourism projects. A hotel is currently under construction with four rooms and a kitchen, though funding will not be sufficient for its completion. The comarca's coordinating body also successfully declared a nearby island

and the surrounding reef, Escudo de Veragua, a protected area. Also, the Damani-Guariviara wetland, lying within the boundaries of the Ngöbe-Buglé Community, is a 20 minute boat ride up a mangrove lined river, and presents a major potential draw for ecotourists.

The community has serious limitations with respect to tourism development, as there are no reliable means of communication with a complete absence of telephone, cellular, and Internet infrastructure, limited electricity, and only basic health services. There is also no reliable means of transportation to Bocas del Toro apart from a relatively bumpy 2 -3 hour boat ride that will be impassable at certain times of year. The risk of delaying community-based tourism development is that a proposed government-sponsored tourism development project will be approved by the comarca's coordinating body and construct a Cancun-style resort complex along the 27 kilometer beach where the second largest population of nesting leatherback sea turtles in the Caribbean is found.

Salt Creek:

The Salt Creek or Quebrada Sal community lies at the end of a mangrove forest on the southeast side of Isla Bastimentos adjacent to the Bastimentos National Marine Park. The approximately 600 people of the Salt Creek community are nearly all indigenous Ngöbe-Buglé and a very small number of Afro-Caribbean families. Very few children finish school though literacy is reported to be high. It is estimated that 25% of students drop out of school at the end of each year meaning less than 24% will finish primary school. Fishing is still the main source of income of more than half of the 70 households; though tourism also contributes to household income it is sporadic and unreliable. Average income for fishermen is estimated to be USD\$1,820 per year while tourism pays approximately \$10 per day. The average community member working in tourism is employed for an average of two months per year, totaling approximately USD\$600 per year.

Fishermen used to fish close to the community but as fisheries become overfished they have had to travel further and further to find productive fisheries. They primarily catch snapper, sierra mackerel, and jack mackerel to sell to restaurants and super markets. Lobster diving is also a source of income for many in the community. The community used to actively poach sea turtles for their eggs and meat, though thanks in large part to conservation efforts by conservation NGOs and notably those of the Sea Turtle Conservancy, poaching of sea turtles has been almost completely eliminated.

The tourism industry employs community members as cooks, housekeepers, boat drivers and gardeners in the hotels and restaurants close by. The community has also, with the help of a USAID grant project, developed tourism products of their own including five tour products, arts and handicrafts, and food services. The largest need facing this community is support with sales and marketing. Currently, the community is facing real difficulties sustaining motivation for tourism as an economic alternative when many days may go by without a single visitor. There are operational elements of their enterprises that can be improved; however, these improvements would be for naught without an increased flow of visitors.

CONSERVATION THREAT ASSESSMENT

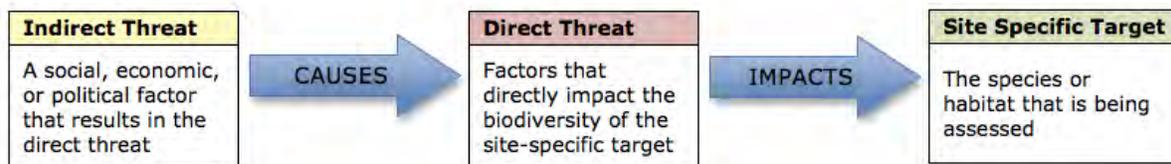
Overview

Solimar’s site assessment objectives included the development of conservation threat assessment models to better define the direct and indirect conservation threats that exist in the Cahuita-Gandoca-Bocas del Toro region, as well as the role that local communities play within those threats (and therefore, also in the potential solutions).

The Solimar’s conservation threat assessment approach is similar to that used by international conservation organizations such as The Nature Conservancy (TNC) and their Conservation Action Planning (CAP) approach.

Conservation threat data was collected during the site assessment through in-depth interviews with a variety of long-term local stakeholders including scientists, NGO representatives, protected area managers, community leaders, and private sector representatives. Conservation threat data was collected after the site assessment through follow-up discussions with these individuals, as well as through research.

Threat Assessment Model



The threat assessment model is built around the cause and effect relationships between indirect threats to biodiversity (such as lack of economic alternatives or lack of conservation awareness), direct threats to biodiversity (such as illegal logging or wildlife harassment), and a site-specific target species or habitat.

For example, the demand of sea turtle eggs for human consumption is a ubiquitous conservation threat that occurs throughout Central America. The threat assessment model for sea turtle egg consumption might look something like this:



In this casual chain there are two indirect threats, lack of conservation awareness and customs & traditions, which result in the direct threat of illegal trade of species (e.g. selling turtle eggs to consumers). This direct threat obviously impacts the site-specific target of sea turtle eggs.

Cahuita-Gandoca-Bocas del Toro Threat Assessment Model

The Solimar site assessment team focused the Cahuita-Gandoca-Bocas del Toro threat assessment's site-specific targets on the MAREA project species and habitats found in the region, specifically:

- Species: grouper, snapper, lobster, shark, conch, cockles, and sea turtles
- Habitat: mangroves, reefs, and beaches

The Cahuita-Gandoca-Bocas del Toro conservation threat assessment is included in its entirety on the following page.

