



**FEALAC - Forum for East Asia-Latin
America Cooperation**

**3rd FEALAC
Conference in Nature Based Tourism and Ecotourism**

**Trends, Progress and Challenge in Nature Based
Tourism and Ecotourism in Latin America**

Mr. Marcello Notarianni

International Hospitality and Sustainable Tourism Expert

Barranquilla, Colombia, 23 August 2012



Presentation outline

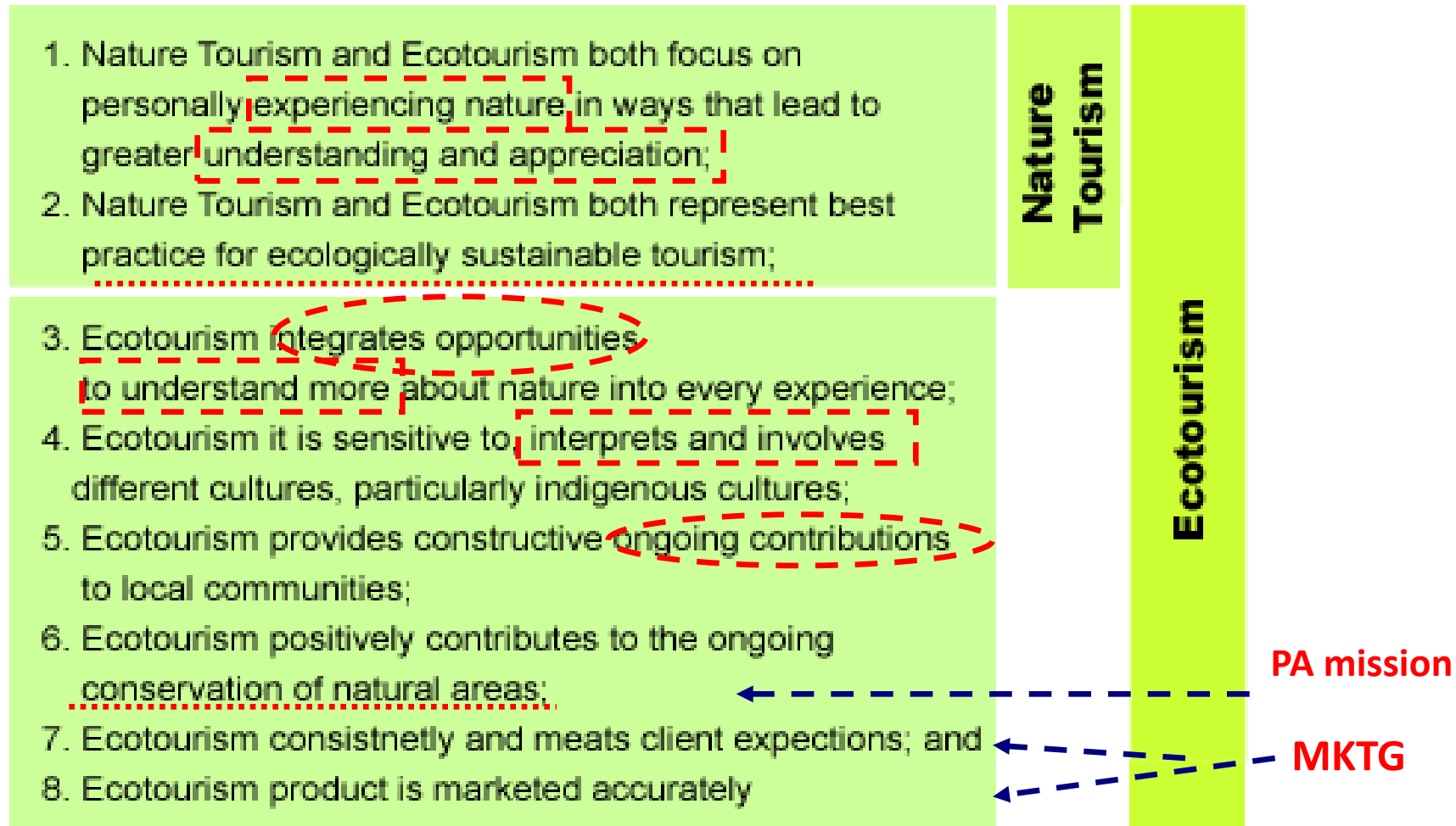
- ☐ Concept/definitions
- ☐ Trends
- ☐ Progress
- ☐ Bottlenecks/weakness
- ☐ Challenges for the future
- ☐ Questions



