DRAFT NATIONAL TOURISM POLICY

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<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.2 Key objectives</td>
<td>36</td>
</tr>
<tr>
<td>5.3 Policy direction</td>
<td>36</td>
</tr>
<tr>
<td>5.4 Key strategies</td>
<td>37</td>
</tr>
<tr>
<td>5.5 Actions</td>
<td>37</td>
</tr>
<tr>
<td>5.6 Key Performance Indicators</td>
<td>38</td>
</tr>
<tr>
<td>6.0 HUMAN RESOURCES – EDUCATION AND TRAINING</td>
<td>39</td>
</tr>
<tr>
<td>6.1 Introduction</td>
<td>39</td>
</tr>
<tr>
<td>6.2 Overview of current situation</td>
<td>39</td>
</tr>
<tr>
<td>6.3 Key Objectives</td>
<td>40</td>
</tr>
<tr>
<td>6.4 Policy Direction</td>
<td>40</td>
</tr>
<tr>
<td>6.5 Key strategies</td>
<td>41</td>
</tr>
<tr>
<td>6.6 Actions</td>
<td>41</td>
</tr>
<tr>
<td>6.7 Key Performance Indicators</td>
<td>42</td>
</tr>
<tr>
<td>7.0 MANAGING THE DESTINATION</td>
<td>43</td>
</tr>
<tr>
<td>7.1 Introduction</td>
<td>43</td>
</tr>
<tr>
<td>7.2 Overview of current situation</td>
<td>43</td>
</tr>
<tr>
<td>7.3 Key Objectives</td>
<td>44</td>
</tr>
<tr>
<td>7.4 Policy Direction</td>
<td>44</td>
</tr>
<tr>
<td>7.5 Key Strategies</td>
<td>45</td>
</tr>
<tr>
<td>7.6 Actions</td>
<td>45</td>
</tr>
<tr>
<td>7.7 Key Performance Indicators</td>
<td>51</td>
</tr>
<tr>
<td>8.0 POLICY IMPLEMENTATION AND MONITORING</td>
<td>52</td>
</tr>
<tr>
<td>9.0 FUTURE CHALLENGES</td>
<td>53</td>
</tr>
<tr>
<td>9.1 Airlift</td>
<td>53</td>
</tr>
<tr>
<td>9.2 Climate Change and extreme weather conditions</td>
<td>53</td>
</tr>
<tr>
<td>9.3 Economic Recession</td>
<td>54</td>
</tr>
<tr>
<td>9.4 Oil Driven Economic Boom</td>
<td>54</td>
</tr>
<tr>
<td>9.5 Crime and Unrest</td>
<td>55</td>
</tr>
<tr>
<td>10.0 CONCLUSION</td>
<td>56</td>
</tr>
<tr>
<td>11.0 BIBLIOGRAPHY</td>
<td>57</td>
</tr>
<tr>
<td>11.0 APPENDIX</td>
<td>59</td>
</tr>
</tbody>
</table>
### LIST OF ABBREVIATIONS

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBT</td>
<td>Community Based Tourism</td>
</tr>
<tr>
<td>CTO</td>
<td>Caribbean Tourism Organisation</td>
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<tr>
<td>DOT</td>
<td>Department of Tourism</td>
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<tr>
<td>FAM</td>
<td>Familiarisation</td>
</tr>
<tr>
<td>GATBS</td>
<td>Guyana Amazon Tropical Birds Society</td>
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<tr>
<td>GTA</td>
<td>Guyana Tourism Authority</td>
</tr>
<tr>
<td>MOA</td>
<td>Ministry of Agriculture</td>
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<tr>
<td>MIPA</td>
<td>Ministry of Indigenous Peoples Affairs</td>
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<tr>
<td>MLA</td>
<td>Ministry of Legal Affairs</td>
</tr>
<tr>
<td>MOC</td>
<td>Ministry of Communities</td>
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<td>MOCIT</td>
<td>Ministry of Citizenship</td>
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<tr>
<td>MOE</td>
<td>Ministry of Education</td>
</tr>
<tr>
<td>MOFA</td>
<td>Ministry of Foreign Affairs</td>
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<tr>
<td>MNR</td>
<td>Ministry of Natural Resources</td>
</tr>
<tr>
<td>MPI</td>
<td>Ministry of Public Infrastructure</td>
</tr>
<tr>
<td>MPS</td>
<td>Ministry of Public Security</td>
</tr>
<tr>
<td>THAG</td>
<td>Tourism and Hospitality Association of Guyana</td>
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<tr>
<td>TIES</td>
<td>The International Ecotourism Society</td>
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<tr>
<td>UNWTO</td>
<td>United Nations World Tourism Organisation</td>
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<td>WTTC</td>
<td>World Travel and Tourism Council</td>
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EXECUTIVE SUMMARY

The National Tourism Policy is the overarching document that defines the path that Guyana has chosen for the development of its tourism industry. It examines the current status of tourism development, sets out the growth poles which are expected to be the drivers of tourism over the long term and elaborates a strategic marketing policy aimed at boosting visitor arrivals into Guyana.

The Policy is driven by the need to realise a number of strategic objectives. These are:

1. **Growth in tourism’s contribution to Gross Domestic Product**;
2. **Generation of increased employment in the tourism sector**; and
3. **Meaningful and beneficial involvement of rural and hinterland communities in tourism enterprises**.

The Policy document is structured in the form of a general Background and Overview followed by five policy sections, a look at Monitoring and Implementation and, finally, Future Challenges.

**Background and overview**- A well-defined tourism industry in Guyana is a recent phenomenon. While the decade of the 1950s saw tourism taking off as the principal foreign exchange earner in the Caribbean islands, Guyana was perceived, by both locals and foreigners, as being outside of that grouping, and therefore outside the traditional Caribbean tourism circuit. This non-tourism status for Guyana was also supported by the fact that, at least in the nineteen sixties and seventies, the production of sugar, rice and bauxite meant that there was little pressure on Guyana to explore the development of an alternative industry.

**Developing the Product**- This section presents the strategies to be pursued to strengthen and develop Guyana’s tourism product. *Guyana – South America Undiscovered* encapsulates and expresses the character of the Guyana tourism product. For the foreseeable future Guyana will be marketing and promoting itself as essentially a nature and adventure destination that offers unique cultural expressions. A number of areas of Guyana are highlighted as tourism hotspots in this regard. Some of these hotspots
will be promoted either as places for extended stays or as parts of internal nature/adventure/community tourism circuits.

**Marketing the Product**- A weak image in the international tourism market has been recognized as one of the limitations constraining the volume of visitor arrivals into Guyana. This section defines the traditional markets for Guyana’s tourism product, assesses the strengths of each and proposes alternative markets as well as alternative market niches that Guyana will be exploiting in both the short and long terms. Niches in birding, sports fishing, hiking, wildlife viewing and yachting will be further developed, as well as new destinations forming part of a Northern Amazonia. In addition, current marketing techniques are examined and new strategies outlined, especially including increased use of social media, multi-destination packaging through arrangements with Suriname, French Guiana, Brazil, Barbados, Cuba and other destinations. ‘Celebrity’ marketing is another tool by which internationally famous Guyanese and non-Guyanese personalities lend the weight of their names as a means of raising the visibility of the Guyana tourism product.

**Promoting Investment**- This section discusses the role of investments in an overall strategy for tourism development and proposes certain actions by the Government that would stimulate investment in the tourism sector in Guyana. Government recognition of tourism as an export industry and the various actions outlined are expected to achieve a greater economic contribution from tourism. Investments in tourism infrastructure, review of the incentives framework, development of tourism zones and maximizing economic benefit from protected areas are key actions proposed.

**Human Resources**- Education and training to support human resource development for the industry is a critical element in the National Tourism Policy and it directly addresses one of the stated strategic goals – enhancement of the quality of service. While the latter also embraces components relating to technological know-how and general organizational efficiency, human resource training and development is fundamental to the achievement of the desired levels of service excellence. This section describes a trajectory for human resource education and training for the tourism sector, making specific recommendations regarding the training methodologies most appropriate to
meet the needs of the industry – a mix of competency-based, vocational and academic approaches.

**Managing the Destination** - This section outlines measures that are needed to improve destination management, including the relevant legislation and the institution of standards and regulations to ensure that developments are aligned with established international standards. Standards and regulations are applicable to accommodation, resorts, public attractions and tourist venues, catering establishments, transportation (air, land and water) and other services.

Guyana’s fledgling status as a tourist destination does not relieve it of the obligation to provide services and experiences that meet the required international standards. The tourism industry does not easily forgive destinations that fall short in this regard.

The Policy concludes by looking ahead at some of the possible challenges that may be encountered in developing a bigger and stronger tourism industry in Guyana, and elaborating possible responses.

A Policy Implementation plan is also detailed in the appendix of this document.
VISION AND MISSION

Vision

To be recognized internationally, by the year 2025, as a leading green destination.

Mission

To bring more visitors to Guyana and to enhance the impact of the industry on the Guyanese economy and, in particular, the impact of nature-based tourism on hinterland economies and livelihoods.
1.0 OVERVIEW OF TOURISM

1.1 The Global Picture
Globally tourism is an industry worth over US$1 trillion annually. It has survived a number of shocks – economic downturns, natural disasters, SARS, Zika and other health crises, international terrorism and war. Global industry growth and high receipts are expected to continue well into and beyond 2030. In 2017, growth in international tourism travel is expected to be driven by seven key travel trends: millennials, active and adventure trips, the solo female market, food tourism, mobile photography, business and leisure travel, and responsible tourism.

1.2 Trends in the Caribbean
The Caribbean is widely regarded as the most tourism dependent region in the world. Since the 1950s, in view of the relative paucity of natural resources and the abundance of picturesque coastlines and beach fronts, the Caribbean has essentially been seen as an attractive warm weather destination. According to Business Monitor International (BMI) Research steady growth is predicted for the Caribbean in 2017, driven by increases in arrivals from the USA and a recovery in arrivals from Europe. The Caribbean forecast for 2017 is for 44.3 million arrivals, with over 14.5 million from the main source market, the USA. Currently the initiative for branding and marketing the Caribbean as a single destination is gathering momentum, although much is yet to be accomplished.

1.3 Evolution of the sector in Guyana
Because of its abundant natural resources and strong agricultural sector, Guyana has so far not had to rely on a successful tourism industry in order to achieve economic growth. However, it has long been recognized that the industry could contribute significantly to the diversification of the country’s export earnings, if the product were properly developed.