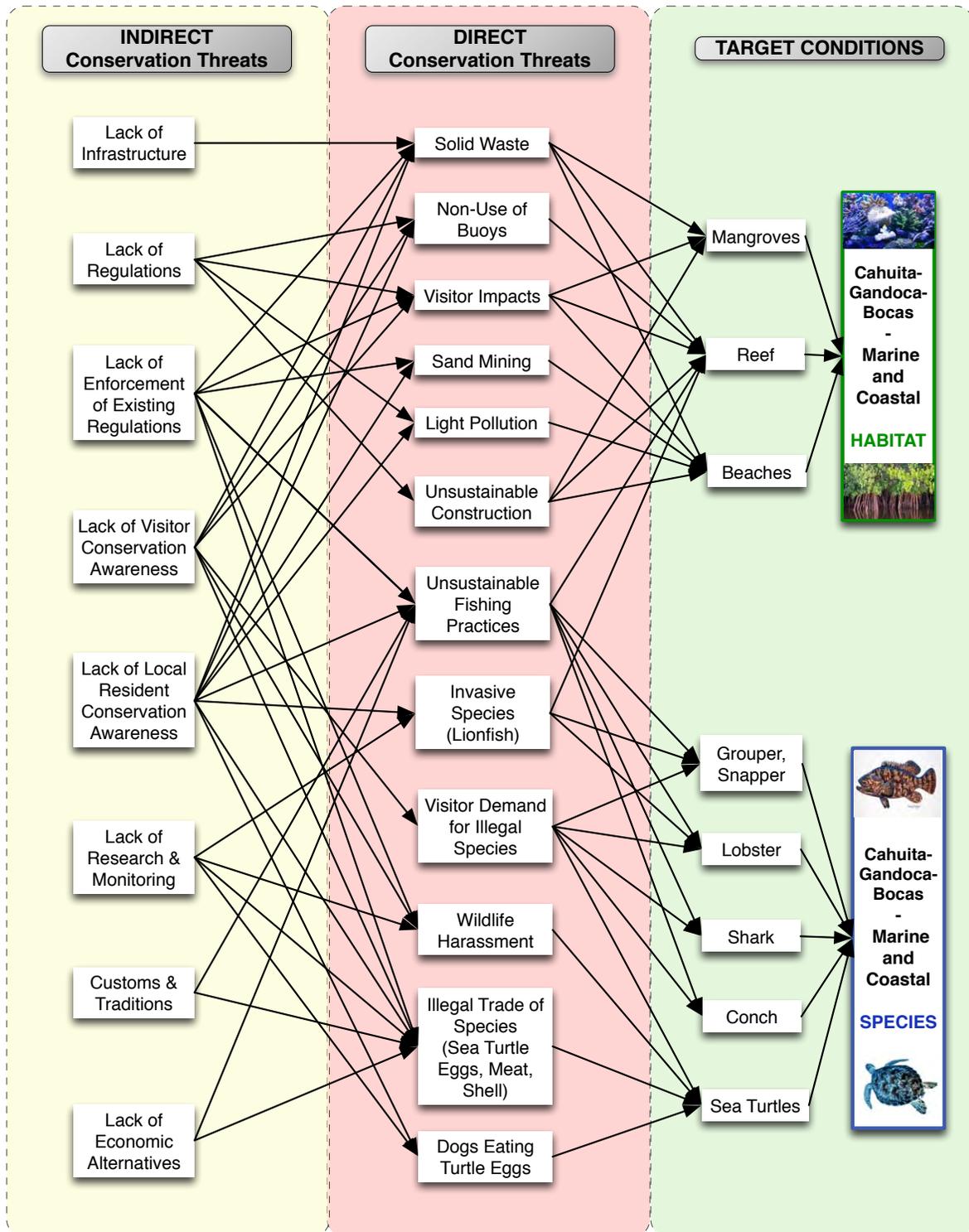


Figure 1

SITUATIONAL SWOT ANALYSIS

A SWOT analysis examines the elements of four factors in determining the present state and future potential of a project, organization, or a destination. This tool enables the identification of both external conditions and internal characteristics. The four factors analyzed – strengths, weaknesses, opportunities, and threats - are explained in more depth below:

- **Strengths:** Internal characteristics that make the group or destination more competitive;
- **Weaknesses:** Internal characteristics that limit the competitiveness of the group or destination;
- **Opportunities:** External conditions that make growth possible;
- **Threats:** External conditions that can be obstacles to sustained growth and pose risks.

The following is an overall situational SWOT analysis for tourism and conservation in the Cahuita-Gandoca-Bocas del Toro trans-boundary region:

Situational SWOT Analysis for Cahuita-Gandoca-Bocas del Toro	
<p>Strengths:</p> <ul style="list-style-type: none"> • Current tourist population value sustainability • Expatriate residents and experiential travelers are more resistant to economic downturns • Wealth of biodiversity and cultural heritage • Expatriate residents bring in a culture of conservation and volunteerism • Not a monopolized industry • Low barriers to new entrants in the tourism market • Diversity of market segments • High level of protection for critical ecosystems • Diverse product offerings • Global perception of the region is as an undiscovered natural destination • The destination has a unique identity in the perception of visitors 	<p>Opportunities:</p> <ul style="list-style-type: none"> • Conservation messaging to a receptive audience can be a catalyst for change • Formation of direct linkages between tourism and conservation • Trans-boundary cooperation for tourism marketing and conservation initiatives • Expatriate residents can provide a long-term and continuous source of support for conservation and social initiatives • Expand formal protection for critical ecosystems • Unique identity allows for product quality-driven competition rather than price-driven competition
<p>Weaknesses:</p> <ul style="list-style-type: none"> • Lower margins for small and micro enterprises • Bluff Beach remains unprotected • Weak fisheries enforcement • Extreme poverty among local communities • Poor training and education for local communities • Weak data collection on tourism market. • Lack of innovative marketing • Weak local public sector institutions in tourism and conservation • Lack of sustainable vision for tourism development 	<p>Threats:</p> <ul style="list-style-type: none"> • Increasing development may cause a loss of the destination’s historic identity and personality • Fisheries regulations are often unobserved and unenforced • Lack of economic alternatives for local communities means continued resource extraction • Price wars among local service providers undermine the sustainability and quality of the destination • Uninformed visitation to sensitive ecosystems is causing negative impacts

The identification of these four elements permits a deeper examination of situational and internal factors that illuminate relationships and enable the establishment of strategies that use internal factors to address external ones. This illustrates clear focal points toward which efforts and future work should be aimed. An example of this matrix is presented below:

	Opportunities	Threats
Strengths	<p>Use strengths to take advantage of opportunities <i>Guiding question: Can this strength help to take advantage of this opportunity?</i></p>	<p>Use strengths to avoid threats <i>Guiding question: Can this strength help to eliminate this threat?</i></p>
Weaknesses	<p>Use opportunities to mitigate weaknesses <i>Guiding question: Can this opportunity help to address this weakness?</i></p>	<p>Reduce weaknesses and avoid threats <i>Guiding question: Does addressing this weakness help mitigate this threat?</i></p>

Table 3

In this analysis the connections between conditional factors and characteristics are examined and given a value from 0-4 with 0 being completely unrelated and 4 being directly linked. This evaluation will clearly show which conditional factors can be taken advantage of or mitigated with internal characteristics. The table on the following page helps to illustrate specific connections that represent strong opportunities for interventions are highlighted; selections were based on strong linkages between highly linked rows and columns in each quadrant.

In an attempt to focus on the most relevant and related situational SWOT factors, the Solimar site assessment team analyzed these numerical values to identify those with high levels of association that led to our suggested actions important for tourism and conservation at the site.

These summarized linkages, or *priority actions*, are presented following the numerical table and are divided by quadrant: strength-opportunity linkages, weakness-opportunity linkages, strength-threat linkages, and weakness-threat linkages. Finally, each priority action is then assigned a tourism development strategy that would help to achieve its implementation.

Situational SWOT Linkage Analysis for Cahuita-Gandoca-Bocas del Toro

	Opportunities:						Threats:					
	<ul style="list-style-type: none"> Conservation messaging to a receptive audience can be a catalyst for change Formation of direct linkages between tourism and conservation Trans-boundary cooperation for tourism marketing and conservation initiatives Expatriate residents can provide a long-term and continuous source of support for conservation and social initiatives Expand formal protection for critical ecosystems Unique identity allows for product quality-driven competition rather than price-driven competition 						<ul style="list-style-type: none"> Increasing development may cause a loss of the destination's historic identity and personality Fisheries regulations are often unobserved and unenforced Lack of economic alternatives for local communities means continued resource extraction, threatening principal attractions Price wars among local service providers undermine the sustainability and quality of the destination Uninformed visitation to sensitive ecosystems is causing negative impacts 					
Strengths:												
• Current tourist population value sustainability	4	4	1	4	4	4	3	4	3	4	4	4
• Expatriate residents and experiential travelers are more resistant to economic downturns	4	3	1	4	1	4	1	1	3	2	0	0
• Wealth of biodiversity and cultural heritage	3	3	3	3	4	4	2	0	0	3	3	3
• Expatriate residents bring in a culture of conservation and volunteerism	4	4	2	4	4	4	4	3	4	3	4	4
• Not a monopolized industry	2	2	3	2	4	4	2	0	2	1	2	2
• Low barriers to new entrants in the tourism market	0	1	4	3	0	4	0	2	3	1	0	0
• Diversity of market segments	0	1	3	0	0	4	3	0	3	3	-	-
• High level of formal protection for critical ecosystems	1	4	1	4	4	4	4	4	0	3	4	4
• Diverse product offerings	0	2	3	0	2	4	3	0	2	3	3	3
• Global perception of the region is as an undiscovered natural destination	3	4	3	1	3	4	4	0	4	4	4	4
• The destination has a unique identity in the perception of visitors	1	3	4	1	3	4	4	0	4	4	3	3
Weaknesses:												
• Lower margins for small and micro enterprises	0	1	3	0	0	4	4	3	4	0	3	3
• Bluff Beach remains unprotected	1	4	0	4	4	1	4	0	2	0	4	4
• Weak fisheries enforcement	3	0	2	3	3	0	0	4	1	1	2	2
• Extreme poverty among local communities	0	4	2	0	0	3	2	4	4	0	3	3
• Poor training and education for local communities	0	3	3	1	0	3	3	3	4	3	2	2
• Weak data collection on tourism market	0	0	1	0	0	0	2	0	1	2	3	3
• Lack of innovative marketing	2	3	4	3	1	4	4	3	3	3	4	4
• Weak local public sector institutions in tourism and conservation	1	4	3	0	4	1	4	3	3	2	4	4
• Lack of sustainable vision for tourism development	3	4	4	3	1	3	4	2	4	3	4	4

