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DELIVERABLE 3: FINAL ASSESSMENT OF TOURISM POTENTIAL ALONG COLOMBIA'S PACIFIC COAST

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EXECUTIVE SUMMARY

The USAID Colombia BIO-REDD+ Program: Biodiversity - Reduced Emissions from Deforestation and Forest Degradation (BIO-REDD+) program plans to implement a set of activities to strengthen community ecotourism in the Nuquí/Utría National Natural Park (PNN in Spanish) and Bahía Málaga/Uramba PNN areas on the Pacific Coast. In these areas, both government and private institutions have recognized in ecotourism an alternative livelihood for local communities that promotes environmental awareness and conservation. While several activities are already ongoing, BIO-REDD+ contracted Solimar International in December 2012 to conduct a more thorough tourism site assessment of both areas, in an effort to develop a more comprehensive strategy to develop community ecotourism on the Pacific Coast – one that encompasses the various players and levels within the value chain.

By analyzing the eight factors in the Tourism Assessment Methodology, Solimar found that Nuquí/Utría PNN and Bahía Málaga/Uramba PNN are similar in that the tour product in both areas is based on nature. The Nuquí/Utría PNN area is a world-class product that needs only a little bit of a push to become a world-renown destination. The six communities and the PNN Utría offer complementary, high-class products; if packaged into a comprehensive tour, the region will be well positioned to increase its tourism sales.

The Bahía Málaga/Uramba PNN area's market is established—it is a more middle class and backpacker, local market that is price sensitive. All communities in the region offer a similar product (mangrove tours); therefore new product development and differentiation is advisable to maintain the market's interest.

Communities in both areas are environmentally conscious and strive to provide a good experience to tourists. In the Nuquí/Utría PNN area, the value chain functions fairly well and needs to only continue strengthening the collaboration that has been started. In the Bahía Málaga/Uramba PNN area, the value chain does not work together cohesively, and a dialogue is needed to begin working toward collaboration.

Community enterprises in both areas lack basic business management and accounting skills, as well as destination marketing strategies. For these reasons Solimar recommends a comprehensive operations and management course for community tourism enterprises, with participants from both areas, and the design of marketing strategies and implementation of discrete marketing activities for each regional destination. Small-scale infrastructure development, such as camping platforms, kayaks, and trail signage, would further strengthen the product offer in both locations.

Within this document the reader will find detailed information about the team's findings in each area, as well as recommendations for tourism activities that the

BIO-REDD+ team can implement during the project's remaining 18 months, and finally, proposed changes to the grant agreements or applications from Mano Cambiada, the Asociación de Guías de Pichindé, and Bahía Málaga La Plata.

PREVIOUS BIO-REDD+ TOURISM ACTIVITIES

The USAID Colombia BIO-REDD+ Program: Biodiversity - Reduced Emissions from Deforestation and Forest Degradation (BIO-REDD+) program plans to implement a set of activities to strengthen community ecotourism in the Nuquí (Utría National Natural Park) and Bahía Malaga (Uramba National Natural Park) areas on the Pacific Coast. In these areas, both government and private institutions have recognized in ecotourism an alternative livelihood for local communities that promotes environmental awareness and conservation.

Nuquí and Utría National Natural Park Area

In May 2012 BIO-REDD+ signed a grant agreement with Mano Cambiada, a community tourism operator in Nuquí that holds the exclusive concession to provide ecotourism services in the Utría National Natural Park. The main objective of the grant is to address five key areas of weakness as identified by BIO-REDD+ at the initial phases of the project: 1) strengthen administrative and financial processes; 2) improve the ecotourism service offering along the value chain; 3) increase the number of tourists visiting the area; 4) strengthen the cultural component in the tourism service offering; and 5) foster a strengthened sense of belonging and ownership of the territory, its biodiversity and cultural identity within the Nuquí population, especially among children and young adults. While the grant agreement addresses some of the constraints that Mano Cambiada is facing, it is limited to this single operator and does not adequately highlight the issues related to other operators and players along the value chain. Recently, other community tourism operators located to the south of the National Natural Park have approached BIO-REDD+ with project proposals focused on enhancing the quality of their services and products in order to play a more significant role in the tourism value chain of the area. The Asociación de Guías de Pichindé, for example, submitted a grant application that was recently approved by a technical evaluation committee and submitted to USAID for approval.

In September 2012, BIO-REDD+ hired an ecotourism consultant, Jascivan Carvalho, to lead a site visit with representatives from three international tour operators who were in Colombia to attend the Latin American Travel Mart in Cartagena. Mr. Carvalho and the group spent three days in Nuquí visiting the tourist sites under the stewardship of Mano Cambiada, in order to assess the potential for including Nuquí in their tourist packages. As a result of this visit Mr. Carvalho produced a report that provided general observations as to the areas of weaknesses that Mano Cambiada needed to address and provided recommendations for BIO-REDD+ to adjust the focus of the grant to Mano Cambiada. While Mano Cambiada has made some progress on the implementation of the grant activities, it has become clear that adjustments in the implementation approach and timeliness need to be made in order to ensure results are achieved by the end of the project – not only for Mano Cambiada but for other operators and service providers along the value chain.

Bahía Málaga and Uramba National Natural Park Area

Activities in Bahía Malaga have been more limited than those in Nuquí. BIO-REDD+ is currently providing assistance to the *consejo comunitario* to develop a grant application to receive BIO-REDD+ funding. During a visit to the area in August 2012 by BIO-REDD+ team members, the potential to develop ecotourism activities surfaced because Bahía Malaga already attracts crowds of weekend visitors, especially during long weekend holidays. Two years ago Parques Nacionales Naturales de Colombia declared a marine protected area that is starting to be designed and implemented. Therefore, the consejo plans to include activities related to ecotourism development in their grant application. This assignment is helping guide BIO-REDD+ as to which interventions will have the most impact in terms of biodiversity conservation and improving livelihoods.

ASSESSMENT METHODOLOGY

Solimar International’s approach to this assignment is grounded in the Tourism Assessment Process (TAP), developed by Conservation International and The George Washington University, that is a comprehensive and participatory approach to assessing a destination’s tourism potential in terms of markets, the positive and negative impacts on natural and cultural resources, the socioeconomic implications, as well as the resource needs. Solimar utilized the TAP methodology to analyze the following eight site conditions and factors. The report’s subsequent sections on Findings and Recommendations are organized by geographic region, and then by these eight factors:

Factor	Description
1. Market Demand	Demonstrated demand is the most logical and strategic way to identify tourism products and services with the greatest potential.
2. Attractions Inventory	Attractions are the magnets that draw visitors to the destination. The assessment examines both existing attractions and attractions that have the potential for future development.
3. Infrastructure and Services	Inadequate infrastructure and a lack of basic services can hinder the development of a tourism destination. Adequate infrastructure presents a key challenge to the development of these two areas as tourism destinations; the key to success will be to strike a balance between adequate infrastructure while maintaining as much of the pristine character of the zone as possible.
4. Supply and Competitiveness	Other destinations often offer similar products and services and compete to attract the same travel markets. Assessing supply and competitiveness helps ensure new concepts that are competitive within the overall tourism industry are recommended.
5. Human and Institutional Capacity	<p>Tourism is a service industry that lives and dies by the quality of the experience that local tourism service providers deliver to clients. In light of the exponential growth of peer-to-peer online information sharing that occurs through travel websites such as TripAdvisor and countless travel forums, reports of bad service travels fast these days and can ruin a business nearly overnight.</p> <p>The challenges of establishing a solid foundation of human and institutional capacity for managing tourism is particularly challenging in rural and isolated destinations like Nuquí/Utría, and even more so in Bahía Málaga/Uramba, where few local residents have ever worked directly with tourists.</p>
6. Socio-economic Considerations	The negative impacts of tourism, particularly to the social and cultural integrity of a community, usually occur when the values and behaviors of the local community are threatened or compromised, even when resulting from interventions with the best intentions. This can include changes to family structures, relationships, collective traditional lifestyles, and moral values. On the other hand, tourism can help foster