Though a latecomer to the club of Caribbean tourism destinations, Guyana has long been attractive to international travelers. An early 20th century publication – British Guiana as a Holiday resort (Browne, 1911) - mentions colonial officials as the precursors to the modern day international tourists. Kaieteur Falls was a popular attraction, followed by trips to the Rupununi and to scenic spots in the Essequibo.
The period 1989-2005 saw tourism advances on a number of fronts. In 1989 the First National Conference on Tourism was held. In the 1990s two Tourism bodies came into being – the Tourism Association of Guyana (TAG), forerunner of the THAG, and an Association for owners of small hotels. Another significant development was the inauguration of Tourism education at the University of Guyana and the establishment of a degree programme.

A surge in private sector investment in tourism also occurred in the latter years of the 20th century with a number of rural and interior resorts either constructed or remodeled including Arrowpoint, Baracara, Baganara, Emerald Tower, Mainstay, Shanklands and Timberhead.

The designation of 1996 as Visit Guyana Year signaled to Guyanese at home and abroad that Guyana was a place worth visiting, and a place that deserved to be taken seriously as a tourism destination.

Developments continued into the 21st century with the creation of the Guyana Tourism Authority, a semi-autonomous body under a Ministry of Tourism, Industry and Commerce. This saw increased budgetary allocations for tourism and a heightening of Guyana’s visibility at international trade fairs and other tourism events. Tourism publications also increased as greater efforts were made to raise the profile of the Guyana tourism product.

Stakeholder organisations have also multiplied; the North Rupununi District Development Board (NRDDB) and the South Rupununi Conservation Society (SRCS) address matters of tourism development as part of their wider mandate. Another initiative – Visit Rupununi- was recently launched to raise the profile of the Rupununi as a tourism destination.

Further evidence of the growth of interest in Guyana as a tourism destination is provided by the number of studies that focus upon Guyana, its tourism potential and strategies that could be pursued in the development of that potential.
1.4 Tourism Growth
From 2008 to 2016 visitor arrivals to Guyana have been registering annual increases. 2016 saw a 14% increase over the previous year with a record number of 235,279 arrivals. Arrivals for the first half of 2017 exceeded the 2016 figures for the same period by 8.2 %, pointing to the likelihood of further growth in 2017.

**Table 1. Guyana Visitor Arrival- 2008- 2017 (Jan-Jun)**

<table>
<thead>
<tr>
<th>Year</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>(Jan-Jun)2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrival</td>
<td>129,595</td>
<td>141,281</td>
<td>151,926</td>
<td>156,910</td>
<td>176,642</td>
<td>200,042</td>
<td>205,825</td>
<td>206,819</td>
<td>235,279</td>
<td>113,529</td>
</tr>
</tbody>
</table>

*Detailed table in appendix (B)*

1.5 Contribution to the economy
Estimates differ regarding the value of tourism’s contribution to the national economy. There is currently not enough data being collected on the industry’s earnings and spending for any methodology to be applied in pursuit of such calculations. So while there is a general perception that the contribution is significant, there is no empirical support for a precise determination.

Notwithstanding this, the Acorn Tourism Consulting Group gives a figure of 3.7% as tourism’s contribution to GDP for the year 2014.

From an economic standpoint tourism has value for Guyana for the following reasons:

- It is a net **export** industry that generates foreign revenues through local consumption of the product;
- It is a generator of employment, thereby providing additional revenues through employee income taxes;
- It stimulates investment in tourism infrastructure;
- It stimulates local economies especially in hinterland areas.

While domestic tourism is an important component of the industry, it is the international visitor who brings much needed foreign earnings into the economy and it is therefore this component that needs to be nurtured and grown if the industry is to make its maximum contribution to the national economy.
The difficulty in measuring tourism’s contribution to GDP is also reflective of the diversity of its value chain and the mainstream industries that it cuts across such as transportation and entertainment. The extremely conservative assumption that the average visitor spends at least US$500 in the local economy places tourism among Guyana’s top three export earners and worthy of the special support and attention granted to other key economic sectors.

It can be argued, even without any supporting data beyond visitor arrival figures, that the value of tourism to Guyana’s economy warrants further public sector investment in the industry geared towards strengthening the Guyana Tourism Authority and holding it accountable for delivering on this transformational National Tourism Policy.

1.6 Economic Outlook
Economic reviews of Guyana generally concur that the Guyana economy stabilized between 2006 and 2013 during which period it grew by an average of 4.7% - attributable in large measure to inflows from extractive industries, foreign direct investment, debt relief and the introduction of a Value Added Tax (VAT).

Economic growth between 2014 and 2016 slowed to an average of 3.4%, reflecting reduced export earnings from sugar, rice and bauxite. The Mid-year Report for 2017 shows growth of 2.2% for the first half of the year, up from 2% for the corresponding period last year, and projects a revised annual growth rate of 3.1%.

The most significant economic development in recent times was the 2015 discovery of oil off the Guyana coast. Further drilling has revealed additional deposits and the project has moved to the development stage with production of first-oil scheduled for 2020. This is widely expected to be transformational for Guyana’s economy and augers well for its emerging tourism industry.
1.7 Key Players and Functions
The responsibility for the development of the Tourism Industry in Guyana rests largely with these key stakeholders, namely the Department of Tourism, Guyana Tourism Authority and Tourism and Hospitality Association of Guyana. The table below outlines the assigned functions of each of these entities:-

<table>
<thead>
<tr>
<th>Ministry of Business (Department of Tourism)</th>
<th>Guyana Tourism Authority</th>
<th>Tourism and Hospitality Association of Guyana</th>
</tr>
</thead>
<tbody>
<tr>
<td> Policy elaboration and implementation</td>
<td> HR development &amp; training</td>
<td> Tourism and Hospitality advocacy</td>
</tr>
<tr>
<td> Research and Strategic direction</td>
<td> Industry research</td>
<td> Destination promotion and marketing</td>
</tr>
<tr>
<td> Donor community relations</td>
<td> Monitoring/regulation of standards</td>
<td> Sales</td>
</tr>
<tr>
<td> Diasporic tourism</td>
<td> Dissemination of statistics</td>
<td></td>
</tr>
<tr>
<td></td>
<td> Destination promotions locally and overseas</td>
<td></td>
</tr>
<tr>
<td></td>
<td> Tourism awareness</td>
<td></td>
</tr>
<tr>
<td></td>
<td> Expansion of airlift</td>
<td></td>
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<tr>
<td></td>
<td> Enhancement of visitor experience</td>
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2.0 POLICY BACKGROUND

2.1 Policy Formulation Process
This National Tourism Policy is the fruit of work that was started more than two decades ago. In 2003 the Guyana Tourism Authority, utilizing a number of earlier studies - Acorn Tourism Consulting (2014); David Andersen (1997); Martin Copeland (2013); Philip Heneghan (2006); Lieve Coppin and Samuel Morales (2015); Bernice Critchlow-Earle (2012); Philip Heneghan (2006); prepared a set of ‘Policy recommendations’. However, a coherent national policy document was never introduced.
The task of preparing the present National Tourism Policy has been aided by the existence of various pertinent studies that have been the subject of stakeholder reviews. Care has been exercised that this final document reflects as closely as possible the valued inputs of consultants, researchers and stakeholders.

The process therefore involves the following steps:

- Identification of prominent studies and research
- Compilation of recommendations and stakeholder submissions
- Synthesis of results
- Dissemination to industry principals
- Final amendments
- Endorsement by the Minister
- Public dissemination of Policy essentials

2.2 Rationale
Decades of haphazard growth of Guyana’s tourism industry point to the need for greater coordination between the industry and those responsible for policy, planning and implementation.

It is clear that Guyana’s potential to attract visitors in sufficient numbers to sustain a tourism industry, capable of contributing a significantly greater percentage of Gross Domestic Product than currently prevails, needs to be purposefully pursued.
Attracting greater numbers of visitors, however, must be pursued in conjunction with a long-term approach to social and economic development in Guyana. Vision 2030, which depicts Guyana’s long-term achievements through its Green State Development Strategy speaks of “a Green, Inclusive and Prosperous Guyana that provides a good quality of life for all its citizens ..” and envisages Guyana as “... a model of sustainable development and environmental security worldwide ...

The National Tourism Policy will align the development of Guyana’s tourism industry with the vision, goals and objectives of the Green State and ensure that the anticipated increased visitor arrivals deliver maximum benefits to the citizens of Guyana.

Tourism, like most other economic sectors, is expected to develop as a result of private investments. Given the risks inherent in private ventures, it is critical that the industry at all times enjoys a high level of investor confidence.

Government’s commitment to a range of supporting measures within a clearly articulated National Tourism Policy in which the industry is prominently positioned in Guyana’s long-term development agenda, will create the confidence that the sector needs to attract investors.

2.3 Policy Objectives
The Policy is driven by the need to realise a number of key objectives.

These are:

1. **Growth in tourism’s contribution to Gross Domestic Product** – This can be significantly enhanced through a coordinated and strategic approach to the industry’s development between public and private sector.

2. **Generation of increased employment in the tourism sector** - The capacity of tourism to generate employment needs to be increased if the industry is to play a larger role in sustaining livelihoods nationally.

3. **Meaningful and beneficial involvement of rural and hinterland communities in tourism enterprises** - Tourism in Guyana must not only provide returns on investments but must also be a means of strengthening local economies and enhancing capacity among rural and hinterland communities. Rural
and hinterland dwellers should therefore expect to be meaningfully integrated into the tourism value-chain.

These objectives represent the macro thrust of the tourism industry in Guyana and the foundation for the strategy measures and recommendations contained in the National Tourism Policy.

2.4 Policy Implementation Phases
The sections that follow outline the Policy guidelines and key strategies and actions being proposed for execution in a 2-phase execution cycle.

Phase 1 will be implemented during the period 2017 to 2019 while Phase 2 will be implemented during the period 2020 to 2021.
3.0 DEVELOPING THE PRODUCT

3.1 Introduction
Guyana's tourism product can be defined in terms of the range of activities and experiences available to visitors. In the context of development this must include those that are not currently available but which, it is felt, can enhance the overall product.

The product must also evolve continuously through private sector investment, enterprise and innovation in order for Guyana to become, and remain, a competitive tourism destination.

The Government of Guyana recognises the need for product development and will support this through a combination of policy-making, facilitating and regulating, as well as promoting activities that add value to the industry and draw more visitors to Guyana.

This section captures the key policies and strategic objectives through which Guyana will diversify, expand and refine its tourism product.