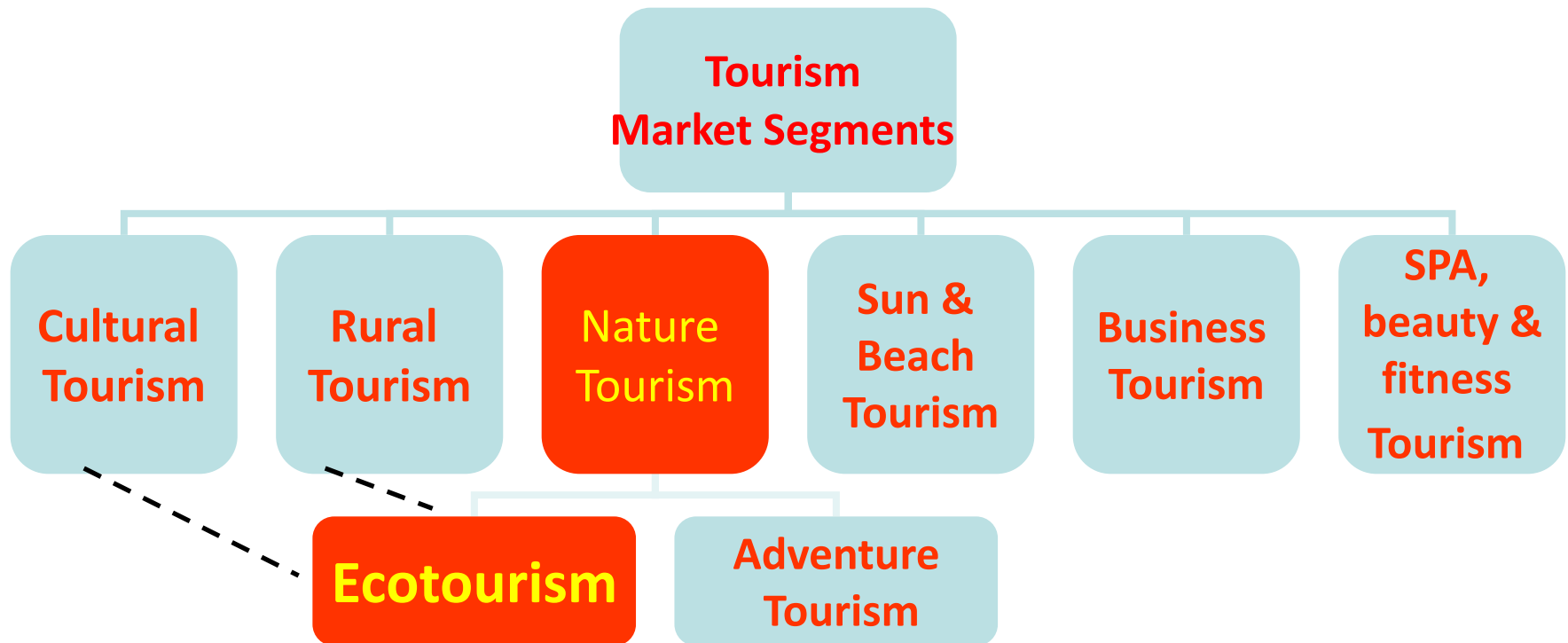
Concept/definition



Nature Tourism and Ecotourism



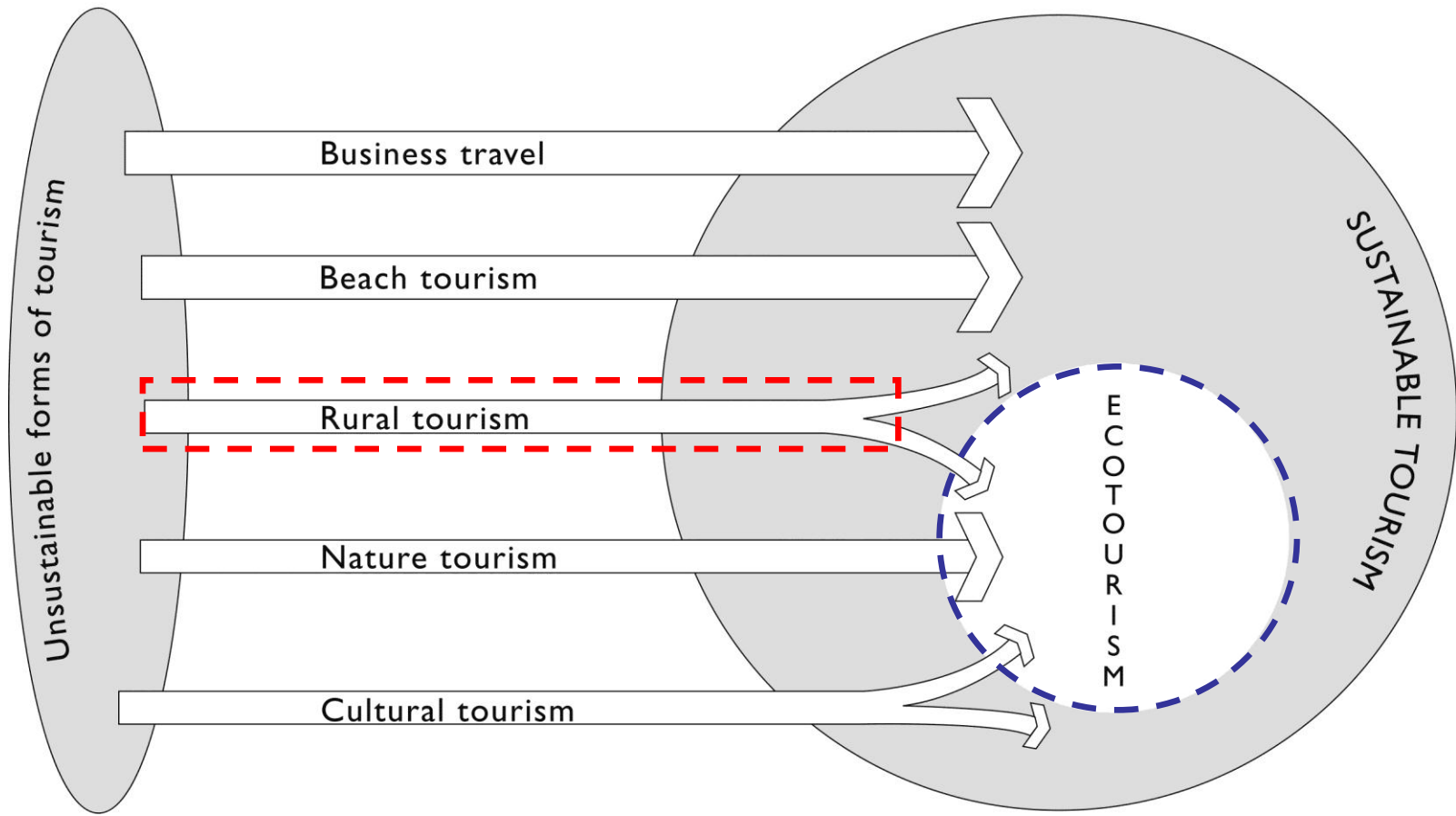
Ecotourism as market segment



Source: UNWTO modified from Strasdas 2001



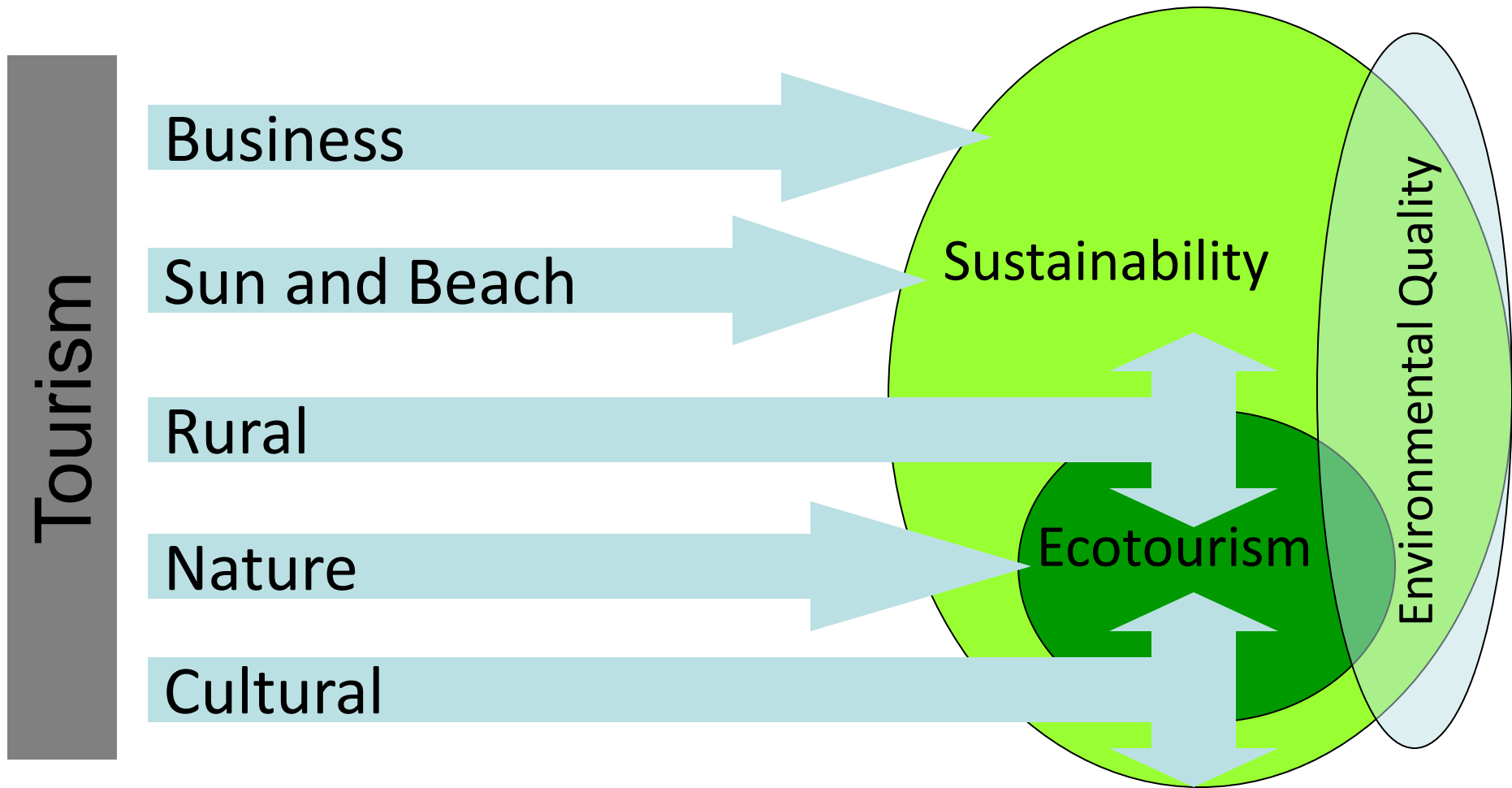
...as sustainable tourism concept



Source: UNWTO modified from Strasdas 2001

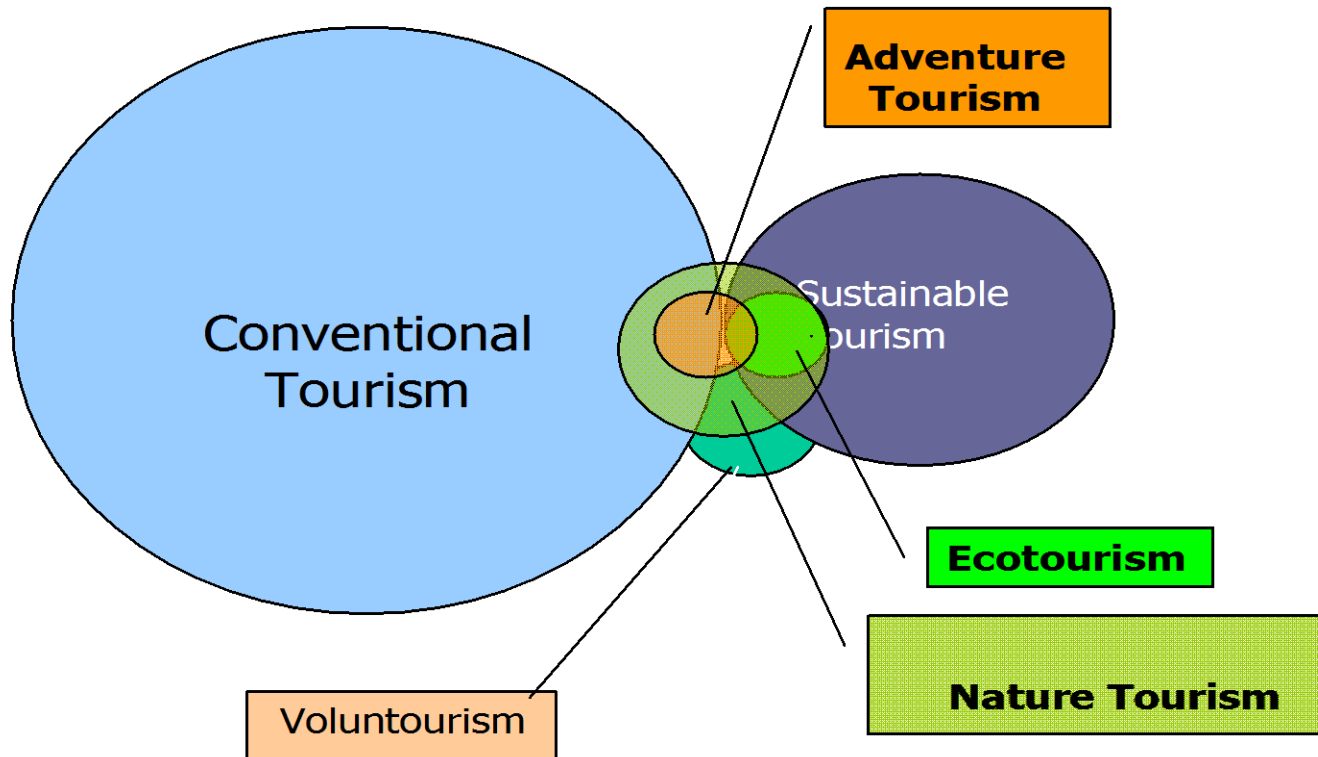


Nature tourism, ecotourism and sustainability

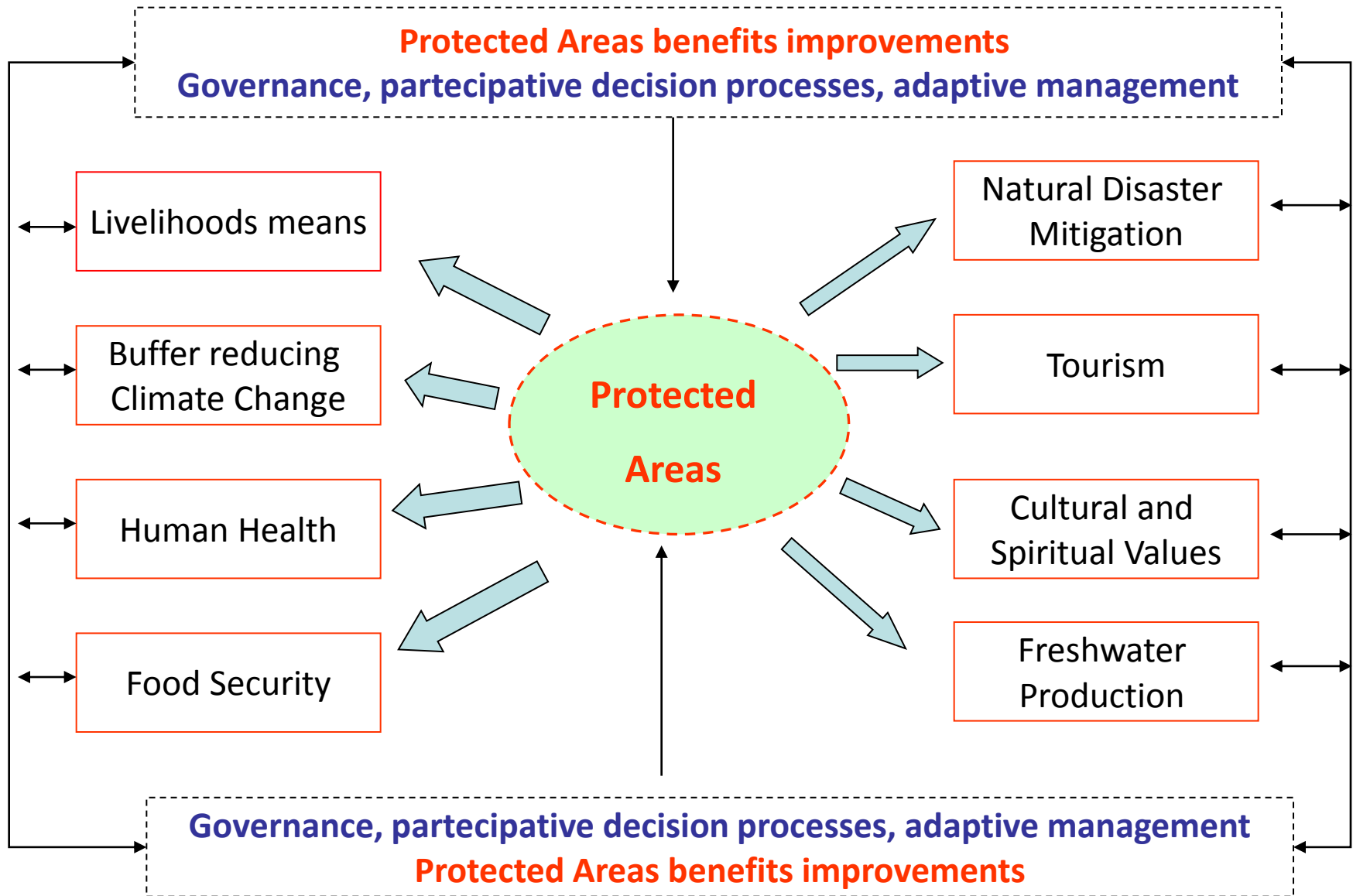


Relationship among Tourism segments

I



Protected Areas Values

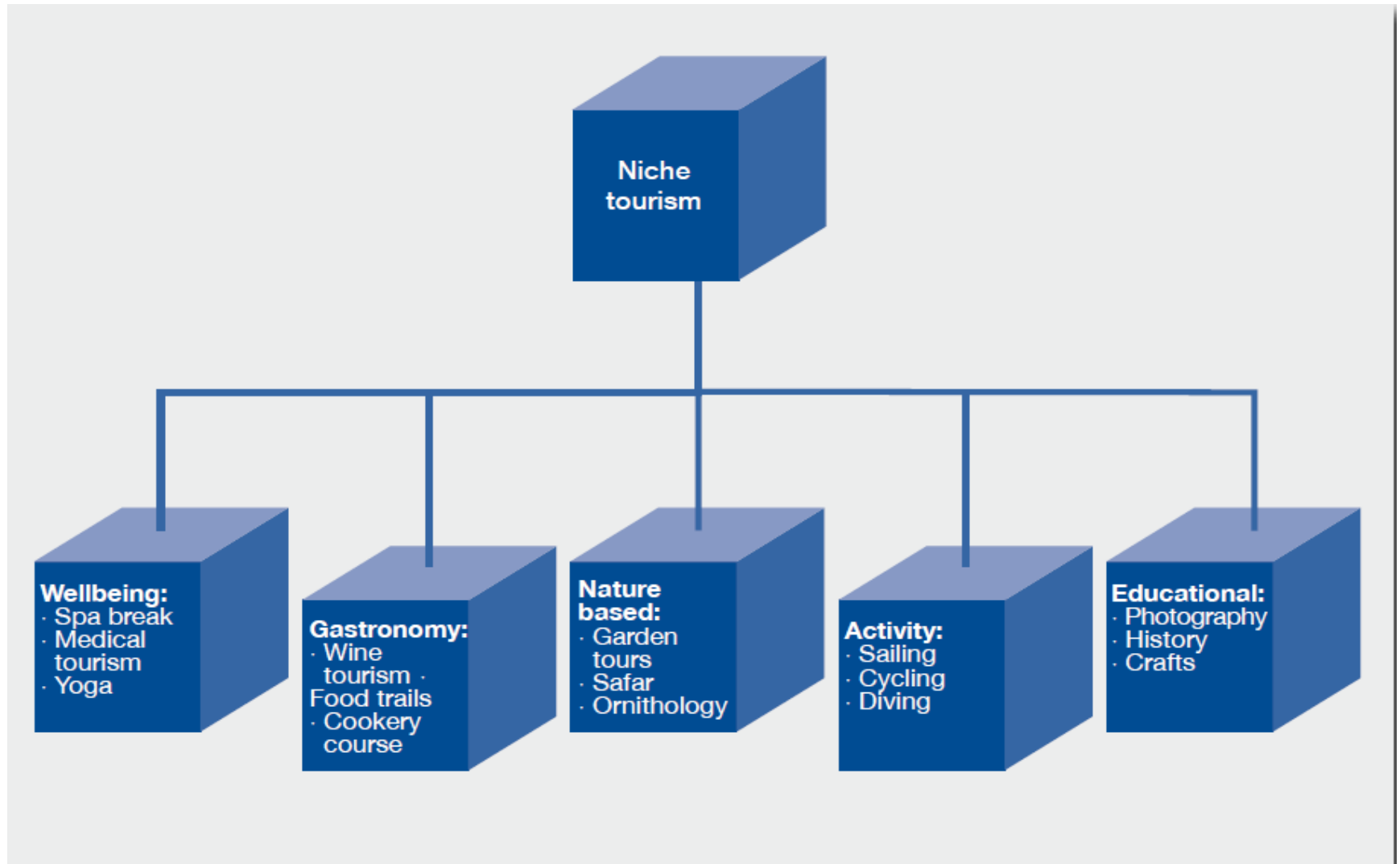


Trends





Fragmentation of tastes



Understanding the markets: Experience marketing

- ☐ Focused on consumer's experiences
- ☐ Consumption as an holistic experience
- ☐ Designed for consumer's behaviour: do the “road” consumers do during their experience
- ☐ Understanding that consumers are individuals
- ☐ Uses various tools and channels

Source: Bernd Schmitt, Experimental Marketing



communities

learning

multi-motivation

E-sharing

hyper-informed

tailor-made

segmentation

flexibility &
convenience

impatient



multitask

“story-telling”

experiences

**“the power
of simplicity”**

unique

specialization

authenticity



'word-of-mouse/word of M-touch'



user generated content

"influentials' / 'reputation networks"

on line
social networks

Blogs

Trust



Tripadvisor.com
- 50 million
visitors a month

Youtube channel

communities / affinity groups

use of UGC by destinations and providers



Tourism World Trends 2010 - 2020

Tourism



4,3

Eco-Tourism



15,0

Nature Tourism



20,0

Source: Reid R.K. Air Pacifica Island. / World Resource Institute (2000)



Tourism Demand vs Nature/Ecotourism products

- ☐ Based on experience/activity
- ☐ More specialized/fragmented
- ☐ Sustainability concern and commitment
- ☐ Active and integrated with other segments
linked to nature based
- ☐ Holistic approach



Nature tourism and Ecotourism range



Nature and Ecotourism Hard models (active, deep) e Soft (passive, shallow) model: real feature nature and ecotourists