Priority Actions Based on Situational SWOT Analysis Linkages	Tourism Development Strategy
Strength-Opportunity Linkages: <i>Actions that use strengths to take advantage of opportunities</i>	
1. Take advantage of the current market's value for sustainability to create stronger linkages between tourism and conservation through:	
a. Awareness campaigns;	Awareness Campaigns
b. Marketing that highlights product sustainability and conservation linkages;	Marketing
c. The generation of resources and constituencies to support the increased protection of critical habitats;	Enterprise Development
d. Product development to strengthen or create more attractions that are founded in community-based "authentic" experiences.	Enterprise Development
2. Leverage the expatriate community's openness to conservation through their participation in a Destination Management Organization (DMO) and awareness-building campaigns.	DMO Strengthening, Awareness Building
3. Use the high level of protection of critical ecosystems to the advantage of the destination by:	
a. Marketing protected areas as tourism attractions;	Marketing
b. Linking tourism revenues to increase and expand protection, as well as provide a source of alternative incomes to local communities.	Enterprise Development
4. Highlight the destination's identity as a unique and "undiscovered" location in marketing based on product quality and sustainability rather than on price.	Marketing
Weakness-Opportunity Linkages: <i>Actions that use opportunities to address weaknesses</i>	
1. Use product quality-driven marketing to strengthen protection of threatened critical habitats, particularly Bluff Beach, and link visitation to conservation.	Marketing
2. Use the unique identity of the destination as a central point in more innovative marketing initiatives based on product quality and sustainability.	Marketing
3. Incorporate the strengthening of a DMO to promote sustainable tourism products & services, support conservation activities and local public-sector institutions, and provide a sustainable vision for tourism development.	DMO Strengthening
Strength-Threat Linkages: <i>Actions that use strengths to mitigate risks posed by threats</i>	
1. Though visitors value sustainability, they are often uninformed about impact mitigation. Use awareness campaigns to leverage visitors' value for sustainability by providing information they need to modify/mitigate their negative behavior.	Awareness Campaigns
2. Leverage the destination's unique identity and the value placed on sustainability by visitors and expatriates to guide further developments toward being smaller-scale and lower-impact.	Awareness Campaigns, Marketing, Enterprise Development, DMO Strengthening
3. Use product quality-based marketing to attract "experiential travelers" who have fewer budgetary constraints and who are more likely to contribute to conservation activities and purchase sustainable tourism products.	Marketing

Weakness-Threat Linkages: Actions that would address weaknesses in order to avoid threats	
1. Strengthen protection of Bluff Beach to mitigate impacts from unsustainable development through the strengthening of a DMO and partnerships with public-sector institutions.	DMO Strengthening
2. Increase education and training for local communities to help provide economic alternatives.	Enterprise Development
3. Use innovative marketing to limit visitor impacts, sell more community-based tourism products and provide economic alternatives, and to promote “authentic” natural and cultural assets to travelers.	Marketing
4. DMO strengthening to provide a more cohesive sustainable tourism development vision, which can help to mitigate visitor impacts, control unsustainable developments, support local public-sector institutions in tourism and conservation, and provide alternative livelihoods to local communities.	DMO Strengthening

TOURISM DEVELOPMENT STRATEGIES

The purpose of developing a conservation threat assessment is that it provides critical information on the anthropogenic factors that are impacting biodiversity at a given site and how they are related. As stated earlier, the purpose of developing the SWOT situational analysis is that it determines the present state and future potential of factors that may influence a project.

By combining these two key inputs, it allows one to start piecing together the complex puzzle of human/nature interactions at the site. From this process, a clearer picture emerges that allows a project to focus on activities and interventions that will ultimately have the greatest impact on protecting biodiversity at the site.

With this goal in mind, the Solimar site assessment team analyzed the overall Cahuita-Gandoca-Bocas del Toro conservation threat assessment and SWOT analysis, and has identified four overarching tourism conservation strategies that are needed to address conservation threats that exist in the region:

1. Conservation Awareness Building
2. Enterprise Development
3. Marketing
4. Destination Management Organization (DMO) Strengthening

The following defines the specific activities of these categories, the threats they address, and the species and habitats they support. Two additional conservation threat assessment models are included in the annex of this document that highlight the overall linkages between these two strategies and their targeted conservation threats.

Conservation Awareness Building Activities

As seen in the conservation threat assessment, lack of conservation awareness – both with visitors as well as local residents – is the most severe indirect threat in terms of its causal relationship with the highest number of direct threats.

Based on this severity, Solimar developed five individual conservation awareness campaign concepts that will increase the awareness of visitors and local residents as well as target conservation threats and specific species and habitat unique to each campaign.

All of these campaign concepts have been developed because of their regional relevance. Although the following five conservation awareness campaigns will implemented only in the Cahuita-Gandoca-Bocas del Toro region during year one of the MAREA project, the expectation and opportunity exists to replicate them at a regional level in years two and beyond.

1. Sustainable Seafood Awareness Campaign

This campaign will focus on the visitor-driven demand that exists for unsustainable seafood in tourism hubs throughout the region. Campaign materials and messages will focus on the informing visitors at the point of purchase (i.e. restaurants) which consumer seafood species are threatened and not recommended, as well as sustainable alternatives.

Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Sustainable Seafood Awareness Campaign	Lack of <i>Visitor</i> Conservation Awareness	- Visitor Demand for Illegal Species	<u>Species</u> - Grouper - Snapper - Lobster - Shark - Conch - Cockles - Sea Turtles	- <i>Target visitor demand by promoting sustainable seafood alternatives and threatened species data within regional restaurants through campaign materials and marketing incentives</i>

Table 4

2. Tourism Regulations Awareness Campaign

This campaign will focus on increasing the awareness of visitors to Bastimentos MPA about the regulations that apply to visiting the protected area. This visitor-focused approach was selected in part because of failed past attempts to rely solely on local service providers’ adherence (primarily the boteros boat associations in Bocas del Toro) to these regulations.

Therefore, the tourism regulations awareness campaign will focus on communicating (via boat and terrestrial signage) a simple visitor “code of conduct” that will address the most potentially negative visitor impacts to the Bastimentos MPA, including: wildlife harassment, snorkeling and diving practices, waste management, and the importance of the mooring buoys for anchoring in the park. By empowering visitors with information and encouraging them to only select responsible service providers, the expectation is that service providers themselves will begin to alter destructive behavior.

Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Tourism Regulations Awareness Campaign	Lack of <i>Visitor</i> Conservation Awareness	- Solid Waste - Non-Use of Buoys - Visitor Impacts - Wildlife Harassment	<u>Habitat</u> - Mangroves - Reefs - Beaches <u>Species</u> - Sea Turtles	- <i>Develop & post visitor "code of conduct" signage on boats & beaches in MPAs</i>

Table 5

3. Sea Turtle Tourism Impact Mitigation Awareness Campaign

Sea turtles are perhaps no more vulnerable than when they are in the process of laying their eggs on a beach. It is precisely this same moment upon which the burgeoning sea turtle tourism industry depends to sell their tour products, and for sea turtle conservation projects to attract paying volunteers and “voluntourists”.

Therefore, the sea turtle tourism impact mitigation awareness campaign will develop signage for popular nesting beaches that help to ensure that everyone, both visitors and local residents, are well informed about what is acceptable behavior around a nesting sea turtle and how to mitigate their overall impact to sea turtles and their habitat.