3.2 Overview
Eco-tourism and nature-based tourism are identified as core areas of focus for the achievement of inclusive, high value-adding industrial development in Guyana’s Framework for Green State Development Strategy.

As an emerging eco-tourism destination, Guyana does not yet offer a broad and competitive range of options to travelers seeking to enjoy nature-based activities in its vast hinterland.

Poor infrastructure and transportation challenges make it expensive to travel to hinterland locations. This discourages domestic tourism thereby reducing demand and stymieing growth in this sub-sector.

Despite efforts to promote Guyana as an eco-tourism destination, coastal tourism still dominates the industry with less than ten percent of visitors to Guyana spending any time
in the hinterland. As a consequence there has been insufficient investment in appropriate tourist accommodation outside of population centers.

There is little collaboration between the management of Guyana’s Protected Areas and the tourism industry. This leaves untapped opportunities for tourism as an economic activity within the Protected Areas system. There is also no zoning for tourism by Guyana’s land administrators, leaving Guyana without designated tourism areas to promote to investors.

Community-based tourism projects are being operated in a handful of areas and appear to be self-sustaining. However, this will need to be replicated in many more communities if it is to significantly impact hinterland economic development.

Coastal and urban tourism have enjoyed strong growth over the past decade and investors, large and small, are responding, with a number of new hotels, restaurants and retail outlets appearing on the scene in the last few years.

While current visitor numbers do not call for drastic action on the coastland, any significant shift in favour of hinterland tourism will have to be driven by targeted policy measures and a coordinated strategic approach in which Government must play a key role.

3.3 Key Objectives
1. Significantly expand the range of organized tourism activities in Guyana’s hinterland;
2. Identify and develop the major tourism hotspots in each of Guyana’s ten regions;
3. Improve the quality of the visitor experience of all major tourism activities in Guyana.

3.4 Policy Direction
Government policy as it relates to the development of Guyana’s tourism product is expressed as follows:
• The Government of Guyana recognizes tourism as an export industry with potential for high growth and seeks to maximize the economic contribution of this sector to the nation;

• The Government of Guyana holds the view that there is high economic value in the well-preserved natural habitats of Guyana’s hinterland that can and should be obtained through non-destructive means, including sustainable tourism;

• The Government of Guyana will emphasize nature-based sustainable tourism as a means of enhancing local economies and reducing economic inequalities.

3.5 Key strategies
• Draft and implement industry-friendly regulations for new and existing activities with a view to encouraging best practices and improving the overall quality of Guyana’s tourism product;

• Conduct research and analysis to determine the viability of specific activities and assist the development of related project profiles for investor information;

• Mapping of all tourism activities using geospatial software to be used as a tool for tourism development, planning, logistical support as well as visitor information;

• Establish a network of tourism trails (navigable by foot and by ATVs) linking eco-lodges throughout the hinterland;

• Establish designated tourism zones in the hinterland regions under special regulations designed to support sustainable tourism projects and discourage malpractices.

3.6 Actions Proposed

▪ Engage a consulting firm to conceptualize, develop, test, package and price new or improved product offerings in the area of eco-tourism.

▪ Request from various state agencies updated geospatial information related to land use in order to build a system for collecting and utilizing geographic data for optimizing tourism planning and monitoring. Seek software that will assist this work and allow digital maps to be made available for various purposes.
3.7 Proposed Activities

a) **Birding** - Guyana’s birding resources have been recognized as being of sufficient significance to make Guyana an important birding destination in the region.

**Actions**

- Elaborate an action plan to increase birding travel and tours to Guyana
- Identify the most rewarding birding trails and compile information on birding populations
- Create an informative birding website
- Offer specific FAM tours to birding sites for purposes of feedback and promotion;
- Train, in collaboration with existing birding societies, operators and guides who will specialize in birding tours;
- Produce birding maps and guides for use by birders;
- Organise birding photographic competitions as a means of promoting birding tourism and increasing awareness about birding species and habitats;
- Implement a birding marketing plan that includes participation in at least two birding fairs per year.

b) **Nature-based/ecotourism** - With its abundant biological diversity Guyana is well placed to design and implement a strategy for the development of a nature-based/ecotourism segment of tourism. Many of the actions recommended here would have impacts upon several other forms of tourism.

**Actions**

- Introduce Ecotourism Certification that is aligned with a reputable certifying body as a means of benchmarking standards in local ecotourism enterprises.
- Design and implement a Guyana Ecotourism Curriculum that would be accessible to both local and foreign students and would provide practical nature-based exposure (off-campus training) to participants.
• Develop a Domestic Tourism Promotion Programme – “Know your country, enjoy your country, promote your country” as part of an overall marketing and enhancing awareness strategy.

• Design a local Ecotourism Observatorio or Database of all actual and potential ecotourism products showing travel guides and maps using a GIS platform.

• Design an internal network of flagship ecotourism routes to be marketed as the essential Guyana Ecotourism experience.

• Work with the relevant agencies to create and implement a national land use plan that would support the development of ecotourism and other sustainable forms of tourism.

• Propose legislation that would include environmental protection clauses for sensitive and fragile nature tourism areas.

• Mandate the development of management plans for sensitive tourism sites.

• Develop a system that would enable the collection of demographic information about persons visiting natural and ecotourism attractions.

• Design and implement mechanisms to maximize tourist spending (through accommodation, or the provision of food services, souvenir purchases etc.) where possible at nature-based attractions.

• Develop more multi-destination Ecotourism and tourism itineraries involving Suriname, French Guiana, Brazil and Venezuela that give the visitor an experience of the country’s nature-based /ecotourism product plus other forms of tourism – culinary, heritage etc.

c) Adventure and leisure tourism- The topography of the country is a good support base for the development of adventure and leisure tourism.

Actions
Many of the actions proposed under the Ecotourism heading would also support the development of adventure and leisure tourism in Guyana. In addition the following are being proposed:
Create 5 pilot adventure and leisure circuits that would be marketed as the adventure and leisure hotspots of the Guyana destination. These would include areas suitable for trekking, mountain biking, kayaking, whitewater rafting and similar adventure type activities

Create a package of experiences that would appeal to the millennials market segment

d) **Wildlife viewing**- Despite its small size the Guyana hinterland is home to an impressive array of wildlife which could be used as an important tourism resource for wildlife viewing

**Actions**

Industry initiatives in the area of wildlife viewing depend heavily upon actions and measures that need to be taken by agencies in other departments of government. The ability to view wildlife and the success of wildlife viewing expeditions bear directly upon the level of protection accorded different species; protection from either game hunting or commercial exploitation as part of the wildlife trade. Wildlife viewing in Guyana must be a non-invasive activity that does not threaten in any way the habitats of the species under observation. The following measures are therefore being proposed:

- Support the implementation of recently passed Wildlife legislation to ensure that the resource is sustainable from a tourism standpoint.
- Develop a comprehensive database of wildlife species showing major areas of concentration for both captive and free-ranging animals, as well as land and marine-based species. This data will be hosted on a geographic information system (GIS).
- Produce a Guyana wildlife map using GIS.
- Propose the inclusion of wildlife education on the school curriculum
- Develop a system of official wildlife trails which would be subject to professionally guided tours.
- Design and implement a Code of Conduct for the industry in relation to visitor behaviour on wildlife tours.
- Train communities in the adoption of strategies to increase the economic value of their constituent wildlife species.

e) Community-based tourism- As one of the few countries in the western hemisphere that is registering an increase in its Indigenous population, Guyana boasts indigenous community enterprises that can serve as models of sustainable approaches to community entrepreneurship and comprise the basis for community-based tourism. The latter holds great promise as a mechanism for strengthening local economies and enhancing cultural traditions.

**Actions**

- Identify 5 pilot community projects that satisfy the criteria or have the potential to become community-based tourism enterprises
- Conduct an assessment of the communities to determine what artistic expertise or other cultural or natural resources could form the basis of CBT.
- Seek funding to build capacity among the community members in skill areas relevant to the development of the enterprise – entrepreneurship, food handling, customer service, interpretation, business management, accounting etc.
- Support CBT projects by providing technical and financial incentives for investment in CBT enterprises
- Develop mechanisms to ensure that a major portion of revenues from CBT enterprises remains within the local community.
- Develop marketing material for the pilot communities and utilize the internet and other selling networks to market the CBT attractions.
- Establish a CBT Certification Programme in order to benchmark standards and enhance product excellence.
f) **Sports fishing**- Fish resources exist in abundance in the ‘land of many waters.’ These can be harnessed for the creation of a viable Sports fishing tourism segment. Recognition of this potential for Sports Fishing has been growing among both fishing and tourism enthusiasts and the First Rockstone Fish Festival, celebrated in 2006, represented the first attempt at turning this recognition into a structured event. The Ministry of Tourism is committed to the development of the Sports Fishing niche market and perceives the need for an overarching regulatory framework within which a viable sports fishing sector could be developed.

**Actions**

- Declare specific areas in Guyana as zones for sports fishing and place those under a community management authority.
- Elaborate clear guidelines and regulations for enforcement by host communities backed by the appropriate legislation and supported by the necessary agencies.
- Develop mechanisms to ensure that host communities benefit directly from sports fishing activity.
- Develop a management system by which all sports fishing activity is under the supervision of a community guide.
- Develop clear management guidelines especially pertaining to species management, capacity management and fishing seasons.
- Host an annual sport fishing festival to promote awareness locally, regionally and internationally.

g) **Sports tourism**- Sports Tourism is characterized as “...an economic and social activity at the crossroads of sport and tourism. Sports tourism is a segment of the tourism market and its economic contribution has grown strongly in recent decades...”

Guyana offers both traditional (cricket, motor-racing and football) and non-traditional (archery, regattas) sports activities that are of sufficient strength and appeal in the market to support a sports tourism strategy. The advantage of sports
tourism is that it enables a hosting destination to capitalize on the sporting talent of its nationals in an encounter with teams from overseas.

**Actions**

- Develop an awareness programme for Sports Associations in Guyana that explains the business potential of sport in the sports tourism model.
- Strengthen collaboration with the Department of Sport, Ministry of Education with a view towards increasing the budgetary allocations for the development of sport infrastructure.
- Prepare a catalogue of prominent sports heritage venues, buildings and structures (for example the Bourda cricket ground) that would form part of a Guyana tourist itinerary.
- Develop training programmes that target Sports Associations aimed at strengthening capacity in the area of events management, entrepreneurship and customer service.
- Design an annual calendar of major sports tourism events which would be marketed in the appropriate places, both via internet and tourism events.
- Plan for the creation of a Sports Tourism Officer position as a liaison between the Ministry of Tourism and the Department of Sport, Ministry of Education.

h) **Cruises and yachts**- Despite the constraints posed by its relatively shallow channel, Guyana is in a position to accommodate smaller and more ‘themed’ cruise vessels. In addition, its position south of the Caribbean hurricane belt enables it to offer safe harbor facilities for small yachts during the traditional Caribbean hurricane season.