Latin America Trends

- ☐ Looks inwards to develop off the beaten track destinations
- ☐ Roads less travelled
- ☐ Social media spreads the word
- ☐ Sustainability/Environmental/Responsible items
- ☐ From nature based and ecotourism product to biodiversity and cultural tourism products
- ☐ Latin America re-brands as a luxury destination
 - ☐ investing in luxury infrastructure to appeal to local and international travellers after the crisis is over.
 - ☐ preparing to steal share from North America, Europe and Asia Pacific.



Tourism and biodiversity in LA

- 2/3 and ¾ of international tourists visits at least 1 Natural Parks
 - Perú 73%
 - Argentina 60%
 - Costa Rica (65-75%)
- 94% of surveyed Caribbean tourism and hospitality companies depends on natural environment for their subsistence.

Sources: PromPeru, (2008) "Perfi I del Turista Extranjero 2007". Primera Edición. Lima; Instituto Costarricense de Turismo (1996) Plan Nacional de Desarrollo Turístico de Costa Rica 2002 - 2012: Actualización 2006; Vere Slinger, V.A. (2002) "Ecotourism in a small Caribbean Island: Lessons Learned for Economic development and Nature Preservation". University of Florida Dissertation .



UNWTO Spanish Outgoing market to America

- ☐ Key resources: nature and culture
- ☐ Key factors: Distance, price, value for money, resources and products quality
- ☐ Main tour packages:
 - ☐ Cities + **nature** + culture
 - ☐ Beach + **nature** + culture
 - ☐ Cities + beach



Chile advocate for Sustainable Tourism in Protected Areas

Chile aboga por incentivar el

www.caribbeannewsdigital.com/noticia/chile-aboga-por-incentivar-el-turismo-sostenible-en-areas-protectadas

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Informando a Profesionales del
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01.08.2012

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Chile aboga por incentivar el turismo sostenible en áreas protegidas

08.05.2012

 E-mail  Imprimir