It is also worth noting that a nesting sea turtle is also the best opportunity to instill a sense of awe and respect in local residents – particularly school children – in sea turtles through a well-crafted environmental education program, an approach that will also be explored within this document.

Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Sea Turtle Tourism Impact Mitigation Awareness Campaign	Lack of <i>Visitor</i> Conservation Awareness	- Solid Waste - Visitor Impacts - Wildlife Harassment	<u>Habitat</u> - Beaches	- Develop & post visitor "code of conduct" signage on popular sea turtle nesting beaches
	Lack of <i>Local Resident</i> Conservation Awareness	- Light Pollution - Dogs Eating Turtle Eggs	<u>Species</u> - Sea Turtles	- Develop & post local resident "code of conduct" signage on popular sea turtle nesting beaches

Table 6

4. Sea Turtle Egg Consumption Awareness Campaign

As stated earlier, the supply and demand of sea turtle eggs for human consumption is one of the most common species conservation threats seen throughout the Central America region. Therefore, Solimar will develop a campaign targeting both within the Cahuita-Gandoca-Bocas del Toro region. Fortunately, many past and current conservation projects (including the USAID/CUENCAS project in El Salvador) have developed effective campaign messages and materials that Solimar intends to incorporate into the Cahuita-Gandoca-Bocas del Toro sea turtle egg consumption awareness campaign.

Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Sea Turtle Egg Consumption Awareness Campaign	Lack of <i>Local Resident</i> Conservation Awareness	- Illegal Trade of Species	<u>Species</u> - Sea Turtles	- Develop campaign materials that target the demand for sea turtle eggs
	Customs & Traditions	- Unsustainable Fishing Practices - Illegal Trade of Species		- Develop campaign materials that target the supply for sea turtle eggs

Table 7

5. Lionfish Reduction Awareness Campaign

The National Oceanic and Atmospheric Administration (NOAA) recently stated that due to their population explosion and aggressive behavior, lionfish have the potential to become the most disastrous marine invasion in history by drastically reducing the abundance of coral reef fishes (including MAREA species) and leaving behind devastated marine ecosystems.

The urgency to reduce lionfish populations throughout the Caribbean has led private sector tourism partners, such as dive shops and tour operators, to encourage their clients to actively eliminate this invasive species. Lionfish “Derbies” and “Eat Lionfish” campaigns have proven to be successful in places like the Florida Keys, Cozumel, and the Bay Islands of Honduras.

The MAREA lionfish reduction awareness campaigns will be a multifaceted approach to the problem. First, it will target visitors by encouraging them to safely spear and handle lionfish, as well as to ask for lionfish when dining out at local restaurants. Second, it will encourage and train local fisherman to target the species and will also work with regional restaurants to encourage them to pay the fisherman top dollar for lionfish filets. Finally, the lionfish campaign will target resource extractors, such as turtle poachers, with trainings and support to begin fishing the invasive species.

Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Lionfish Reduction Awareness Campaigns	Lack of Visitor Conservation Awareness	- Invasive Species	<u>Species</u> - Grouper - Snapper - Lobster <u>Habitat</u> - Reef	- Promote lionfish fishing with recreational divers through campaign materials & special events - Promote lionfish consumption by visitors through local restaurants
	Lack of Local Resident Conservation Awareness	- Invasive Species		- Promote lionfish fishing with local fisherman through campaign materials & special events
	Lack of Economic Alternatives	- Unsustainable Fishing Practices - Illegal Trade of Species		- Encourage local restaurants to pay top dollar for lionfish filets from local fisherman

Table 8

Enterprise Development Activities

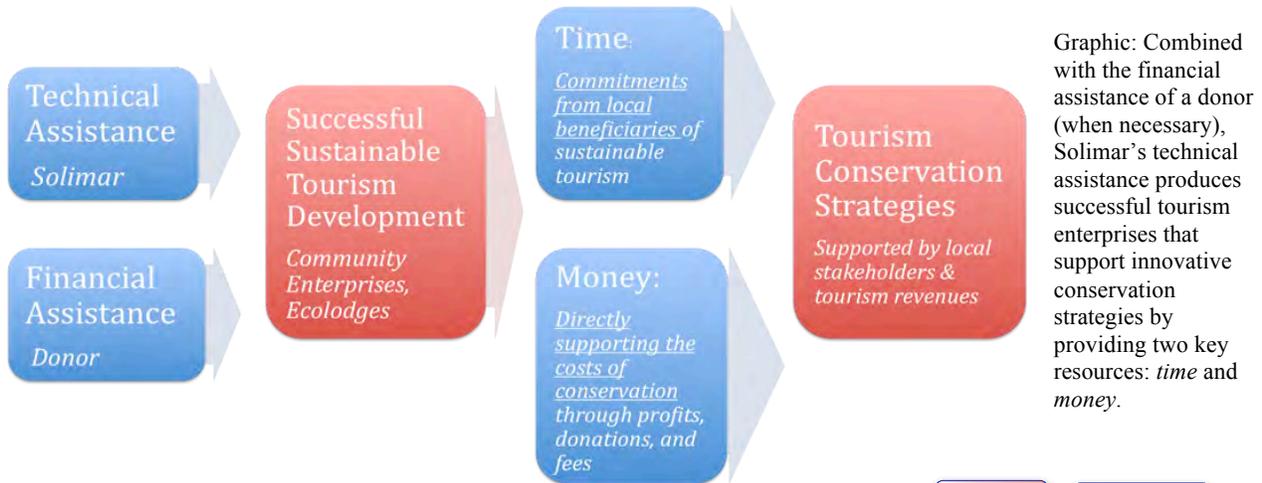
Perhaps the greatest power of sustainable tourism as a tool for conservation is its ability to align the world’s largest industry, tourism, with the direct financial support of biodiversity conservation initiatives. Solimar has embraced this approach by identifying ways in which tourism – from community enterprises to five-star resorts – can generate revenue to support conservation through year-end profits, visitor donations and “travel philanthropy”, and conservation taxes and fees.

In addition to financing conservation, Solimar’s approach to sustainable tourism development also produces a resource even more powerful than money: the **time** and **involvement** of local communities in conservation.

By developing economic alternatives for local communities that inherently depend upon the *protection* of natural resources (such as sea turtles) rather than their *extraction*, new incentives and opportunities for local communities open up that bring value to conservation.

The foundation of Solimar’s unique approach to sustainable tourism enterprise development is built upon a number of business development manuals and training programs, from business planning to operations and management to sales and marketing. Solimar’s “Tourism Toolkit”

will capture these critical tools to share with MAREA project participants. This toolkit, combined with well-documented tourism conservation strategies, will enable Solimar and the MAREA project to develop and promote a network of tourism enterprises in Central America that are actively supporting marine and coastal conservation.

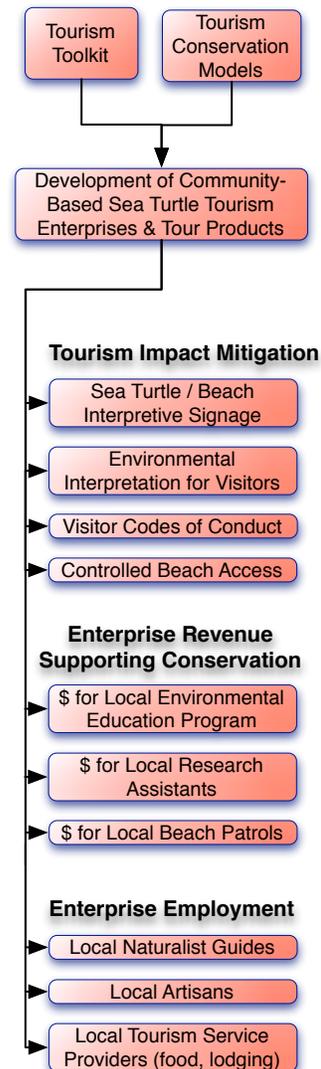


New Tourism Enterprise Development: Bluff Beach

In the Cahuita-Gandoca-Bocas del Toro region, the best opportunity to apply this model is with the Bluff Beach sea turtle nesting site and local community. MAREA partner the Sea Turtle Conservancy has been working with sea turtle monitoring and research (and a handful of local residents) at the beach for a number of years, and has also started a community outreach program at Bluff Beach that targets youth through environmental awareness activities.