**Actions**

- Input plans for the upgrade of port infrastructure and facilities that would impact both cruise and commercial traffic.
Propose tax and other incentives for investments in marinas and other berthing infrastructure.

Allocate resources for the design of material that promotes Guyana as a destination for smaller cruises.

Develop a plan to grow the annual yachting rally to attract more yachts and to create a more sustained flow of yachts into Guyana.

i) **Entertainment and events** - As part of an overall strategy of product diversification the development of a portfolio of entertainment and events based upon talents both local and international can give a significant boost to visitor arrivals.

**Actions**

- Design a body of tax and other incentives to encourage greater regularity and increased investments in the entertainment sector
- Design a Programme to raise the level of awareness and appreciation of national cultural forms, traditions and talent
- Develop and sustain collaboration between Tourism and Entertainment industries
- Promote cultural talent as part of the Guyana tourism product to be marketed internationally
- Publish an annual Calendar of Entertainment events to be included in international marketing and promotional events.

j) **Heritage and culture tourism** - The heritage and cultural traditions of Guyana are unique in many ways, comprising a stock of experiences that no other destination can offer or replicate exactly. The traditions in construction, creative and culinary arts, music and expression are the raw material upon which a vibrant heritage and cultural tourism product can be based.
Actions

- Accelerate plans for the delineation and upgrading of heritage trails/districts in Georgetown, Essequibo and Berbice.
- Begin the identification and designation of new sites deemed to be the expressions of the sport, industrial or cultural heritage of Guyana.
- Develop proposals to offer incentives for investment in heritage activity; for retentions of the historical character of buildings, structures and sites and for the preservation of traditional cultural resources.
- Promote links between heritage and other sectors of the economy so as to spread the benefits of tourism to the wider community through, for example, sale of local craft products, local cuisine and use of local cultural performances at these specific sites.
- Provide human resource training for personnel in the cultural heritage industry in cultural entrepreneurship management, events management, customer service and other relevant areas.
- Market the cultural heritage as an integral part of the overall tourism product of Guyana.
- Support the development of a slate of national festivals and celebrations based upon the culinary, artistic, musical or other heritage of Guyana.

k) Agri-Tourism – In 2016 a Cooperation Agreement was signed between the Minister of Tourism and the Minister of Agriculture. That Agreement outlined the parameters for the development of an agri-tourism sector based on agricultural sites, production processes and agricultural products being made into tourism attractions. In this regard abundant examples exist in the Caribbean region and beyond of farms, estates and agricultural products that are the bases for tourism attractions.

Actions

- Review the Cooperation Agreement with a view to updating its recommendations and making its provisions more actionable
- Based upon the relevant research, the Department of Tourism is to develop a Manual for Agri-Tourism which will explain the form of tourism and spell out the requirements for its success
- Identify at least three (3) Agriculture sites that have potential for development as agri-tourism attractions.
4.0 MARKETING THE PRODUCT

4.1 Introduction
One point that provokes little disagreement among industry leaders and stakeholders is that the image of Guyana as a tourism destination needs to be significantly enhanced and that the Guyana tourism product needs to be marketed with greater intensity. This higher market visibility demanded by the industry has implications at both budgetary and market operational levels. At the budgetary level, the attendance at trade fairs and other market events, the production of collateral material and its distribution at strategic locations, the campaigns to raise awareness at the national level are all tasks that demand a significantly higher allocation of resources than the sector has been blessed with in the past. At the operational level, sustaining an image in the right markets requires strategic initiatives and campaigns in multiple promotional environments and in multiple venues.

4.2 Overview
Guyana has consistently branded itself green in the market, connoting a destination committed to forms of tourism based upon nature, adventure and unique cultural traditions and expressions. This marketing thrust has distinguished Guyana from its Caribbean island neighbours who have generally projected an image of sea, sand and sun and has aligned it more with the territories of the continent of South America that lay claim to vast stretches of rainforest, jungle and ancestral cultural traditions. The slogans ‘Guyana-the Amazon Adventure’ and ‘Guyana - South America Undiscovered’ resonate well with this market thematic.
Guyana also has the potential to develop a number of niche markets in order to diversify the product offering. These have already been addressed in the previous section. The imperative now is to market Guyana.

4.3 Key objectives
A marketing strategy for Guyana should seek to fulfill the following objectives:
1. To sustain increases in arrivals into Guyana across all market segments
2. To increase the flow of domestic visitors to local tourism attractions
3. To increase visitor spend
4. To boost repeat visits
5. To enhance the tourism image of Guyana in the global marketplace

4.4 Policy Direction

Recognising the importance of positioning Guyana strategically in the international marketplace and creating the appropriate incentives and attractions for especially foreign visitors, the Government of Guyana will support initiatives to:

- Increase the capacity of the GTA to discharge its responsibilities with respect to promoting Guyana’s tourism product;
- Reduce negative travel advisories based on security assessments by governments and industry analysts;
- Conduct relevant market studies to inform the adoption and implementation of an agreed marketing strategy.

4.5 Key strategies

A still relevant Marketing Strategy elaborated by the Acorn Tourism Consulting Ltd. & ABMR (2014) proposes a division of Guyana’s target market into four segments – Core markets, Tactical markets, Investment markets and Watch list markets.

**Core markets** - these comprise visitors from the traditional source markets of the USA, Canada and the UK which are already visiting in significant numbers

**Tactical markets** – these comprise persons that can be attracted when specific opportunities arise and usually are to be found in Guyana as well as in neighbouring countries and the diaspora.

**Investment markets** – these are markets with potential for future growth (for example Germany and Holland)
Watch list markets – these are markets to be targeted over the longer term (South America, Asia)

Based upon this segmentation a strategic approach is being proposed that combines the following initiatives:

- Presence at selected trade shows and other sales events that are most closely aligned to the core Guyana tourism product.
- Production of digital and other collateral material for distribution to and use at marketing and sales events and other promotion locations.
- Strategic placing of advertisements in visitor-yielding publications.
- Provision of support to Diasporic and other events aimed at boosting travel to Guyana

4.6 Actions proposed
The strategies outlined above are the basis for the proposed actions that follow:

a) Enhancing local awareness

The marketing of Guyana as a tourism destination begins with raising levels of awareness among the local population about the tourism resources of Guyana, the importance of the industry to Guyana and the role that locals can play as stakeholders in the sector.

Actions

- Use the public communications media to build local brand appreciation
- Collaborate with the private sector and other agencies to organize FAM trips for the media, public and private sector employees and other local bodies.
- Promote the use of local tours as incentive travel.
- Collaborate with the tourism private sector to foster student travel through the provision of discounted fares for student groups.

(b) Growing Guyana’s Core and Secondary markets
The first phase of the Guyana marketing strategy would entail the consolidation and growth of the core and secondary markets. These are the markets (USA, Canada, UK, the Caribbean, the diaspora and the neighbouring territories of Suriname and Brazil) that supply the bulk of visitors to the country. To achieve this, the following actions are recommended:

**Actions**

- Develop mechanisms for supplementary sourcing (for example a percentage of departure tax) of funds to be allocated for the marketing of Guyana.
- Deploy representation agencies in core markets who would be responsible for marketing Guyana in those market areas. Key responsibilities would include the following:
  - Engagements with existing and new tour operators
  - Identification of appropriate personnel/entities for Media and Trade Fam trips
  - Contacts prior and activities/meetings during trade shows
  - Sales training for marketing personnel
  - General PR outreaches and initiatives
- Attend at least 2 major trade fairs annually in each of the core market countries (USA, Canada, UK) supported by annual road shows.
- Support the execution of 2 to 4 FAM trips annually per core market country involving media, operators or other relevant personnel.
- Support the sustained production of a bank of fresh narratives, videos, images etc. pertaining to Guyana’s tourism attractions and major events.
- Support the production of adequate supplies of bi-lingual collateral material that would be suitable for users in specific markets.
- Develop ‘Guyana experience’ pilot routes that market different facets of the Guyana tourism product – leisure and adventure, heritage and culture, social interest, enjoyment of nature etc. in the forms of day trips, weekends, short breaks.
- Creation of a state of the art website to drive a digital marketing strategy.
c) **Tapping into new and other growth markets**

The actions recommended in this section comprise approaches to be adopted in a Second Phase (2018-2020) of the marketing strategy. The first phase was the phase of consolidation of the core markets, creating a spike in visitor numbers. The second phase targets expansion and diversification during which the markets that were targeted in Phase 1 are further consolidated and the investment markets included in the awareness campaign are now fully targeted with aggressive marketing activities. These will include the niche markets, already actively targeted through the digital marketing strategy, the European markets and nationals from neighbouring markets (Caribbean islands, Suriname, Northern Brazil). A full range of marketing tools and techniques will be deployed to grow these markets.

**Actions**

- Develop multi-destination packages that combine visits to selected Caribbean islands with a Guyana vacation to be sold as an Amazon-Caribbean experience.
- Develop trans-border packages that link Venezuela, Brazil, Guyana, Suriname and French Guiana and market as the Guianas Shield experience.
- Develop strong itineraries for birding and venues for sport fishing and other outdoor type events to be marketed to the outdoorsy, adventure and experience-seeking European and North American markets.
- Strengthen the digital presence of Guyana’s niche markets through more sophisticated website applications.
- Place advertisements in more specialty publications and TV programmes viewed by nature, sport and adventure lovers.
- Allocate resources for Guyana’s attendance at more specialty adventure trade shows and market events.

**d) Reviewing market segmentation**
A review of market segmentation is aimed at bringing under the marketing umbrella new and promising segments not previously or adequately targeted as part of the national marketing strategy.

In the case of Guyana two segments that merit attention are the following – a) Millennials and b) the Diaspora. The recent Conference of Ministers of Tourism of CTO Member Countries, held in Curacao, stressed the importance of the Millennials market to the Caribbean. The recent Diaspora Engagement Conference 2017 held in Guyana saw a strong interest in Guyana’s tourism product both from the investment and visitor perspective.