Con el propósito de mejorar la gestión y conservación de sus áreas protegidas, al tiempo que potencia el desarrollo del turismo sostenible, Chile promulgó un reglamento que establece los procedimientos y normas que regirán a partir de ahora para otorgar concesiones turísticas en esas zonas.

Según informó la subsecretaria de Turismo del país austral, Jacqueline Plass, ese documento fue elaborado de conjunto con el ministerio de Bienes Nacionales, CONAF y el ministerio del Medio Ambiente, y propone que las Áreas Silvestres Protegidas (ASP) sean consideradas como "un recurso único y de gran valor para la biodiversidad", pero también como un potencial para el desarrollo sustentable de las comunidades aledañas a estas regiones, bajo la visión del turismo sostenible.

Citada en un despacho del portal del Servicio Nacional de

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> Aporte del turismo a la economía de Perú crecerá en una media de cinco por ciento hasta 2022

> Crystal anuncia para 2015 crucero mundial que zarpará desde Miami

> El barco de cruceros Europa 2 toca el agua por primera vez en astilleros de Francia

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South American Tourism Industry to become more Environmentally Sustainable

www.caribbeannewsdigital.com/en/noticia/south-american-tourism-industry-become-more-environmentally-sustainable

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If you make a connection flight in Panama on your next trip via Copa Airlines, you can stay a few days with no costs. You only have to notify it at the time of booking your ticket.

Caribbean News DIGITAL Keeping travel industry pros in the know 08.07.2012

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South American Tourism Industry to Become More Environmentally Sustainable

06.13.2012

E-mail Print

EarthCheck, the world's leading environmental benchmarking and certification company for the travel and tourism industry has forged a partnership with one of South America's most respected environmental sustainability organizations.