	pride in local traditions and culture, decrease rural flight and foster increased global understanding.
7. Environmental Considerations	Sustainable tourism has the potential to not only mitigate the potentially harmful impacts of visitation to a natural area, but it can also act as a powerful tool to support conservation of the ecosystems upon which it depends. At its best, sustainable tourism presents an opportunity to better align the economic activities and needs of rural populations, particularly those living in or around protected areas, with biodiversity conservation objectives.
8. Value Chain Analysis	Solimar applies Porter's Value Chain theory, which posits that a firm or industry can, through value chain analysis and strategic planning, maximize profitability and competitive advantage by understanding and then seeking to maximize the "value added" (also referred to as productivity or efficiency) at each link in the supply chain that delivers a product or service. In the case of Colombia's Pacific Coast, it allows us to identify and incorporate ancillary economic activities (existing and potential) such as transportation, <i>artesanías</i> , and food production, to create a more complete development model. Moreover, it allows us to determine how to reach the markets identified in the market analysis and how to sell the specific products that we recommend for development.

BACKGROUND RESEARCH AND KEY FINDINGS

For both geographic areas the team completed extensive online research, including TripAdvisor and travel blogs such as Thorn Tree, tripwolf, and Blogabond; reviewed Colombian guidebooks such as Lonely Planet and National Geographic; and reviewed the reports of and consulted with Mr. Jascivan Carvalho, who had previously completed two tourism-related consultancies for BIO-REDD+. As a result of this research we learned that there is very little public tourism information related to either of these two geographic areas. As such, the international tourism market is not well informed on the offerings of these two areas.

The subsequent section is organized by geographic region, then by the eight TAP factors as previously mentioned, and lastly by findings and recommendations. Where appropriate, suggested changes to grant agreements or applications are made after the recommendations section.

Further information on the online resources consulted can be found in Annex I—References.

Nuquí and Utría National Natural Park Area

TAP #1: Market Demand Analysis

In the Nuquí/Utría National Natural Park (PNN in Spanish) area, the target market segment, due to the high access costs, is upper middle class people primarily from Medellín, but also from Bogotá and foreign countries. The region lacks a cohesive destination marketing strategy and brand, and instead relies on the Mano Cambiada and PNN Utría websites, which are extremely limited in their marketing functions, as well as word-of-mouth. There is a missed opportunity to develop and distribute promotional materials in Bahía Solano, in the Nuquí airport, and in Mano Cambiada's Nuquí office. As a result of our conversations



Nuquí Pacífico branded life jackets

with Mr. Carvalho and Colombian tour operators, and owing to the uniqueness of the product, Solimar has found that there is indeed interest by Colombian and international tour operators in selling the destination.



Jovi beach

TAP #2: Attractions Inventory

As a destination, the Nuquí/PNN Utría area is a world-class, spectacular, unique tourism product. The region boasts ocean and beaches, rainforests, rivers, inlets, mangroves, coral reefs, waterfalls, hot sulfur springs, humpback whales, dolphins, sea turtles, myriad birds, reptiles, flowers, and more. July-October is the high season for tourism in the area because the humpback whales come into the Utría inlet to give birth. In the rainforest there several trails have been developed to allow for hiking and bird watching. In addition, the local communities are warm and laid back, providing the perfect respite for relaxing while connecting with the local people. There is definitely something for everyone, and plenty to see and do to comprise a 5-7 day tour package.

TAP #3: Infrastructure and Services

It is difficult and costly to access the area, but this has also kept the area free from mainstream tourism and allowed it to stay pristine. One can only access Nuquí, the region's "jumping off point" by small plane; only three airlines (Satena, ADA, and AEXPA) fly to Nuquí and infrequently at that. Exacerbating the infrequency of the flights is the fact that the Satena flight begins in Bogotá, then stops in Medellín to pick up more passengers before going on to Nuquí. If one misses the flight out of Bogotá, he/she misses the flight out of Medellín, and therefore cannot get to Nuquí for two more days.

Once in Nuquí the only way to travel to PNN Utría and the other communities is by small ocean craft. Boat fuel is expensive and the price is passed along to the

consumer, although boat service is readily available and the waters are calm. Within the communities, tours of rivers and mangroves are made in traditional, carved boats, which present no cost to the community and actually add to the visitor experience.

The lodge in PNN Utría, run by Mano Cambiada, and the posadas in the other communities are basic, but comfortable and traditionally styled, with indoor bathrooms.

Communications access is incredibly difficult, with little to no access to Internet or a cell phone signal. Despite this the communities seem to have worked out transport logistics fairly well; however, the lack of communications also means it would be difficult to find healthcare for visitors should they experience an emergency.

TAP #4: Supply and Competitiveness

As stated above under Attractions Inventory, the region is quite competitive in terms of its product offer. There are few other regions in Colombia, and perhaps even the world, that rival its splendor and the abundance of its flora and fauna. In addition, each community's product is unique and therefore complementary to the other products: Termales has the hot sulfur springs, rainforest trail, and sea turtle beach; Joví has a river tour and waterfalls; Coquí has a mangrove tour; Jurubirá has a hot sulfur spring and colorful community; Guachalito has wide, pristine beaches; Utría has the humpback whales, coral reefs, and more mangroves, rainforest trails, and sea turtle beaches. Combined, these specific products form an amazing 5-7 package in which the visitor is not partaking in the same activity twice.

TAP #5: Human and Institutional Capacity

The communities in this area are very friendly, and there is a higher level of consciousness about client satisfaction than we would have guessed beforehand. Posada staff were careful to pay attention to detail, setting up our mosquito nets before bed and greeting us first thing in the morning with fresh papaya. Guides have a high level of knowledge of the area's flora and fauna, and visitor interpretation. Community members and guides are keenly aware of the importance of environmental preservation, understanding that the tourism product in the area is entirely based on a thriving ecosystem.

However, no one speaks any English, causing them to lose sales when non-Spanish speakers call, and hardly anyone has been formally trained in business administration, accounting, etc. Organizations do not have business plans or pricing strategies and are not tracking visitor numbers, sales figures, etc. We encountered logistical confusion within Mano Cambiada in regards to what time the boat would depart Nuquí, and after completing the roughly one hour trip from Nuquí to Utría, learned that the staff realized they did not have any cooking oil on

hand and would have to take the boat back to town. Mismanagement does not only reflect unprofessionalism, but it can be unnerving to clients, and in this case, necessitated that the community make an extra, expensive boat trip to procure more cooking oil.

TAP #6: Socio-economic Considerations

Tourism represents an important alternative livelihood in this area, where the people are otherwise dependent on fishing and subsistence-level, garden-sized agriculture. As mentioned previously, the communities in the Nuquí/PNN Utría area generally work well together, and seem to understand the importance of working together. However, conflicts sometimes arise, and a bit more could be done to ensure a more equitable distribution of the economic benefits from tourism. As the tourism pioneer in the area and PNN Utría concessionaire, Mano Cambiada receives the lion's share of visitor inquiries.