**Actions**
The following actions are recommended in relation to these market segments:

**Millennials**
- Produce an informative and state of the art website that gives precise information in attractive format about experiences and events in Guyana likely to be favoured by millennials.
- Allocate funds for advertising in special interest publications and for accessing social media domains frequented by millennials.
- Develop ‘packaged’ travel experiences that fit the tastes and leisure experiences of the millennials.
- Allocate funds for ongoing research into the trends, behaviours and profiles of this millennials segment.
- Allocate funds for trade sector intelligence and monitoring of the tourism economy (including TSA) to keep the industry in the know regarding the latest trends and impacts of tourism in Guyana.

**Diaspora**
• Produce an annual and comprehensive Calendar of Events and Festivals for
distribution through diasporic Associations and events and at foreign embassies
and advertised on social media, blogs and websites and in local media and
publications.
• Support the creation of special events – Town and Village Weeks as well as outdoor
sports and social events attractive to this segment.
• Allocate funds for advertisements in publications popular among the diaspora in
North America and the UK.
• Allocate funds for the establishment and resourcing of a Tourism Office of the
Diaspora in the Ministry of Business with responsibility for Tourism to oversee and
coordinate activities, strategies and initiatives that bear upon diasporic travel to,
and activities outside and in, Guyana.

4.7 Key Performance Indicators
The following will be used to measure progress or success in the implementation of these
marketing strategies:

1. Growth in annual visitor arrivals across all market segments
2. Expansion in number of registered tourism businesses in response to higher
demand
3. Increases in hits registered on promotional websites
4. Growth in sector contribution to national economy
5.0 PROMOTING INVESTMENT

5.1 Overview
The discovery of significant off-shore oil deposits in 2015 has focused international attention on Guyana and provided a dynamic platform from which to promote our nation to investors and visitors alike.

The Government of Guyana recognizes tourism as one of the country’s key growth sectors, and the current international visibility favours an accelerated investment programme to develop Guyana’s unique tourism product.

It is therefore important at this point that Government elaborate an investment policy for the tourism industry that aligns with the values and objectives that support and guide Guyana’s long-term development.

5.2 Key objectives
Key investment objectives for the tourism sector include:

a) To generate and significantly increase the number of appropriate tourism properties in Guyana’s hinterland.

b) To establish additional large-scale hotel projects on the coast.

c) To elaborate at least one significant tourism investment project in every region.

d) To create economic opportunities in protected areas through tourism investments.

e) To create specially regulated tourism zones

5.3 Policy direction
The need to increase investment in Guyana’s tourism industry is articulated as follows:

- The Government of Guyana recognizes tourism as an export industry with potential for high growth and seeks to maximize the economic contribution of this sector to the nation;

- The Government of Guyana also recognizes the need for adequate tourism infrastructure to meet the medium to long-term demand of a growing industry, and seeks to encourage private investment to address it;
• The Government of Guyana will emphasize sustainable tourism as a means of enhancing local economies and reducing economic inequalities;

• The Government of Guyana holds the view that there is high economic value in the well-preserved natural habitats of Guyana’s hinterland that can and should be obtained through non-destructive means, including sustainable tourism.

5.4 Key strategies
Key strategies for achieving the tourism investment objectives include:

• Promote and support the development of a network of eco-lodges in the hinterland regions
• Create business plans for the development of community based tourism projects in hinterland regions
• Develop a portfolio of tourism investment projects in collaboration with regional stakeholders
• Establish specially regulated tourism zones throughout Guyana and invite proposals for environmentally friendly tourism investment projects within these zones
• Collaborate with the Protected Areas Commission to create and regulate a restricted but attractive tourism product for development through private investment

5.5 Actions
In the light of the limited success in attracting new investments in tourism and based on feedback from industry stakeholders the Ministry of Business is now proposing the following actions:

• Review the current investment concessions for the sector with a view to creating an investment stimulus package which sees the public sector investing by way of concessions granted and receiving a return on investment by way of various taxes collected within a ten year period.
In conjunction with item (a) of section 5.2, draft a Hinterland Investment Policy.

Prepare a list of sites in the hinterland that have been identified as suitable and desirable areas for the location of eco-lodges, and develop a project profile for each, including the preferred means of financing both public and private.

Draft a Tourism Zones Framework for the establishment, operationalizing and regulating of designated tourism zones. In collaboration with the Guyana Lands and Surveys Commission establish a set of tourism zones and facilitate their development through private investment in accordance with the framework.

In collaboration with the Protected Areas Commission, develop strict tourism guidelines for each type of protected area and draft a Protected Areas Investment Guide.

Facilitate the lease of land for investments in viable large-scale hotel projects in Guyana’s coastal regions

Actively promote Guyana’s tourism investment projects targeting investors with international market and air transport linkages, as well as local investors.

5.6 Key Performance Indicators
Key indicators for the successful implementation of the Tourism Investment Policy are as follows:

1. Number of new tourism sector investment and expansion projects
2. Value of new and expansion tourism investments
3. Number of new jobs created in the tourism sector
4. Number of site profiles prepared for eco-lodges
5. Increase in international airlift capacity to Guyana
6. Time remaining for investor readiness of Protected Areas projects
7. Time remaining for investor readiness of Tourism Zone projects
6.0 HUMAN RESOURCES – EDUCATION AND TRAINING

6.1 Introduction
Guyana’s tourism product needs to be handled more professionally... It also requires further investment at both the private and public levels, especially in providing qualified and skilled staff and fostering a professional atmosphere that encourages a strong sense of commitment, pride and responsibility.

The above observation from Guyana’s 1996 National Development Strategy remains relevant today. Service excellence is what drives repeat visits and positive reviews, and a body of well-trained service professionals must be deployed throughout the sector if Guyana wants to compete with well-established destinations for a share of the global tourism market.

As the tourism sector grows the need for suitably trained and qualified service personnel will become more acute and must therefore be adequately addressed by effective training.

The scale, scope and quality of the training required by Guyana’s tourism industry, as well as the means by which it is to be achieved call for a strategic approach that is guided by clear government policies. It cannot be left to chance.

6.2 Overview of current situation
Service standards in the local industry are both low and inconsistent. There is limited recognition within the industry of the importance of human resource training, with local operators investing very little in training. Jobs in the tourism and hospitality sector are still perceived as menial occupations and high staff turnover is reported in the industry.

Additionally, there are currently no programmes in place for training that can provide the industry with a steady flow of the qualified service providers it requires. The Tourism Studies programme at the University of Guyana is not focused on hospitality, while the
programmes offered by the Carnegie School of Home Economics are not sufficiently related to tourism.

In view of the priority that attaches to the provision of a well-trained labour force to serve the industry, a plan of action must be formulated to address the current situation and to create a sustainable programme for building the human resource capacity of the industry.

**6.3 Key Objectives**
The principal objectives that will guide human resource development in Guyana’s tourism industry are:

1. To equip persons with the appropriate knowledge, skills and aptitudes for work in the tourism sector;
2. To develop and sustain appropriate training programmes to support Guyana’s tourism industry;
3. To attract Caribbean and other overseas students to high-quality tourism training programmes in Guyana.

**6.4 Policy Direction**
1. Given the continued upward trajectory in visitor arrivals, and in recognition of the importance of a well-trained tourism workforce the Government of Guyana anticipates an increased demand for professional training, and will:
   a) Lead the effort to establish a dedicated institute for the delivery of hospitality education and training; and
   b) Invest in educational programmes targeting the needs of the tourism and hospitality sector.
2. In the interest of achieving and sustaining a well-trained tourism workforce, the Government of Guyana will promote the use of approved industry certification within the hospitality sector.
3. Given the location of Guyana’s most valuable tourism attractions, the Government of Guyana will ensure that opportunities for appropriate training are available to tourism workers throughout Guyana.
6.5 Key strategies
Key strategies in pursuit of the objectives of the National Tourism Policy in the area of Human Resource Education and Training are as follows:

- The development and promotion of professional training programmes for the tourism industry;
- The promotion of *service excellence* as a key factor in generating repeat visits to Guyana;
- The establishment of a Hospitality Training Institute in Guyana;
- Strengthening partnerships between industry operators and the providers of hospitality and tourism education and training;
- Strengthening capacity within remote, indigenous and hinterland communities;
- Seeking international accreditation of tourism and hospitality training programmes;
- Supporting the work of the Caribbean Tourism Organisation in the execution of regional education and training initiatives that can directly benefit the local tourism sector;

6.6 Actions

- Convene an Inter-Agency Hospitality and Tourism Education Task Force to oversee the execution and implementation of all policy measures in the area of education and training for the sector.
- Seek donor funding for the improvement and enhancement of the physical facilities of the Carnegie School of Home Economics.
- Seek donor funding for technical assistance for the upgrading of the curriculum, including the provision of online courses and industrial attachments, at the Carnegie School of Home Economics.
- Support, through the provision of funding, programmes to deliver appropriate skills training for the staff of the Carnegie School of Home economics.
- Accelerate the establishment of a **Hospitality Training Institute for Guyana** that would be articulated with the Carnegie School of Home Economics and the University of Guyana.
- Support the process leading to the international accreditation of the programmes of the Hospitality and Training Institute.
• Establish a mechanism for continuous monitoring and evaluation of entities engaged in the delivery of hospitality and tourism education and training.

6.7 Key Performance Indicators
The following will be used as the Indicators to measure the success of efforts in the area of Human Resources Education and Training:

1. Higher number of persons receiving skills training in Tourism and Hospitality
2. Increase in number of Tourism and Hospitality training programmes available to the workforce
3. Increases in investment in Tourism and Hospitality training facilities
4. Increased number of repeat guests at tourism establishments
7.0 MANAGING THE DESTINATION

7.1 Introduction
Destination management in the current state of the evolution of Guyana as a tourism destination presents both challenges and opportunities. While Guyana is seeking to carve a niche in the international tourism marketplace as a green destination committed to the development of a tourism product that is sustainable and climate smart, it is pursuing that goal in an increasingly competitive environment; vying for the same market as are more mature destinations in the Amazon region, Central America, Africa and Asia.

At the same time the very freshness and ‘undiscovered’ nature of the Guyana product presents an opportunity for innovative tourism experiences in a relatively untried and emerging tourism destination.

Destination management in more mature tourism destinations, is usually the responsibility of Destination Management Organisations (DMOs) or Destination Management Companies (DMCs). At this stage of the development of Guyana’s tourism industry there are responsibilities to be discharged by both the public and private sectors.

7.2 Overview of current situation
Currently the Guyana Tourism Authority manages a small (by Caribbean destination standards) budget to support initiatives in product development, marketing, research and data collection and administration. A strong product exists in some of the more remote locations of Guyana’s hinterland, but there are challenges in terms of access, facilities and infrastructure, training, management and marketing. In addition, Guyana has been the subject of negative advisories in relation to the safety and security of tourists.