Chile based, Valor Sustentable will provide EarthCheck training and services throughout Chile, Argentina, Uruguay and Peru. EarthCheck's environmental sustainability program is currently used by more than 1,300 clients in 70 countries.

Valor Sustentable specializes in environmental projects involving energy efficiency, industrial ecology, sustainability strategizing, carbon and water management and solar power development.

CEO Stewart Moore said Valor Sustentable shares the vision that responsible tourism organizations need to develop and implement strategies which contribute toward environmental sustainability as well as saving money and improving operational efficiency.

Valor Sustentable Managing Director Tomas Steinacker said the scientifically proven EarthCheck system and the independently audited processes have the potential to change the face of environmental sustainability in the South American tourism industry.

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Ecotourism on the Riviera Maya...the Sustainability factor

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Ecotourism on the Riviera Maya... The Sustainability Factor

01.25.2012

 E-mail  Print

By Bill Milligan and Yndiana Montes



The Riviera Maya is an amazingly blessed area of Mexico, semi-tropical in nature, limestone based, shrub jungles, cenotes (sink holes with vast underground water systems), Mayan ruins, beaches and coves of pristine white sands, star studded skies, clouds practically touchable and warmth... plenty of warm, sunny days touched by humidity, but manageable by mother nature's trade winds that bathe this lush coast.

The Riviera Maya begins in Cancun (southeastern tip of the Yucatan peninsula), and ends in the UNESCO declared World Heritage Biosphere of Sian Kaan. Between these two points, lies the small town of Puerto Morales, the bustling and rapidly growing Playa del Carmen, turtle nesting grounds of Akumal and the Mayan ruins and town of Tulum.

This is a rich coast, loaded with biodiversity, dotted with multi-million year old caves and underground water systems, filtering through limestone and tree roots into mangroves.

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Central America Declares 2012 the Year of Sustainable Tourism

12.28.2011

E-mail Print



Central America will attend FITUR 2012 in order to inaugurate its Year of Sustainable Tourism, an initiative set up by the Heads of State and Government of the countries that make up the Region, namely Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama. This measure makes part of the Region's Plan 2009-2013, whose purpose is to promote sustainable development through tourism.

This project will pay close attention to the issue of climate change and ethical tourism practices, as well as securing the participation of local communities and small and medium-sized companies from the industry when it comes to preserving the natural and cultural heritage that exists throughout the Region.

Furthermore, in order to boost the benefits offered by this program, different measures will be strengthened in fields as diverse as the integral management of disasters and climate change, safety and security and the battle against poverty and social exclusion.

Furthermore, support for the establishment of a Central American Customs Union will be maintained, with a view to

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- > Major US Travel Company Marketing Guyana as Eco-tourism Destination

“Brazil has much more to offer than sun and beach products. The program for the Regionalization of Tourism has been key to expansion by introducing new products and destinations.”

Source: Sáskia Lima, General Coordinator of Tourism Segmentation, Ministry of Tourism, Brazil



Programs/Projects in Latin America

- ☐ Fam trips in Pantanal (Brazil)
- ☐ Mexico is pushing Pueblos Mágicos and Ruta Maya.
- ☐ Increasing in popularity of the Salt Flats of Salar de Uyuni (Bolivia).
- ☐ Valle de la Luna, San Pedro de Atacama (Chile) and Cerro Negro Volcano (Nicaragua) stargazing and sandboarding.
- ☐ Ciudad Perdida (Colombia) is a draw for adventure tourists, accessible only by trekking through jungle to see the ruins.
- ☐ Credit funded by Brazilian Tourism Ministry and BNDES for (new or upgraded) eco-hotels (544.4 US\$ ML)
- ☐ Different projects/programs and plans based on sustainable Tourism (Belize, Guatemala, Bolivia)



Progress



Progress in nature & ecotourism

- ☐ Strong focus in product development
- ☐ Awareness and sensitivity to environmental issue linked to tourism development
- ☐ More emphasis on integrated and participatory planning approach (community involvement)
- ☐ Introduction of new terms linked to ecotourism and nature tourism in protected areas: “biodiversity” and “ecosystem service”
- ☐ Increase in sustainable tourism/ecotourism courses at academic level and at project/program levels



Shifting

- ☐ From niche market to more consolidated segments recognized by the market

In terms of:

- ☐ Product development
- ☐ Sustainability issue and matters
- ☐ Knowledge development (training)
- ☐ Organization development and building alliance (partnerships)



From niche market to more consolidated segments recognized by the market

- ☐ Magazine/Review (Nat Geo, WRD mag., Etc.)
- ☐ Branding (Destinations and products)
- ☐ Specialized tourism fairs and workshops
- ☐ TO/TA incorporate nature/ecotourism in the mainstream/mass market
- ☐ OLTA specialized on niche markets
- ☐ GDS and distribution systems integrate and sell “green package”



Institutional/Donors Project/Programs

- ☐ Millennium Development Goals Programs
- ☐ Sustainable Tourism Eliminating Poverty (ST-EP)
- ☐ Inter-American Development Bank
- ☐ USAID
- ☐ GTZ/GIZ
- ☐ Swiss Cooperation
- ☐ AECID (Spanish Cooperation)
- ☐ SNV (Netherland Development Cooperation)
- ☐ Community based initiative (CBi, ILO, etc.)



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IN THE SPOTLIGHT

Filipino youth who can't find work start their own



In a country with soaring youth unemployment, young people are getting MDG-Fund support to train as entrepreneurs and open their own businesses.

LATEST VIDEO



Sustainable Tourism Eliminating Poverty (ST-EP)

Tourism and Poverty Alleviation

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Masaya-Granada Destination, Nicaragua

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30 Jun 12 News **Région Touristique Côtière Occidentale du Ghana**
La consolidation de la côte occidentale du Ghana, en tant que destination touristique, est l'aboutissement d'une importante initiative ST-EP, un an après son achèvement grâce au financement du...

31 May 12 News **Burkina Faso and community-based ecotourism**
A two-year ST-EP project developing community-based tourism in the province of Tapoa, Burkina Faso, has recently been completed thanks to financing by the Italian Ministry of Foreign Affairs. The...