TAP #7: Environmental Considerations

As mentioned above, there is a high level of environmental awareness among staff and community members. Everyone seems to understand that their tourism product is based on the conservation of their surrounding environment. Some businesses already use solar energy, and the beaches are incredibly clean.

TAP #8: Value Chain Analysis

As mentioned various times above, the value chain works together adequately, but there is room for improvement. More could be done to ensure a more equitable distribution of the economic benefits from tourism.

Bahía Málaga and Uramba National Natural Park Area

TAP #1: Market Demand Analysis

In the Bahía Málaga/Uramba PNN area, the target market segment is backpackers and middle class Caleños and people from surrounding areas, due to the relative ease of access along the highway from Cali or Buga to Buenaventura. Families come to this region more so than Nuquí/Utría because of the easier access and lower costs. The area is a weekend getaway spot; it caters to the “turismo popular” market. It is not clear that there is interest by Colombian or international tour operators in selling the destination; there is likely not a significant enough profit margin for them to do so.

As in Nuquí/Utría, the Bahía Málaga/PNN Uramba region lacks a cohesive destination marketing strategy and brand, and relies almost wholly on word-of-mouth marketing. The amount of information online is very limited. There is a

missed opportunity to develop and distribute promotional materials in Buenaventura's tourism port.

The clientele is price sensitive. It is an affordable destination in which lodging ranges between US\$10-20 per room (rooms can often accommodate 4-6 people) and food is cheap. Tours are about US\$10-15 per person. Rates could not be raised much before the market would begin to dry up.

TAP #2: Attractions Inventory

The Bahía Málaga/PNN Uramba area offers a satisfactory nature-based product. Although not as spectacular or pristine as those in Nuquí/PNN Utría, the region does offer ocean and beaches, rainforests, rivers, mangroves, two waterfalls, humpback whales, otters, myriad birds, reptiles, flowers, and more. Walking along the beach from one community to the other is a common pastime, and the waves have formed interesting caves in the cliffs in front of Juanchaco and Ladrilleros. As in Nuquí/PNN Utría, the local communities are warm and laid back. Ladrilleros, owing to its open oceanfront, is said to be a surfer's paradise, although local community members told us there is only one person who offers surf instruction.



**Cascada La Sierpe,
Bahía Málaga La Plata**

However, all of the communities offer essentially the same product: mangrove tours. Unique products were found in Juanchaco, off the coast on the islands of Palma and Ismael, where hiking trails and kayaking routes have been envisioned. The community that has the most to offer is Bahía Málaga La Plata, which has the two waterfalls, miles and miles of tranquil mangrove-lined inlets where birds and otters linger, the Ruta de la Piangua (a type of black clam), and a vibrant community. The community has created a tourist-facing Facebook page under the name EcoManglar: www.facebook.com/pages/ecomanglar/190354741094818.

TAP #3: Infrastructure and Services

It is relatively easy and inexpensive to access the area, which has allowed for a more mainstream version of tourism that has also unfortunately brought with it a lot of garbage. One can access Buenaventura, the region's "jumping off point" relatively easily and quickly via highway from Cali and Buga. High-speed boats can be taken fairly regularly from Buenaventura to the communities along the bay.

Boats are the quickest way to move from one community to another, although one can walk along the beach between Juanchaco, Ladrilleros, La Barra, and Puerto España when the tide is low. Again, boat fuel is expensive and the price is passed along to the consumer. The ocean is much more unpredictable here than in Nuquí/Utría; our team was fearful of capsizing on one particular boat between Bazan Bocana and Juanchaco. Safety should be of utmost concern when dealing with tourists; transporting tourists in relatively small craft over rough seas should not be done.

In Bazan Bocana we were taken on a mangrove tour in a motorboat. Not only is it costly to procure the fuel, it detracts significantly from the visitor experience, as it is loud and produces gas fumes.

The posada in Bahía Málaga La Plata is rustic, but the style of the other posadas we stayed in (Bazan Bocana and Juanchaco) is reminiscent of the 1970s. Mattresses are old and uncomfortable. Mosquito netting was not available in Bazan Bocana and Juanchaco; however, in-suite bathrooms were. While we did not stay overnight in La Barra or Puerto España, we understand from speaking to community members that there is a complete lacking of accommodations in both places. Camping seems to be the only option, and there are no toilets or changing areas.

Communications access is also inconsistent, with little access to Internet. However, there does seem to be access to a cell phone signal in most areas. As mentioned above, consistent, reliable access to communications is necessary in case of emergency.

TAP #4: Supply and Competitiveness

As stated above under Attractions Inventory, the region offers a nature-based version of “turismo popular” to the local market. Because many of the communities in the area offer the same or very similar products, they are vulnerable to price competition. For example, EcoNatal, the tour operation arm of the consejo comunitario in Ladrilleros, told us that they are often undercut on price for their mangrove tour by the town’s hotels, which are not owned by community members.

As mentioned under Infrastructure and Services, La Barra and Puerto España have become somewhat popular backpacking spots, Bahía Málaga La Plata offers unique products in its waterfalls and Ruta de la Piangua, and Juanchaco has the opportunity to develop unique products.

TAP #5: Human and Institutional Capacity

Like in Nuquí/Utría, communities in this area are friendly, and guides have a high level of knowledge of the area’s flora and fauna and visitor interpretation. Well-trained guides appear to have been trained by the Servicio Nacional de

Aprendizaje (SENA). Community members and guides are keenly aware of the importance of environmental preservation, understanding that the tourism product in the area is mostly based on a thriving ecosystem. There is a satisfactory level of consciousness about client satisfaction.

Yet again, no one speaks any English, and hardly anyone has been formally trained in business administration, accounting, etc. Organizations do not have business plans or pricing strategies and are not tracking visitor numbers, sales figures, etc. As stated before, mismanagement does not only reflect unprofessionalism but can leave a bad impression with clients.



Bahía Málaga La Plata

TAP #6: Socio-economic Considerations

As with Nuquí/Utría, tourism represents an important alternative livelihood in this area, where the people are otherwise dependent on fishing and subsistence-level, garden-sized agriculture. The communities seem to have little if any interaction among one another, with perhaps the exception of Juanchaco and Ladrilleros, which are only 30 minutes apart on foot. Conflicts sometimes arise, for example, between EcoNatal and the hotels in Ladrilleros (the hotels sell “all inclusive” packages to their guests), and more could be done to ensure a more equitable distribution of the economic benefits from tourism across the region.

TAP #7: Environmental Considerations

As mentioned above, there is a high level of environmental awareness among staff and community members. Everyone seems to understand that their tourism product is based on the conservation of their surrounding environment. However, In La Barra and Puerto España, where backpackers come but have nowhere to deposit their garbage or use comfort facilities, they leave trash behind. Also, Buenaventura dumps its garbage into the bay, and a current carries it north and

deposits it on the beaches of the communities, notably Juanchaco and Bazan Bocana. The communities organize beach cleanups, but the tide continues to carry more garbage in day after day. Unfortunately the key to solving this problem lies in Buenaventura, not in the Bahía Málaga region.

TAP #8: Value Chain Analysis

As mentioned various times above, there is little interaction between the various members of the value chain; there is a great deal of room for improvement. More could be done to ensure a more equitable distribution of the economic benefits from tourism.

RECOMMENDATIONS

Nuquí and Utría National Natural Park Area

Marketing Assistance

The Solimar team recommends several marketing activities for Nuquí Pacífico (Mano Cambiada's consumer-facing) website, to increase sales and therefore raise revenue for the Mano Cambiada corporation:

- Creation of a marketing alliance and brand for the destination that includes Mano Cambiada and the nearby communities of Jurubirá, Joví, Coquí, Guachalito, and Termales. We recognize that Mano Cambiada and some of the communities are members of the Red Colombiana Verde; however, we do not feel that the Red does an adequate job of inbound marketing for the destination. A marketing alliance would create an economy of scale for individual communities that could not afford to take on marketing activities on their own, and would also help evenly distribute the amount that goes into marketing the destination.

- Update the Nuquí Pacífico (Mano Cambiada's consumer-facing; <http://nuquipacifico.com/>)

website using inbound

marketing tools. Nuquí Pacífico needs to increase sales in order to ensure the sustainability of the Mano Cambiada corporation. Currently, there is a gap between the products and the potential clients that would be interested in buying the product. 85% of global tourists conduct online research while planning their vacations and consider the Internet their main source for travel planning information. The average traveler visits approximately 22 travel sites over an average of 9.5 planning sessions prior to booking, therefore it is necessary to have a website that provides all the information that potential clients need to make a decision. It is also important to improve Nuquí Pacífico's website with inbound marketing tools so that it ranks higher on search engines. Lastly, the website currently only features Utría and Nuquí; it

A **marketing alliance** between Mano Cambiada and the communities of Nuquí, Joví, Guachalito, Termales, Jurubirá, and Coquí is intended to promote the destination, increase sales, and lower the operational costs of the members.

A marketing alliance would achieve the following:

- Creation of a website that presents packages that include all communities, and also contains information about each destination and the products and services they offer
- A system on the website for potential clients to send inquiries and make reservations online for packages
- The communities can share the cost of website maintenance, development and printing of promotional materials, and for the costs to run a small sales office and pay a sales representative to coordinate all the reservations
- Poll funding to attend tourism fairs and host visits by tour operators in Colombia
- Represent the alliance in front of governmental organizations and NGOs to acquire funding, concessions etc.

may make sense, if Mano Cambiada is amenable, to turn Nuquí Pacífico into the regional destination's brand and website.

- Develop a sales catalog for tour operators that includes sample itineraries and pricing and payment policies for both Colombian and international tour operators. Tour operators cannot sell packages to the destination without this information; at this point the best they can do is refer tourists to Mano Cambiada, which does not benefit the entire value chain.
- Target hotels, hostels, and restaurants in Medellín for posting tourism information and distributing brochures. We understand that Josefina Klinger, the head of Mano Cambiada, made an alliance with a hostel in Medellín in early December 2012 to allow Mano Cambiada to conduct marketing and sales from their office, specifically targeted at free and independent tourists (FITs). This is a great first step toward penetrating the Medellín market.
- Develop promotional materials (posters, brochures) for tourists that can be placed in the Nuquí airport, and distributed at Mano Cambiada's office in Nuquí.
- Determine a place (airport, Internet café, travel-related business, etc.) in Bahía Solano, just north of Utría, where the aforementioned promotional materials can be distributed. Mano Cambiada told us that tourists often come to Utría overland from Bahía Solano, based on the suggestion of people there, but they do not have a good understanding of what the attractions are, where to stay, or even the fact that as a PNN, Utría has special rules that they must abide by. An information source in Bahía Solano would capture a greater share of potential visitors to Utría and ensure that the tourists are better informed when they arrive.

Package Products to Enhance the Visitor Experience and Strengthen the Value Chain

Because of the plethora of attractions in the area, we do not find a need to develop new tourism products, but do recommend packaging all of the products into one holistic tour package.

- Develop 5-7 day tour packages that include visits not only to PNN Utría, but visits to Jurubirá, Joví, Coquí, Guachalito, and Termales as well. Solimar has created a sample six-day itinerary that can be found in Annex II - Nuquí/PNN Utría Sample Itinerary. A tour package could be sold at a higher margin, and would also allow tour operators to sell the tour to their clients. If tourists are staying longer in the area and spending more money when they are there, everyone along the value chain will benefit.
- Include cultural activities in the packages, such as singing, dancing, gastronomy, etc.
- Make basic improvements to trail infrastructure, such as turning steep inclines into staircases made from timber steps (which will also decrease erosion), creating switchbacks in the trail to decrease the amount of incline, adding rope handrails, etc.

- Identify tour operators that provide itineraries targeted toward the SAVE (scientific, academic, volunteer, and educational) market, such as higher-education science trips, sea turtle research, etc., to explore the possibility of offering tours to Nuquí/PNN Utría. SAVE itineraries would assist the PNN's collection of scientific data or conservation activities while also providing visitors with a once-in-a-lifetime experience.

Improve Infrastructure and Services

- Each community should have its own motorboat so as to ensure the most equitable distribution of work, and therefore, economic benefits. Joví currently does not have its own boat, and therefore relies on transport from other communities to receive tourists.
- Tour packages should plan for anyone originating in Bogotá to stay overnight in Medellín before connecting on to Nuquí, so as to avoid missing the connection.
- Each community organization should have an emergency plan in place that they practice regularly, in case a tourist should have an emergency. Emergency plans should include contact information for the nearest airport, local doctors, and national-level emergency evacuation transport operators. Further, staff should be trained in First Aid.

Enhance Better Stakeholder Dialogue

- Encourage better dialogue between all stakeholders—Mano Cambiada and all the other communities. At present it seems there is some level of logistical transport planning between communities, but bringing everyone to the table regularly would ensure a more equitable distribution of the benefits from tourism, and would help the region market itself as a cohesive destination. The marketing alliance mentioned above under Marketing Assistance would provide the forum for enhanced dialogue.

Strengthen Human and Institutional Capacity

- Solimar recommends a comprehensive operations and management course for community tourism enterprises be given to at least one person from each community organization in this area and the Bahía Malaga/PNN Uramba area, for a total of no more than 15 participants, so that the trainer will be able to

work as closely with each participant as possible.¹



Consultant Lucia Prinz (far left) discusses tourism operations and management topics with Mano Cambiada staff

- In addition to the tourism operations and management course, we recommend a course that covers housekeeping and facilities management, food preparation and hygiene, and customer service.
- Hire at least one person with basic English language skills to receive sales inquiries on behalf of the marketing alliance. At a minimum, this person should be able to take the inquiring party's information and pass it along to the sales team.

Further Assist Environmental Conservation

- Although the communities have a high environmental consciousness, more could be done to communicate the importance of conserving the environment to visitors. Here we recommend a short environmental best practices training course, which would include the creation of codes of conduct for staff and visitors, to be displayed visibly throughout the organizations' sphere of influence.²

¹ Solimar's Tourism Operations and Management training program is designed to help local entrepreneurs manage and grow community-based tourism enterprises by training participants in the "nuts and bolts" of running a small tourism enterprise. From reservation and payment systems to tour logistics to financial procedures to conflict resolution, the program teaches local entrepreneurs the day-to-day tasks of running a small tourism enterprise. While we understand that training has been provided to Mano Cambiada in the past, we are confident that our intensive, hands-on training will provide participants not just a basic overview of business management principles, but will help them create the policies and procedures to run their businesses over the long term.

² Solimar has recently assisted USAID and Chemonics with environmental best practices training and creation of codes of conduct in Roatán, Honduras and Bocas del Toro, Panamá, under the USAID Regional Program.