While, the prospect of oil revenues accompanying production in 2020 does raise the possibility of more money being available for tourism and other developmental projects, growing visitor arrivals and recent tourism investments point to more immediate needs for industry support.

Since destination management places much emphasis on the quality of visitor experience, collaboration among stakeholders and the execution of effective marketing strategies, a
synergistic effort will be required from both public and private sectors in order to realise this endeavor.

7.3 Key Objectives
Making Guyana a preferred green destination involves fulfilment of the following objectives:

1. To create a pleasant, safe and memorable experience for both first-time and returning visitors to Guyana
2. To foster the private-public sector collaborations needed to execute all initiatives required for this unique visitor experience.
3. To ensure that ports of entry offer a welcoming and hassle-free experience
4. To promote the highest standards of hospitality and service excellence throughout the entire visitor experience
5. To bring the destination experience in line with best practices for sustainable tourism.

7.4 Policy Direction
In pursuit of Destination Management for sustainability the following are the key policy imperatives:

1. Government is committed to the establishment of a green economy and will support a tourism industry that is aligned with sustainability prescriptions and best practices;
2. Government recognises that ports of entry are the gateway to a quality visitor experience and is committed to the expansion and enhancement of such gateways;
3. Given the importance of safety, Government has committed to enacting an appropriate regime to enhance the safety of visitors;
4. The Government attaches priority to the involvement of Regions in Destination Planning and is committed to a process of Regional consultations for tourism destination planning.
7.5 Key Strategies

- Revision of existing legislation or enactment of appropriate new legislation to support industry development;
- Upgrading of public infrastructure especially ports of entry;
- Profiling of industry-endorsed tourism hotspots by Region
- Identification of flagship tourism projects by Region
- Rationalisation of visitor entry procedures to make those more supportive of tourism.

7.6 Actions

This section will seek to bring together the corps of management interventions which government, in collaboration with private and public agencies, will need to make in order to put Guyana in a state of readiness for expanded tourism.

a) Legislation and Standards

Besides the industry specific Guyana Tourism Authority Act, there exist in scattered legislation, a number of laws and regulations that impact the operations of the tourism industry. Proposals are made here for additional legislative action:

- **International air transportation**- Engage the relevant authorities to ensure a periodic review of Civil Aviation codes in order to bring those in line with modern codes of the sector.
- **International water transportation**- Work with subject Ministry to bring about more comprehensive legislation that would go beyond passenger movements at sea and would also govern impacts upon the maritime environment as a means of protecting the maritime area under its jurisdiction.
- **Inland water navigation**- Collaborate with relevant authorities to conduct a comprehensive review of the River Navigation Act and Regulations and the Fisheries Act in order to bring current river transport activity in line with the operational standards and norms.
- **Accommodations, restaurants and places of entertainment**- Work to enact legislation making the registration of hotel accommodations a legal
requirement, with registration hinging upon compliance with stipulated standards.

- Review content of **Provisions Relating to Common Lodging Houses** with a view to updating the standards and making those provisions apply countrywide.
- **Food licensing and Food safety** - Review the current regulations regarding food handling permits to make their possession a legal requirement countrywide, and to extend the period of their validity from six months.
- **Differently able persons** - Enact legislation requiring hotels and restaurants to provide amenities and facilities for the differently able.
- **Places of entertainment** - Review regulations governing matters such as capacity limitations, provision of sanitary facilities and fire exits, safeguards against noise nuisance, and other offences to neighbouring residents.
- Draft or revise legislation that stipulates the required fire safety criteria, or structural reliability, means of escape, fire-fighting equipment, fire detection, and restriction or suppression of the spread of fire.

**b) Tourism corridors**

Visitors travelling to Guyana cannot possibly see the entire country. Therefore their tourism experience should involve exposure to such aspects of the country’s physical, social and cultural life as would give them a satisfying experience of Guyana. Hence the idea of the tourism corridor as a means of connecting tourist with destination.

The following extract from a study undertaken by Prideaux and Cooper in 2002 best describes the concept of Tourism Corridors “... an approach to tourism that offers travelers the opportunity to visit a variety of built and natural attractions along a themed route. By moving away from the well-established destination resort model of tourism development that focuses on a specific locality, tourism corridors offer visitors the opportunity to travel through a variety of landscapes and visit a range of iconic and non-iconic yet locally significant attractions.”

It follows from the above that a tourism corridor in Guyana is expected to possess the following elements:
1. **A strong attraction base** comprising a number of appealing sites or places that are of interest from the standpoint of their biodiversity, historical, cultural, social, heritage, environmental or other significance.

2. **Easy connectivity** that does not present any logistical hardships in accessing and moving between such attractions.

3. **Appropriate services and amenities** especially in the provision of such necessities as food and drinks, well-appointed rest stops, options for overnight accommodation, basic medical care and security.

4. **Adequate directional and/or informational signage** that facilitates travel and educates the traveler about the attractions within the corridor.

With these conditions understood the following action will be pursued for the development of tourism corridors in Guyana.

- Develop plans, through collaborations with public and private sector agencies, for the upgrading of six tourism corridors in Guyana that would satisfy fully the 4 elements prescribed above and be available for marketing digitally and otherwise. These would be interventions both in the area of public infrastructure and capacity building aimed at enhancing the appeal of the tourism product and the quality of the visitor experience. The corridors proposed are:

  1. **Demerara (coasts and banks)** – a mix of heritage, cultural, industrial, shopping, culinary, historical and nature-based attractions.
  2. **Cuyuni -Mazaruni - Pomeroon** – an experience of the towns, resorts, water-based attractions and agricultural areas of this corridor
  3. **Linden – Lethem** - From mining and industrial heritage to the rich indigenous community tourism experience of the Rupununi, with exposure to the worlds of the rainforest in the Iwokrama region and the savannahs of the South Rupununi.
  4. **Potaro – Siparuni** – A biodiversity and natural splendor blitz in central Guyana
5. **Barima – Waini** – Close encounters with turtles nesting and abundant indigenous experiences


c) **Public Infrastructure**

Some of the key infrastructure interventions needed to enhance the tourism product are:

i. **Ports of entry**

An official port of entry is usually a visitor’s first introduction to a destination. In that moment of first encounter perceptions (positive or negative) are heightened and it is therefore in the interest of those managing a destination to ensure that facilities, amenities, human resources and the entire ambience of a port of entry all combine to create a positive impression. Congestion, facilities in disrepair, ugly aesthetics, long, slow queues and general lack of order are sure to generate a negative first impression. On the other hand a pleasing physical appearance, immaculate facilities, courteous service and efficient immigration systems create a favourable impression of the destination. Not all the desired conditions listed are matters of public infrastructure, but interventions under the latter go a far way towards creating the right ambience at a port of entry.

**Actions**

- Help to ensure a total systems and facilities review of the four main ports of entry into Guyana – Cheddi Jagan International airport, Ogle International Airport, Lethem and the Moleson Creek Terminal with a view to upgrading physical infrastructure (including access roads to all ports of entry), passenger facilities and amenities and operational systems and procedures.

- Institute training (or re-training) for front-line staff and service providers (including immigration and customs officers, security personnel, staff working in food concessions, taxi and bus drivers) in such appropriate areas as customer service, personal hygiene, road courtesy, basic knowledge about Guyana.
ii. Visitor attractions
Visitor attractions rarely exist or succeed as standalone items. Invariably action is needed in the following areas:
- Access roads or stellings or airstrips to facilitate visits;
- Appropriate, sufficient and user friendly signage;
- Public amenities and conveniences in key locations

iii. Development and maintenance of Tourism Corridors
As part of the effort to enhance the quality of tourism attractions the following actions are proposed:
- Collaborate with relevant agencies to prioritise the upgrade of all access roads leading to the main attractions in the tourism corridors.
- Collaborate with relevant agencies to establish or enhance public signage associated with prominent attractions in the six tourism corridors.
- Mandate the provision of adequate, disabled persons-friendly amenities and conveniences as a prerequisite for licensing of food and beverage establishments at tourist attractions.

d) Security
The absence of, or inadequate, security at a destination can be a major reason for the decline in visitor arrivals. Tourists simply are not motivated to venture where they perceive a risk to themselves or to their personal property. Destination managers should therefore make every effort to ensure the provision of safety not only for tourists but also for their property and possessions.
Safety and security issues are usually part of any discussion of constraints to tourism development in Guyana. It was this awareness of the impact of crime on tourism that in large measure prompted the Tourism and Hospitality Association of Guyana (THAG) to sign an MOU with the Ministry of Home Affairs in 2012.

Given the prominence of crime reporting in Guyana and, more importantly, the perceptions that are created internationally by negative travel advisories such as the following issued by the Government of Canada: there is no nationwide advisory in effect
for Guyana. However, you should exercise a high degree of caution due to high crime rates (May 2017), it is necessary to employ counter measures to protect the industry.

**Actions**

- Establish a **Tourist Police Unit** in Guyana.
- Develop, in collaboration with the Ministry of Public Security, an Action Plan for the enhancement of security between the Cheddi Jagan International Airport and Georgetown /East Coast Demerara, as well as at selected, major tourist sites around the country.
- Collaborate with relevant taxi and bus operating services to institute Tourism Awareness training programmes that target taxi and bus drivers who transport visitors to and from points of arrival, in order to inculcate attitudes of courtesy, honesty and fair business practices in those service providers.

**e) Visas and Immigration procedures**

Border controls have become an essential feature of the machinery of government. In an age of transnational crime and international terrorism-networks, governments in the Caribbean and the rest of the world take a keen interest in monitoring all persons entering their national space. Border control systems also give Governments vital statistical information of arrival trends.

Guyana requires that all visitors be holders of a passport that is valid for at least 6 months. In relation to visas, visitors from more than fifty countries enjoy visa-free access to Guyana. However, the system for granting visas needs to be made more efficient and modern, so as to maintain effective border controls without unduly extending the application process.
**Action**

- Conduct a review of immigration systems with a view towards streamlining a set of regulations that would allow the granting of visas on arrival to those bona fide visitors not in possession of entry visas.