The Sea Turtle Conservancy (STC) and Solimar are proposing the development of a community-based tourism enterprise at Bluff Beach in year 2 of the MAREA project. The enterprise would offer evening sea turtle nesting tours and early morning hatching tours during the 6-7 month sea turtle season that begins in late February.

The two MAREA partners would also work together in the training component of the project with Solimar focused on small business management and STC on the conservation aspects of the project. And with Bocas Town just 15 minutes away by shuttle, the logistics and costs to link the beach to the tourism market in Bocas are low and attractive. To summarize, the product is strong, the demand is considerable, and the financial potential of such an enterprise is lucrative for both conservation financing as well as local job creation.



Through additional site assessments and collaboration with MAREA partners, Solimar intends to identify a number of sites within MAREA’s target regions that exhibit similar conditions to that of Bluff Beach in order to scale up this enterprise development approach with multiple project sites in years 2 and 3.

Existing Tourism Enterprise Development:

In addition to Bluff Beach, there is also opportunity to work with existing tourism enterprises (particularly those that are community-based and located in and around protected areas) to improve their sustainability and apply the same tourism conservation strategies listed below. These enterprises have received valuable support from local organization “Alianza Bocas”, but could also benefit from Solimar’s product development, training, and marketing tools to further strengthen their quality and sustainability.

Examples of these existing community tourism enterprises in the region include²⁷:

Name	Location	Products/Services
AAMVECONA: Asociación Amigos y Vecinos de la Costa y de la Naturaleza	San San River & Road Changuinola-Guabito	<ul style="list-style-type: none"> • Observation of Manatees and Marine Turtle • Tours of the San San-Pond Sak Wetland • Volunteers program on the marine turtles conservation
ACUDEEM: Multicultural Center and Tourism Marketing Net	El Empalme, Changuinola, Bocas del Toro	<ul style="list-style-type: none"> • Tours of the Province • Cultural activities of the regional ethnic groups
ALIATUR: Tourism Community Organization of Salt Creek	Salt Creek, Bastimentos Island, Bocas del Toro	<ul style="list-style-type: none"> • Lodging & food • Trails and cultural activities • Handicrafts
OCEN: Tourism Organization of the community of Bony	Bonyik (Teribe River)	<ul style="list-style-type: none"> • Lodging • Restaurant & handicrafts • Trails and visits to the Naso communities
MERI NGOBE: Community Organization of Women of Popa	Sandubidi, Popa Island, Bocas del Toro	<ul style="list-style-type: none"> • Lodging • Restaurant & handicrafts • Hiking Trails

In terms of threat mitigation, the tourism conservation strategies of Solimar’s community enterprise development approach can be categorized into three main areas:

1. Tourism Impact Mitigation
2. Enterprise Revenue Supporting Conservation
3. Enterprise Employment

1. Tourism Impact Mitigation

Developing guided interpretive tours is the most effective mechanism to not only mitigate tourism impacts such as solid waste and wildlife harassment, but also to develop an appreciation and awareness of sea turtles in visitors. That appreciation can then translate into donations and contributions to local conservation efforts through a well-designed travel philanthropy program.

²⁷ <http://www.redtucombo.bocas.com/>

Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Tourism Impact Mitigation - Interpretive Signage - Interpretive Local Naturalist Guides - Visitor Codes of Conduct - Controlled Beach Access	Lack of Visitor Conservation Awareness	- Solid Waste - Visitor Impacts - Wildlife Harassment	Species - Sea Turtles Habitat - Beaches	- Local guides leading interpretive turtle tours, raising visitor awareness, and monitoring visitor behavior and impacts
	Lack of Local Resident Conservation Awareness	- Solid Waste - Illegal Trade of Species		- Sea turtle interpretive signage in English/Spanish posted on beaches, raising awareness of both visitors and local residents
	Lack of Research & Monitoring	- Wildlife Harassment - Illegal Trade of Species - Dogs Eating Turtle Eggs		- Presence of local guides and "voluntourists" to increase sea turtle research monitoring - Guide training helps to prepare local residents to support monitoring & research activities

Table 9

2. Enterprise Revenue Supporting Conservation

STC has developed a similar philanthropy program at Tortuguero that raised more than \$100,000 in donations in one year alone. A similar approach could be explored with the Bluff Beach enterprise targeting Bocas Town visitors. A second conservation financing strategy with the Bluff Beach enterprise would involve dedicating a percentage of year-end enterprise profit to support conservation costs.

The money generated by both of these financing strategies would then be utilized to support specific conservation activities at Bluff Beach. First, STC's environmental education effort could be expanded to include other communities in the region. Second, salaries of community beach patrollers as well as community research assistants would be paid from the tourism revenues and donations, resulting not only the generation of additional employment for local residents but also a significant increase in the monitoring and research activities at the site.

Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Enterprise Revenue Supporting Conservation - \$ for Local Environmental Education Programs - \$ for Local Research Assistants - \$ for Local Beach Patrols	Lack of Local Resident Conservation Awareness	- Solid Waste - Unsustainable Fishing Practices - Illegal Trade of Species - Dogs Eating Turtle Eggs	Species - Grouper - Snapper - Lobster - Shark - Conch - Cockles - Sea Turtles Habitat - Mangroves - Reefs - Beaches	- % of enterprise year-end revenue supporting local environmental education programs that target youth conservation awareness
	Lack of Research & Monitoring	- Illegal Trade of Species - Dogs Eating Turtle Eggs		- % of enterprise year-end revenue supporting the salaries of local research assistants and community beach patrol programs
	Lack of Economic Alternatives	- Illegal Trade of Species		- Targeting local resource extractors (e.g. turtle poachers, fisherman) with employment in guiding, research, and beach patrols

Table 10

3. Enterprise Employment

Successful community tourism enterprises create employment opportunities not only for guides, but also for a host of ancillary local services providers as well. Transportation (boat and vehicle)

will be required to move visitors from Bocas Town to the beach and back. Food and beverage services can be packaged with the turtle tours providing employment for local families. Finally, artisans can be trained to develop arts/crafts products that can be sold to visitors who come to the community.

One of the most successful models of sea turtle tourism in the region is that of the volunteer programs associated with the larger sea turtle projects that WIDECASST manages in sites like the Cahuita and Gandoca MPAs. Although Bluff Beach’s business model would begin by focusing on night/day tours rather than long-term volunteer placements, such an opportunity may exist for the community in the future, and could result in significant additional financial returns for the enterprise and local conservation activities.

Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Enterprise Employment - Local Naturalist Guides - Local Tourism Service Providers (food, lodging, transportation) - Local Artisans	Lack of Local Resident Conservation Awareness	- Solid Waste - Unsustainable Fishing Practices - Illegal Trade of Species - Dogs Eating Turtle Eggs	<u>Species</u> - Grouper - Snapper - Lobster - Shark - Conch - Cockles - Sea Turtles	- Training guides & local services providers in sustainable tourism & "best practices" (waste/water management, etc.) begins to develop environmental awareness with local adult populations
	Lack of Research & Monitoring	- Illegal Trade of Species - Dogs Eating Turtle Eggs	<u>Habitat</u> - Mangroves - Reefs - Beaches	- Training local naturalist guides for tourism also prepares them to support research and monitoring activities as beach patrollers and/or research assistants
	Lack of Economic Alternatives	- Unsustainable Fishing Practices - Illegal Trade of Species		- Targeting local resource extractors (e.g. turtle poachers, fisherman) with employment in guiding, research, and beach patrols

Table 11

Marketing Activities

The greatest challenge to successful tourism development that Solimar consistently identifies within its various tourism development projects around the world is *how to effectively link sustainable tourism products and destinations to target markets*. Solimar International began primarily as sustainable tourism marketing firm, and this core capacity remains one of Solimar’s greatest strengths. Innovative and effective branding and marketing strategies, cutting-edge digital and print promotion campaigns, and the ability to harness the power of online social networks and travel planning sites. These are just a few of Solimar’s tools to better link sustainable tourism products and services to domestic and international clientele.

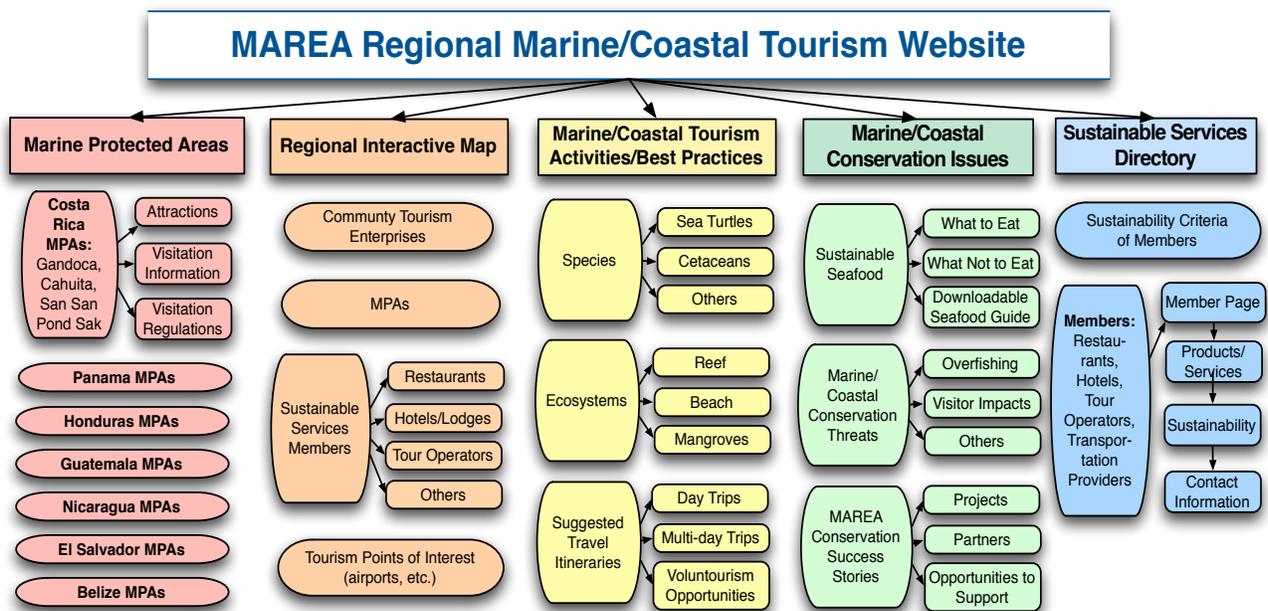
Regional Sustainable Marine & Coastal Tourism Website

A regional website could be developed to serve as a marketing platform to support a number of tourism-focused MAREA project activities and objectives. Such as website could promote:

1. *MAREA Marine Protected Areas*: The regional website could include an individualized web page for each MPA within the MAREA project that would highlight that MPA’s attractions, visitation information (how to get there, entrance fees, etc.) and visitation regulations. The MPA web pages could also feature a picture gallery of each protected

area, as well as a list of “sustainable service providers” (such as tour operators and boat drivers) who offer tourism products in that particular park and meet basic sustainability criteria (explained below).

2. *A Regional Interactive Map:* Web visitors could take an interactive tour of the entire region by navigating an interactive map that could feature MPAs, community tourism enterprises, sustainable service providers throughout the region, and other tourism points of interest such as airports, tourism offices, and hospitals.
3. *Marine/Coastal Tourism Activities and Best Practices:* The MAREA regional tourism website could include a number of suggested activities, organized by either featured species (e.g. sea turtles, dolphins, etc.) or ecosystems (e.g. reef, mangrove, etc.). The website could also highlight a number of suggested routes and itineraries in the region for day trips or multi-day adventures, as well as “voluntourism” opportunities.
4. *Marine/Coastal Conservation Issues:* A large component of the website could be focused on raising the conservation awareness of visitors to the region. The website would be the perfect platform to share sustainable seafood information and downloadable seafood guides, information on invasive species such as lionfish, and other overall marine/coastal conservation issues affecting the region. The website could also highlight MAREA’s project and partner’s “success stories” and provide specific opportunities for visitors to contribute to marine and coastal conservation efforts in the region.
5. *Sustainable Services Directory:* Finally, the regional website could include a directory of “sustainable service providers” who meet some basic criteria established by the MAREA project. For example, if a restaurant commits to only serving sustainable seafood products, then that business would be given a webpage on the website that features their products and services (short description, photos, how to get there, etc.). Most small businesses throughout the region lack this kind of web marketing presence, and such an offer might be all the incentive necessary for them to adopt basic sustainability criteria.



Project Activity	Indirect Threats	Direct Threats	Site Specific Target	Project Activity Example
Marketing of Sustainable Tourism Providers & Destinations	Lack of Visitor Conservation Awareness	<ul style="list-style-type: none"> - Solid Waste - Visitor Impacts - Invasive Species - Visitor Demand for Illegal Species - Wildlife Harassment - Illegal Trade of Species 	<u>Species</u> <ul style="list-style-type: none"> - Grouper - Snapper - Lobster - Shark - Conch - Cockles - Sea Turtles <u>Habitat</u> <ul style="list-style-type: none"> - Mangroves - Reefs - Beaches 	<ul style="list-style-type: none"> - Promoting MPAs and their visitation regulations - Promoting conservation awareness campaign messages and materials - Promoting sustainable tourism service providers who contribute to MAREA's conservation objectives

DMO Strengthening Activities

Through the Conservation of Central American Watersheds Program, Solimar worked in the Bocas del Toro region from December 2008 - November 2009 to help establish the Bocas Sustainable Tourism Alliance (BSTA). The BSTA is a membership and marketing program whose mission is to increase the competitiveness of sustainable tourism operations, generate increased revenue for tourism linked to conservation, and improve the environmental performance of local private sector tourism operations in and around Bocas de Toro.

As identified within the situational SWOT Analysis, a strong DMO serves as the foundation that will enable of a number of proposed MAREA tourism and conservation activities in the Bocas region. Simply put, working directly with and supporting the BSTA will be critical to MAREA's success in Bocas del Toro.