Visitor code of conduct sign

Bahía Málaga and Uramba National Natural Park Area

Marketing Assistance

As in the Nuquí/Utría area, the Solimar team recommends several marketing activities for the Bahía Málaga/PNN Uramba region to increase tourism sales:

- Create a marketing alliance with the PNN Uramba for the destination. The existing website www.bahiamalaga.org, which is an initiative by an individual stakeholder, is currently the best marketing piece for the region as a whole, although it could use improvement to make it more attractive to tourists. It is important to have a website that provides all the information that potential clients need to make a decision in a visually attractive way, and to take advantage of free social media tools such as TripAdvisor and Facebook. As explained in the Nuquí/Utría section, a marketing alliance and brand would create an economy of scale for individual communities that could not afford to take on marketing activities on their own, would help evenly distribute the amount that goes into marketing the destination, and would ensure more equitable participation of all actors in the tourism value chain.
- Develop a promotional poster and brochure that can be placed in the Buenaventura tourist port and tourism office. Hard copy promotional materials can be expensive or go unused; we are not suggesting implementing

a marketing campaign using only hard copy promotional materials, as we know that online marketing is the most cost effective way to reach a large audience. Yet we think it would be worthwhile to design at least one poster and one brochure for each destination to be posted in key tourists spots, to grab the attention of backpackers or day-trippers.

- Determine a place (perhaps the boat transport check-in area) within the tourist port area in Juanchaco where the aforementioned promotional materials can be distributed. Promotional materials would better inform tourists about the offer on hand when they arrive, and will show tourists that they have options beyond booking all tours with their hotels.

Develop New Products

Because there are not many unique products in the area (with the exception of Bahía Málaga La Plata), we see the need to develop new tourism products. Development of new products will provide more opportunity for tourists to stay longer and spend more money in the region, and will mitigate the problem of price competition.

- In Juanchaco, develop basic trails and signage on the islands of Palma and Ismael, and purchase kayaks and train guides for kayak tours around the islands.
- In Ladrilleros, develop surf tours and promotion.
- Suggest more cultural activities, such as singing, dancing, gastronomy, etc., to all communities.
- As with Nuquí/Utría, we recommend trying to identify tour operators that provide itineraries targeted toward the SAVE (scientific, academic, volunteer, and educational) market, such as higher-education science trips, piangua research, etc., to explore the possibility of offering tours to Bahía Málaga/PNN Uramba.

Improve Infrastructure and Services

- Procure kayaks or paddleboards for several communities so as to offer a more cost-effective, environmentally friendly product as a differentiation away from the area's other numerous mangrove tours.
- Construct camping platforms or dormitories with basic bathrooms for La Barra and Puerto España.
- Each community organization should have an emergency plan in place that they practice regularly, in case a tourist should have an emergency. Emergency plans should include contact information for the nearest airport, local doctors, and national-level emergency evacuation transport operators. Further, staff should be trained in First Aid.

Encourage Better Stakeholder Dialogue

- Encourage better dialogue between all area stakeholders to deter price competition, ensure a more equitable distribution of the benefits from tourism, and help the region market itself as a cohesive destination. The marketing alliance with the PNN Uramba mentioned above under Marketing Assistance would provide the forum for enhanced dialogue.

Strengthen Human and Institutional Capacity

- As stated above in this section under the Nuquí/Utría discussion, Solimar recommends a comprehensive operations and management course for community tourism enterprises be given to at least one person from each community organization in this area and the Bahía Malaga/PNN Uramba area, for a total of no more than 15 participants, so that the trainer will be able to work as closely with each participant as possible.
- In addition to the tourism operations and management course, we recommend a course that covers housekeeping and facilities management, food preparation and hygiene, and customer service.
- Negotiate low-cost guide training courses with SENA to train guides for any new tour products.

Further Assist Environmental Conservation

- Although the communities have a high environmental consciousness, more could be done to communicate the importance of conserving the environment to visitors. As in Nuquí/Utría, we recommend a short environmental best practices training course, which would include the creation of codes of conduct for staff and visitors, to be displayed visibly throughout the organizations' sphere of influence.
- Constructing camping platforms or dormitories with basic bathrooms for La Barra and Puerto España will help reduce the amount of solid waste that goes unmanaged.
- Communities, particularly La Barra and Puerto España, should charge "entry conservation fees". These fees would be used to help fund the construction and maintenance of the camping platforms/dormitories, and offset the costs of keeping the town clean. The purpose of the funds should be communicated to visitors through the aforementioned codes of conduct; tourists are more accepting of fees when they learn they are intended for conservation efforts.
- Encourage the communities and hotel owners to work together to organize beach cleanups.

SUGGESTED CHANGES TO BIO-REDD+ GRANTS

Solimar feels that all BIO-REDD+ grantees could benefit from tourism operations and management training and marketing assistance, whether it is provided through grants or separately. All three grant agreements/applications have the objective of addressing administrative and accounting weaknesses within the organizations; however, no solutions for *how* to build the organizations' capacity or impart knowledge were proposed.

We also suggest that, if possible, BIO-REDD+ assign a grant manager to each geographic area to liaise with grantees. The geographic distance between the destinations and project office (particularly for Nuquí/Utría), compounded by limited Internet and cellular access, makes it difficult for grantees and the project to communicate and work together effectively. Periodic visits by a grant manager to ensure activities are being implemented, to help grantees complete required reports and deliverables, and to answer questions, would help implementation run more smoothly.

Mano Cambiada

We understand that BIO-REDD+ has chosen to close Mano Cambiada's grant agreement effective mid January 2013 due to ineffective grant management on Mano Cambiada's part. To Solimar, this is further indication that Mano Cambiada is in need of business management support.

BIO-REDD+'s grant agreement with Mano Cambiada stated that one of its main objectives was to address administrative and accounting weaknesses within the organization. Solimar recommends a tourism operations and management course be given to Mano Cambiada leadership (we have already secured the interest of Mano Cambiada's founder Josefina Klinger), as well as at least one person from each community organization in this area and the Bahía Malaga/PNN Uramba area, to build business operations, management, and accounting capability within all the organizations. As Mano Cambiada no longer has access to BIO-REDD+ funding in the form of a grant, it is recommended that BIO-REDD+ contract and pay for a tourism operations and management training course itself. In this way it may actually be easier for BIO-REDD+ to invite participants from both geographic areas to the training, as opposed to the focus being on only one grantee.

Tourism operations and management training will further support BIO-REDD+'s two other anticipated future grantees, Asociación de Guías de Pichindé and Bahía Málaga La Plata, thereby increasing their chances of successfully managing their grants.

Asociación de Guías de Pichindé

While it was not contemplated by the Pichindé guides while preparing their grant application, Solimar found that Joví in particular was hampered by the lack of a boat. The community of Joví currently does not have its own boat, and therefore relies on transport from other communities to receive tourists. The community having its own boat would allow them greater access to the tourism value chain, and having a boat at the ready would be beneficial in case of emergency. Assuming that the two boats that are to be refurbished are for Coquí, it is recommended that a third boat for Joví be added to Result 1.1: *Las tres organizaciones de turismo comunitario del sur de Nuquí cuentan con la logística necesaria para brindar servicios de transporte a los turistas interesados en su oferta de productos.*

As with Mano Cambiada, the Asociación de Guías de Pichindé is hardworking and well intentioned, but they recognize they lack enterprise operations and management and marketing skills. The Pichindé guides attending a tourism enterprise operations and management training would help address Result 2.1 in the grant agreement: *Las organizaciones de turismo comunitario del sur de Nuquí están capacitadas en los aspectos administrativos, comerciales y organizativos.* The training course will also include a session on environmental best practices, which will help address Result 3.4: *La comunidad de Joví cuenta con un plan de manejo integral de residuos sólidos, implementado en su primera fase.*

Bahía Málaga La Plata

We understand that Bahía Málaga La Plata's grant application is still under consideration and that further changes may be made; however, when we visited the community, Santiago Valencia of the consejo comunitario told us that one of the requests made in the application is to upgrade the posada, which we agree should be done. (It rained overnight the night we stayed there and rain ran through the palm frond roof into our beds.) Mr. Valencia also told us the community planned to build a second, higher-class lodge, and had already scoped out the land to do so.

As with Mano Cambiada and the Asociación de Guías de Pichindé, Bahía Málaga La Plata's is hardworking and well intentioned, but they recognize they lack enterprise operations and management and marketing skills. The recommended training and marketing assistance would help address the following grant results:

1.2: *Cien prestadores de servicios ecoturísticos o etnoturísticos capacitados en prácticas ambientalmente sostenibles relacionadas con la actividad.*

1.3: *Cien prestadores de servicios ecoturísticos o etnoturísticos capacitados en gobierno propio y aplicando las resoluciones de los Consejos Comunitarios que regulan el etno y ecoturismo en sus territorios.*

3.3: *Un plan de negocios diseñado en asocio con una empresa que ha desarrollado el producto—estudio la factibilidad de recoger agua lluvia.*

3.5: *Una campaña de mercadeo y promoción desarrollada en lugares específicos y de manejo de residuos sólidos.*

CONCLUSIONS

The Nuquí/Utría PNN area is a world-class product that needs only a little bit of a push to become a world-renown destination. The six communities and the PNN Utría offer complementary, high-class products; if packaged into a comprehensive tour, the region will be well positioned to increase its tourism sales.

The Bahía Málaga/Uramba PNN area's market is established—it is a more middle class and backpacker, local market that is price sensitive. All communities in the region offer a similar product; therefore new product development and differentiation is advisable to maintain the market's interest.

Communities in both areas are environmentally conscious and strive to provide a good experience to tourists. In the Nuquí/Utría PNN area, the value chain functions fairly well and needs to only continue strengthening the collaboration that has been started. In the Bahía Málaga/Uramba PNN area, the value chain does not work together cohesively, and a dialogue is needed to begin working toward collaboration.

Community enterprises in both areas lack basic business management and accounting skills, as well as destination marketing strategies. For these reasons Solimar recommends a comprehensive operations and management course for community tourism enterprises, with participants from both areas, and the design of marketing strategies and implementation of discrete marketing activities for each regional destination. Small-scale infrastructure development, such as camping platforms, kayaks, and trail signage, would strengthen the product offer in both locations.

ANNEX I – REFERENCES

INFORMATIVE WEBSITES

Colombia

www.colombia.travel

<http://www.lonelyplanet.com/colombia>

<http://www.lonelyplanet.com/thorntree/forum.jspa?forumID=22&keywordid=235>

<http://www.tripwolf.com/en/guide/show/477/Colombia>

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<http://nuquipacifico.com/>

<http://www.blogabond.com/CommentView.aspx?CommentID=109112>

<http://www.paisatours.com/nuqui.htm>

[http://www.experienciacolombia.com/destino.php?Region-Occidental=Nuqui\(Choco\)&Nuqui&destino=32](http://www.experienciacolombia.com/destino.php?Region-Occidental=Nuqui(Choco)&Nuqui&destino=32)

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<http://www.marviva.net/index.php/es/proyectos/colombia/conservacion-con-liderazgo-social>

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<http://ecoglobalexpeditions.com/avistamiento-de-ballenas/>

<http://www.wwf.org.co/?194448/Baha-Malaga-es-al-fin-Parque-Nacional-Natural>

TOUR OPERATORS

USA

Ecovoyager.com

ietravel.com

lostworldadventures.com

mtsobek.com

southwindadventures.com

wildernesstravel.com

wildland.com

www.globalbasecamps.com/
www.detourdestinations.com

UK

dragoman.co.uk
exodus.co.uk
guerba.co.uk
lastfrontiers.co.uk
topdecktravel.co.uk
www.prestonreid.com

Colombia

http://www.turiscolumbia.com/tours_nuqui.htm
cinarucotours.com (not currently selling the area but plans to)

LODGING

Nuqui

El Cantil Ecolodge
35 min. boat ride south of Nuquí
www.elcantil.com
elcantil@elcantil.com
57-4-252-0707

Palo de Agua *Mano Cambiada
30 min. boat ride from Nuquí
www.nuquipacifico.com
57-310-822-6157

Casa Jacky
Arusi
Contact info?

Hotel Nuquimar
http://www.tripadvisor.com/ShowUserReviews-g809122-d1804617-r68845608-Hotel_Nuquimar-Nuqui_Choco_Department.html

Iraka del Mar Eco Hotel
http://www.tripadvisor.com/Hotel_Review-g809122-d1108725-Reviews-Iraka_del_Mar_Eco_Hotel-Nuqui_Choco_Department.html

Piedra Piedra Lodge *Owned by the Ecolodges group
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[Nuqui Choco Department.html](http://www.theecolodges.com/info/hoteles/piedrapiedra/)

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ANNEX II – NUQUÍ/PNN UTRÍA SAMPLE ITINERARY

Day 1:

After your arrival in Nuquí from Medellín you will enjoy a delicious snack and then board the boat that will conduct you to the community of Termales. After settled in your room, you will enjoy a lunch of traditional fish prepared with coconut, a traditional dish for the Pacific Coast in Colombia. In the afternoon your community guide will take you to relax in the hot sulfur springs. In the night you will enjoy dinner while you watch a traditional dance by the children of the community.

Day 2:

In the morning after having a traditional breakfast of arepas, hot chocolate, or if you prefer, “tinto” (coffee), you will start your hike through the rainforest where you can see a lot of wildlife. At the end of the trail you will have the opportunity to bathe in a beautiful waterfall surrounded by the rainforest and the song of its birds. After you cool down your guide will start the way back to the community.

After lunch, you will have a short boat ride that will take you to Guachalito, a small community by the sea. In the afternoon, you will fish your own dinner in a traditional canoe.

Day 3:

After breakfast, you will take a short boat ride to Joví. There your guide will take you on a canoe ride along the river and show you many birds, you also will learn about the locals’ many uses for the trees and plants in the rainforest.

After lunch we will go to the neighboring community of Coquí, where you will take a tour of the mangroves in another traditional canoe.

Day 4:

After breakfast in the community, we will take you to Utría National Natural Park, where this adventure will continue! You will take a boat to look for the

Tour at a Glance

Day 1: Termales

Arrival in Nuquí
Transfer
Typical lunch
Relaxing bath in the hot sulfur springs
Community dance presentation
Typical dinner

Day 2: Guachalito

Hike Termales trail in the rainforest
Lunch
Transfer to Guachalito
Fishing trip in traditional canoes

Day 3: Joví and Coquí

Canoe ride in the rainforest
Canoe ride in the mangroves
Dinner

Day 4:

Transfer to Utría National Park
Whale watching trip
Hike in mangrove trail

Day 5:

Hike La Quebrada Trail
Snorkel in Playa Blanca
Lunch
Cooking class in the afternoon

Day 6:

Transfer to the airport

humpback whales that come to the Utría inlet and its surroundings to give birth. Don't forget your camera because today you will have an experience that you will never forget! For lunchtime you will come back to the lodge and enjoy a delicious meal prepared by the wonderful cooks in Utría.

In the afternoon when the tide is high, one of our guides will take you on the mangrove trail and show you all the birds and other animals that live in this incredible ecosystem.

Day 5:

After breakfast you will hike our Quebrada Trail, where our guide is going to explain to you about all the plants in the rainforest. This trail ends on a secluded beach where you can take a dip and refresh yourself. After that our boat will take us to a reef close to a white sand beach where you can snorkel and see many colorful fishes.

In the afternoon after you take a nap in our hammocks, our cooks will teach you how to cook the Colombian way!

Day 6:

After breakfast you will board the boat back to Nuquí, where you will board your flight back to Medellín and tearfully wave goodbye to the beautiful Utría area.

ANNEX III – TOURISM’S CONTRIBUTION TO ALTERNATIVE LIVELIHOODS AND BIODIVERSITY CONSERVATION

Tourism is one of the world’s largest industries, garnering more than US \$1 trillion in 2011. The United Nations World Tourism Organization (UNWTO) tracks the importance of tourism to the global economy. According to a 2011 UNWTO report, “Over the decades, tourism has experienced continued growth and deepening diversification to become one of the fastest growing economic sectors in the world. Modern tourism is closely linked to development and encompasses a growing number of new destinations. These dynamics have turned tourism into a key driver for socio-economic progress.

Today, the business volume of tourism equals or even surpasses that of oil exports, food products, or automobiles. Tourism has become one of the major players in international commerce, and represents at the same time one of the main income sources for many developing countries. This growth goes hand in hand with an increasing diversification and competition among destinations.” (www2.unwto.org/en/content/why-tourism)

Alternative Livelihoods

Tourism is truly a global economic activity, one that takes place in destinations across the world, from leading capital cities and smaller towns and villages in rural and coastal areas, to some of the most remote points on the planet. It is one of the world’s largest economic sectors, contributing trillions of dollars annually to the global economy, creating jobs and wealth, generating exports, boosting taxes, and stimulating capital investment.

- Tourism supports 10% of all global economic activity and 8% of all global employment
- Tourism ranks in the top five export categories for 83% of developing nations
- 47% of international tourists choose developing countries for travel, spending \$200 billion per year

In addition to national-level economic development, tourism creates jobs on the ground for local communities. In places like Nuquí and Utría National Natural Park and Bahía Málaga/Uramba Utría National Natural Park, tourism represents an important alternative, sustainable livelihood for communities that have traditionally fished and used forest products for subsistence. Tourism represents a livelihood that can be sustained over the long term and promotes the conservation of the ocean and rainforests rather than extraction from these resources.

Biodiversity Conservation

In addition to its economic benefits, tourism can also contribute positively to biodiversity conservation. The quality of environmental surroundings is important

for all forms of tourism, no more so than along Colombia's Pacific Coast, where the product is certainly nature-based. According to the Convention on Biological Diversity and United Nations Environment Programme, "Tourists demand places that are unpolluted and free from waste. Many tourists also appreciate the wildlife and flora around them... In a recent survey of high-volume tourism companies, many reported that large numbers of their clients take excursions to see wildlife at some point during their holidays. Biodiversity is a main component of specialist holidays, whether based on scuba diving around coral reefs or on wildlife watching."

(<http://biodiv.unwto.org/sites/all/files/docpdf/cbd2007usersmanual.pdf>, page 12)
Solimar can testify to Pacific Coast communities' understanding that their product is based on the conservation of nature, and that they are fully committed to conserving the flora and fauna in their areas.

Tourism can contribute positively to compliance to advanced norms and standards (such as ISO 14001 and Green Globe), resource efficiency, renewable energies, recycling and use of eco-materials, and wildlife and ecosystem preservation activities, such as beach cleanups.

ANNEX IV – FURTHER INFORMATION ON THE ASSESSMENT METHODOLOGY

Solimar International’s approach to this assignment is grounded in the Tourism Assessment Process (TAP), which can help illuminate a destination’s potential as well as its deficiencies. Developed by Conservation International and The George Washington University, the TAP is a comprehensive and participatory approach to assessing a destination’s tourism potential in terms of markets, the positive and negative impacts on natural and cultural resources, the socioeconomic implications, as well as the resource needs.

Solimar utilized the TAP methodology to analyze the following eight site conditions and factors. The report’s subsequent sections on Findings and Recommendations are organized by geographic region, and then by these eight factors:

1. Market Demand

Demonstrated demand is the most logical and strategic way to identify tourism products and services with the greatest potential. The overall travel trends and visitor profiles are relatively well documented in the region, and the Solimar team focused its market demand analysis on exploring niche travel segments – such as adventure travel, SAVE tourism, or high-end ecolodges - that most likely possess the greatest opportunity for tourism development in the along the coast. There are many advantages to working with niche markets, including their willingness to visit new and isolated destinations as well as the increased ability to reach them with targeted, lower cost marketing activities.

2. Attractions Inventory

Attractions are the magnets that draw visitors to the destination. The assessment examines both existing attractions and attractions that have the potential for future development. Each is evaluated for its potential using the following key criteria: potential draw, aesthetic or scenic value, biodiversity value, cultural value, historical value, uses and activities, local participation, control, access, and product development potential.

To complete the Attractions Inventory we compiled a list of potential natural, cultural, historical, and heritage attractions, as well as related recreational activities.

3. Infrastructure and Services

Inadequate infrastructure and a lack of basic services can hinder the development of a tourism destination. Accessibility, communications, transportation, and waste management are among the services essential to tourism. Adequate infrastructure presents a key challenge to the development of these two areas as tourism destinations; the key to success will be to strike a balance between adequate

infrastructure while maintaining as much of the pristine character of the zone as possible.

Yet once again, these same challenges can be seen as opportunities as well. Limited access to the coast's tourism destinations, especially the Nuquí/Utría area, may very well become a competitive advantage for local service providers who have the equipment or understand the logistics of getting visitors in and out of the area. Isolation may also limit outside competition for local service providers. Finally, such isolation increases the dependency, and opportunity, for the strengthening of the local value chain – from artisan producers to transportation providers to food producers.

4. Supply and Competitiveness

Other destinations, whether in the same region or on the other side of the globe, often offer similar products and services, and compete to attract the same travel markets. The Solimar team's understanding of the regional tourism industry, as well as how it is functioning is vital to identifying new products that could bring added value to the destination - especially given the mostly untapped potential of the coast. In addition to this insight, assessing supply and competitiveness helps ensure new concepts that are competitive within the overall tourism industry are recommended.

5. Human and Institutional Capacity

Tourism is a service industry that lives and dies by the quality of the experience that local tourism service providers deliver to the clients that they receive. In light of the exponential growth of peer-to-peer online information sharing that occurs through travel websites such as TripAdvisor and countless travel forums, reports of bad service travels fast these days and can ruin a business nearly overnight.

The challenges of establishing a solid foundation of human and institutional capacity for managing tourism is particularly challenging in rural and isolated destinations like Nuquí/Utría, and even more so in Bahía Málaga/Uramba, where few local residents have ever worked directly with tourists.

Based on the markets that exist and the products that meet those demands, we have identified the human and institutional capacity needed to make these projects a success.

Tourism Knowledge and Skills

- Managerial and operational;
- Accounting and controlling;
- Human resource management;
- Marketing and sales;
- Leadership;
- Food services skills such as menu planning, food preparation and waiting tables;
- Housekeeping;
- Reception guest services;
- Travel agency services;
- Tour operations;
- Attraction and recreational management;
- Knowledge of destination; i.e. cultural heritage, history and biodiversity;
- Interpretation, guiding and languages;
- Park and protected area management;
- Architectural design, landscaping and building;
- Business planning and development;
- Land-use planning, zoning and building codes;
- Environmental management and auditing;
- Banking and credit card services.

Solimar understands the needs of human and institutional capacity in tourism because it is a global leader in sustainable tourism training – from community-based tourism enterprise development to building the capacity of DMO staff and managers, we work around the world creating local capacity to manage and grow tourism destinations. The following are just a few examples of Solimar’s tourism training programs:



Institutional support also plays a critical role. Well-established tourism institutions and organizations at different levels can effectively facilitate tourism development in the destination, and help fill in some of the gaps encountered in human resource capacity. Government organizations such as the Ministry of Commerce, Industry, and Tourism; ProExport; the Fondo de Promoción Turística; Parques Naturales Nacionales de Colombia; consejos comunitarios; local industry associations; and other non-governmental organizations play a key role in successful tourism development along the coast.

Human resource planning, capacity building, and institutional strengthening are central components of planning for successful tourism development. Just as with traditional infrastructure, the needs identified in human resources and institutional capacity present potential components of the public/private investment model to be developed for the coast, especially when modeled as part of the Value Chain Analysis.

6. Socio Economic Considerations

Because tourism involves bringing “strangers” into a community, it is important to consider the social, economic, and cultural impacts of the introduction or enhancement of tourism in a destination, especially when

considering communities as pristine as those comprising the Pacific Coast.

The negative impacts of tourism, particularly to the social and cultural integrity of a community, usually occur when the values and behaviors of the local community are threatened or compromised, even when resulting from interventions with the best intentions. This can include changes to family structures, relationships, collective traditional lifestyles, and moral values. On the other hand, tourism can help foster pride in local traditions and culture, decrease rural flight and foster increased global understanding.

7. Environmental Considerations

A cornerstone of Solimar’s philosophy is that sustainable tourism has the potential to not only mitigate the potentially harmful impacts of visitation to a natural area, but it can also act as a powerful tool to support conservation of the ecosystems upon which it depends. At its best, sustainable tourism presents an opportunity to better align the economic activities and needs of rural populations, particularly those living in or around protected areas, with biodiversity conservation objectives.

Specifically, sustainable tourism presents an opportunity to develop economic alternatives dependent upon the *preservation* of natural resources, rather than their *extraction*.

In order to achieve these direct linkages between community-based tourism and conservation, in its projects Solimar introduces direct financial incentives as a way to encourage local communities to adopt sustainable tourism principles and practices.

Two examples of this approach include:

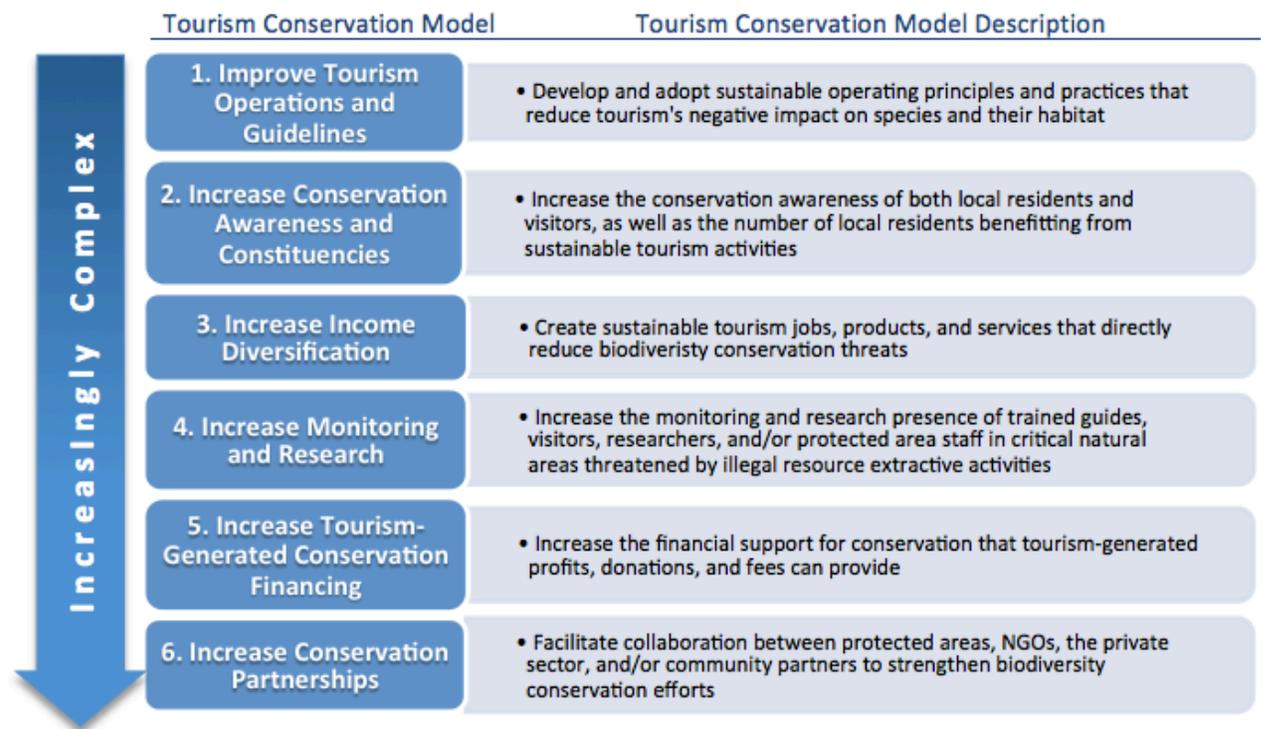
- **Memorandums of Understanding (MoUs) and other Legal Agreements**
During the project development stage, specific agreements are outlined within MoUs that clarify stakeholder commitments. For example, the project partner or investor may commit to a certain level of financial or technical assistance to support the establishment of a community tourism enterprise. In exchange, the community partner agrees to contribute a certain amount of time or percentage of money to support project conservation objectives, or may agree to adhere to certain restrictions as to the way they manage their land and future activities.



- **Marketing Incentives and Best Practices Programs**

Many small and medium enterprises lack the resources and capabilities to effectively link their products and services to global, regional, or even local markets. Whether it is a lack of capital, training, technology, or knowledge, reaching target markets is a common challenge that many tourism enterprises face. Yet, this need also presents an opportunity to offer marketing support to enterprises (and the sales it generates) in exchange for their adoption of sustainability criteria or some other form of direct conservation support.

Over the past five years, Solimar International has analyzed its own sustainable tourism projects, as well as partner projects, to identify direct linkages between sustainable tourism, biodiversity conservation, and community development. The result has been the development of the six *Tourism Conservation Models* that are presented below.



The reader will find examples of how all of these models can be employed in the Nuquí/Parque Natural Nacional Utría (PNN in Spanish) and Bahía Malaga/PNN Uramba areas below.³

³ For example, Solimar recommends conducting its Tourism Operations and Management training to help community enterprises implement sustainable operating practices, creating staff and visitor codes of conduct to increase conservation awareness, create new tour products to create new jobs in sustainable tourism, and facilitate collaboration between communities, the private sector, and protected areas managers.

8. Value Chain Analysis

Solimar International applies Porter's Value Chain theory, which posits that a firm or industry can, through value chain analysis and strategic planning, maximize profitability and competitive advantage by understanding and then seeking to maximize the "value added" (also referred to as productivity or efficiency) at each link in the supply chain that delivers a product or service. In the case of Colombia's Pacific Coast, it allows us to identify and incorporate ancillary economic activities (existing and potential) such as transportation, *artesanías*, and food production, to create a more complete development model. Moreover, it allows us to determine how to reach the markets identified in the market analysis and how to sell the specific products that we recommend for development.