15 Apr 12 **"Mysteries of Titicaca", Bolivia**
An agreement has been recently signed between the UNWTO and Fundación

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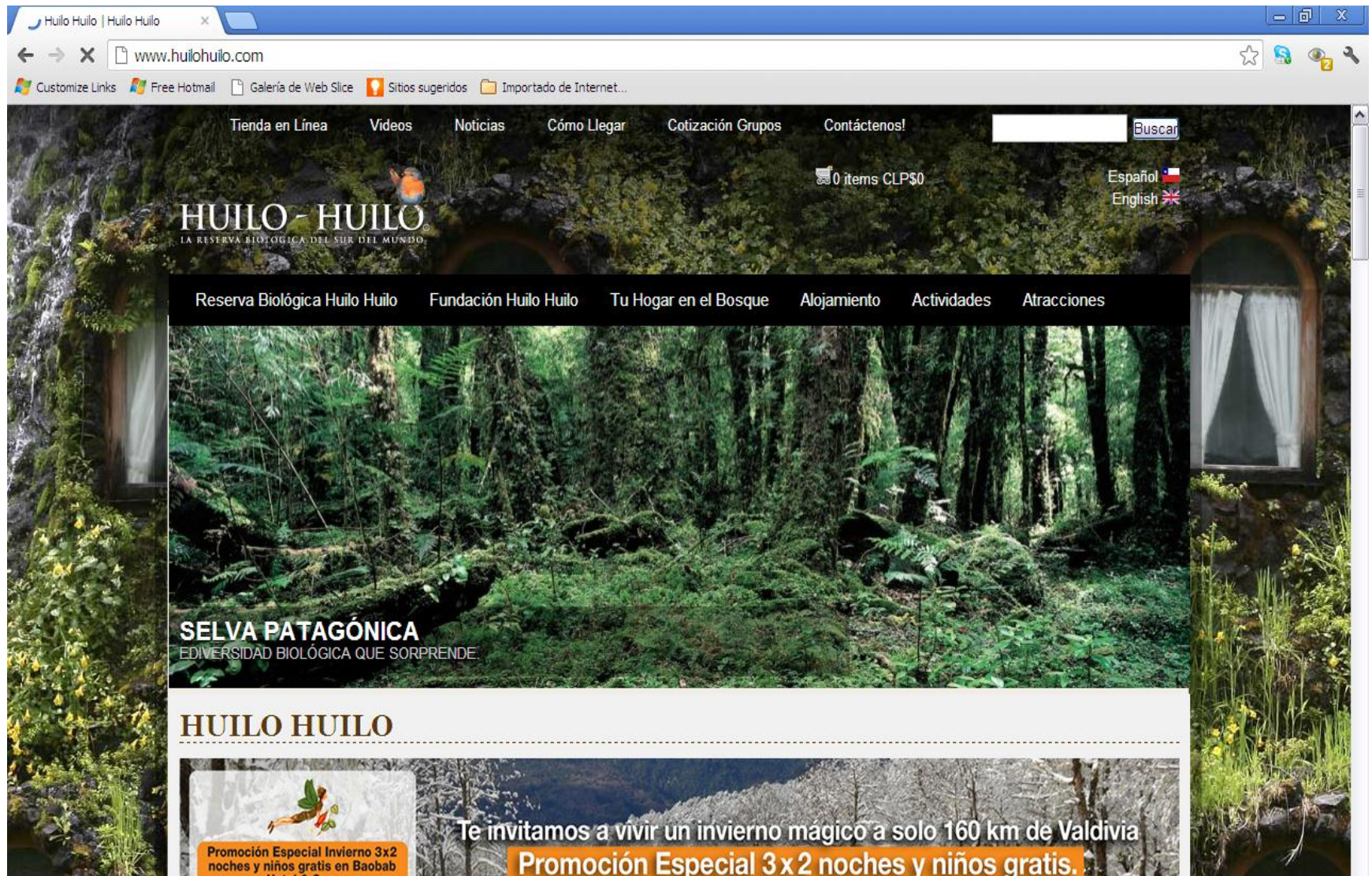
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Example of nature tourism and ecotourism business in Latin America