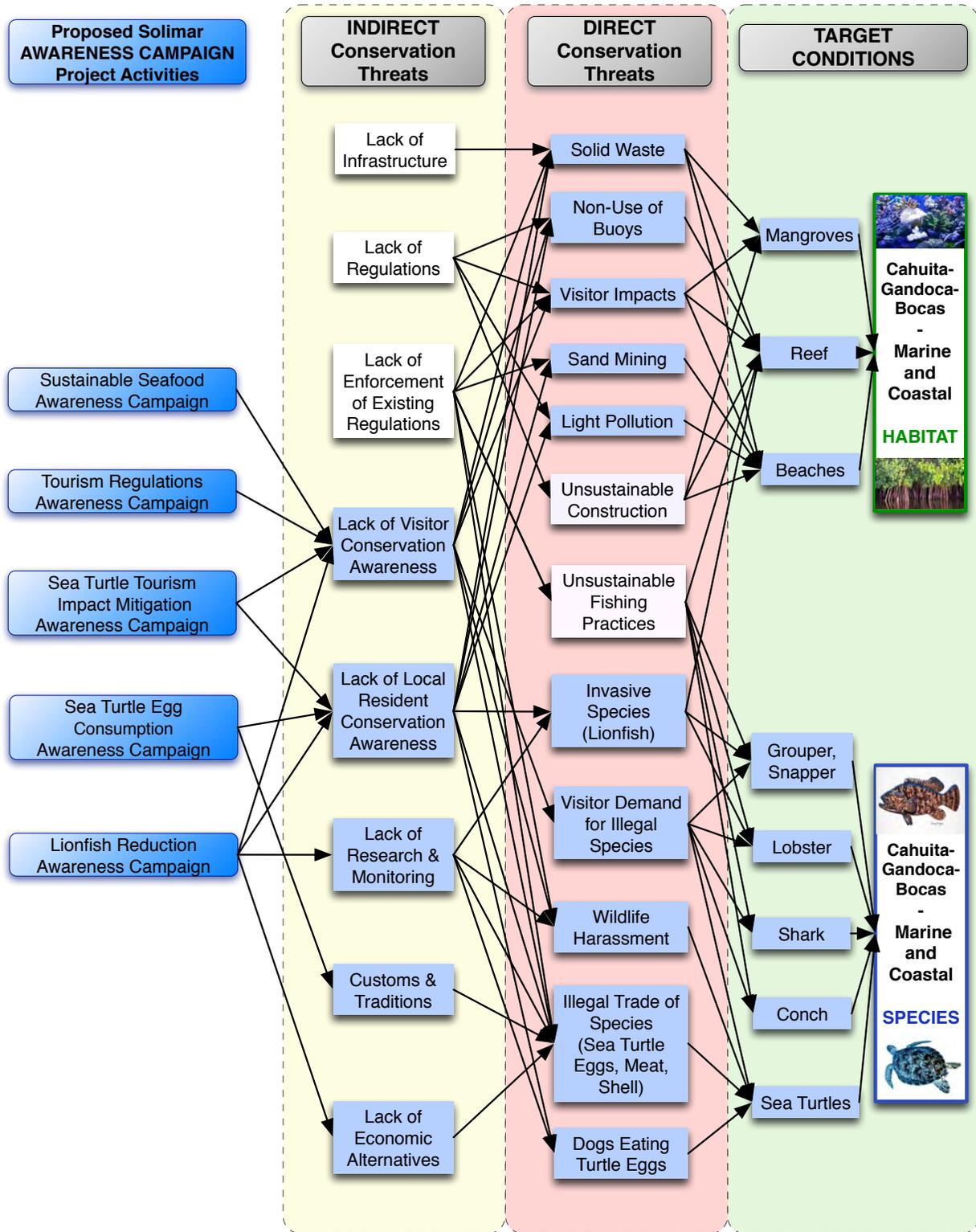
First and foremost, the BSTA is the ideal partner to sustain MAREA's tourism and conservation activities well beyond the life of the project. From conservation awareness campaigns to marketing to maintaining the overall sustainable vision of the destination, the BSTA is the local, long-term driver of sustainable tourism objectives in Bocas del Toro. Second, the BSTA has successfully liaised with private sector partners, the expat community, and local residents – all critical stakeholders to involve in MAREA project activities.

As with most nascent organizations, the BSTA continues to struggle to reach financial viability and meet organizational objectives. Membership dues help pay basic operational costs, but are not sufficient to sustain the staff needed for the organization to grow. Understaffed, the BSTA has dedicated most of its limited bandwidth to advocacy (coordinating a number of successful campaigns against destructive tourism development) and less on developing new sources of revenue such as tour commissions and development grants. To summarize, the BSTA has done great things in its inaugural year, but like any young organization...could use some help.

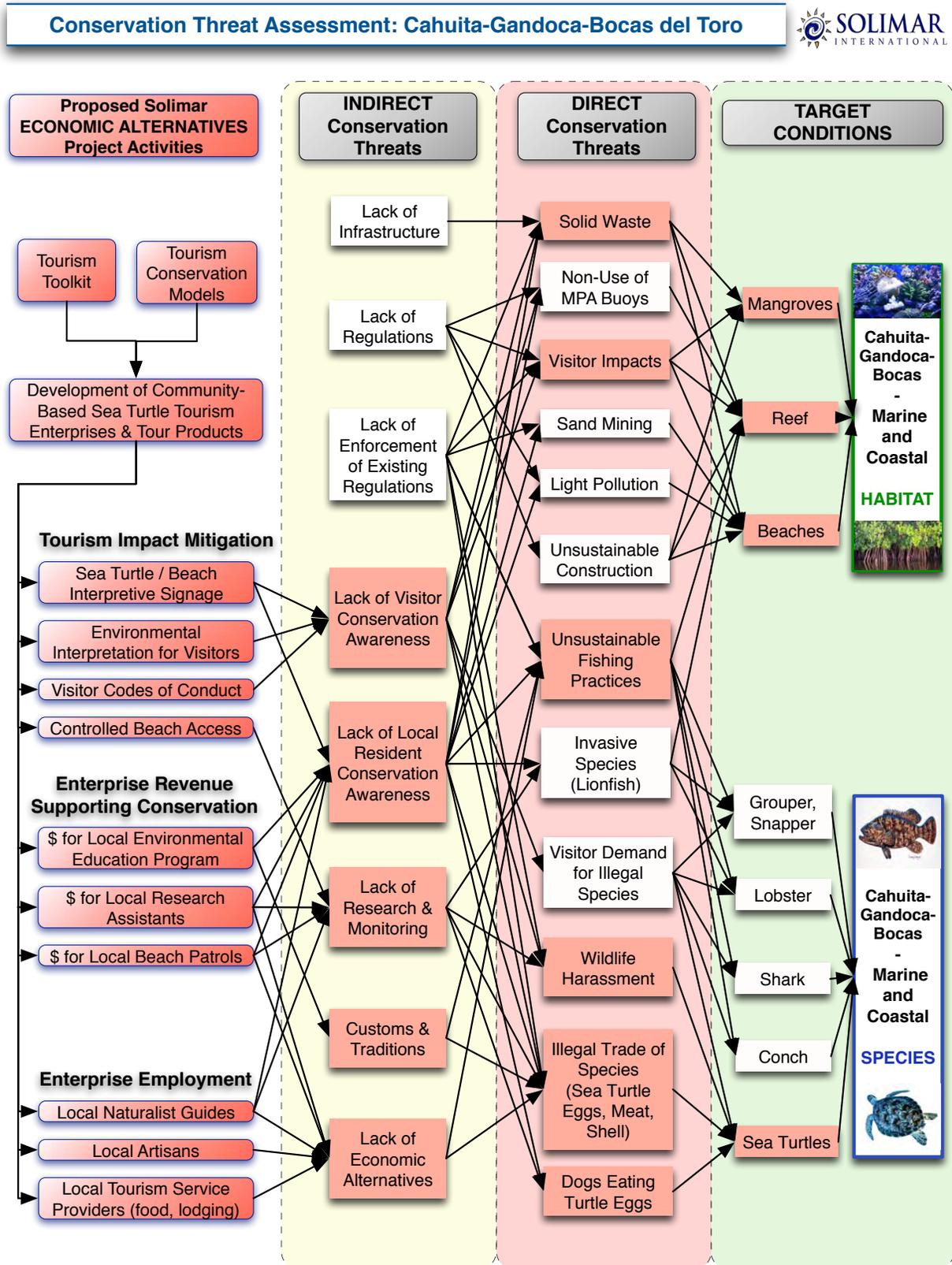
Solimar proposes to provide technical assistance to the BSTA primarily in areas that will help to solidify its financial footing and ensure its long-term presence. These activities could include business planning, product development, operations and management training, and sales and marketing support. In addition, Solimar proposes that the BSTA is more directly involved with the implementation of MAREA's tourism and conservation activities in the Bocas del Toro region to ensure their success and longevity.