**7.7 Key Performance Indicators**

The following are proposed as measures of performance:

1. Increase in the number of persons investing in tourism facilities
2. Increase in the number of repeat visitors
3. Higher satisfaction among persons sampling the product (as gleaned from visitor surveys)
4. Shorter time spent by visitors at Immigration on arrival
5. Reduction in the number of crimes committed against visitors
8.0 POLICY IMPLEMENTATION AND MONITORING

As is the case in any development sector, policy implementation will involve the input and collaboration of a wide variety of players. While the principal implementing agents will be the Department of Tourism, the Guyana Tourism Authority and the Tourism and Hospitality Association of Guyana Tourism activities and initiatives will cross the domains of Culture, Infrastructure, Education and Sports, Security, Indigenous Peoples Affairs, Forestry, Health, Business and Finance, Natural Resources, Communities among others. This requires very well structured consultations and synergies since the overarching paradigm of Green State development itself unites development strategies into the pursuit of one common goal of sustainability.

Therefore between 2017 and 2021 the tourism sector expects to be partnering with the Ministries and agencies listed in the paragraph above in an effort to ensure coherence with the policies and lines of actions of those entities and in pursuit of full policy implementation by the end of the second phase of the Policy implementation cycle.
9.0 FUTURE CHALLENGES

This section will attempt to project some key challenges for Guyana as a tourism destination and try to craft the likely development responses. The observations and recommendations in this section are based largely upon the evidence supplied by the consultancy reports used in the preceding sections and upon the best intelligence of the author. The key challenges being explored are the following:

- Airlift
- Climate change
- Economic recession
- Oil driven economic boom
- Crime and unrest

9.1 Airlift
Critical to strengthening the appeal of Guyana as a tourism destination is the expansion of airlift both into and within Guyana at competitive prices. At the moment Guyana has direct links with a handful of carriers that offer direct flights from a few Caribbean, and North American airports. There are no direct flights from any European, Asia, or African countries. Air links with South America are also weak and it would be in the interest of tourism for those to be strengthened, especially with Brazil and the more southern territories. A comprehensive strategy that embraces both additional scheduled and charter services would be of benefit.

9.2 Climate Change and extreme weather conditions.
Climate change and extreme weather conditions are a serious threat to the development of the tourism industry since its impacts are upon the very natural assets and built environment upon which a tourism industry is based. The consensus that now exists in the scientific community about the reality and effects of climate change is a good foundation upon which to elaborate the adaptation and mitigation strategies needed to address the challenge of climate change.

Prolonged drought conditions in the Rupununi, inundations along the coast, unusual weather patterns all have the effect of stressing ecosystems and natural environments that are important to tourism in Guyana.
Responding to these challenges from an industry standpoint will require a deliberate effort by all stakeholders. The first priority would be the reduction of greenhouse gas emissions by the industry through the use of cleaner and more energy efficient technologies in construction, transportation and accommodation. Strict enforcement of environmental regulations combined with fiscal incentives to help cushion the burden of additional costs required to introduce greener business practices in the industry will be necessary, to foster a collaborative approach to climate related risks by public and private industry stakeholders.

9.3 Economic Recession
The travel and tourism industry is susceptible to global economic shifts especially when recession conditions occur in key markets of origin. Although the number of annual arrivals in Guyana continues to show growth when compared to other Caribbean destinations, sudden declines in visitor numbers will create ripple effects that will be felt along the value chain.

The response that would cushion the impact of economic recession on the local tourism industry is one of prevention through diversification. The aim is to reduce Guyana’s over-reliance on tourism as well as to reduce dependence on visitors travelling mainly from any one destination.

Diversification is neither an easy nor an overnight solution and requires an integrated approach to tourism development that positions tourism as part of a suite of economic drivers including agriculture, services, mining & petroleum, forestry, and manufacturing. While recessions may also affect commodity prices and promote currency instability affecting all sectors, the net negative effect on tourism is likely to be attenuated in an economy that is more diversified.

9.4 Oil Driven Economic Boom
The caution that needs to be exercised here is based upon the economic reality of Guyana in the early 1970s when a robust economy, driven by favourable prices for sugar, rice and
bauxite on the world market, rendered tourism development superfluous. While a Guyana that is a producer and net exporter of oil is infinitely better than a Guyana that produces no oil at all, attractive oil revenues should not obscure the comparative advantage that Guyana possesses in being the custodian of huge tracts of virgin rainforest, an asset both for nature-based tourism as well as a carbon sink in the battle against climate change.

Guyana can overcome this challenge through a sustained commitment to the development of a green economy that balances the exploitation of non-renewable resources (petroleum and minerals) with the pursuit of sustainable nature-based and ecotourism.

9.5 Crime and Unrest
Crime, war, unrest and instability, like natural disasters, are the universal spoilers of tourism. High-crime destinations rarely succeed in attracting high volumes of visitors. Countries and regions deemed to be vulnerable to terrorist attack or any forms of civil disorder usually find themselves being the subject of travel advisories that impact travel decisions long after the specific threat may have subsided.

This issue of crime and tourism, or tourism and the perception of safety has been discussed more comprehensively in the previous section on destination management. However, the issue is of sufficient gravity in the context of Guyana as to its inclusion among the future challenges facing the industry.

The crafting and implementation of an Action Plan for the enhancement of security between the Cheddi Jagan International Airport and Georgetown /East Coast Demerara, as well as at selected, major tourist sites around the country would go long way in reassuring potential visitors that Guyana is a safe place to visit.
10.0 CONCLUSION

Guyana has an opportunity to establish itself as a modern tourism destination. By 2025 Guyana could be enjoying more than US$500M in annual tourism earnings. This may seem paltry compared to what leading earners in the global industry are generating, however, even this level of earnings will require significant developments in the sector to cater for increased demand. This is especially so when it comes to hinterland tourism since this is the thrust of Guyana’s tourism agenda, but these areas lack critical tourism infrastructure.

The reality is that hinterland tourism in Guyana, while considered desirable, is neither a competitive product nor an attractive investment proposition at this time. That being said, investor confidence in any project or sector can be substantially enhanced by Government support or even perceived support for the project or sector. In addition, targeted public sector investments can improve sector competitiveness.

This National Tourism Policy embodies a commitment to the tourism sector by a government that understands the potential of the industry to add value to the national economy and to provide opportunities for the economic advancement of vulnerable communities. It recognizes the value of a green Guyana and seeks to leverage that value for the benefit of all Guyanese.

The fact that some of the prescriptions herein impinge on the portfolios of multiple Ministries or agencies speaks to the need for a broad-based approach to tourism development.

It is understood that not every initiative contained in this policy can be immediately funded by Government and the Action Plan appended to this document depicts how this will be done over a five-year period ending in 2021. It is recommended that there be complete review of all tourism policy prescriptions before the end of the period with a view to developing a 2030 plan of action for tourism in Guyana.
11.0 BIBLIOGRAPHY

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### 11.0 APPENDIX

#### A) Policy Implementation Plan

<table>
<thead>
<tr>
<th>Areas</th>
<th>Phase 1 (2017-2019)</th>
<th>Phase 2 (2020-2021)</th>
<th>Lead Agencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Birding</strong></td>
<td>a) Audit of birding sites and species</td>
<td>a) Work with the relevant agencies to create and implement a national land use plan that would support the development of ecotourism and other sustainable forms of tourism</td>
<td>Department of Tourism; THAG; GTA</td>
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<tr>
<td></td>
<td>b) Training for birding guides &amp; operators</td>
<td>b) Collaborate to frame legislation to protect fragile tourism sites</td>
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<td></td>
<td>c) Support for birding Fam tours</td>
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<td>d) Production of birding maps &amp; checklists</td>
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<td></td>
<td>e) Elaborate a birding strategy to increase birding tours</td>
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<tr>
<td><strong>Sustainable Ecotourism</strong></td>
<td>a) Mapping of existing and viable ecotourism sites</td>
<td></td>
<td>Department of Tourism; THAG; GTA</td>
</tr>
<tr>
<td></td>
<td>b) Design ‘The Guyana Ecotourism experience’ – a network of flagship ecotourism sites</td>
<td></td>
<td>Min. of Natural Resources; Ministry of Indigenous Peoples Affairs.</td>
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<td></td>
<td>c) Develop management plan for sensitive ecotourism sites</td>
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<td></td>
<td>d) Develop methodology to track demographic information about persons visiting ecotourism sites</td>
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<td>e) Implement strategies to maximize visitor spending at ecotourism sites</td>
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<td></td>
<td>f) Develop more Guianas Shield ecotourism itineraries</td>
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<tr>
<td><strong>Leisure &amp; Adventure</strong></td>
<td>a) Create a pilot 5 leisure &amp; adventure hotspots</td>
<td>a) Extension of leisure and adventure trails to other Guianas</td>
<td>Department of Tourism; THAG; GTA</td>
</tr>
<tr>
<td></td>
<td>b) Develop leisure and adventure packages for millennials</td>
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<tr>
<td><strong>Wildlife tours</strong></td>
<td>a) Produce digital wildlife map to assist tours</td>
<td>a) Collaborate to develop a wildlife curriculum for schools</td>
<td>Department of Tourism; THAG; GTA; MOA.</td>
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<tr>
<td></td>
<td>b) Develop a wildlife circuit to be marketed</td>
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<td></td>
<td>c) Develop visitor Code of conduct</td>
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<tr>
<td>Areas</td>
<td>Phase 1 (2017-2019)</td>
<td>Phase 2 (2020-2021)</td>
<td>Lead Agencies</td>
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</tr>
<tr>
<td>Community-based tourism</td>
<td>a) Identify viable community tourism opportunities by Region</td>
<td>a) Support training initiatives to develop capacity in the community</td>
<td>Department of Tourism; THAG; GTA</td>
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<tr>
<td></td>
<td>b) Assess cultural and other special resources available for tourism</td>
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<td></td>
<td>c) Support training initiatives to develop capacity in the community</td>
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<tr>
<td>Sports Fishing</td>
<td>a) Elaborate a Sports Fishing Policy with clear guidelines for fishing activity in prescribed fishing zones</td>
<td></td>
<td>Department of Tourism; THAG; GTA; Min. of Agriculture; Ministry of Indigenous Peoples Affairs.</td>
</tr>
<tr>
<td>Sports Tourism</td>
<td>a) Develop an Sports Tourism Awareness programme for Sports Associations</td>
<td>a) Develop training programmes that target Sports Associations aimed at strengthening capacity in the area of events management, entrepreneurship and customer service</td>
<td>Department of Tourism; Department of Culture, Youth &amp; Sport</td>
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<td></td>
<td>b) Prepare a catalogue of prominent sports heritage venues, buildings and structures (for example the Bourda cricket ground) that would form part of a Guyana tourist itinerary</td>
<td>b) Establish a Sports Tourism Officer position in the Department of Tourism</td>
<td>Department of Tourism</td>
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<tr>
<td></td>
<td>c) Design an annual calendar of major sports tourism events</td>
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<tr>
<td>Yachts &amp; Cruises</td>
<td>a) Develop a plan to grow the annual yachting rally to attract more yachts and to create a more sustained flow of yachts into Guyana</td>
<td>a) Input plans for the upgrade of port infrastructure and facilities that would impact both cruise and commercial traffic</td>
<td>Department of Tourism; THAG; GTA; MOPI.</td>
</tr>
<tr>
<td>Heritage &amp; Culture</td>
<td>a) Develop strategies, in collaboration with the Department of Culture, to maximize the tourism impact of local heritage and culture</td>
<td>a) Accelerate plans for the delineation and upgrading of heritage trails/districts in Georgetown, Essequibo and Berbice</td>
<td>Department of Tourism; THAG; GTA; National Trust</td>
</tr>
<tr>
<td>Areas</td>
<td>Phase 1 (2017-2019)</td>
<td>Phase 2 (2020-2021)</td>
<td>Lead Agencies</td>
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</table>
| Heritage & Culture | b) Collaborate with the National Trust in elaborating strategies and executing actions aimed at giving tourism prominence to heritage districts, sites, attractions and events  
c) Develop a cultural tourism calendar that incorporates national festivals and celebrations based upon the culinary, artistic, musical or other heritage of Guyana                                                                                                                                       | a) Execute actions begun in Phase 1                                                                                                                                                                                                                                                             | Department of Tourism; GTA; THAG.                                                                                                                                                                                                   |
| Destination marketing | a) Support Fam trips by relevant overseas agencies and interests  
b) Maintain presence at Trade shows that match the Guyana core product  
c) Advertise in publications likely to drive the most tourism business to Guyana  
d) Expand links with diasporic areas  
e) Deploy representatives in key source markets  
f) Support the sustained production of a bank of fresh narratives, videos, images etc. pertaining to Guyana's tourism attractions and major events  
g) Produce collateral material in other languages  
h) Develop ‘packaged’ travel experiences that fit the tastes and leisure experiences of the millennials  
i) Create a Tourism Office for the Diaspora in the Department of Tourism                                                                                                                                                                                   | All actions in Phase 1 to be continued  
b) Develop multi-destination packages that combine visits to selected Caribbean islands with a Guyana vacation to be sold as an Amazon-Caribbean experience  
c) Develop trans-border packages that link Venezuela, Brazil, Guyana, Suriname and French Guiana and market as the Guianas Shield experience  
d) Develop strong itineraries for birding and venues for sport fishing and other outdoor type events to be marketed to the outdoorsy, adventure and experience-seeking European and North American markets  
e) Fund ongoing research into the trends, behaviours and profiles of this millennials segment |                                                                                                                                                                                                                                                                                                      |
<p>| Tourism Investment | a) Review the current investment concessions for the sector with a                                                                                                                                                                                                                                                                                                                                                      | a) Draft a Tourism Zones Framework for the Department of Tourism;                                                                                                                                                                        |</p>
<table>
<thead>
<tr>
<th>view to creating an investment stimulus package which sees the public sector investing by way of concessions granted and receiving a return on investment by way of various taxes collected within a ten year period.</th>
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<tbody>
<tr>
<td>b) In conjunction with item 1, draft a Hinterland Investment Policy.</td>
</tr>
<tr>
<td>c) Prepare a list of sites in the hinterland that have been identified as suitable and desirable areas for the location of eco-lodges, and develop a project profile for each, including the preferred means of financing both public and private.</td>
</tr>
<tr>
<td>d) Facilitate the lease of land for investments in viable large-scale hotel projects in Guyana’s coastal regions. Actively promote Guyana’s tourism investment projects targeting investors with international market and air transport linkages, as well as local investors.</td>
</tr>
<tr>
<td>establishment, operationalizing and regulating of exclusive tourism zones. In collaboration with the Guyana Lands and Surveys Commission establish a set of tourism zones and initiate their development through private investment in accordance with the framework.</td>
</tr>
<tr>
<td>b) In collaboration with the Protected Areas Commission, develop strict tourism guidelines for each type of protected area and draft a Protected Areas Investment Guide.</td>
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<tr>
<td>THAG; Lands &amp; Surveys; PAC</td>
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<td>Areas</td>
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<tr>
<td>Education &amp; Training</td>
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<td>Destination management</td>
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<td>Areas</td>
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<td>Visas &amp; Immigration</td>
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</table>
### B) Arrivals Over the Past 10 years

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<tbody>
<tr>
<td>January</td>
<td>8,933</td>
<td>7,619</td>
<td>8,150</td>
<td>9,284</td>
<td>9,559</td>
<td>10,836</td>
<td>12,691</td>
<td>13,512</td>
<td>14,001</td>
<td>14,449</td>
<td>16,984</td>
<td>17.5</td>
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<td>6,921</td>
<td>8,429</td>
<td>9,501</td>
<td>9,365</td>
<td>11,722</td>
<td>14,000</td>
<td>12,553</td>
<td>13,965</td>
<td>15,080</td>
<td>16,281</td>
<td>8.0</td>
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<td>11,892</td>
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<td>10,087</td>
<td>13,794</td>
<td>23,368</td>
<td>14,648</td>
<td>18,464</td>
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<td>17,330</td>
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<td>8,960</td>
<td>9,660</td>
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<td>12,894</td>
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<td>24,987</td>
<td>18,266</td>
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<td>11,651</td>
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<td>14,601</td>
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<td>25,091</td>
<td>22,954</td>
<td>24,953</td>
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<td>22,770</td>
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<td>9,222</td>
<td>9,408</td>
<td>10,890</td>
<td>13,200</td>
<td>14,179</td>
<td>15,187</td>
<td>15,319</td>
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<td>9,627</td>
<td>9,576</td>
<td>9,925</td>
<td>10,031</td>
<td>10,852</td>
<td>11,685</td>
<td>13,618</td>
<td>14,860</td>
<td>15,183</td>
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<td>9,490</td>
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<td>10,738</td>
<td>10,991</td>
<td>12,279</td>
<td>13,914</td>
<td>15,736</td>
<td>15,705</td>
<td>19,828</td>
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<tr>
<td>December</td>
<td>8,610</td>
<td>14,504</td>
<td>16,075</td>
<td>15,834</td>
<td>19,606</td>
<td>15,735</td>
<td>20,387</td>
<td>22,401</td>
<td>22,573</td>
<td>27,668</td>
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<tr>
<td>TOTAL</td>
<td>134,057</td>
<td>129,595</td>
<td>141,281</td>
<td>151,926</td>
<td>156,910</td>
<td>176,642</td>
<td>200,060</td>
<td>205,824</td>
<td>206,819</td>
<td>235,279</td>
<td>113,529</td>
<td>-51.7</td>
</tr>
</tbody>
</table>

|         | YTD June) | 108,187 | 113,529 | 4.94  |
|         | 5 Yr Co.   | 176,642 | 235,279 | 33.2  |
### C) OVERALL VISITOR ARRIVALS UPDATED AS AT JUNE 2017

<table>
<thead>
<tr>
<th>Month</th>
<th>CJIA</th>
<th>Lethem</th>
<th>Moleson Creek</th>
<th>Ogle</th>
<th>TOTAL 2017</th>
<th>TOTAL 2016</th>
<th>% Chg.</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>13,343</td>
<td>1,119</td>
<td>1,332</td>
<td>1,190</td>
<td>16,984</td>
<td>14,449</td>
<td>17.5</td>
</tr>
<tr>
<td>February</td>
<td>12,643</td>
<td>799</td>
<td>1,422</td>
<td>1,417</td>
<td>16,281</td>
<td>15,080</td>
<td>8.0</td>
</tr>
<tr>
<td>March</td>
<td>15,664</td>
<td>885</td>
<td>1,564</td>
<td>1,455</td>
<td>19,568</td>
<td>20,156</td>
<td>-2.9</td>
</tr>
<tr>
<td><strong>1st Quarter</strong></td>
<td><strong>41,650</strong></td>
<td><strong>2,803</strong></td>
<td><strong>4,318</strong></td>
<td><strong>4,062</strong></td>
<td><strong>52,833</strong></td>
<td><strong>49,685</strong></td>
<td><strong>6.3</strong></td>
</tr>
<tr>
<td>April</td>
<td>19,623</td>
<td>922</td>
<td>2,532</td>
<td>1,833</td>
<td>24,910</td>
<td>17,330</td>
<td>43.7</td>
</tr>
<tr>
<td>May</td>
<td>14,305</td>
<td>903</td>
<td>1,547</td>
<td>1,511</td>
<td>18,266</td>
<td>24,987</td>
<td>-26.9</td>
</tr>
<tr>
<td>June</td>
<td>14,074</td>
<td>736</td>
<td>1,333</td>
<td>1,377</td>
<td>17,520</td>
<td>16,185</td>
<td>8.2</td>
</tr>
<tr>
<td><strong>2nd Quarter</strong></td>
<td><strong>48,002</strong></td>
<td><strong>2,561</strong></td>
<td><strong>5,412</strong></td>
<td><strong>4,721</strong></td>
<td><strong>60,696</strong></td>
<td><strong>58,502</strong></td>
<td><strong>3.8</strong></td>
</tr>
<tr>
<td>July</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>24,953</td>
<td>-100.0</td>
<td></td>
</tr>
<tr>
<td>August</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>21,863</td>
<td>-100.0</td>
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</tr>
<tr>
<td>September</td>
<td></td>
<td></td>
<td></td>
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<td>15,319</td>
<td>-100.0</td>
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</tr>
<tr>
<td><strong>3rd Quarter</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
</tr>
<tr>
<td>October</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>17,461</td>
<td>-100.0</td>
<td></td>
</tr>
<tr>
<td>November</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>19,828</td>
<td>-100.0</td>
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</tr>
<tr>
<td>December</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>27,668</td>
<td>-100.0</td>
<td></td>
</tr>
<tr>
<td><strong>4th Quarter</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
<td><strong>-</strong></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>89,652</strong></td>
<td><strong>5,364</strong></td>
<td><strong>9,730</strong></td>
<td><strong>8,783</strong></td>
<td><strong>113,529</strong></td>
<td><strong>235,279</strong></td>
<td><strong>-51.7</strong></td>
</tr>
<tr>
<td>YTD (Jan-June)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>113,529</td>
<td>108,187</td>
<td>4.94</td>
</tr>
</tbody>
</table>