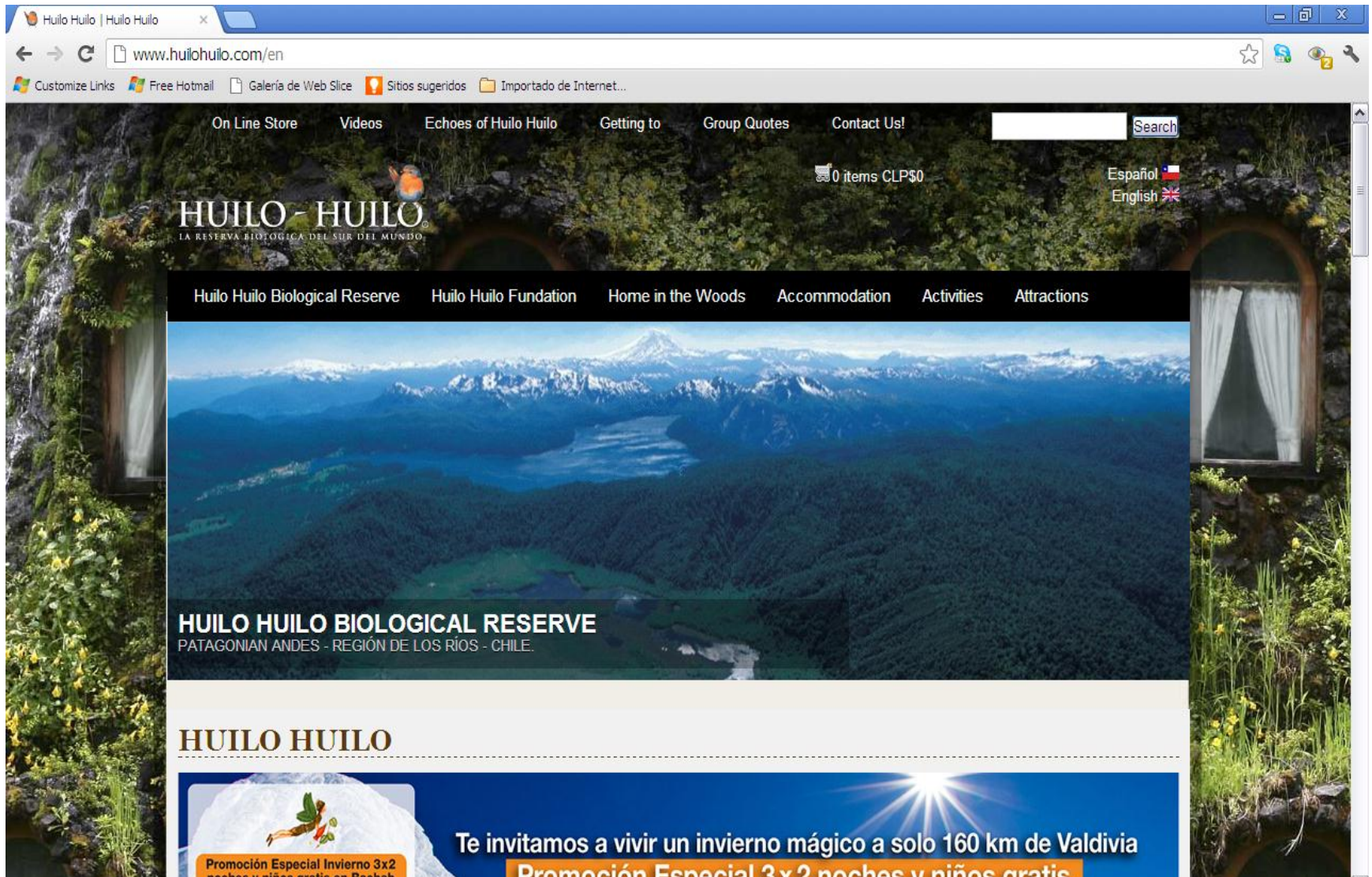
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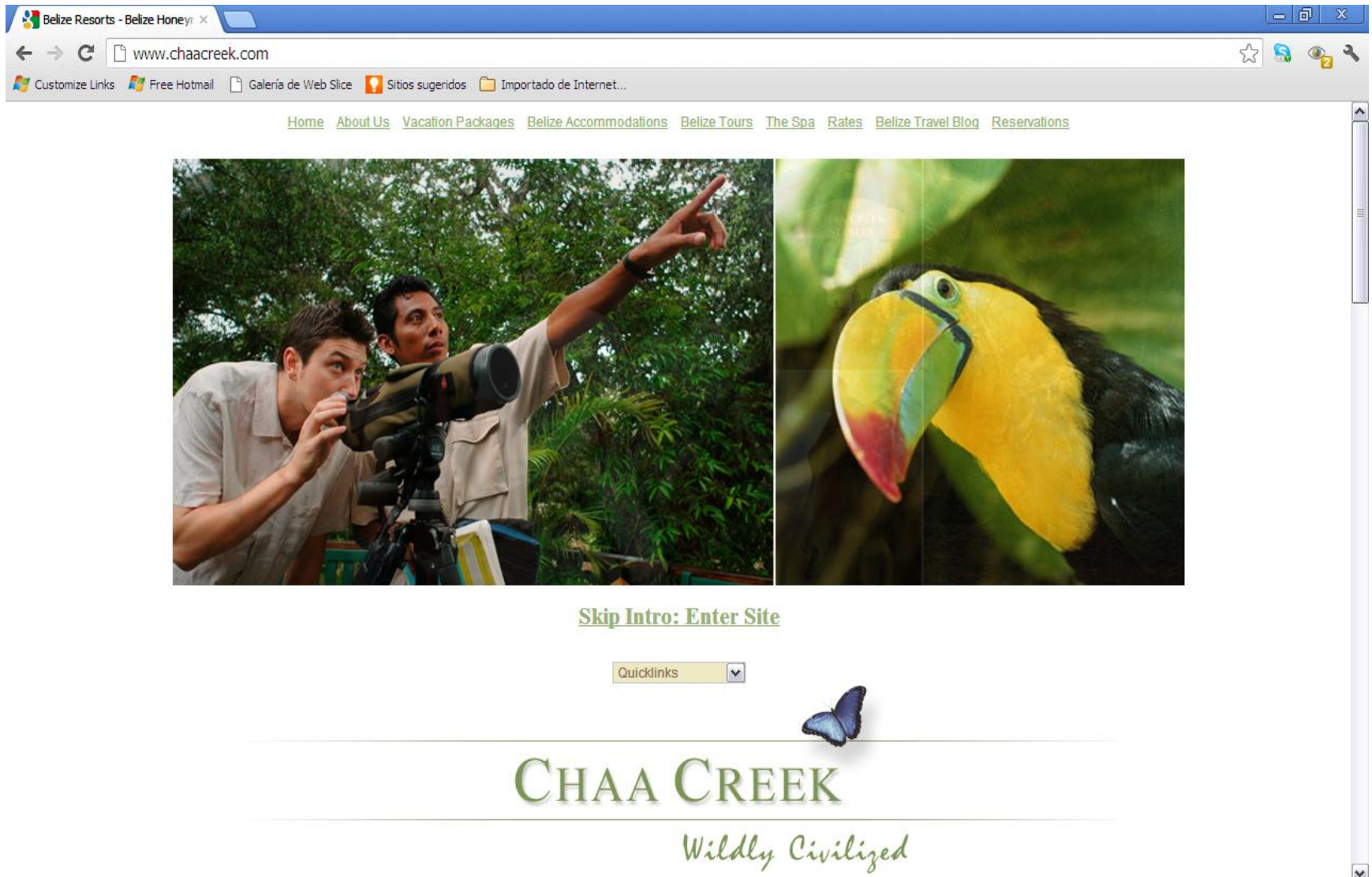
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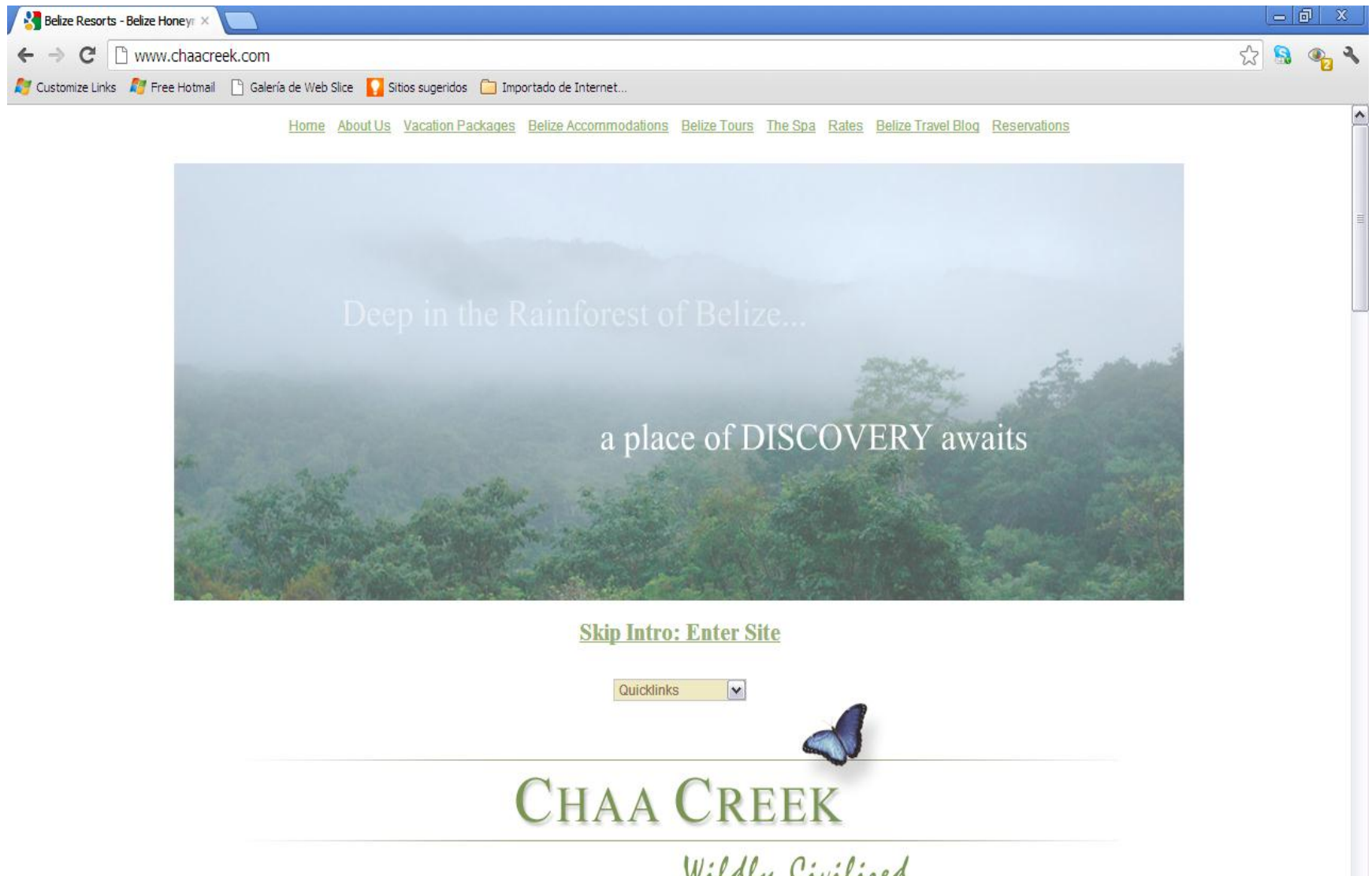
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We have known about the great opportunities in Nicaragua for a number of years. We invested in the "Gran Pacifica" project and could not be happier with the results thus far. Mike Cobb the CEO has been doing a fine job of directing and managing the project.

Joe and Jill B.

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Welcome to Poustinia Foundation's Website!

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The Poustinia Foundation Project



Girl in Pond by Santiago Cal

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Poustinia Land Art Park is an environmental project, in which nature interacts and develops, simultaneously. Poustinia was once a sprawling, eco-insensitive cattle ranch called El Dorado, where trees were cut and hills leveled to produce flat land for grazing. When the pot-of gold failed to materialize, the goals changed and over the years since the late 1980s, the land has been transformed into a magical, eco-sensitive art centre where one can lose oneself in the admiration of nature, and find oneself both intellectually and spiritually. It is a place where the beauty of human inspiration can be contemplated within the beauty of nature.

Here you can wander freely, as the Mayas once roamed, and their spirits still do, among their many mounds, which provide inspiration to many of the artists. You may catch a glimpse of the ghosts of the cattle ranchers (or the rustlers who terrorized them) who razed the land; the loggers who cut the precious wood, to send it rafting down the Mopan River to Belize City, and thence across the ocean to England; the chicleros who tapped the sapodilla trees, collecting the sticky resin to be shipped out to satisfy the chewing public.

With its varied habitat- second-growth jungle, now grown into tall canopy trees, low shrubs, fruit trees, cohune palms, ornamental flowers and shrubs, the different elevations and the rain-filled pond, -Poustinia is a haven for birds. Migrating birds can rest and feed undisturbed while resident ones can raise their young in peace. Brown jays, green jays, and chachalacas wake you in the morning; robins, wrens, several species of hawk, warblers, keel-billed toucans (the national bird) and its smaller cousin the collared aracari, Montecuma's oropendula, trogons, flycatchers, owls and hummingbirds are only a few of the species found here during the course of the year, feasting on the bugs, berries, citrus and mango, cecropia and gumbolimo fruits.