Annex 1: Conservation Threat Assessment: Awareness Campaigns

Conservation Threat Assessment: Cahuita-Gandoca-Bocas del Toro



Annex 2: Conservation Threat Assessment: Enterprise Development



Annex 3: Cahuita-Gandoca-Bocas del Toro Site Assessment Itinerary

Date	Meetings
Monday, September 13th, 2010	<ul style="list-style-type: none"> • MAREA Core Team <ul style="list-style-type: none"> ○ Presentation to regional office staff ○ Presentation of year work plan and proposed deliverables • Augusto Rosales, MAREA Livelihoods Specialist; Mario Jolón, MAREA M&E Specialist
Tuesday, September 14th, 2010	<ul style="list-style-type: none"> • Augusto Rosales, MAREA Livelihoods Specialist; Mario Jolón, MAREA M&E Specialist • Juan Carlos Villagran, MAREA Endangered Species Specialist • Kit Kernan, Director of USAID Cuencas Project; MAREA technical staff
Wednesday, September 15th, 2010	<ul style="list-style-type: none"> • Sergio Martinez, MAREA Fisheries Specialist • Flight from San Salvador, El Salvador to San Jose, Costa Rica
Thursday, September 16th, 2010	<ul style="list-style-type: none"> • Dr. Emma Harrison, Scientific Director for the Sea Turtle Conservancy • Belinda Dick, Technical Assistant for the Inter-American Convention for the Protection and Conservation of Sea Turtles • Adriana Zuñiga, Asociación Costarricense de Turismo Rural Comunitario (ACTUAR)
Friday, September 17th, 2010	<ul style="list-style-type: none"> • Flight from San Jose, Costa Rica to Bocas del Toro, Panama • Renee Kimball, President of the BSTA; Allie Dennis, Coordinator of the BSTA; Arnaldo Napolean, Former President of Boteros Bocatoreños Unidos Boatmen’s Union; Natalia Castro, Biologist • Gabriel Jacome, Scientific Coordinator of Bocas del Toro Research Station for the Smithsonian Tropical Research Institute • Allene Blaker, Bocas Breeze • Arnaldo Napolean, Former President of Boteros Bocatoreños Unidos Boatmen’s Union • Allie Dennis, BSTA Coordinator
Saturday, September 18th, 2010	<ul style="list-style-type: none"> • Cristina Ordoñez, Sea Turtle Conservancy • Visit to Bluff Beach, Isla Colon • Visit to Long Beach, Isla Bastimentos • Arcelio Gonzalez, Community member of Salt Creek on Isla Bastimentos, and research assistant to STC’s turtle project at Long Beach, Isla Bastimentos • Angel Gonzales, Alianza Bocas & www.bocas.com
Monday, September 20th, 2010	<ul style="list-style-type: none"> • Kherson Ruiz, Asociación de Amigos y Vecinos de la Costa y la Naturaleza (AAMVECONA) • Travel overland from Bocas del Toro, Panama to Puerto Viejo, Costa Rica
Tuesday, September 21st, 2010	<ul style="list-style-type: none"> • Alaine Berg, Talamancan Association of Ecotourism and Conservation (ATEC) • Gladys Rojas, ASOMIPAG women’s group in Gandoca
Wednesday, September 22nd, 2010	<ul style="list-style-type: none"> • Claudio Quesada, WIDECASST Gandoca • Travel to San Jose
Thursday, September 23rd, 2010	<ul style="list-style-type: none"> • Didiher Chacon, Latin American Director of WIDECASST

Friday, September 24th, 2010	<ul style="list-style-type: none"> • Flight out of San Jose to United States
Wednesday, October 27th, 2010	<p>Río Caña</p> <ul style="list-style-type: none"> • Orlando Grenald, Owner of the hotel under construction in Río Caña, President of the School Association • Patricia Robinson, Director, Río Caña School • Ausencio Palacio, Former Governor, Current President of Asociación para la Protección de los Recursos Naturales Ngöbe-Buglé (APRORENANB) • Genaro Castillo, Secretario APRORENANB, Assistant to Cristina Ordoñez, Playa Chiriquí sea turtle research project
Wednesday, November 3rd, 2010	<ul style="list-style-type: none"> • Allene Blaker, Bocas Breeze • Allie Denis, BSTA Coordinator • Lisandra & Yunice, Sweet Amy Restaurant & Caribbean View Hotel, Old Bank, Isla Bastimentos • Enrique, Hotel Bastimentos • Del Mira, Roots Restaurant, Old Bank, Isla Bastimentos
Wednesday, November 10th, 2010	<ul style="list-style-type: none"> • Ofilio Gonzales, Sub-Administrator, ALIATUR, Salt Creek Community

Table 12

Annex 4: Organizational Profile: Bocas Sustainable Tourism Alliance (BSTA)

The BSTA is a nascent destination management organization (DMO) founded in 2009 by the USAID Conservation of Central American Watersheds program. The formation of the organization followed the National Geographic Society Center for Sustainable Destinations' methodology for Geotourism Stewardship Councils. This process began by convening meetings with local stakeholders to determine the destination's needs and priorities. Membership was opened to local businesses, indigenous community-based tourism groups, artisans, farmers, transportation providers, and NGOs.

The BSTA currently has 30 members in the Bocas del Toro region. Their members are private sector tourism enterprises (restaurants, eco-lodges, local hotels, local press, tourism attractions) and six indigenous community groups representing communities throughout the archipelago (Popa, Sandubidi/Popa II, San Cristobal, Quebrada Sal, Bahia Honda, Soposo). Their stated mission is to support sustainable tourism development, promote responsible travel, and give incentives for travelers and local residents to understand and protect the local culture and environment that surround them. The vision of the BSTA is to function as a forum for like-minded businesses and organizations to work collaboratively to promote common goals.

So far, the BSTA has helped to organize opposition against the survivor-type "Desafio" television show filming on Bluff Beach and lionfish roundups; they have lead beach cleanups, supported local arts and crafts from indigenous communities, helped to raise money for local social programs, and assisted in developing a "Green Passport" promoting tourism attractions on both sides of the border between Panama and Costa Rica in collaboration with ATEC. The BSTA also provides tourists with information on sustainable tourism attractions in the region and general information such as how to get to Costa Rica, banking hours and locations, transportation to communities, etc.

The BSTA is currently seeking legal registration as a not-for-profit organization; however, completed paperwork has not yet been reviewed and certified by authorities. This delay poses a threat to the BSTA as an organization since forecast revenue streams from arts and craft sales and tour commissions cannot be realized without legal registration. When this situation is resolved the BSTA would like to continue to promote its members and the destination, as well as push for an expansion to include awareness building activities and educational programs with a focus on sustainable tourism and conservation. The BSTA would also like to work to address local issues (buoy use, waste management) and work with local boat driver unions to expand boat tourism options. They would also like to work with indigenous communities to expand and improve tourism offerings to provide economic alternatives for livelihoods based primarily on resource extraction.

Potential points of collaboration:

- Support for content creation on awareness campaigns
- Campaign implementation in Bocas del Toro
- Leveraging support for campaigns and other initiatives among local businesses
- Long-term implementation of sea turtle tourism toolkit and model
- Assistance in leveraging support of public sector actors

- Providing support for alternative livelihoods to local community groups
- Local implementers for regional marketing initiatives