The wildflowers and fruit also attract a host of brightly coloured butterflies, such as the blue morph, malachites, white peacocks and zebra long-wings (heliconias) whose wings

<http://www.turismo-sigap.com/index.php>

Turismo SIGAP - Viaje por las

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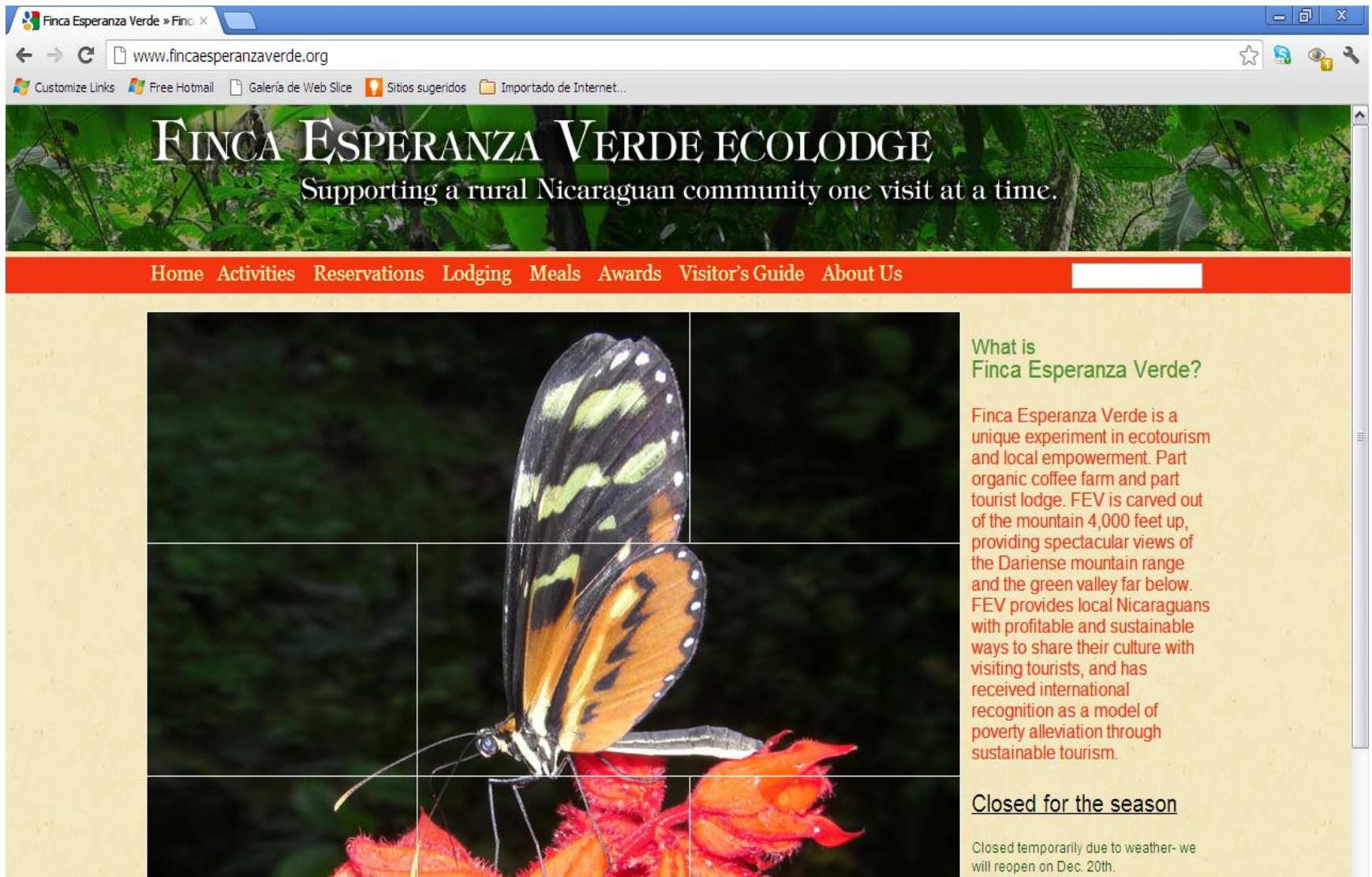
Introducing Ourselves:
We are Lili and Georges Duriaux – Chavarria, small farmers from Nicaragua. El Jaguar is a family run farm, and our main goal is to produce high quality environmental friendly coffee in harmony with nature, and with the community as well.
Mission: To protect the biodiversity of 95 hectares (240 acres) of cloud forest and to produce high quality environmentally friendly coffee in harmony with nature and with the community.
Values: Environment protection and social sustainability
Vision: El Jaguar Preserve has become a model of sustainability with three components: environmental protection, sustainable production and social responsibility.

RELEVANT NEWS:
• See Article about El Jaguar in Audubon Society Magazine:
<http://audubonmagazine.org/features1105/food.html>
• See Article in American Bird Conservancy (Page 18)
http://www.abcbirds.org/newsandreports/birdconservation_pdf/MagFall09.pdf

We are a Private Natural Reserve certified by Nicaragua Natural Resources Agency(MARENA):

RESOLUCION
PRIMERO: Reconocer y aprobar como una Reserva Silvestre Privada la Propiedad El Jaguar, perteneciente a la Señora Liliene Ravela Chavarria Gonsales y al señor Georges Duriaux Chavarria, representados por el señor Georges Duriaux. La Reserva Privada se encuentra ubicada en la Comuna El Muzón, Departamento de Jinotega, inscrita bajo el número 6.707, Tramo 113, Folio 277 y 278, Asiento 8, del Libro de Propiedades Secuenciadas de Derechos Reales, Columna de Inscripciones del Registro Público de la propiedad inmueble de la Ciudad de Jinotega.
SEGUNDO: Prover a la Firma y Subscripción del Convenio de Administración de la Reserva Silvestre Privada con los señores Liliene Ravela Chavarria Gonsales y al señor Georges Duriaux representados legalmente por el señor Jean-Yves Duriaux Chavarria, en calidad de propietarios de la propiedad descrita en la cláusula primera de la presente Resolución Ministerial.
Dado en la Ciudad de Managua, a los 18 días del Mes de Abril del año 2009.
C. ARTURO HERNANDEZ LACAYO

www.fincaesperanzaverde.org/



Challenges



Gap/constraints/bottlenecks

- ☐ Links to the mainstream market
- ☐ Integrate tourism into Protected Areas governance
- ☐ Tourism/visitors management
- ☐ Destination Marketing
- ☐ “Green washing”
- ☐ PA Funding and market based self-financing mechanisms
- ☐ Many initiatives but not coordinated



Challenge

- ☐ From Welcoming attitude to Hospitality Service
- ☐ Understanding the contributions of biodiversity and Ecosystem Service to the sector
- ☐ Visitors Management and Tourism Marketing
- ☐ Measuring and monitoring (not only performance)
- ☐ Tourism Hardware VS Tourism Software
- ☐ Financial sustainability
- ☐ Real commitment to sustainability



Opportunities - from luxury to eco-luxe

- ☐ LA tourism stakeholders embrace luxury tourism practices, boost competition and enhance service levels.
- ☐ Benefit from “eco-luxe” where the desire for natural overlaps with the desire for luxury
- ☐ Future developments with eco appeal
- ☐ Ecological regions such as the Amazon and Patagonia will stand out to environment-friendly luxury tourists
- ☐ Air links with Asia Pacific and the Middle East will be key to demand for luxury.
- ☐ Brazil’s hosting of the 2014 Football World Cup and the 2016 Olympic Games will be a key growth catalyst.



Last thought

Genius Loci- The sustainable tourism root



When the identity of a place is revealed and it is no longer a mystery, people come forth in order to save what is still alive.



Thank you for your attention

Mr. Marcello Notarianni

International Hospitality & Sustainable Tourism Expert

Salamanca / Spain

Mobile ph.: +34 657 692 420

e-mail: notarianni.m@gmail.com

Skype: Marcello Notarianni

Professional Networks Member:

