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**Academy for Educational Development (AED)**

By:  
**George Washington University  
Consulting Team, Washington, D.C.  
& Florida State University Panama**

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Today



# Sustainable Tourism Potential of the Soberanía National Park Region

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***Special Thanks to:***

**Gisela Carles**, City of Knowledge

**Norma Ponce**, Soberanía National Park

## **Acronyms**

SNP – Soberanía National Park

GWU – George Washington University

AED – Academy for Educational Development

ANAM – Autoridad Nacional del Ambiente (The Panamanian National Environmental Authority)

USAID – United States Agency for International Development

FSU – Florida State University

IPAT - Instituto Panameno de Turismo (The Panamanian Institute of Tourism)

CoK – City of Knowledge

USMA – University Santa Maria Antigua

CATA - Central American Travel Agency

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## Executive Summary

This report represents the findings of the *Rapid Assessment and Market Analysis of the Sustainable Tourism Potential of Soberanía National Park (SNP) and the surrounding areas*. The Rapid Assessment was conducted in June 2005 by a consulting team from George Washington University (GWU). This assignment is a component of a project supported by the US Agency for International Development (USAID) and implemented by the Academy for Educational Development (AED). The Project focuses on the conservation of the Panama Canal watershed by stimulating sustainable economic growth through balanced use of natural and cultural resources. The Rapid Assessment and Market Analysis assignment was conducted in two main phases: A Preliminary Research Phase and a Field Work Phase.

Background research helped provide a general framework for the consulting assignment, by identifying important stakeholders and setting clear objectives for the fieldwork phase of the assignment. As part of the background research, the competitive analysis describes Panama's place on the world "tourism map" and discusses the country's tourism trends in the context of its competitors in the region. The branding and positioning analysis identifies the marketing efforts promoting Panama as a tourism destination, and identifies the key marketing elements that can help strengthen the associations between Panama and its rich nature and culture. An important component of the background research is a benchmarking analysis focusing on management and visitor use best practices implemented by national parks throughout the world. The analysis uses examples from the United States, Australia, Costa Rica and Honduras, and identifies critical success factors discussed later in the context of Soberanía National Park (SNP).

Based on the preliminary research phase and the field work, the consulting team identified a series of findings that relate to opportunities for development of sustainable tourism in Soberanía National Park and the surrounding areas. SNP can become a premier destination for tourists with different interests by implementing simple, cost-effective marketing and promotional strategies that result in an increased awareness and visitation of the Park and surrounding areas. With **contemporary cost-effective marketing techniques**, including an enhanced website, promotional events, and joint marketing initiatives, SNP's competitive advantages (which includes its proximity to Panama City and abundance of biodiversity and cultural heritage), can be utilized to reach and attract more tourists. The introduction and effective use of relevant visitor information management systems can help identify and respond to the needs and preferences of the different target groups. This information, coupled with the already available information on the preferences and potential interests of special interest tourists (ecotourists, cultural tourists, birdwatchers, SAVE tourists, and adventure tourists), can help SNP reach potential visitors using the most effective channels, as well as learn more about the expectations. By developing the park trail network and introducing **effective park management systems**, SNP can increase visitation while preserving the Park's resources. Core attractions, infrastructure, concessions, and effective visitor management systems are all basic services that need to be expanded and improved within SNP. Concessions are seen as an excellent mechanism to provide guests with necessary services, such as camping facilities, while encouraging entrepreneurship within the surrounding communities. Improved guiding and information services can help visitors to fully understand and appreciate the Park's

natural resources, while raising tourists' awareness of the sensitiveness of the natural resources, and the need to protect them. Findings related to improved park management also identify opportunities for improved revenue and expenditure management. Establishing connections with other significant attractions in the area through promotion of the Discovery Route concept is seen as a great opportunity for increasing visitation. By turning to sustainable tourism development opportunities, **local communities** that currently experience economic hardship and exert pressure on the canal watershed can experience economic growth and be imbued with a sense of ownership toward the richness of their home region. Utilizing currently existing assistance and training opportunities can help local communities build capacity, improve tourist infrastructure, and initiate tourism business initiatives. A great potential is the use of the already existing facilities of the City of Knowledge to promote voluntourism opportunities and attract groups of volunteers to help develop and strengthen the capacity of communities around the Park.

The background research and the field work lead the consulting team to the following conclusion: **Soberanía National Park has the potential to become a world-class tourism destination.** This potential could be easily realized through implementation of specific, proposed actions towards improved marketing, park and visitation management techniques, and small business development in surrounding communities.

## Resumen Ejecutivo

Este informe presenta los resultados de una rápida evaluación y análisis de mercado del potencial turístico sostenible del Parque Nacional Soberanía (PNS) y de sus alrededores, el cual fue llevado a cabo en Junio de 2005 por un equipo consultor de la Universidad George Washington (GWU). Este estudio es parte de un proyecto apoyado por la Agencia de los Estados Unidos para el Desarrollo Internacional (USAID) y ejecutado por la Academia para el Desarrollo Educativo (AED), que se centra en la conservación de la cuenca hidrográfica del Canal de Panamá estimulando el desarrollo económico sostenible a través del uso equilibrado de los recursos naturales y culturales. Esta rápida evaluación y análisis de mercado se realizaron en dos etapas principales - una etapa preliminar de investigación y una etapa de trabajo de campo.

La investigación preliminar ayudó a proporcionar un marco general para el trabajo de consultoría, a identificar importantes grupos de interés y a fijar objetivos claros para la etapa del trabajo de campo. El análisis de competencias llevado a cabo como parte de esta investigación de fondo, describe a Panamá como un destino turístico mundial, así como también discute las tendencias del turismo en este país respecto a otros competidores de la región. El análisis de marca y posicionamiento identifica los esfuerzos de marketing para promover Panamá como un destino turístico y los elementos principales de marketing que pueden ayudar a consolidar la asociación entre Panamá y su rica naturaleza y cultura. Un componente importante de la investigación preliminar es el análisis de *benchmarking* que se centra en el uso de las mejores prácticas en gestión y visitación puestas en ejecución por otros parques nacionales alrededor del mundo. Este análisis utiliza ejemplos de Estados Unidos, Australia, Costa Rica y Honduras, e identifica los factores críticos del éxito para el Parque Nacional Soberanía y su potencial para un desarrollo futuro.

Basándose en la investigación preliminar y en el trabajo de campo, el equipo de consultores identificó una serie de recomendaciones que se relacionan con oportunidades para el desarrollo del turismo sostenible en el Parque Nacional de Soberanía y en las áreas que lo rodean. El PNS puede convertirse en un destino turístico de primer orden para turistas con diferentes intereses implementando estrategias de marketing y promocionales simples y eficientes en costes, que darían como resultado un mayor conocimiento y número de visitantes del parque y áreas colindantes. Con **técnicas de marketing eficientes y actuales**, que incluyen una página *web* dinámica, eventos promocionales, iniciativas de marketing conjuntas y otras, las ventajas competitivas del PNS (tales como su proximidad a la Ciudad de Panamá y la abundancia de su biodiversidad y herencia cultural) pueden utilizarse para llegar y atraer a más turistas. La introducción y el uso eficaz de los sistemas de gestión de la información de visitantes pueden servir de ayuda y responder a las necesidades y preferencias de los distintos grupos que se pretende atraer. Esto, unido a la información ya disponible sobre las preferencias y gustos potenciales de los turistas con intereses especiales (ecoturistas, turistas culturales, observadores de aves, turistas SAVE, turistas de aventura) puede contribuir a que el PNS llegue a los visitantes potenciales empleando los canales más eficaces, a la vez que mejorar el conocimiento de sus expectativas. Con el desarrollo de la red de senderos del parque y la introducción de **sistemas eficaces de gestión del parque**, el PNS puede incrementar su número de

visitantes al mismo tiempo que preserva los recursos del parque. Las atracciones centrales, la infraestructura, las concesiones y los sistemas eficaces de gestión de los visitantes son servicios básicos que necesitan ser impulsados y mejorados dentro del PNS. Las concesiones se convierten en un excelente mecanismo para proporcionar numerosos servicios a los visitantes, tales como instalaciones de acampada, a la vez que fomenta las actividades de creación de empresas entre las comunidades colindantes. La mejora en los servicios de guía e información pueden ayudar a que los visitantes comprendan y aprecien los recursos naturales del parque mientras incrementa la sensibilidad de los turistas hacia los recursos naturales y la necesidad de protegerlos. Los hallazgos relacionados con la mejora de la gestión del parque también identifican oportunidades para optimizar la gestión de los ingresos y gastos. El establecimiento de conexiones con otras atracciones significativas en el área mediante la promoción de la Ruta del Descubrimiento supone una gran oportunidad para incrementar el número de visitantes. Con las oportunidades de desarrollo de turismo sostenible, las **comunidades locales** que actualmente experimentan dificultades económicas y ejercen presión sobre la cuenca hidrográfica del canal pueden lograr un crecimiento económico y desarrollar un sentimiento de propiedad sobre la riqueza de su región. El aprovechamiento de oportunidades de formación y asesoramiento disponibles actualmente puede contribuir a que las comunidades locales desarrollen capacidades, mejoren las infraestructuras turísticas y pongan en marcha iniciativas de negocios turísticos. Un aspecto a destacar en esta línea es el gran potencial que tiene la Ciudad del Saber como elemento de promoción de las actividades de volunturismo y de atracción de grupos de voluntarios para ayudar a desarrollar y fortalecer las capacidades de las comunidades que rodean al parque.

La investigación preliminar y el trabajo de campo llevaron al equipo consultor a la conclusión de que el Parque Nacional Soberanía tiene el potencial suficiente para convertirse en un destino turístico de clase mundial. Este potencial se podría fácilmente desarrollar a través de la implementación de acciones específicas propuestas con la finalidad de mejorar la promoción del parque, las técnicas de gestión del mismo y el desarrollo de pequeñas empresas en las comunidades circundantes.

## Preface

*Year 2010.... Mr. and Mrs. Johnson got off the bus and looked at the building in front of them. The sign above the door said:*

*“Welcome to Soberanía National Park!  
Central Visitor Center”*

*The couple entered the building and approached the large map of the park displayed at the waiting area. A local family with a small child and a young American couple were standing in front of the map...*

*Mr. and Mrs. Johnson were visiting the Park for the first time... actually, a second time: last year, while on a 7-day Caribbean cruise, one of the stops of which was Colon, they had taken a one-day trip to the town of Limon. They were fascinated with their guide – a man from the town of Limon – who took them on a boat and toured Lake Gatun at the northern perimeter of Soberanía National Park... The couple was amazed with the magic scenery and the most wonderful stories that their guide and the boat operator told them... Of course, the peak of their experience was the stop at the northern entrance of the Pipeline Trail of Soberanía National Park... They could not have dreamed to spot a capuchin monkey swinging in the trees above their heads at the moment they stepped out of the boat... a guide from the local community who knew everything about the rainforest, the plants and the animals took them on a brief hike - one kilometer down the Pipeline Trail. Mr. and Mrs. Johnson saw so many birds and plants they have never seen before and knew nothing about. They did not believe their eyes when their guide noticed a toucan, AND a hummingbird on their way back to the boat! This brief experience was the most unforgettable time during their trip..... so this year they decided to come and stay in Panama... On their first day, they were coming to Soberanía National Park... it was the place they remembered... Since the Park seemed quite large and there were many trails marked on the map, Mr. Johnson decided to talk to the young couple next to him and ask for suggestions on where to go.*

*The young couple was visiting the area for a second time. They were passionate hikers and loved exploring nature, and Soberanía National Park was so rich, they could not get enough of it. During their previous visit, they always used a guide – all guides at the park were local so they “felt” the nature around them and made the experience even more unforgettable. The couple found that this time most of the guides also spoke English – three years ago when they first came to the park, they were still training them. The young couple was now waiting for their guide-- they had booked one for the day on-line a couple of days earlier while searching the Park’s website for the different hikes and experiences that it offered. Since they knew there were now five new trails in addition to the original four that were here three years ago, they requested a guide to explain the different trails to them. The Park’s website had now short videos from some of the trails... the young couple especially enjoyed the one on Ulysses S. Grant and his expedition through Panama, as well as the one about the Camino de Cruces trail.*

*While talking about the different trails, Mr. and Mrs. Johnson and the young couple from New York were joined by the man from the local family standing next to them. He overheard the conversation and politely introduced himself apologizing for the*

*interruption. His name was Juan and he was here with his wife and young child. He heard that Mr. and Mrs. Johnson were looking for suggestions on where to go, so he recommended that they ask for a guided tour along Camino de Cruces. He explained that guides tell many stories about how the bands of pirates used to rob people bringing gold up the Camino de Cruces trail from Peru, through Panama, to the Caribbean and back to Spain, and thus turned the hike into the most fascinating experience. Juan shared that he and his family just went on the trail last week - right after the 5<sup>th</sup> annual historical celebration walk of Camino de Cruces.*

*Juan explained that he had a small tour operator business, but often brought his family on his days off. He worked with Soberanía National Park and knew almost everything about it – he had to know everything, since especially in the last couple of years almost everyone who came to Panama wanted to visit Soberanía. Juan explained that one of the experiences that visitors liked most is taking the boat ride down the Chagres River. It was operated by the San Antonio-Wounan indigenous community and was an amazing experience. It dropped people off at the entry point of the Camino de Cruces trail. Even though the trail was now clearly marked and with many interpretive signs, he always recommended hiring a guide. Guides took tourists to the church ruins on the new 5 km loop, told stories and legends from the past, and pointed the attention of people to interesting plants and animals. Guides often took groups also to Ella Peru Emberas - to the indigenous community, giving visitors an opportunity to learn not only about nature, but the cultural richness of the region as well.*

*Since Juan seemed to know everything about Soberanía, Mr. Johnson asked him about the new section of the Charco trail – he read in the guide book that it was recently opened and it lead to an old gold mine. Juan said that the trail was great and that it involved an intense hike, which many adventure lovers enjoyed. Since their son was still too young, Juan and his wife had not taken it yet. They enjoyed spending their free time out in nature and often went to Summit Park - with the renovations and its expansion, it was now an excellent place for a family day out. With the recent improvements and promotion of Soberanía National Park, they began visiting it as well. Their son has begun learning to recognize the species he saw at Summit and looks for them in Soberanía. The previous weekend, he actually saw some monkeys in the trees and some interesting insects which kept him extremely intrigued. His children's Soberanía activity book had drawings and explanations about all the plants and animals one saw. Juan said that Soberanía was now an excellent place for a family weekend – parents took a break from their daily lives and kids loved the nature and learned many new things. It is like a natural museum of almost everything you can see in Panama – abundant nature, rich indigenous cultures... it is fascinating...*

## Introduction

This report represents the findings of the *Rapid Assessment and Market Analysis of the Sustainable Tourism Potential* of **Soberanía National Park (SNP) and the surrounding areas**. The Rapid Assessment was conducted in June 2005 by a consulting team from George Washington University (GWU). This assignment is a component of a project supported by the US Agency for International Development (USAID) and implemented by the Academy for Educational Development (AED). The Project focuses on the conservation of the Panama Canal watershed by stimulating sustainable economic growth through balanced use of natural and cultural resources. As the largest industry in Panama, tourism offers an excellent opportunity for sustainable development of the Panama Canal watershed area, specifically the areas including and surrounding SNP. In order to assess SNP's potential, and identify key opportunities for economic growth through sustainable tourism development, this assignment involved the following three key components:

1. Market research and analysis of the tourism potential of SNP and the surrounding areas;
2. Assessment and analysis of SNP's visitor management system;
3. Business plan and development strategy for an ecotourism cluster in the areas surrounding SNP.

The key stakeholders for the project are USAID, AED, Autoridad Nacional del Ambiente (ANAM), SNP, the Instituto Panameno de Turismo (IPAT), the City of Knowledge (CoK), surrounding communities, and SNP visitors.

The Rapid Assessment and Market Analysis component of the project was conducted by a consulting team of 17 GWU graduate students as part of their International Consulting Practicum course lead by Dr. Donald Hawkins. The team also worked with a group of Panamanian students advised by Dr. Alex Coles of Florida State University in Panama. GWU has conducted the International Consulting Practicum every year for the past five years in various locations around the world. This year, the International Consulting Practicum in Panama was supported by the World Tourism Organization (WTO) as a WTO-TedQual Volunteer pilot project.

The structure of this report follows the consulting process, by which the Rapid Assessment and Market Analysis of SNP and the surrounding areas was conducted. The *Introduction* is followed by a description of the consulting team's *Approach* and the major milestones in the assignment. The *Background Research* section describes the preliminary research activities and key findings that provided general context to the assignment and guided the consulting team in their fieldwork. It also contains several key focuses: competitive analysis, branding and positioning, and national park benchmarking. The *Main Findings* section identifies and discusses a series of opportunities for successful development of sustainable tourism in SNP and the surrounding areas identified by the consulting team. Each identified opportunity is described and accompanied by specific, proposed actions that will lead to the successful utilization of its potential. The main body of the report is followed by an *Annexes* section containing specific *action plans* (addressing some of the specific opportunities identified by the consulting team), *business & marketing plans* (related to some of the main findings), and *addendums* (providing supplemental information and detailed

observations on specific issues of interest identified by the consulting team or the client). All annexes are referenced in the main body of the report.

## Approach

The GWU consulting team conducted the Rapid Assessment and Market Analysis in two main stages (a preliminary research stage and a field work stage) which included several major milestones. The preliminary research stage took about three weeks from May 19 – June 11, 2005. These studies encompassed a market analysis of Panama’s tourism potential, including tourism potential of SNP; national parks benchmarking studies and best practices research; as well as preliminary research of small business development in the surrounding communities. This stage also involved the identification of potential individuals, organizations, and resources to be contacted and researched during the field work stage in Panama.

The second stage of the assignment took place between June 12 - 25, 2005 at the City of Knowledge in Panama. The first major milestone was the Inception Presentation which introduced the results of the preliminary research to stakeholders on June 13, 2005. “*Assessing the Potential of Panama’s Soberanía National Park to Stimulate Economic Development through Sustainable Tourism*” was delivered by the consulting team in front of representatives from USAID, AED, ANAM, SNP, and CoK.

During the field work, the consultants contacted key individuals and institutions; visited attractions, potential attractions, tourist sites, and other places of interest in SNP and the surrounding areas; gathered materials and reports on already completed studies and analyses of tourism development in the region. The consulting team conducted meetings, interviews, surveys, and small focus groups with many key stakeholders and potential partner organizations. Key stakeholders and partners included ANAM, SNP, IPAT, UNDP, Cooperacion Espanola, Summit Gardens, Metropolitan Natural Park, Florida State University (FSU) Panama, University Santa Maria Antigua (USMA), University of Panama, as well as representatives from the communities of Chilibre, Agua Buena, and the Gamboa Cooperative. Among the important tourist sites visited and analyzed by the team were SNP, Panama Viejo, Miraflores Locks, Mi Pueblito, Gamboa Resort, Smithsonian Marine Exhibition Center, Summit Gardens, and Metropolitan Natural Park.

The second major milestone was the *Sustainable Tourism Product Development and Innovation Workshop* at the City of Knowledge Campus on June 20, 2005. The workshop was keynoted by Brad Weiss of the World Tourism Organization, and incorporated findings from both the preliminary research and the existing field work. It brought together the consultants, the client, as well as key small business stakeholders, to solicit innovative ideas for the emerging of SNP and surrounding areas as a unique sustainable tourism destination. A manual for entrepreneurs and small business owners, “*Development of Competitive Tourism Products for Panama*” (See Addendum 12), was developed and distributed to all attendees. On June 21, 2005 consultants continued their consultations with the small business owners and entrepreneurs to develop preliminary business plans.

The background research and the rapid assessment fieldwork cumulated in a final presentation of the consultant’s findings on June 23, 2005 at the Miramar Intercontinental Hotel. The event was attended by more than 100 guests and solicited broad media interest. The presentation introduced the major findings of the client and

solicited comments and feedback from the client and guests in a question-and-answer session.

It is important to note that the GWU consulting team was interested in, and sought opportunities to, attract interest in the local media. By encouraging coverage of the assignment and some of its major milestones the team utilized all opportunities to raise awareness on the key issues and objectives of the project. (See Addendum 15).

## Background Research

This section contains important background information gathered during the preliminary research and the fieldwork phases of the consulting assignment. The background research helped provide a general framework for the consulting assignment, identify important stakeholders and set clear objectives for the fieldwork phase of the assignment. The background research is structured around several main focuses related to Panama in general, as well as to SNP in specific: a *competitive analysis* describes Panama's place on the "tourism map" and provides clarity on where the country stands in comparison to its competitors in the region; a *branding and positioning* analysis identifies the marketing efforts promoting Panama as a tourism destination and identifies elements relevant to the promotion of natural and cultural resources; a *benchmarking analysis* focuses on management and visitor use practices used by national parks throughout the world that have the potential of being implemented in SNP.

### *Competitive Analysis on Panama's Existing Tourism Market*

#### *The World Tourism Industry*

In general tourism is considered one of the fastest growing and biggest industries in the world. Even with several very significant tragic events in the last few years (which had a strong negative impact on the industry worldwide), WTO data reveals that in 2004 international tourism arrivals reached an all time record of **760 Million**<sup>1</sup>. This increase represents a 10% growth (69 Million in absolute numbers) compared to 2003, and is the highest growth the industry has experienced since 1984. This comes after relative weak results in the previous two to three years. According to WTO statistics<sup>2</sup>, in 2003 the volume of international tourism experienced a decrease by 1.7% to **691 million**, compared to the 2002 volume of **703 million**.

#### *Tourism in Central America*

Even in the years (2001/2002) when tourism experienced a huge crisis, Central America kept its industry growth positive. In 2002, when the Americas as a whole suffered a 4.4% decrease in the industry, Central America experienced a positive growth of 6.4%<sup>3</sup>. In 2004 Central America welcomed almost 6 Million international arrivals and marked a 17% increase compared to 2003<sup>4</sup>. This success is contrasted with the very disappointing numbers of South America as a region, which is a strong competitor in terms of attracting foreign arrivals both from the Americas and the world.

#### *Overall Competitive Analysis*

Tourism in Central America comprises approximately 4.1% of the total visitors to the Americas region (North, Central, South, and the Caribbean). In 2002 it represented 3.0% of the region's estimated tourism revenues.<sup>5</sup> Although several of the countries

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<sup>1</sup> WTO (2005), WTO Barometer, January 2005, p.2

<sup>2</sup> WTO (2004), Tourism Highlights, Edition 2004, p.2

<sup>3</sup> WTO (2004), World Overview and Tourism Topics, Tourism Market Trends – Edition 2003 – p.13

<sup>4</sup> WTO (2005), WTO Barometer, January 2005, p.3

<sup>5</sup> WTO, "International Tourist Arrivals by Country of Destination" ([www.world-tourism.org](http://www.world-tourism.org)).

within Central America enjoyed significant increases in percentage growth of tourists and tourist receipts, most of the absolute growth in tourist arrivals took place in Costa Rica. As of 2002, Costa Rica's tourism receipts, at \$1.1 billion, represented approximately 32% of the entire region's total economic benefit from tourism. In addition, approximately 24% of the region's tourist arrivals headed for Costa Rica.<sup>6</sup>

In the period from 1990-2000, Panama enjoyed the second-highest percentage increase in tourism (16.45%) in Central America (Guatemala was first-highest).<sup>7</sup> In raw numbers, Panama's total number of tourist arrivals, at 534,000 annually, was third to last in the region. However, its total tourism receipts were tied for second highest in the region, behind Costa Rica, at \$679 million<sup>8</sup> – which indicates that the average tourist in Panama spends more than his/her counterpart elsewhere in the region. In fact, according to WTO estimates, Panama received \$1,271 per tourist arrival, the highest in the region and significantly more than the second-place country, Costa Rica, which receives \$968 per tourist arrival.<sup>9</sup>

It is important to note that over 50% of Central America's tourists arrive from the United States; less than two-thirds of the arrivals are from the North American region, which includes Canada and Mexico. In addition, over 40% of tourist arrivals in Central America in 2000 were intra-regional – i.e., originating from other Central American countries.

#### *Analysis of Central American Competitors*

Even though neighboring countries could be strong partners in tourism development, the rest of the countries in the region are among Panama's key competitors. Even with geographical and climate similarities, however, the level of development and impact of tourism in each Central American country is different. Below is a description of the tourism assets and profile of the tourism industry in each of the countries in the region.

*Table 1. Economic Analysis of Panama's Central American Competitors:<sup>10</sup>*

	<b>Total Area (km<sup>2</sup>)</b>	<b>Coastline (km)</b>	<b>Population (millions)</b>	<b>GDP (\$ Billions)</b>	<b>GDP Growth Rate (%)</b>	<b>Inflation (%)</b>	<b>Unemployment (%)</b>
<b>Panama</b>	<b>78,200</b>	<b>2,490</b>	<b>3.04</b>	<b>\$20.57</b>	<b>6%</b>	<b>2%</b>	<b>12.6%</b>
Belize	22,966	386	0.28	\$1.78	3.5%	2.9%	12.9%
Costa Rica	51,100	1,290	4.02	\$37.97	3.9%	11.5%	6.6%
El Salvador	21,040	307	6.70	\$32.35	1.8%	5.4%	6.3%
Guatemala	108,890	400	14.66	\$59.47	2.6%	7.2%	7.5%
Honduras	112,090	820	6.98	\$18.79	4.2%	7%	28.5%
Nicaragua	129,494	910	5.47	\$12.34	4%	9.3%	7.8%

Source: CIA World Factbook

<sup>6</sup> *Ibid.*

<sup>7</sup> "Destination: Central America – A Conceptual Framework for Regional Tourism Development" by Chris Inman, Jean Pierre Ranjeva, Gustavo Segura, Nathalia Mesa and Andrea Prado, p.8.

<sup>8</sup> "International Tourism Receipts by Country of Destination", *Op. Cit.*

<sup>9</sup> *Ibid.*

<sup>10</sup> From "CIA – The World Factbook" available on the Central Intelligence Agency's website (www.cia.gov).

### Belize

Belize is among the most successful tourism destinations in Central America. In fact, jobs related to travel and tourism represents almost 20% of Belize's total employment.<sup>11</sup> Belize's key tourism attractions are island beaches, virgin rainforests and the Mayan ruins and culture. In the last few years it has taken great strides in diversifying its traditional sun-and-beach product by positioning itself as a prime eco-tourist destination. In many aspects, Belize is more similar with the island-nations of the Caribbean than with its Central American neighbors. It has a safe, coup-free history and is English-speaking. The country's drawbacks include unevenly developed infrastructure and relatively high costs.

### Costa Rica

Costa Rica is the tourism leader in the region and has successfully positioned itself as the pre-eminent destination for nature-based adventure tourism in the region. The country's main tourism attraction is its nature. Costa Rica has a well managed national protected area system offering easy access and a very wide variety of experiences. Over 25% of the country's land mass is covered by protected areas. The success of Costa Rica's tourism strategy has benefited from the long-term political and economic stability that the country has enjoyed.

### El Salvador

Although El Salvador has spectacular mountains, volcanoes, and a beautiful coastline, its tourism industry is still in early stages of development. Most of the current travel to El Salvador is for business, not leisure (See Table 2 for details). Another factor contributing to that is the lack of any low fare travel opportunities that typically attract tourists. According to WTTC statistics, as of 2003, only 262,000 of El Salvador's visitors arrived by air (among the lowest in the region), compared to almost 600,000 by road. El Salvador evokes images of the civil war in the 1980's, which has slowed El Salvador's attempts to grow tourism.

### Guatemala

Tourists are attracted to Guatemala by the abundant biodiversity coupled with historical colonial cities, 28 registered Mayan sites, and 28 ethnic and indigenous communities that co-exist together. Even though historically Guatemala was among the dominant tourist destinations in Central America, several decades of conflict that ended in 1996 eroded this position. The country's tourist industry continues to struggle despite its bevy of natural and historical resources. Travel and tourism represent only 6% of total employment in the country.<sup>12</sup>

### Honduras

In the last years, Honduras has been increasingly attracting tourists with a combination of spectacular nature and rich culture. Beautiful beaches, protected coral reefs and a world heritage biosphere reserve are among the top tourist attractions. Combined with a relative ease of travel and affordable prices, Honduras has experienced strong growth in the last several years. Honduras government has also been very strategic in its efforts to

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<sup>11</sup> "Belize – 2005 Travel and Tourism Economic Research" from the World Travel & Tourism Council ([www.wttc.org](http://www.wttc.org)).

<sup>12</sup> "Guatemala – 2005 Travel and Tourism Economic Research" from the World Travel & Tourism Council ([www.wttc.org](http://www.wttc.org)).

improve the country's image and utilize the unlimited tourism potential. Honduras has been very active in promoting scientific, academic, volunteer and educational (SAVE) tourists.

### Nicaragua

Even though Nicaragua is rich in natural landscapes, stunning vistas, and vast cultural treasures, its tourism sector is severely underdeveloped. The country's potential tourism attractions include 71 protected areas, including 3 national parks, sanctuaries for wildlife and endangered species, and abundant biodiversity resources. Poor infrastructure, including lack of access and limited supply of lodging facilities, coupled with a negative image are among the main challenges that the current government (which has committed itself to making tourism the nation's top source of foreign revenue), has to overcome.

### *Panama's Relative Competitive Positioning*

In many respects, Panama is well positioned in response to its Central American competitors. It is third in the region in overall visitor arrivals, behind market leaders Costa Rica and Belize. Panama has the highest proportion of its visitor arrivals via air, indicating that air access is reasonable and accessible. Regionally, Panama has the most balanced purpose of visit percentages: 55% for leisure visits and 36% for business visits. Nations such as Belize and Costa Rica tend to be heavily reliant on leisure visitors, while Nicaragua relies mostly on business visitors and El Salvador on other visitors, such as foreign residents visiting family members. (See Table 2 for more details).

*Table 2. General Tourism Information of Panama's Central American Competitors (leading positions are highlighted in red).<sup>13</sup>*

	Total Visitor Arrivals (in thousands)	Air Arrivals (in thousands)	Air Arrivals as % of Total Arrivals	Purpose of Visit by %			% of Employment from Tourism as of 2005	Travel & Tourism Growth for 2005	Tourism as Percent of Total GDP
				Leisure	Business	Other			
Panama	897	450	86%	55%	36%	9%	12.9%	7.4%	13.5%
Belize	999	152	69%	94%	6%	N/A	19.7%	9.4%	20.0%
Costa Rica	1,514	928	75%	73%	22%	5%	13.3%	9.7%	13.7%
El Salvador	857	262	31%	25%	22%	53%	6.8%	6.7%	7.8%
Guatemala	880	402	46%	N/A	N/A	N/A	6.0%	8.3%	6.9%
Honduras	887	248	41%	61%	13%	26%	8.5%	7.3%	10.4%
Nicaragua	643	180	34%	35%	61%	4%	5.6%	8.8%	6.9%

Source: WTO

In the context of sustainable tourism development potential Panama also holds a strong position. It offers a combination of abundant nature, varying landscapes and cultures. Its

<sup>13</sup> From individual country reports available at World Tourism Organization website (www.world-tourism.org).

wealth of bird species (the greatest in the region), the 4 UNESCO World Heritage Sites, indigenous communities and protected areas contribute to its potential for attracting special interest tourists. It is important to note that Panama has an advantage over most other countries in the region in terms of the overall quality of its infrastructure, accessibility, and stability. Panama trails only Costa Rica in the World Economic Forum’s ranking of Global Competitiveness and the United Nation’s Human Development Index.

Table 3. Miscellaneous Nature/Heritage/Rankings of Panama’s Central American Competitors (leading positions are highlighted in red):

	UNESCO World Heritage Sites	# of National Parks/ Protected Areas	Nationally Protected Areas (%)	# of Diverse Bird Species	Global Competitiveness Ranking (World Economic Forum)	Human Development Index (U.N.)
<b>Panama</b>	<b>4</b>	<b>14</b>	<b>19.1%</b>	<b>716</b>	<b>50</b>	<b>61</b>
Belize	1	19		368	N/A	99
Costa Rica	3	38	13.7%	662	<b>39</b>	<b>45</b>
El Salvador	1	3	0.5%	329	63	103
Guatemala	3	<b>51</b>	16.8%	547	73	121
Honduras	2	18	9.9%	541	78	115
Nicaragua	1	4	7.4%	512	75	118

Source: WTO

## Marketing Panama

### Branding

Panama’s branding and promotion efforts are geared towards three main markets: the North American and Latin American market, the European and Asian market, and the Domestic market.

There are currently two branding campaigns promoting Panama internationally. The first campaign geared towards the North America and Latin America markets is entitled “La Ruta por Descubrir” or “The Path Less Traveled”. This campaign is managed by Instituto Panameno de Turismo (IPAT) and is intended to differentiate Panama from the other Central American countries. The campaign offers a great opportunity to attract tourists looking for new and unexplored destinations especially in the context of the saturation of Costa Rica’s image as a new and unexplored destination. The primary distribution channels for this campaign are tour operator wholesalers, print media, and electronic media (particularly the website [www.visitpanama.com](http://www.visitpanama.com)).

The second international branding campaign promoting Panama, is a campaign developed for the entire Central American region. It is managed by the Spain-based Central American Travel Agency (CATA) and is entitled “Centroamerica”. This campaign is working to create more awareness specifically amongst the European and Asian markets. In addition to strengthening the region’s image, CATA is working closely with several airline companies to increase available travel opportunities. As a result, Iberia and Air Madrid both recently added direct flights from Spain to Panama.

Panama is also being marketed and sold through tour operators as a multi-destination package.

In addition to the international branding and promotion efforts, IPAT is currently turning to the domestic market. It is preparing to launch a branding campaign called “Conoce Panama” or “Know Your Panama”. Within the “Know Your Panama” national campaign IPAT is developing smaller campaigns promoting specific regions throughout Panama. The regional sub-campaign will use the same theme ( for example “Conoce Kuna Yala”, “Conoce Chiriqui”, etc.) and will focus on promoting the top twenty-five tourist attractions for each region. This campaign intends to encourage domestic travel, and at the same time raise Panamanians’ awareness of their rich cultural and natural assets.

### Positioning

The association and positioning of Panama on the international market is an important foundation for the promotion of its natural and cultural assets. Several years ago the German-based organization FODESTUR conducted detailed market research as part of an initial branding efforts for the Central American countries,. It revealed that the one phrase Europeans most associate with Panama is “Canal”. Panama’s brand image, along with the other Central American countries, can be found in the following Brand Management Map:



Seventy-eight percent of tourists surveyed associate the word “Canal” with “Panama”<sup>14</sup>. Of these tourists, most associate the word “Canal” with “Nature” explaining why Panama scores well as a “nature” orientated travel destination (compared to other Central American countries). FODESTUR was also able to compare the various

<sup>14</sup> ‘Central America Market Research Europe,’ Fomento al Desarrollo Sostenible Mediante Turismo en Centro America (FODESTUR), September, 2000.

perceptions of Central American countries using several categories, including “Nature,” “Culture,” and “Tourist Aspects.” (see Table 4 for details).

*Table 4. Positioning and associations of Central American countries in terms of Nature, Culture and Tourist Aspects.*

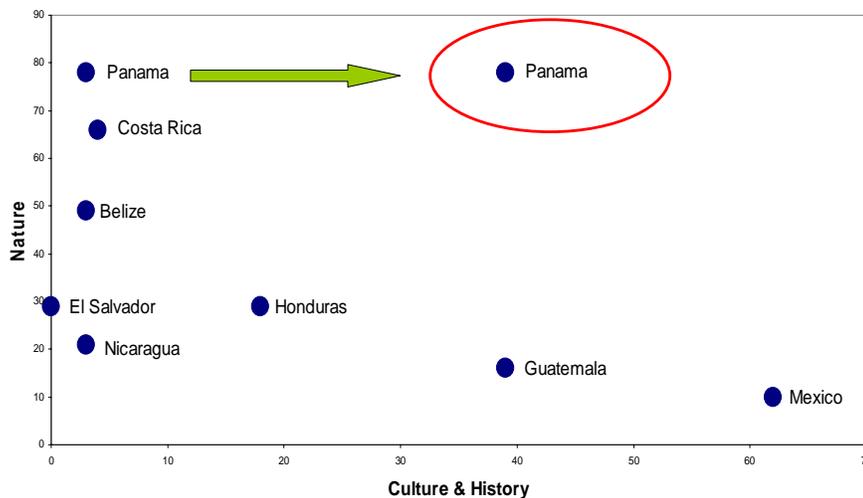
	<i>Nature</i>	<i>Ethnic Aspects</i>	<i>Culture</i>	<i>Tourist Aspects</i>	<i>Negative Associations</i>	<i>Positive Associations</i>	<i>Not Reported</i>
<b>Guatemala</b>	16	19	39	3	13	4	6
<b>Belize</b>	49	14	3	17	11	3	3
<b>Honduras</b>	29	2	18	11	18	2	20
<b>El Salvador</b>	29	14	0	14	14	0	29
<b>Nicaragua</b>	21	5	3	5	34	11	21
<b>Costa Rica</b>	66	5	4	6	1	14	4
<b>Panama</b>	<b>78</b>	<b>0</b>	<b>3</b>	<b>8</b>	<b>4</b>	<b>5</b>	<b>4</b>
<b>Mexico</b>	10	8	62	7	4	5	4

Source: FODESTUR

Even though Panama is rich in opportunities for cultural experiences, research indicates that the associations with “culture” are weak. In order to differentiate itself from the other Central America countries and diversify the tourist perceptions, Panama can leverage the existing perceptions of “Canal” and “Nature” and combine them with perceptions of “Culture and History”. The following Perceptual Map helps demonstrate the need to combine perceptions of “Culture and History” with the existing perceptions of “Nature” to help differentiate Panama from the other Central American countries.

## Perceptual Map

Source: FODESTUR



In conclusion it is important for Panama to balance both “The Path Less Traveled” country campaign with the “Centroamerica” regional campaign. The different positioning for both campaigns should not conflict because each campaign and brand image has a separate and distinct market. Both, “The Path Less Traveled” and the

“Centroamerica” campaigns, as well as the domestic “Know Your Panama” campaigns have the potential to build more awareness of the diverse cultural and natural experiences that Panama can offer.

### ***SNP Benchmarking***

Soberania National Park (SNP) has tremendous potential to be the premier national park of Panama. Visitation management and product development are critical in order for the park to reach its potential and ensure protection of the diverse natural and cultural heritage assets. This benchmarking analysis looks at protected areas from the United States, Australia, Honduras, and Costa Rica and specifically analyzes their management systems, visitor distribution, carrying capacity, fee systems, visitor motivations and marketing.

Several benchmarking and best practices studies have been written regarding successful national park management plans in the US and Australia. These visitation management guides provide systems for a positive visitor experience that ensures the park attracts and maintains public support necessary for the preservation of the park. Distinct offerings and attractions bring visitors and income into the national park. The design and maintenance efforts of parks are often guided by the importance of specific attractions; these are the draw that brings people to the park. Once in the park, controlled distribution and diffusion of visitors to less well known areas of the park is vital to maintaining the carrying capacity and ambiance of the park. Well developed trail systems allow for the controlled and safe movement of visitors throughout protected areas while ensuring the regions long term preservation. Best practices guides indicate that successful product development in protected areas should be geared towards enhancing the contact of visitors with nature, as well as their knowledge. Important tools in this aspect are directional signage and park user information, as well as extensive interpretation and educational programs. These, however, should be tailored to the needs and motivations of the visitors of each specific park. More details on visitor motivation studies in national parks are provided in Addendum 1.

An important element of the best practices in protected areas management in Australia and the US is collecting fees to further park development. Protected area management and policies in Australia are based on the philosophy that for sustainable tourism to succeed, it must provide tourists with adequately funded protected areas that provide high quality visitor experiences. Most successful income mechanisms in the US and Australia include fee systems. They can include entrance fees collected at protected areas entrance points or user fees – fees collected for the use of specific attractions or facilities. Additional fees are often charged for the use or rent of equipment or park property. Studies also indicate that an excellent channel of revenue for national parks is the controlled private sector use of public assets; these include concessions, licenses and permits for operations within the park boundaries. Private sector involvement is vital to revenue enhancement for parks but must be controlled in a strict manner by the national park itself. There was also a trend in park systems for fees and revenue, especially from concessions, to go directly back into the park where they were generated. These sources of income are often supplemented by voluntary donations and/or volunteer labor.

Based on these best practice guides, asset development within SNP should consist of enhancing and focusing on the park’s greatest assets, which consist of a trail system that

showcases the biodiversity and historical significance that the park has to offer. Visitor uses systems in Australia and the US provide ideal frameworks for efficient visitor management and financial management systems. A further analysis of this is provided in Addendum 1.

*Table 6. Key characteristic of protected area management approaches in Costa Rica and Honduras.*

	<b>Costa Rica</b>	<b>Honduras</b>
	Chirripo National Park	La Tigra National Park
Operating Hours	6:00 am – 5:00 pm	8:00 am– 2:00 pm Tues – Sun (may stay in park until 5:00 p.m.)
Entrance Fee	US \$6.00	US \$10.00
Multi-tiered pricing (different prices based on residency, age, location, etc.)	Yes	Yes
Annual Visitors	1,862	10,000

*Table 7. Key characteristic of Metropolitan National Park and Soberanía National Park.*

	<b><u>Metropolitan Natural Park</u></b>	<b><u>Soberanía National Park</u></b>
Size	265 hectares	22,104 hectares
Entrance Fee Nationals	\$1.00	\$1.00
Entrance Fee Visitors	\$2.00	\$3.00
Visitors Center	Yes	No
Management authority	Board of Trustees, led by Panama Mayor	ANAM

Through benchmarking of Australian, US, Honduran, and Costa Rican national parks, several critical success factors have been identified and are discussed further in Addendum 1. Further examination and synthesis of these factors suggest the following commonalities between park systems: using multi-tiered entrance fees, establishing visitor centers for guiding and enhancing park usage, using interpretative resources to enhance visitor experiences, and exploring various financing options for other visitor services. These factors can be applied to Soberania National Park to help improve its visitor management plan, park assets and offerings to visitors. The analysis and findings found in Addendum 1. will synthesize elements of the identified critical success factors and implementation strategies for application at SNP.



## ***Finding #1: Improve the existing and development of new trails***

### *Today*

Today visitors to SNP use four main trails: El Charco, Camino de Cruces, Pipeline, and Plantation Road. **El Charco Trail** is a popular trail within SNP for leisure hikers, and currently has limited signage describing the route. In addition, several of the signs along the trail, as well as the bathroom facilities, picnic area, and bridges need replacement and maintenance. **The Camino de Cruces** trail currently provides an exciting and challenging trail roughly 10-kilometers in length. The trail requires a guide, as it is overgrown in several places and has many fallen trees that need to be cleared. The Camino de Cruces is an important historical attraction, with a past involving United States President Grant, pirates, and smuggled gold. **The Pipeline Trail** does not currently have any signage or a ranger at the beginning of the trail. The trail itself is in very good condition and has a widely cleared path. It is one of the best bird-watching locations in the world. **Plantation Road** is adequately cleared and is an excellent trail for any hiker. In addition to the avid hiker, the trail is also good for birding and nature observation. There are bathrooms at the entrance to the trail as well as picnic tables for the first kilometer into the trail. While the existence of these facilities is good, they need to be cleaned and renovated. Detailed analysis of the existing SNP trails is provided in Addendum 2.



### *Tomorrow*

In addition to the existing four main trails, five new trails should be developed in the future. Field research suggests that the trails within SNP be classified according to each trails' particular target market, attributes and level of use. Once these distinctions are determined, the trail can be branded, developed, and promoted accordingly. A summary of the existing and future trails, along with their classification, is summarized in Table 8.

Leisure trail development within SNP could encompass primarily three trails that will comprise an intensive use zone in the park: The ruins at the entrance of Camino de Cruces (Venta de Cruces loop), the Summit – SNP trail connector, and the El Charco Trail. There are also two trails that will most likely have a lower intensity of use, and will be targeted for adventure tourists: The Camino de Cruces Trail and the Gold Mine Trail. A third set includes trails dedicated to birding and more intensive nature activities: Pipeline Trail, Plantation Road, and Plantation Side Trail. For more detailed recommendations on tailoring SNP attractions to specialized tourist interests and specific categories of tourists, see Addendums 3 and 4.

Table 8. Summary of existing and future trails in SNP.

<b>Trail Name</b>	<b>Existing/New</b>	<b>Classification</b>	<b>Target Market</b>
Camino de Cruces Trail	Existing	Adventure	Adventurous and advanced hikers
Pipeline Road	Existing	Niche (bird watching)	Birdwatchers; potential to reach additional target markets for other types of niche nature observation
Plantation Road	Existing	Niche	Bird watchers and nature enthusiasts
El Charco Trail	Existing	Leisure (Intensive Use)	Nature and hiking enthusiasts within the mass market
Gold Mine Trail	New	Adventure	Adventurous and advanced hikers who are looking for a challenging trail with historical significance
Limon Pipeline Entrance	New	Leisure (Intensive Use)	Cruise ship passengers disembarking for the day at Colón
Venta de Cruces loop	New	Leisure (Intensive Use)	Cruise ship passengers and mass market
Plantation Side Trail	New	Niche	Birdwatchers and nature enthusiasts
Summit-SNP Trail connector	New	Leisure (Intensive Use)	Panamanian families and independent tourists

*Action*

The existing trails all require similar improvements: new signage providing more direction and interpretation, general infrastructure maintenance, and clearing of the trails that have become overgrown. For more information and details on existing trail improvements, please see Addendum 2. Action Plan 2 provides details on the suggested new trail development.

Venta de Cruces Trail & Ruins

*Implementation:* The church ruins at the beginning of Camino de Cruces, across the river from the Gamboa resort, can be further developed into a historical site. The area

surrounding the church ruins would need to be cleared and minor excavation work would need to be conducted, including clearing several hundred yards of the trail. Coordination with tour operators to initiate tourist visits would be a critical marketing element. Historical, preservation and/or archaeological societies could be approached to participate in the revitalization of the trail and restoration of the church. Volunteers through educational institutions or voluntourism organizations could provide resources to clear and maintain the trail. Corporate sponsorships could also be initiated to provide further financing or other resources.

#### Summit Park Entrance to SNP Trails

*Implementation:* Coordination between SNP and Summit Park managing entities (through a general memorandum of understanding) would provide a basis for cross marketing and “single destination” integration of the two parks. Path clearing and additional signage would be necessary for these trails to be operative. Corporate sponsors could provide signs and path clearing would be accomplished by volunteer organizations similar to those described above.

#### Goldmine Trail

*Implementation:* The Goldmine Trail can provide a mix of adventure hiking and historical adventure. Once the history of the mine is identified, a story can be drawn providing a strong branding opportunity for the trail and potential exposure for the park. Beyond trail development of the two attractions, signage providing interpretation and direction should be added to the trail. Guides should be able to provide information on the history of the trail, the mine, and their links to Panama.

Development of the Goldmine Trail could be funded by NGO organizations because of their historical significance. Development could also be provided through volunteer organizations, educational institutions, and corporate sponsors. Tour operators should also be involved in order to provide exposure to world markets.

#### Plantation Road Side Trail

*Implementation:* The Plantation Road Side Trail would need to be cleared as well as have additional signage added. Clearing would require professional park rangers who may be supplemented with additional volunteers.

#### Limón Trail

The northern entrance to the Pipeline Road is located across Lake Gatún from the gateway community of Limón. The trail is currently underdeveloped and not easily accessible due to overgrown vegetation and lack of signage. Steps to establish a business for tours originating in Limón for travel by boat around Lake Gatún and northern SNP should be continued. Improved access paired with a new two-kilometer trail at the northern entrance of the Pipeline Road could attract the cruise ship passengers disembarking for the day at Colón.

*Implementation:* The new trail will utilize a one-kilometer stretch of a cleared portion of the existing Pipeline Road, as well as a newly cleared one-kilometer section that loops back to the entrance of the trail. SNP will work with volunteers and educational organizations to revitalize the northern entrance of the Pipeline Road, as well as the clearing of the new one-kilometer portion that loops back to the trail’s entrance. Corporate sponsorship and in-kind contributions will be sought to assist with the trail’s

development. Possible funding agencies for trail revitalization, expansion, and new signage include AED, USAID, and the Panamanian government. SNP will work with the Limón community to determine methods for the collection of entrance fees to the park. The Avifauna organization supports this vision for the future of the northern Pipeline Road in its report. It suggests the use of a segment of the Pipeline Trail for low-impact ecotourism activities.

## ***Finding #2: Launch and promote the Discovery Route***

### *Today*

The region from the Pacific Ocean and Panama City to Soberanía National Park, along the Panama Canal, encompasses many significant tourist attractions, including the proposed Biodiversity Museum and Rainforest Discovery Center, Panama Viejo, Miraflores, and of course SNP itself. These attractions and others in the region draw many of the same type of visitor; people interested in the cultural, historical and natural sites that Panama has to offer. Currently, there is no synergy between the marketing and positional efforts of these facilities. Each facility conducts costly promotional activities independently of each other. A recent GWU/TDI study about Tourism in Protected Areas developed a proposition on connecting major attractions within a Discovery Route.<sup>15</sup>



### *Tomorrow*

The launching and promotion of a Discovery Route will encompass key tourist attractions in and around Panama City along the Canal to Soberanía National Park and will tie them together in a competitive cluster, enhancing the tourism product of the region and the visitation to all facilities in the cluster, including SNP.

The Discovery Route will be an opportunity for tourists with varied interests and available time to choose from a “menu” of experiences. The main benefits of the Discovery Route are to enhance visitation throughout the region and reduce marketing costs for individual facilities. The main products of the partnership will be innovative marketing materials that will promote visitation to sites along the route. The Discovery Route will help increase visitation to all attractions, and will be especially beneficial to attractions such as Soberanía National Park.

### *Action*

The launching and promotion of the Discovery Route concept requires establishing of strong partnerships among the attractions it will encompass and the development of one integrated promotional campaign. Development of the route is proposed in two phases. The first phase involves the development of a demonstration suite of maps and promotional materials that will help sell the route concept to prospective partners. Once partnership has been secured phase two will involve the full development and

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<sup>15</sup>TDI Corporation, and International Institute of Tourism Studies, School of Business, The George Washington University (2004), “Tourism in Protected Areas: Strategic Guidelines for Enhanced Environmental Conservation and Economic Development in Panama,” USAID, George Washington University

implementation of three main marketing products proposed by the consulting team: a *3D map* in the form of a static display board, an *interactive Internet or computer based map* and a *pocket sized paper map*. The 3D static display board will include a large map of the region and information about each of the sites along the route. The user will be able to use 3D glasses to see the entire route and learn about the exciting attractions that they can visit along the way. The 3D aspect will draw visitors, especially children to the display, increasing the impact of the display on passing tourists and increasing visitation to sites along the route. The interactive map will also act as a draw for tourists, allowing them to fly around the virtual route, clicking on sites of interest as they fly to get information, streaming video or pictures about the site. This system will be available on the Internet as well as on computers in key locations, such as the airport and Miraflores Locks, which have high visitor flow. The interactive map may also be made available on credit card sized CDs, that people can use on their own computers. A small paper map will also be available to tourists, as this will provide the tourist with something to refer back to during their visit and keep the Discovery Route on their mind.

Establishing a shuttle bus between partner sites would facilitate easy travel from one location on the trail to another. The shuttle bus would also help tour operators sell attraction packages and may attract them to increase their tours to sites along the route. Linking the tourism sites and making them easily accessible to tourists is vital to increasing the overall visitation along to sites along the route.

A specific action plan on the launching and promotion of the Discovery Route is proposed in Action Plan 1.

### ***Finding #3: Increase revenue and manage expenditure***

#### *Today*

Observations during the fieldwork phase of the assignment suggest that the current revenue and expenditures of SNP are not efficiently managed. The fee system is not consistent throughout the Park and SNP is losing revenue to tour operators that frequent the Park's trails.

In regards to resources, the current staff is over-utilized and often assumes additional responsibilities. SNP currently has 12 employees to manage operations throughout its 22,104 hectares. Park staff and resources are limited and the many responsibilities are overwhelming. The lack of trained guides in addition to park rangers results in inconsistency in the staff carrying out their responsibilities. The shortage of staff forces rangers to devote time to leading hikes through the Park instead of tending to other, more pertinent park management responsibilities. However, lack of funding prevents SNP from hiring additional staff members and/or guides. The approximate cost of one park employee per year is \$7,000 USD.

#### *Tomorrow*

The vision for SNP's revenue and expenses is to have a consistent and enforceable fee collection system, preferably collected at a primary entrance point, and to take advantage of voluntourism programs to decrease the excessive pressure on SNP staff and administrative resources. SNP can increase its staffing resources by outsourcing guide responsibilities to certified and/or licensed third-party guides. This will reduce the amount of time rangers spend guiding visitors through the Park and will enable SNP to offer the added service of guided park tours without comprising rangers' abilities to fulfill their park management responsibilities. The result of maintaining a consistent and enforceable fee collection system, along with the contributions of voluntourism, is to stimulate the economic sustainability of SNP and to generally preserve the Canal watershed area of the park.

#### *Action*

The recommendations regarding SNP's visitor management include concepts and strategies that increase revenue and supplemental resources that compliment the Park's existing resources. The following discussion outlines how increased revenue could be attained and maintained on a more consistent basis by revising SNP's fee system. Furthermore, a review of supplemental resources is conducted, through volunteer programs and donations, in order to decrease the over-utilization of SNP resources. Further actions addressing fee systems are proposed in Action Plan 3.

***Recommendation #1: Revise fee system: \$1 for domestic visitors (excluding \$2 map) and \$5 for international visitors (which includes the map)***

The entrance fees collected from park visitors are the primary source of SNP park revenue. The preliminary benchmark analysis determined that a commonality amongst the benchmarking parks was that an increase in fees is acceptable to the majority of foreign tourists visiting national parks. Therefore, we recommend that SNP's fees be increased to \$5, including a park map, for international visitors and remain at \$1 for domestic visitors, although the domestic entrance fee does not include the \$2 cost of

purchasing a park map. These entrance rates were determined through a review of the existing fee structure and the cost of the park maps. The park maps cost \$1 to manufacture, and \$1 of profit is reinvested to ANAM. In implementing this recommended fee structure, SNP would earn \$1 revenue per domestic visitors and \$4 revenue per international visitor.

*Areas of Consideration:* Because most domestic visitors visiting SNP know the area and the park, a challenge that may surface would be encouraging domestic visitors to go to the SNP headquarters office to pay and obtain a map before entering the park.

***Recommendation #2:*** *Collect fees through SNP headquarters, tour operators and indigenous communities.*

A second component of the fee system at SNP is the point of fee collection; including how and where the fees are collected. Our fieldwork suggests that in the short-term the collection of fees occur through three mediums; at SNP headquarters, a fee sharing agreement with tour operators and a fee sharing agreement or similar collaboration with indigenous community tour operators. Collection of fees at SNP headquarters would target primarily domestic visitors and individual tourists and would be collected at the office. Fee collection through a fee sharing agreement with tour operators would encompass an agreement between SNP and a tour operator, which allows the tour operator to frequent certain park trails. This agreement could outline whether the fee paid to SNP is a fixed annual or monthly fee, whether it is dependent on the number of tourists in the tours, or whether the fee is a percentage of revenue derived from the tour package that includes SNP. In the long-term the collection of fees could occur at the proposed visitor center and/or at the proposed Rainforest Discovery Center at the Pipeline Trail.

*Areas of Consideration:* Challenges to the fee collection system include making domestic and international tourists aware of the fee collection at SNP headquarters and creating agreements with the tour operators that are acceptable to both participants.

***Recommendation #3:*** *Utilize supplemental resources, such as Voluntourism, Intern programs, NGOs, and Corporate Sponsorship.*

The primary expenditure for SNP is staffing and the primary gap is cash inflow, thus it is recommended that SNP tap into supplemental resources for staffing and maintenance of the park. Identified supplemental staffing resources are: 1) voluntourism; 2) intern programs; and 3) NGO resources. Voluntourism would entail working with the Tourism Development Core or another similar organization to organize groups of tourists that would visit SNP in order to maintain trails and/or conduct training workshops. In addition, partnerships will be forged with third-party licensed guides to provide volunteer interpretative services to park visitors.

Intern programs associated with U.S. or European universities are also available for either domestic or international students to help maintain trails, work in the office, or offer any other tourism or forestry contributions. The Intern program could be known as the junior ranger program and would create an affiliation with local and international universities that house tourism, forestry, and/or international development departments. The Junior Ranger Program can be created through partnerships with educational

institutions in Panama and abroad. The ‘Ranger’ program will offer students the opportunity to spend time interning as rangers in SNP and support full-time rangers by assisting with park maintenance responsibilities. Furthermore, a junior ranger program based in SNP Panama would be beneficial both to SNP and to the universities. Recently a proposal was signed between GWU, FSU Panama and SNP that outlined a program for FSU students in Panama in the tourism department to help maintain trails within SNP as part of the tourism students’ curriculum. Finally, policing authority will be delegated to park rangers in an effort to combat poaching in cooperation with local community police.

The third supplemental staffing resource that has been identified is tapping into the resources of domestic and international NGOs. This concept would entail identifying interested NGOs that could provide expertise, insight, programs and volunteer workers to enhance and protect the biodiversity and tourism of the park.

Another source of supplemental resources is corporate sponsorship and arranging for various opportunities for corporations to contribute financially and/or in kind to SNP. This could be in the form of an adopt-a-trail program, sponsorship of the park map, or corporate donations of materials and supplies. Many corporations already invest in corporate social responsibility (CSR) activities, and this recommendation is intended to parallel CSR. Therefore, corporate sponsorship would entail identifying corporations, either domestic or international, that would have an indirect or direct interest in enhancing and preserving SNP (examples include paper, lumber, biotech companies, and any Panamanian companies). For the adopt-a-trail program, a company would pay a predetermined amount of money or materials that would provide maintenance of a particular trail. Then at the beginning of that particular trail there would be a sign indicating which company adopted the trail. Sponsorship of the park map would involve corporations paying a predetermined amount of money to have their corporate logo or slogan displayed on the map brochure. The funding from the map sponsorship could be allocated for either the cost of the map or for maintenance of the trails. Lastly, corporations could donate funds or materials directly to SNP.

*Areas of Consideration:* Challenges for this recommendation include attaining a level of transparency that would encourage corporations to participate in corporate sponsorship.

### ***Finding #4 – Adopt an integrative approach to SNP marketing***

#### *Today*

Currently, marketing of SNP is very limited. Maps and brochures of the park do exist, but availability is often difficult or restricted. There are display stands at local Panama City malls that advertise the park, which is a good start, although the stands seem to be in limited traffic areas and may seem somewhat out of context.

SNP’s marketing does not encompass many of the traditional marketing strategies, and even fewer of the nontraditional strategies. There is very little evidence of cross-promotion with other tourist sites or affiliation marketing with related interest groups. Their market does not segment the different types of groups that would potentially target SNP, and there is very little coordination with tour operators. Although many tour operators do bring visitors to SNP, they tend to stick primarily to Pipeline Road as a promotional vehicle, rather than the park’s offerings as a whole.



#### *Tomorrow*

Future marketing strategies for SNP will be dynamic and comprehensive, with an emphasis on low-cost nontraditional marketing strategies rather than more expensive traditional strategies. SNP will directly targeting the many diverse market segments that frequent the park (i.e., ecotourists, domestic tourists, cultural/heritage tourists, adventure tourists, etc.) separately and distinctly (more details on tourism profiles and targeting channels are provided in Addendum 3; sample itineraries for different groups of visitors are provided in Addendum 5). This will be accomplished through cross-promotion of SNP’s attractions by placing visitor materials, brochures, and pamphlets, or even creating visitor kiosks, at other area attractions. Examples of these visitor sites include Summit Park and Zoological Gardens, the Miraflores Visitor Center of the Panama Canal, Mi Pueblito, and Panama Viejo. In addition, SNP will create affiliations with the differing market segments by providing links from their user websites and linking with their established organizations in order to generate interest and educate the groups regarding SNP’s vast array of offerings.

Also, there will be a wide availability of SNP’s marketing materials and brochures at areas that may be accessed by the “accidental tourist” – sites such as Tocumen International Airport, Panama City hotels, and through programs with local schools. Finally, SNP will embark on an educational program of tour operators (summary of tour operators feedback and recommendations is provided in Addendum 7), in conjunction with IPAT and ANAM that will result in the creation of more diverse and creative tourist itineraries at the park.

### *Action*

The creation of a comprehensive marketing strategy will require coordination at the highest levels between SNP, ANAM, IPAT, and possibly Summit Park. If accomplished, SNP will be strongly positioned to implement the steps outlined above. The majority of them are relatively quick and cost-effective to implement since they involve nontraditional marketing channels of distribution. However, they do involve significant outreach efforts for the creation of affiliations and cross-promotion.

In addition, the majority of these recommendations will involve significant expenditures of time, currently a limited resource due to SNP's small staff. For this reason, SNP should strongly consider hiring a full-time individual (or converting/promoting an existing employee) to focus solely on marketing, outreach, and coordination efforts. Since many of the steps above are low-cost to implement, there would not be too many additional costs besides salary, benefits, and training costs for this new position. The SNP Director of Marketing would be able to focus his or her resources solely on the recommendations provided here, such as networking with local organizations, holding educational workshops and training sessions with targeted market segments, building alliances and affiliations with other organizations and websites, and updating SNP's own website. Action Plan 5 describes the specific actions towards developing and enhancing SNP website.

A detailed description of a proposed marketing strategies, and associated costs are provided in Business & Marketing Plan 1: Soberanía National Park Marketing Strategies.

## ***Finding #5 – Introduce visitor information management system***

### *Today*

Currently, there is lack of visitor data collection at SNP and the surrounding attractions. There is no formal way to track the number of visitors to the park or the attractions.

The GWU/Panama consulting team performed a visitor survey at Summit Gardens on June 18<sup>th</sup>, 2005 and June 19<sup>th</sup>, 2005. The survey could not be carried out at SNP because of the limited number of visitors to SNP and no central point to collect this information. Of the visitors surveyed at Summit Gardens, 75% had never visited SNP, although SNP borders Summit Gardens. There is potential to bring these visitors to SNP because of the 75% who had never visited SNP, 55% said they would be interested in visited in SNP. The details of the survey used and the data extrapolated from the results can be found in the Annex

### *Tomorrow*

In the future, an on-going system of visitor data collection and management is envisioned. The system will include exit surveys collected from visitors exiting SNP and Summit Gardens, informal feedback collected by tour guides and tour operators and online surveys and feedback provided by visitors on the ANAM/SNP website.

### *Action*

In addition, an in-house specialist or research consultant(s) will collect, analyze and report visitor monitoring data on a regular basis (quarterly or half-yearly) to help ANAM know the market segments that visit the park and why. In essence, it will allow ANAM to better market itself SNP to locals and international visitors.

To get to this point, a formal visitor monitoring and collection system is needed to track visitor satisfaction levels and spending patterns. The information generated from this will be instrumental in knowing who visits the park, how satisfied they are with the park and its facilities and where they spent the most and/or least amount of money. It will allow SNP management and ANAM to use this feedback to better the park and its facilities in conjunction with the needs of the visitors.

The collection and management of this data can only be successful if the stakeholders related to the park collaborate to share information with each other, i.e. ANAM/SNP administration, IPAT, Summit Gardens and AED work together to create this system and use the information generated from it. In addition, universities and NGO's can be used to create and perform surveys and extrapolate information from it.

A formal system of tracking and collecting visitor data is important because it is essential to know who to market SNP to and how to get those market segments to the park. A detailed plan on introducing a visitor information management system is provided in Action Plan 4.

## ***Finding #6 Enhance SNP website***

### *Today*

Currently, SNP has a single, static website page that is accessible through Panama's National Parks Website. The SNP website page offers little information to travelers about the wide biodiversity and abundance of activities that exist in the park.



### *Tomorrow*

In the future, SNP's website will be both dynamic and comprehensive. The website will utilize a visitor planning and booking system. It will also host a wide variety of multimedia features such as audio, video, and flash content. The website will also use online surveys to capture and gain critical feedback from park visitors.

As a nonprofit national park, web site promotion is one of the most important aspects of SNP's marketing plan. Every effort made to market and raise awareness of SNP should always direct the audience back to the website. Web site promotion is critical for tourists from North America who are Panama's single largest source of visitors and whom rely heavily on the Internet for their travel research.

### *Action*

The SNP website will make wide use of electronic promotional techniques that will both push and pull through the website through the Internet to the desired audience. Some of the promotional features are as follows:

- **Metatags and keywords:** SNP's web site should embed metatags and keywords into the HTML tags of the website. This allows search engine spiders (used by Google, Yahoo!, and AOL) to find the site through keywords such as "eco-tourism," "cultural tourism," and "heritage tourism".
- **Directory Listings:** There are several travel directory listings where SNP can list their website.
- **Electronic Press Releases:** SNP will also push electronic press releases through affiliate organizations such as IPAT and ANAM.

- **Affiliate Links:** SNP will approach nonprofit organizations with similar goals in an attempt to cross-link both organizations' websites, including ([www.visitpanama.com](http://www.visitpanama.com)) and ([www.panamainfo.com](http://www.panamainfo.com)).
- **Website Signature:** Every piece of marketing material, both hard copy and electronic, will have the organization's website address as its signature.
- **Electronic Newsletter:** Visitors to the site can sign up for SNP's newsletter. The regular newsletter will help keep subscribers informed about the latest news and events from the SNP.
- **RSS News Feeds:** Really Simple Syndication is a new technology that allows websites to post targeted news content obtained from multiple sources, and syndicate the news content through other websites. By subscribing to RSS enabled news websites such as The New York Times, CNN, and WildGrapes ([www.wildgrapes.net](http://www.wildgrapes.net)), news feeds filtered by keywords such as "eco-tourism," "cultural tourism," and "heritage tourism" will be sent through SNP's website. More importantly, from a marketing perspective, SNP can use RSS news feeds to push news content and the website's address to other sites. With RSS technology other users and websites can receive syndicated news items from SNP the same way the SNP can receive news items from The New York Times. With RSS SNP has the ability to write their own news and press releases (further marketing the organization and including SNP's website signature) and push the feeds along with other news through other websites.
- **Movable Type:** Movable Type will allow SNP to keep the website fresh and current by adding, deleting, and editing the content of their website.
- **Multimedia:** SNP will eventually incorporate more multimedia features including streaming video, pictures, and slide shows. Most search engines such as Google and Yahoo! are now developing the capability to search the internet for multimedia files. By including more multimedia applications on the website that include the organization's website address, SNP can increase its exposure through multimedia web searches.

More specific details on the implementation of a website enhancement plan are provided in Action Plan 5.

## ***Finding #7 Utilize promotional events***

### *Today*

Currently, there is very limited use of promotional events to help market SNP. Events organized in the city and the surrounding areas seem to attract many citizens and guests of Panama City. However SNP has failed to capitalize on them in terms of promotion.



### *Tomorrow*

SNP will use different events to attract visitors and build general awareness about its existence and assets. The Park will use events as a promotional tool in several ways. First, it will capitalize on relevant events organized and initiated by other organizations and institutions. SNP will initiate the celebration of tourism and nature-related significant dates that will attract visitors and build general awareness. The park can partner with Summit Park and organize joint events sharing costs and benefits. Because it is very important for the Park to initiate its own Park-specific events, SNP could introduce several specific celebrations and holidays that could become regular.

### *Action*

Beginning with this year's 25<sup>th</sup> anniversary of SNP as the first transfer of lands from the United States to Panama, the Park could benefit from existing celebrations and events. The 25<sup>th</sup> anniversary is a significant event that will be marked with celebration involving the highest government officials, which will attract a lot of public and media attention. The mentioning of the name of Soberanía National Park and incorporating information on its resources as part of the information disseminated for the event has a significant impact on the awareness levels of the general public.

A second element of the event promotion strategy of the park could be the regular celebration of tourism and nature-related significant dates like Earth day and the World Tourism Day. The Park could be the initiator of these celebrations, but they could be organized with the support of other parks in the area (Summit Park, Metropolitan Park, etc.), relevant non-governmental organizations and private businesses (tour operators, hotel chains, etc.). The celebrations could be established as regular events as a way to increase the general public awareness on the importance of both – the natural resources in the area and the sustainable development of tourism in the region.

Another element of the recommended event promotion strategy for the park could be the partnership with Summit Park. The initiation of joint events will have several benefits for both parks: cost efficiency, shared human, time and other resources,

awareness capitalization among visitors of both parks and promotion of the connection between the two parks.

It is very important for the park to initiate and establish its own park-specific events. A good example for an annual park-specific event could be the historical celebration of the Camino de Cruces trail (for a detailed description of a concept for a historical celebration event see Addendum 10). Other examples for events that could serve as strong visitor attraction tools are significant bird-watching events, animal birthdays (for example Harpy eagle annual event in collaboration with Summit Park) and cultural festivals celebrating the cultures of the communities in the areas around the Park.

## ***Finding #8 Realize Chilibre's potential***

### *Today*

Chilibre, population approximately 1,200, is a town located in the state of Colon, 20 minutes from Panama City and bordering Soberanía National Park. Due to the limited economic development, the residents of Chilibre rely on natural resources as sources of living. Fishing, hunting, and logging in and around SNP causes increased pressure on the natural resources and endangers the balance in the watershed areas. This creates a need for alternative sources of living and the need for economic development, which will help establish a balance between the needs of the community and the need to sustain natural resources in the park and the watershed areas.

There is a potential for introducing sustainable tourism practices as a source of economic development and sustainable management of the valuable natural resources. Chilibre offers a set of natural and cultural characteristics that could potentially enhance the region and local communities' competitive advantage in the tourism sector along with surrounding areas, such as Panama City. The surrounding nature allows for nature-based activities like bird watching, natural overlooks, fishing, hiking, white-water rafting and kayaking along with additional ecotourism activities. The main challenges to tourism development, however, are poor education and limited infrastructure.

### *Tomorrow*

The development vision for Chilibre is to create a tourism circuit incorporating the cultural and natural assets that already exist in the region, all being managed by a destination management company that works towards the best interest of the communities and the surrounding environment. The proposed Destination Management Company will work with and help develop Local Tourism Organizations in each of the communities to build capacity and develop infrastructure in respective sites. Chilibre will be able to offer a variety of products tailored to the individual or group by arranging packages that appeal to particular niche markets; ecotourism, heritage tourism, adventure and educational tourism as well as voluntourism.

A significant potential for Chilibre is the attraction of voluntourism groups, which could bring significant benefits to both, the community and SNP. Voluntourists would be linked with the proposed Spanish School, a "Homestay", or camping at the proposed eco-resort for lodging while working on necessary projects identified by the community.

### *Action*

In order to achieve this vision of Chilibre and the surrounding communities, action needs to be taken to begin laying the foundation for a sustainable tourism industry.

Specific marketing actions could help promote Chilibre amongst the national and international tour operators and distinguish their unique characteristics from their competitors. An inventory of unique artisan items and specific marketing actions are described in Addendum 11.

A special coordination unit for volunteer groups could be established through the Junta Comunal in Chilibre (see Business & Marketing Plan 5). It can work with a proposed SAVE center (see Finding 12) to attract volunteer groups and utilize their potential efficiently. Marketing & Business Plan 5 contains detailed description about the potential engagement of the community in promotion of voluntourism.

There is a potential for tour operators and outfitters small business development in and around the community. This will create opportunities for economic development and alternative sources of living for the local communities, and will help alleviate the pressure they exert on surrounding natural resources. Addendum 9 identifies 10 different potential opportunities in the area.

### ***Finding #9 Develop Agua Buena through voluntourism***

Agua Buena (a town of 1,200 residents located near SNP's southeast entrance) does not currently contribute to SNP's development as a tourism destination. Instead, Agua Buena's poor waste management system pollutes both the community and SNP's bordering ecosystem. The town also has poor infrastructure, especially roads and lodging, which would deter most tourists. Social issues, including crime and security, must be dealt with before any tourism initiatives can be taken into consideration.

#### *Tomorrow*

In the future, Agua Buena will become the premier, central community for attracting "voluntourists;" tourists who want to experience how other people live in exchange for their knowledge services. These voluntourists will contribute their time, energy and talents in exchange for cultural and language immersion, personal gratification, and a unique experience that typical tourists don't normally receive. By attracting and hosting voluntourists (as well as utilizing a sports stadium, café, Spanish/English school, and homestay) Agua Buena will have a positive impact on SNP's success as a premier tourism destination.

#### *Action*

Sports Stadium (see Action Plan 9): There is a sports stadium where soccer and baseball games are played each weekend. However, the field is overgrown and the bleachers are in need of repair and repainting. With a rebuilt stadium and some publicity, Agua Buena could host both sporting and cultural events. These events would increase Agua Buena's potential as a tourism destination and would increase the success of the SNP tourism cluster.

Café (see Action Plan 6): Adjacent to the stadium, a small area currently exists with the perfect dimensions for a small café. The café could sell food and drinks to the stadium's visitor when they come for both sporting and cultural events. The café would increase revenues within the community, create new jobs for local residents, and contribute to the success of the SNP tourism cluster.

Spanish/English School (see Action Plan 7): The primary target market for the school would be American and European teachers who wish to learn Spanish in a rural community and experience complete immersion into the culture and language. In return, these teachers would teach English to specific community members, who would become stakeholders in SNP and Agua Buena's tourism industry (such as park guards, SNP tour guides, and café owners).

Homestay (see Action Plan 8): Tourists and students would also stay at a homestay on a small farm in Agua Buena. Guests would help maintain the farm by picking vegetables and assisting with food preparation. The homestay is critical lodging for voluntourists, teachers, and students, and would contribute to Agua Buena and SNP's success as a tourism destination.

## ***Finding #10 Build the capacity of the Gamboa Cooperative***

### *Today*

The Gamboa cooperative includes the town of Gamboa, two different indigenous groups and The Gamboa Rainforest Resort and Lodge itself. Even though the cooperative has unique opportunities to develop sustainable forms of tourism relying on the rich natural and cultural resources, difficulties in partnerships and communication hinder the process. Another significant challenge is the limited capacity necessary to utilize the potential for tourism development.



### *Tomorrow*

The Gamboa cooperative region of SNP will be one of the most popular attractions in the park. Guests will come to the area to see the indigenous communities, stay at the Gamboa Resort, and also have the opportunity to learn about and get exposed to different types of research that is conducted in the rainforest.

The two indigenous communities will work together to provide different portfolios of guest services to include interpreted trails, medicine walks, hikes to the proximate waterfall, arts and crafts workshops, fishing tours, culinary lessons, and other cultural celebrations that will be packaged and sold through the Gamboa Resort, other hotels in Panama City, Tour Operators, and museums and cultural centers (Mi Pueblito, the proposed cultural center at Summit Park, Natural History Museum, etc.). The communities will also host SNP visitors in suitable campground areas or traditional village huts. Campers will be able to stay overnight in the communities and be exposed to many aspects of their culture. These adequate guest facilities would also house local Panamanian students and researchers from Gamboa who are making in field observations.

### *Action*

There are two main areas of focus that could help realize the potential of the area: partnership building and capacity building.

The Gamboa Cooperative could use partnership initiatives that could unite the efforts of the different stakeholders and will help join their resources. An eco-lodge would be an ideal type of business opportunity that could bring together the Gamboa Cooperative. Justification of the usefulness and potential of an eco-lodge development is provided in Business & Marketing Plan 3. The formation of a proposed tour company managed by the indigenous communities is another important step in cooperation and partnership

building. A business plan for the envisioned tour company is provided in Business & Marketing Plan 4.

The second main area that needs to be addressed is capacity building. There is a need to improve available tourist infrastructure and amenities, which could create opportunities for camping and accommodation of voluntourists and researchers. There is a very strong need for well trained and possibly English-speaking guides that can enhance the tourist experience of the rich biodiversity in the area. Guide training opportunities are further discussed in Finding 13 and Addendum 14.

## ***Finding #11 Establish educational institution networks***

### *Today*

Panama has a variety of educational institutions that include multiple universities, museums, and research and cultural institutions. Institutions like Florida State University – Panama (FSU), University Santa Maria Antigua (USMA), and University of Panama all offer programs related to tourism or the environment. These institutions can play an important role in education and building broad-scale awareness on the importance of the natural resources in the area and the opportunities of sustainable tourism development. Natural partners in such initiatives are other educational and/or research institutions and sites like the Museum of Natural History, the planned Biodiversity Museum, Mi Pueblito, the planned Summit Zoological Park, the Smithsonian institutions, etc. Currently, there is no cooperation and partnership mechanism among educational institutions and they do not have any contribution to the sustainable development in the area.

### *Tomorrow:*

Educational network of academic, research and cultural institutions can contribute to the enhancement of sustainable management of the natural and cultural resources in SNP and the surrounding areas. This network will help join capacity in education and awareness building for the need of sustainable development and management of the cultural and natural resources. The network can be an initiator of research and volunteer activities related to preservation and sustainable development.

### *Actions:*

FSU and University of Panama will incorporate into their respective curricula, joined programs with research facilities such as PROENA and STRI. Examples and studies from SNP and the surrounding communities will be incorporated in academic and research agendas.

FSU's environmental club will continue its monthly volunteer cleanup of entrances to SNP (see Addendum 13). The environmental club's volunteer activities could eventually expand to park development activities, based upon the needs of SNP. Other universities will follow suit, establishing student clubs that volunteer to help clean, preserve, and develop SNP and its surrounding communities.

USMA will offer its students a program to fulfill their 100 hours of social work requirement by working with the communities in and around SNP. Students will have an opportunity to work with the indigenous communities and help raise their awareness on the importance of environmental preservation. Additionally, the students will be able to assist the communities in development and expansion of small businesses through methods that provide for economic and environmental sustainability.

The establishment of student-run clubs for volunteers helping in cleanup, preservation and development of SNP and communities in the area is another opportunity. Universities could provide support to such clubs through transportation, and necessary equipment.

## ***Finding #12 Apply SAVE: Scientific, Academic, Volunteer and Education***

### *Today*

An emerging trend in tourism is “voluntourism,” where tourists seek to incorporate volunteer work into their travels. The goal of the experience is to reach across social, economic and political borders in an effort to help people. These tourists want to interact with local communities in more remote locations and offer their assistance in their areas of expertise.

The SAVE travel market, an acronym developed by The George Washington University’s tourism study abroad consulting team in Honduras (2003) encompasses all of the existing voluntourism components: Scientific, Academic, Volunteer and Educational. It is our recommendation that the various needs for education and infrastructure in communities surrounding SNP utilize SAVE voluntourists. Brief descriptions of the components are as follows:

*Scientific:* Individuals or groups that travel to conduct specific research or observation within such fields as biology, archaeology, anthropology, etc. Organizations that currently deploy volunteers for this type of work include Earth Watch Institute, Global Vision International, Greenforce Conservation, and World Heritage Center Sites. These expeditions hire local workers, live in the communities, eat local food, utilize local transportation and buy local goods leading to positive economic impacts on surrounding communities.

*Academic:* Individuals or groups that travel with the intention of participating in experiential learning leading to credit towards a formal degree program. Fields of study include anthropology, archaeology, languages, conservation biology, etc. and some are formal study abroad programs. The focus is on the importance of incorporating field studies in academic disciplines with experiential learning opportunities.

*Volunteer:* Individuals or groups that travel to participate in specific activities that will contribute to the betterment of society. Organizations such as the International Volunteer Program Association, VolunTours, and Tourism Development Corps deploy volunteer travelers who wish to incorporate volunteer service into their travel experiences.

*Educational:* Individuals or groups that travel to obtain knowledge or experience for personal gratification rather than academic credit within a wide range of human activities. Organizations such as Smithsonian Journeys, Natural Habitat Adventures, The Nature Conservancy Educational have travel components that allow voluntourists to experience various value-added firsthand learning within a wide range of special interest activities. One example might be a culinary trip where the visitor learns how to prepare local food in a traditional manner.



### *Tomorrow*

Panama is a potential destination for SAVE travelers. For example, in the communities of Agua Buena and Chilibre, scientific volunteers could educate the community on the importance of maintaining the precious resources of the park. Scientists could reach out to the communities in an effort to explain the repercussions negative pressures such as pollution, logging and hunting have on the biodiversity of SNP and the watershed of the canal.

Academic volunteers with backgrounds in environmental issues will be called upon to help with the myriad environmental needs of all communities surrounding the park including sanitation, waste management, and pollution control. Also, volunteers will be culled from a variety of areas including engineers and architects who can help reconstruct a proper bridge or design a small café.

Voluntourists as educators may also be interested to teach English to residents of Agua Buena or Chilibre in exchange for complete immersion in the Spanish language and culture of a mestizo community. Teachers in the US and Europe with summers off would be a potential target market. Their role could include educating Panamanian school teachers how to properly teach Spanish as a foreign language. The presence of SAVE tourists would require the development of some services. Potential home stay opportunities exist on a nearby farm. Educators in ornithology, social work or other relevant backgrounds for the community would be considered educators as tourists.

In addition to looking for assistance from academic volunteers abroad, students at USMA in Panama City are required to fulfill 100 hours of community service. This is an excellent and untapped resource for domestic voluntourism within Panama.

Another key component in getting a SAVE strategy operating is to have adequate facilities to house and accommodate the volunteer travelers. Currently, some communities surrounding SNP can not provide adequate host facilities. UNPYME, as part of a MIF grant proposal, could create a SAVE Center in Panama. The City of Knowledge, located near Miraflores Locks, is perfectly equipped to house the SAVE Center.

The mission of the City of Knowledge is “to be an international center of excellence, to generate, disseminate, and apply knowledge to advance human development using Panama’s competitive advantages.” This mission statement reflects the goals and values of a SAVE Center strategy. Additionally, the facilities including villa accommodations,

cafeteria and catering, computer lab with high speed Internet, and other amenities make this the perfect place to house SAVE volunteers.

A full-time “Volunteer Coordinator” position would need to be created to handle the coordination and logistics of the program. This person would be responsible for disseminating the scope of work and specific objectives to each volunteer. He or she would coordinate all logistics involving the volunteers’ length of stay, duties to be performed (either within the communities or in the SNP), developing realistic timeframes for accomplishing goals, handling volunteers’ travel arrangements, answering questions, etc. Volunteers would help with infrastructure needs and work with small businesses to secure grants. Ultimately the goal is to educate the community and stimulate the economic development and preservation of the park.

Voluntourists will come from a variety of areas. There is currently a SAVE database which contains profiles of affinity groups and organizations in Europe and North America who are interested in participating in special interest activities. The SAVE Travel Alliance will be an intermediary for countries to access the SAVE markets and will reduce the lead time that it takes to find the right affinity group for the special interest travel activity.

#### *Actions*

Some of the above-mentioned strategies can be developed through grant money from sources such as the Multi-Lateral Investment Fund (MIF) through the Inter-American Development Bank, a pilot program that is further detailed in Addendum 8. This method of financing was pursued by the consulting team while in Panama and a potential executing agency the team identified was Union Nacional de Pequeñas y Medianas Empresas (UNPYME). A sample proposal is outlined in Action Plan 11. Action Plan 10 details the implementation of the establishment of a SAVE center.

### ***Finding #13 Improve the tourism experience through training in the tourism sector***

#### *Today*

Currently, there are limited professional tourism training opportunities for businesses and entrepreneurs working in the tourism sector (tour operators, tour guides, hotel and restaurant managers, etc.). There are limited professional tourism training opportunities for staff members at public organizations and institutions that provide tourism services like Soberanía National Park and other parks in the area. There are two major limitations caused by the inadequate professional tourism training opportunities: *missed opportunities for tourism product diversification*, and *limitations in enhancement of the tourist experience*.

#### *Tomorrow*

In the future, there will be opportunities for professional tourism training accessible for public and private sector entities working in the tourism sector as well as guide training programs tailored to nature, culture and historical guides. Professional training programs, in addition to already established academic programs, will allow tourism professionals already working in the field to enhance their knowledge about the tourism industry and the current trends. Tailored training courses will focus on the development of specialized skills necessary for the successful development of tourism attractions. The availability of world-class professional tourism training opportunities will help entrepreneurs and businesses working in the area of tourism build capacity and identify opportunities for enrichment and diversification of the tourism product in SNP and the surrounding areas. The availability of specialized training and certification programs for guides will help guides in the SNP area develop the skills and knowledge allowing them to enhance the tourist experience of visitors to the area. Professional and specialized training programs will help improve the English language proficiency of the professionals working in the tourism sector. The use of internationally acknowledged certification and training programs will help turn SNP into a world-class destination.

#### *Action*

The actions for training in this field consist of two components; destination management for tourism professionals and guide training for interpretation professionals.

#### Destination Management

An excellent opportunity for the development of tourism professionals would be the implementation of the Tourism Destination Management Certificate Program offered through the GWU International Institute of Tourism Studies (IITS). The program offers general courses focusing on tourism assessment & development, tourism marketing, etc.; as well as a broad spectrum of specialized tourism courses focusing on areas like ecotourism, cultural heritage tourism, community-based tourism, tourism guide techniques, and many others. The program includes a series of six two-day sessions delivered by Spanish-speaking tourism professionals focusing on topics selected by the partner organization in Panama (for example ANAM, IPAT, etc.). Upon successful completion trainees receive a Tourism Destination Management certificate. The Tourism Destination Management Certificate Program is the only TedQual certified destination management certificate program. Once delivered, and in partnership with

IITS, the program could be replicated across the country through a local educational or academic institution (see Business & Marketing Plan 6). The program is also available in an online format.

### Guide Training

Another important step towards the enhancement of the tourist experience of visitors to SNP and the surrounding areas is the training of guides through an internationally recognized tour guide training and certification program. One such program is the RARE Nature Guide Training Program. ([www.rareconservation.org](http://www.rareconservation.org)) This program provides field tested comprehensive training to new guides and those with existing experience. (see Addendum 14) With the assistance of international donors, ANAM and interested local businesses/individuals could establish contact with RARE or another specialized guide training program and secure training for potential guides in the region. The cooperation with a guide training and certification program will offer opportunities for training of private guides from local communities interested in starting a tourism guide business or in offering tourism guide services through an existing business. As mentioned earlier, independent guides will reduce the burden and responsibilities presently levied on SNP staff.

In addition and in parallel to the guide training program a Study Abroad English Speaking Guide Program could be established to compliment training efforts. Presently there is a shortage of English speaking guides in Panama. This program would bring bilingual students from international universities into the country through partnership with local universities. The students would have a natural science, history or cultural anthropology background and as part of their study abroad program would work in the field with a local guide. Students would partner with a local guide, helping the guide enhance their English skills while the guide would assist the student with plant and animal identification, cultural and historical interpretation, guiding techniques and other skills. This program, with its' unique field experience curriculum would appeal to a wide range of students from diverse backgrounds and universities. This dual education program would enhance the skills of the student and guide, bringing long term educational tourists to Panama and improving the tourism product of the country.

## Summary of Findings Table

### Summary of Findings

Finding	Cost	Funding Options	Timeline	Link with Strategic Objectives
<b>1. Trails</b> Improved infrastructure and interpretation on existing trails. Development of 5 additional trails.	Volunteer program \$7,000 Signage \$3,200	ANAM/AED/USAID	Jan 2006 – Dec 2006	Educate visitors about watershed protection and conservation, build support for parks, provide sustainable resources for ecotourism activities
<b>2. Discovery Route</b> Linking SNP to other regional attractions and marketing the entire cluster collectively	Phase 1: demonstration \$4,650 Phase 2: Implementation \$20,000	Phase 1: AED/USAID  Phase 2: Route Partners  Sponsorship AED/USAID	Phase 1: Aug 2005 – Mar 2006 Phase 2: Apr 2006 – July 2006	Developing Panama as a tourism destination, enhance economic activity, reduce poverty, educate visitors ,build partnership and cooperation
<b>3. Park Revenues and Expenditures</b> Revise fee systems and their collection methods, develop supplemental staffing options	Phase 1: \$1 cost per map (sold for \$2) Phase 2: \$0 to arrange fee-sharing agreements, eventually sacrificing % of revenue to ensure consistency of fee-sharing with tour operators and guides. Phase 3: \$0 for volunteer/academic	ANAM / USAID	Phase 1: Aug 2005 – Jan 2006 Phase 2: Aug 2005 – Aug 2006 Phase 3: Aug 2005 – Aug 2006	Preserve the canal watershed by improving the efficiency of the parks operation and reducing encroachment

	guides			
<b>4. SNP Marketing</b> Innovative cross-promotional marketing using itineraries targeted to specific market profiles	Coordinator Position \$10,000 – \$25,000 Activity Brochure \$2,000 - \$4,000 Example Itineraries \$2,000 Marketing Materials \$4,000 - \$6,000/year Kiosk/Ads \$3,000	ANAM/AED	Aug 2005 – Aug 2006	Stimulate sustainable economic growth by developing Panama and SNP as a tourism destination, education about conservation of the canal watershed
<b>5. Visitor Information Management System</b> An ongoing system of visitor data collection	Initial Cost: \$5,000 - \$7,000 Maintenance Cost \$4,000 - \$6,000	ANAM/AED	Implementation Aug 2005 – May 2006	Help develop SNP and the Panama Canal region as a tourism destination
<b>6. SNP Website</b> A new interactive website with online booking and information systems	Website development \$4,000 - \$8,000 Annual Upkeep \$2,000 - \$5,000	USAID/ANAM	Implementation Aug 2005 – July 2006	Help develop SNP and the Panama Canal region as a tourism destination
<b>7. Promotional Events</b> To attract visitors to the park and region	\$100,000	USAID/AED Corporate Sponsors ANAM	Planning Aug 2005 – Dec 2005	Educate visitors about the watershed region, promote SNP and the region as a tourism destination
<b>8. Agua Buena</b> Use of volunteering to develop capacity	Part of MIF grant \$100,000	MIF and UNPYME, also SAVE volunteers	Aug 2005 – May 2006	Poverty reduction, promote sustainable economic growth
<b>9. Chilibre</b> Development of tourism	Part of MIF grant \$100,000	MIF and UNPYME, also	Aug 2005 – May 2006	Poverty reduction, promote sustainable

circuit		SAVE volunteers		economic growth and tourism in the SNP region
<b>10. Gamboa Cooperative</b> Development of Tourism business opportunities in the community	Part of MIF grant \$100,000	MIF and UNPYME, also SAVE volunteers	Aug 2005 – May 2006	Poverty reduction, promote sustainable economic growth and tourism in the SNP region
<b>11. Educational Institution Networks</b> Link educational facilities with SNP and the region	N/A	Florida State University, University of Panama	August 2005 onward	Educate visitors and students about the value of the watershed, Develop the SNP region as a tourism destination
<b>12. SAVE</b> Scientific, Academic, Volunteer and educational travel	Total operating cost \$14,000/year	Multi-Lateral Investment Fund (MIF) and Union Nacional de Pequeñas y Medianas Empresas (UNPYME)	Aug 2005 – July 2006	Develop Panama and the SNP region as a tourism destination, reduce poverty, promote the balanced use of natural and cultural resources, educate visitors and locals about the importance of protecting the watershed
<b>13. Training</b> Train guides for SNP and the surrounding region	Unknown	AED/USAID RARE Local Businesses	Aug 2005 – Aug 2006	Develop Panama and the SNP region as a tourism destination, educate visitors and residents about the importance of watershed protection

## Conclusions

Panama and the Soberanía National Park Region epitomizes ‘the path less traveled;’ consisting of lush seemingly unexplored rainforest, historic sites with winding trails stretching for centuries into the past, a diverse cultural heritage and modern vibrant cities. Assessing the sustainable tourism potential of the region in and around SNP encompassed three strategic directions:

1. Tourism Market Analysis of SNP and the surrounding area
2. Analysis of Public Access Management in SNP
3. Business Plan and Strategy Development for the SNP ecotourism cluster

The project followed several key objectives that were central to the development of findings and recommendations for sustainable tourism potential in the region. The main objectives that guided the project were:

- Preserve the Panama Canal Watershed
- Educate on the importance of the Panama Canal Watershed area
- Stimulate sustainable economic growth
- Reduce poverty
- Promote the balanced used of natural and cultural resources
- Develop Panama as a tourism destination

The findings of the paper tie these objectives into actionable recommendations that will help to fulfill the overall objectives of the client. The consulting team analyzed the external and internal situation of the SNP region and developed twelve findings with specific recommendations for enhancement of the area. The findings focus on increasing visitation to SNP, streamlining the revenue and expenditure systems of the park, developing viable economic and educational opportunities for the communities that boarder the park and marketing the region in a cohesive effective manner. The findings are backed up by action plans, business plans, grant applications and observations; each with timelines for implementation, cost estimates and objectives for each action. This suite of tools, contained in the annexes of this report, will allow the client or other agencies to initiate each project with a cohesive plan for implementation.

The SNP region is ‘a path less traveled,’ but one that has the potential to be traveled a little bit more. The suite of tools and plans provided in this report will help the region on its path to developing a sustainable tourism product that is economically viable, socially responsible and ecologically sound. With the assistance of partner organizations AED will have the opportunity to make the Soberanía National Park Region a path of ecological, cultural and historical significance for this and future generations.

# APPENDICES

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3. Application of Tourist Profiles in SNP
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5. Sample Visitor Itineraries in 2010
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## **ACTION PLANS**

- 1. Discovery Route**
- 2. Soberanía National Park New Trail Development**
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- 11. Multi-lateral Investment Fund (FOMIN/MIF)**

<b>Action Plan 1: Discovery Route</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposition by:	George Washington University Panama Consulting Team	
Consultant	Simon Jones 600 21 <sup>st</sup> Street Washington, DC 20053	Phone: 202 994-0254 Email: swjones@gwu.edu

## **Action Plan 1: Discovery Route**

<u>Section 1</u> <b>Description of Recommended Action</b>
<p><b>Phase 1: Discovery Route - Partnership Building</b></p> <p>Partnership building takes time, coordination, and a dedicated lead organization to facilitate the process. The key success factor is getting buy-in to the process from partners; this is done by first selling the product to the partners. A list of some of the possible sites is included in section 4 of this action plan. A demonstration suite of marketing tools should be developed to attract partners to the project. The demonstration product will consist of a printed 3D map of the region from Panama City to Soberanía National Park with points on the map marking the tourist sites. In addition, an example interactive computer based map will be developed, demonstrating a user flying along the Discovery Route, as if they were an eagle, with the tourism sites marked along the route. One or two of the sites would be developed with popup information to show what would be developed for the whole route. A key partner in developing this component of the project would be the SERVIR NASA project that can provide the maps, software and expertise to develop the demonstration. This organization has offered to help and is able to provide the technology required for the program for free. Detailed aerial maps may also be required; these could be retrieved from ACP who has high resolution pictures of the Canal Zone in their possession.</p> <p>The team has plotted the coordinates of many of the locations along the route (section 5); however there will need to be additional sites plotted. Dr. Alex Coles and students from FSU-Panama could collect coordinates for the missing sites and work on putting them into a suitable format for incorporation within the maps. Once this information has been gathered, a team member could work with SERVIR at their headquarters in Alabama to combine the information into the demonstration maps to promote the route to partners. Once the demonstration product has been developed, AED in coordination with IPAT should meet with all partners, demonstrating the product and garner support and buy-in from the Discovery Route partnership. An MOU should be signed between all partners formally establishing the Discovery Route partnership. An event marking the signing could be coordinated as a promotional tool to attract further support as well as sponsorship of the route.</p> <p>It is recommended that AED with USAID assist with funding and coordination of this component of the project through the development and partnership building phase. Cost estimates are provided in section 2; timeline provided in section 3.</p>

**Phase 2: Discovery Route – Development and Launch**

This phase consists of full development of the 3D static display board map, the interactive computer based map and the paper map as promotional tools for the route. Funding for this phase could come in part from AED/USAID but should also include partial financing from each of the partners as well as corporate sponsorship. Corporate sponsors would have the opportunity to place their logo/name on the maps, 3D display, on the website and on the interactive map system displayed in key visitation areas.

Phase 2 consists of further work with GIS technicians, SERVIR, designers and members of the partnership to develop the fully operational 3D, interactive and pocket map. The design and printing of the 3D map and the pocket map will be conducted and locations, such as the international airport and Miraflores, secured for the display. Locations will also be selected to demonstrate the interactive map, using an arcade game format to run the program. The format of a computer game will help to attract people to the display and interactive map; providing a fun, easy to use, innovative format for the potential visitor to learn about the attractions along the Discover Route.

<b>Section 2</b>		
<b>Objectives, tasks and costs</b>		
<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility/Cost</b>
<b>Phase 1:</b>		
1. Contact partners to gauge interest in Discovery Route Concept	1.1 Identify potential Partners (see Section 4 for list of potential partners)  1.2 Gauge partner interest in the Discovery Route Concept	1.1 AED 1.2 AED  10 hours of Staff time
2. Develop demonstration suite of maps to sell partners on Discovery Route idea	2.1 Collect missing GPS coordinates for partnering sites 2.2 Log coordinates into a usable format for SERVIR mapping system 2.3 Retrieve high resolution aerial photos from ACP and georectify for use in the map 2.4 Gather information about sites to use in demonstration 2.5 Work with SERVIR at their headquarters in Alabama to input information into a usable demonstration of maps	2.1 FSU Panama student 2.2 FSU Panama/GIS technician (15 hours) 2.3 GIS technician (10 hours) 2.4 FSU Panama student 2.5 Team member (2 days, travel + stipend)  \$2,650

3. Form the Discovery Route Partnership	<p>3.1 Meet with potential sites to develop the Discovery Route partnership</p> <p>3.2 MOU signed by all partners officially forming the Discovery Route. Celebrated through an event</p> <p>3.3 Talk to local companies about sponsorship of the Discovery Route maps</p>	<p>3.1 AED/IPAT</p> <p>3.2 AED/IPAT</p> <p>3.3 AED/IPAT</p> <p>Staff Time (80 hours) + Event \$2,000</p>
<b>Recommended Implementer:</b>		AED/USAID
<b>Phase 1 Total Cost:</b>		<b>\$4,650</b>
<b>Phase 2:</b>		
4. Fully develop Suite of maps for the Discovery Route	<p>4.1 Add GPS coordinates of additional partner sites as well as coordinates of the SNP trails. Link in roads, boundaries and other important coordinates to the map</p> <p>4.2 Work with SERVIR to create the 3D and interactive map</p> <p>4.3 Work with design firm to develop 3D, interactive and pocket map into a user friendly, attractive product</p>	<p>4.1 FSU Panama student and GIS technician (student 30 hours, GIS technician 15 hours)</p> <p>4.2 Project team member (3 days, travel + stipend)</p> <p>4.3 AED/partnership team</p> <p>\$5,000</p>
5. Produce and implement promotional suite of products	<p>5.1 Print and deploy three 3D display boards to key, high visitation sites</p> <p>5.2 Print 5,000 pocket maps of the Discovery Trail</p> <p>5.3 Develop interactive map into a user friendly online format</p> <p>5.4 Develop interactive map into a user friendly arcade style format for two key locations, the airport and the Miraflores Locks</p> <p>5.5 Promote the Discovery Route through advertising in hotels and other high visitation areas</p>	<p>5.1 AED/partnership team \$3,000</p> <p>5.2 AED/partnership team \$5,000</p> <p>5.3 AED/partnership team \$500</p> <p>5.4 AED/partnership team \$2,000</p> <p>5.5 AED/partnership team \$2,000</p> <p>\$12,500</p>
<b>Recommended Implementers</b>		<p>AED/UDAID (25%)</p> <p>Discovery Trail Partnership (25%)</p> <p>Corporate Sponsorship (50%)</p>
<b>Phase 2 Total Cost:</b>		<b>\$20,000</b>

(Includes \$2,500 for contingencies/overhead etc.)

The information provided in Section 2 is an estimate of the tasks required, the implementers and the costs of project components. The GWU consulting team recommends greater research into the costs associated with Phase 2 before the project is adopted.

### Section 3

#### Work Plan Timing

Task		Timing by Month, beginning August 2005											
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>1</b>	<b>Contact partners to gauge interest in Discovery Route Concept</b>												
1.1	Identify potential Partners	X	X										
1.2	Gauge partners interest in the Discovery Route Concept	X	X										
<b>2</b>	<b>Develop demonstration suite of maps to sell partners on idea</b>												
2.1	Collect missing GPS coordinates for partnering sites		X										
2.2	Log coordinates into a usable format for SERVIR mapping system		X	X									
2.3	Gather information about sites to use in demonstration			X									
2.4	Work with SERVIR at their headquarters in Alabama to input information into a usable demonstration of maps.			X	X								
<b>3</b>	<b>Form the Discovery Route Partnership</b>												
3.1	Meet with potential sites to develop the Discovery Route partnership					X	X	X					
3.2	MOU event signed by all partners officially forming the Discovery Route								X				
3.3	Talk to local companies about sponsorship of the Discovery Route promotional materials							X	X				
<b>4</b>	<b>Fully develop Suite of maps for the Discovery Route</b>												
4.1	Add GPS coordinates of additional partner sites as well as coordinates of the SNP trails. Link in roads, boundaries and other important coordinates to the map.									X	X		

4.2	Work with SERVIR to create the 3D and interactive map											X	
4.3	Work with design firm to develop 3D, interactive and pocket map into a user friendly, attractive product											X	
<b>5</b>	<b>Produce promotional suite of products and implement them into the area</b>												
5.1	Print and deploy three 3D display boards to key, high visitation sites												X
5.2	Print 5,000 pocket maps of the Discovery Route												X
5.3	Develop interactive map into a user friendly online format											X	X
5.4	Develop interactive map into a user friendly arcade style format for two key locations, the airport and the Miraflores Locks.											X	X
5.5	Promote the Discovery Route in hotels and other high visitation areas												X

**Section 4**  
**List of Potential Partners**

- 1. Biodiversity Museum**
- 2. Panama Viejo**
- 3. Panama City Museums**
- 4. Mi Pueblito**
- 5. Miraflores Locks Visitor Center**
- 6. SNP Visitor Center**
- 7. Summit Park**
- 8. Rainforest Discovery Center**
- 9. Tower and Canopy Walkway**
- 10. SNP Trails**
- 11. Others**

**Section 5**  
**Site Coordinates**

The following are GPS coordinates of locations along the Discovery Trail taken by the GWU Team while on their field work in Panama.

<b>Name-Location</b>	<b>Latitude</b>	<b>Longitude</b>	<b>Note</b>
Sciencias Naturales	8.96708	-79.53740	National Science Museum
Reine Torres De Arroso	8.96078	-79.54023	Natural History Museum
Instituto Nacional De Culture	8.95000	-79.53208	National Museum of Culture
Museo Del Canal	8.95239	-79.53467	Main Square, Old City (Casco Viejo)
Biodiversity Museum			
Smithsonian Marine Park	8.91264	-79.52889	
Panama Viejo	9.00602	-79.48817	The Old City
Limon Church	9.25660	-79.81532	
Limon Dock/ANAM House	9.25230	-79.81425	
Arapana Indigenous Community	9.23045	-79.53292	
Chilibre Boat Launch	9.24747	-79.60801	
Ellapuru - Embera Community	9.13340	-79.69177	
Juventud Con Una Mission	9.12704	-79.69167	Youth Missionary that hosts different mission groups
La Escuela John F. Kennedy	9.12205	-79.60350	School in Agua Buena
Campo Deportivo	9.12064	-79.60360	Agua Buena Sports and Recreation Field
Chilibres Bat Caves	9.17588	-79.61653	
Entrance to 'El Mirador de Pressa'	9.22325	-79.62638	Scenic Overview
Scenic Overview	9.21265	-79.61857	
Puente de Chagres	9.20409	-79.62652	Bridge over Chagres River

La Union - Veraguena Camping Resort and Water Park	9.13912	-79.62181	
San Antonio - Wonan Community	9.13426	-79.69394	
El Camino del Rey	9.27888	-79.57546	Historic unexcavated trail from Chagres River to Portabello
Tusipono - Embera Community	9.22949	-79.53884	
Parara Puru - Embera Community	9.23163	-79.53304	Community of 73 people, 20 strictures
Victoriano Lorenzo Rural Community	9.22358	-79.54675	On Chagres River
The Mountain Country Club	9.19606	-79.56661	Country Club w/ pool, sports, fields, bar, Villas. Closed for last 10 years - no maintenance
La Venta San de Pequeney	9.22434	-79.58031	Underwater town with structures visible on some days
Shade Grown Coffee Plantation and Forest Gardens	9.26848	-79.57554	
Boca de Bahia	9.25904	-79.59635	Point known by locals to have incredibly diverse bird species. No trails or development, vast biodiversity
El Charco	9.08257	-79.66587	
Plantation Trail	9.07514	-79.65913	
Pipeline Trail	9.12237	-79.71500	
Camino De Cusis	9.10284	-79.61534	
Gamboa Lodge	9.12094	-79.69292	
City of Knowledge	8.99886	-79.58301	

## Action Plan 2: Soberanía National Park New Trail Development

<b>Action Plan 2: Soberanía National Park New Trail Development</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposer: Name & Address	Soberanía National Park	Phone: Email:
BCEG Advisor: Name & Address	Norma Ponce Soberanía National Park	Phone:
GW Team: Name & Address	Brian Beall, Amy Bragg, Lawrence Cristini, Tathiana Del Arroyo, Katherine Janik, Simon Jones The George Washington University Department of Tourism and Hospitality Management 600 21 <sup>st</sup> Street, NW Washington, DC 20052 USA	Phone: 202-994-6281 Email: bbeall@gwu.edu

<b>Description of Recommended Action</b>
<p>Five new trails should be developed within the Soberanía National Park (SNP). The Park currently offers four trails to visitors: El Charco, Camino de Cruces, Pipeline Road, and Plantation Road. An analysis of the current state of the Park identified opportunities to further expand its current product offering. Similar to the existing trails, the new trails should be classified according to the particular visitor target market, attributes, and level of use. The additional trails will compliment existing trails by expanding opportunities for visitors to explore the Park and enjoy the rich biodiversity of the canal watershed area.</p> <ul style="list-style-type: none"> <li>• The first new trail is the Goldmine Trail, targeted toward adventure tourists and classified as a low-intensity use area. Goldmine focuses on the historic goldmine attraction located deep in the rainforest at the end of the proposed trail. It will attract adventurous and advanced hikers looking for a challenging trail with historical significance.</li> <li>• The new Limon Pipeline Road entrance will be classified as a leisure/intensive-use trail and target cruise ship passengers disembarking for the day at Colón. The new trail will utilize a one-kilometer stretch of a cleared portion of the existing Pipeline Road, as well as a newly cleared one-kilometer section that loops back to the trail entrance at Lake Gatún.</li> <li>• The third new trail, the Venta de Cruces loop, will be classified as a leisure/intensive-use trail and be targeted toward cruise ship passengers disembarking in the Gamboa area, as well as the mass tourism market in Panama.</li> <li>• The fourth new trail is the Plantation Side Trail, classified as a leisure/intensive-use trail, targeted toward birdwatchers and nature enthusiasts. This is a short loop beginning and ending on Plantation Road to offer birders the opportunity to step into the thick rainforest brush to observe additional bird species.</li> <li>• The fifth new trail is the Summit-SNP trail connector. This new trail takes advantage of</li> </ul>

SNP's close proximity to the more highly visited Summit Botanical Gardens Park and connects the two parks. This new trail will be classified as leisure/intensive-use and target local Panamanian tourists, families, and independent tourists.

The five new trails will be developed through a combined effort of volunteers, park rangers, NGOs, governmental agencies, corporate sponsorship, and in-kind donations.

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Creation of the Goldmine Trail	1.1 Identify and document the historical significance of the mine 1.2 Seek funding and volunteers to clear and develop the trail 1.3 Clear and develop the trail 1.4 Install directional and interpretive signs 1.5 Train guides to provide information on the history of the trail, the mine, and their links to Panama 1.6 Plan a promotional event to celebrate the opening of the new trail	1.1 ANAM/SNP, potential NGO, AED, USAID 1.2 All parties involved 1.3 All parties involved 1.4 AED, USAID, corporate sponsorship 1.5 All parties involved 1.6 All parties involved
2. Creation of Venta de Cruces loop	2.1 Seek funding and volunteers to clear the existing trail and develop the new loop 2.2 Clear the trail, develop the new loop; clear the area around the ruins 2.3 Install directional and interpretive signs 2.4 Coordinate with tour operators to bring visitors to the trail 2.5 Plan a promotional event to celebrate the revitalization of the area and the new loop trail	2.1 ANAM/SNP, Panamanian government, NGOs, AED, USAID 2.2 Volunteers, educational organizations, corporate sponsorship, historical societies 2.3 AED, USAID, corporate sponsorship. 2.4 ANAM/SNP, NGOs, AED, USAID 2.5 All parties involved
3. Creation of the Limón Pipeline Road entrance and trail	3.1 Seek funding and volunteers to clear the existing trail and develop the new one-kilometer	3.1 ANAM/SNP, Panamanian government, NGOs

	<p>loop</p> <p>3.2 Clear the entrance and existing trail; develop the new one-kilometer loop</p> <p>3.3 Install directional and interpretive signs</p> <p>3.4 Work with the Limón community to determine methods for park entrance fee collection</p> <p>3.5 Plan a promotional event to celebrate the revitalization of the Limón Pipeline Road entrance</p>	<p>3.2 Volunteers, educational organizations, corporate sponsorship</p> <p>3.3 AED, USAID, corporate sponsorship</p> <p>3.4 ANAM/SNP, Limón community</p> <p>3.5 All parties involved</p>
4. Creation of Plantation Side Trail	<p>4.1 Seek collaboration between park rangers and volunteers to clear new side trail</p> <p>4.2 Clear and develop new side trail</p> <p>4.3 Install directional and interpretive signs</p> <p>4.4 Coordinate with birding tour guides to manage use of new side trail</p> <p>4.5 Plan a promotional event to celebrate the opening of the new side trail and promote the opportunity to see rich biodiversity</p>	<p>4.1 ANAM/SNP, volunteer organizations, educational institutions</p> <p>4.2 Park rangers, volunteers</p> <p>4.3 AED, USAID, corporate sponsorship</p> <p>4.4 ANAM/SNP, tour operators</p> <p>4.5 All parties involved</p>
5. Creation of Summit-SNP trail connector	<p>5.1 Seek collaboration between park rangers and volunteers to clear new trail</p> <p>5.2 Seek funding and volunteers to clear and develop the connector trail</p> <p>5.3 Clear and develop the connector trail</p> <p>5.4 Install directional and interpretive signs</p> <p>5.5 Plan a promotion event to celebrate the opening of the new trail</p>	<p>5.1 ANAM/SNP, Panama City (Mayor's Office)</p> <p>5.2 ANAM/SNP, Panama City, AED, USAID, corporate sponsorship</p> <p>5.3 Volunteer organizations, educational institutions</p> <p>5.4 AED, USAID, ANAM, Panamanian government, Panama City</p> <p>5.5 All parties involved</p>

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: Goldmine Trail is opened	<p>Funding has been obtained to develop the new trail and historical attraction</p> <p>Volunteers cleared the trail</p> <p>Visitors easily tour the area thanks to new, additional directional and interpretive signs</p>
Obj. 2: Venta de Cruces loop opened	<p>Funds have been obtained for revitalization surrounding the ruins; the loop has been developed</p> <p>Tour operators are bring increased visitors to the area</p> <p>A successful promotional event is held to highlight the area and its historical and cultural importance</p> <p>Visitors easily tour the area thanks to new, additional directional and interpretive signs</p>
Obj. 3: Creation of Limón Pipeline Road entrance, revitalization of northern Pipeline Road, new one-kilometer loop back to Lake Gatún	<p>Funds have been obtained for revitalization and new trail development</p> <p>A protocol has been designed with the local community to collect park entrance fees</p> <p>Cruise ship passengers from Colón are visiting the northern entrance of SNP</p> <p>Visitors can easily tour the area thanks to new, additional directional and interpretive signs</p>
Obj. 4: Plantation Side Trail is opened	<p>Park rangers and volunteers have cleared the new side trail</p> <p>Visitors enjoy a new location for birding</p> <p>Visitors easily tour the area thanks to new, additional directional and interpretive signs</p>
Obj. 5: Summit-SNP trail connector is opened	<p>MOU signed between ANAM/SNP and Panama City (Mayor's Office)</p> <p>Area promoted as one attraction</p> <p>Positive working relationship established between the two parks; many operating and marketing synergies achieved</p>

<b>Resource Requirements:</b>		
<i>Item</i>	<i>Description</i>	<i>Estimated Costs (if any)</i>
Staff	Volunteers to assist rangers with trail development	\$ 0 (not including administrative costs of development volunteer programs to support park activities)
Consultants	Consulting activity previously completed by GWU graduate students summer 2005	
Other persons	Tour operators, local community in Limón	
Equipment	General equipment for clearing trails (chainsaws, rakes, shovels, gloves, axes, etc)	\$ 7,000
Other	New directional and interpretative signage	\$ 3,200

<b>Describe Linkages:</b>	
Strategic Alliances	<p>SNP and Limón (gateway community)</p> <p>MOU between Summit and SNP stakeholders</p> <p>Tourism Development Core (for volunteer recruitment and volunteer program development)</p> <p>Local Panamanian corporations for donations/sponsorship opportunities (i.e., donation of supplies and equipment for trail clearing activities)</p>
Institutional arrangements	Arrangements with educational institutions for volunteer identification and recruitment activities
Other	

### Work Plan Timing

Task		Timing by Month, beginning January 2006											
No.	Description/Specific Tasks	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>1</b>	<b>Creation of the Goldmine Trail</b>												
1.1	Identify and document the historical significance of the mine	X	X										
1.2	Seek funding and volunteers to clear and develop the trail	X	X										
1.3	Clear and develop the trail			X	X								
1.4	Install directional and interpretive signs				X	X							
1.5	Train guides to provide information on the history of the trail, the mine, and their links to Panama				X	X							
1.6	Plan a promotional event to celebrate the opening of the new trail					X	X						
<b>2</b>	<b>Creation of Venta de Cruces loop</b>												
2.1	Seek funding and volunteers to clear the existing trail and develop the new loop	X	X										
2.2	Clear the trail, develop the new loop; clear the area around the ruins	X	X										
2.3	Install directional and interpretive signs		X	X									
2.4	Coordinate with tour operators to bring visitors to the trail	X	X	X	X								
2.5	Plan a promotional event to celebrate the revitalization of the area and the new loop trail				X	X							
<b>3</b>	<b>Creation of the Limón Pipeline Road entrance and trail</b>												
3.1	Seek funding and volunteers to clear the existing trail and develop the new one-kilometer loop						X	X					

3.2	Clear the entrance and existing trail; develop the new one-kilometer loop							X	X				
3.3	Install directional and interpretive signs								X	X			
3.4	Work with the Limón community to determine methods for park entrance fee collection								X	X			
3.5	Plan a promotional event to celebrate the revitalization of the Limón Pipeline Road entrance									X	X		
<b>4</b>	<b>Creation of Plantation Side Trail</b>												
4.1	Seek collaboration between park rangers and volunteers to clear new side trail						X	X					
4.2	Clear and develop new side trail							X	X				
4.3	Install directional and interpretive signs								X	X			
4.4	Coordinate with birding tour guides to manage use of new side trail								X	X			
4.5	Plan a promotional event to celebrate the opening of the new side trail and promote the opportunity to see rich biodiversity									X	X		
<b>5</b>	<b>Creation of Summit-SNP trail connector</b>												
5.1	Seek collaboration between park rangers and volunteers to clear new side trail								X	X			
5.2	Seek funding and volunteers to clear and develop the connector trail								X	X			
5.3	Clear and develop the connector trail									X	X		
5.4	Install directional and interpretive signs										X	X	
5.5	Plan a promotion event to celebrate the opening of the new trail											X	X

## Action Plan 3: Revise Fee System

<b>Action Plan 3: Revise Fee System</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposer: Name & Address	Soberanía National Park	
BCEG Advisor: Name & Address	Norma Ponce Soberanía National Park	
GW Team: Name & Address	Brian Beall, Amy Bragg, Lawrence Cristini, Tathiana Del Arroyo, Katherine Janik, Simon Jones The George Washington University Department of Tourism and Hospitality Management 600 21 <sup>st</sup> Street, NW Washington, DC 20052 USA	Phone: 240-432-6454 Email: krjanik@gwu.edu

<b>Description of Recommended Action</b>
<p>The entrance fees collected from park visitors are the primary source of SNP park revenue. The preliminary benchmark analysis determined that a commonality amongst the benchmarked parks was that an increase in fees is acceptable to the majority of foreign tourists visiting national parks. The entrance rates that are recommended were determined through a review of the existing fee structure and the cost of the park maps. The park maps cost \$1 to manufacture and \$1 of profit is reinvested into ANAM. In implementing this recommended fee structure, SNP would earn \$1 profit per domestic visitor and \$4 profit per international visitor.</p> <p>Secondly, SNP should have a consistent and enforceable fee collection system, preferably collected at primary entrance points. Our fieldwork suggests that in the short-term the collection of fees should occur through three mediums; at SNP headquarters, a fee sharing agreement with tour operators, and a fee sharing agreement or similar collaboration with indigenous community tour operators. Collection of fees at SNP headquarters would target primarily domestic visitors and individual tourists and would be collected at the office. Fee collection through a fee sharing agreement with tour operators would encompass an agreement between SNP and a tour operator, which allows the tour operator to frequent certain park trails. This agreement could outline whether the fee paid to SNP is a fixed annual or monthly fee, whether it is dependent on the number of tourists in the tours, or whether the fee is a percentage of revenue derived from the tour package that includes SNP. The result of maintaining a consistent and enforceable fee collection system is to stimulate the economic sustainability of SNP and to generally preserve the Canal watershed area of the park.</p>

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Increase SNP revenue by revising entrance fees	1.1 Identify and document the cost of park maps 1.2 Determine sale price of maps 1.3 Increased entrance fee for international visitor to \$5, including a park map 1.4 Maintain \$1 entrance fee for domestic visitors, although the domestic visitor entrance fee does not include the \$2 cost of purchasing a park map	1.1 ANAM/SNP 1.2 ANAM/SNP 1.3 ANAM/SNP 1.4 ANAM/SNP
2. Revise fee collection system	2.1 Identify tour operators and guides with which to establish fee-sharing agreements 2.2 Establish revenue/fee sharing as incentive for guides and tour operators to comply with the fee-sharing agreement 2.3 Implement patrols by park rangers or supplemental staff resources to randomly check visitors on trails for proof of paid entrance fee	2.1 ANAM/SNP 2.2 ANAM/SNP, tour operators, independent guides 2.3 ANAM/SNP, volunteers

<b>Work Outputs by Objective</b>		<b>Critical Success Indicators</b>
Obj. 1: Fee system is revised		Revenue collected from international and domestic visitors increases. Profit made from sale of park maps
Obj. 2: Fee collection system is revised		Fee-sharing agreements are established with local tour operators and guides. A protocol has been designed with the local community and volunteers to collect park entrance fees through patrols
<b>Resource Requirements:</b>		
<i>Item</i>	<i>Description</i>	<i>Estimated Costs (if any)</i>
Staff	Establish fee-sharing agreements with tour operators and guides.	TBD depending on the fee agreement
Consultants	Consulting activity previously completed by GWU graduate students summer 2005	\$0
Other persons	Tour operators, guides, local community, volunteers	TBD
Equipment		\$0
Other		\$ 0

<b>Describe Linkages:</b>	
Strategic Alliances	ANAM/SNP and tour operators ANAM/SNP and guides Tourism Development Core (for volunteer recruitment and volunteer program development) Local Community
Institutional arrangements	Arrangements with educational institutions for volunteer identification and recruitment activities
Other	

*Complete detailed work plan tasks and timing using table overleaf*

### Work Plan Timing

Task		Timing by Month, beginning January 2006											
No.	Description/Specific Tasks	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>1</b>	<b>Increase SNP revenue by revising entrance fees</b>												
1.1	Identify and document the cost of park maps	X											
1.2	Determine sale price of maps	X											
1.3	Increased entrance fee for international visitor to \$5, including a park map		X										
1.4	Maintain \$1 entrance fee for domestic visitors, although the domestic visitor entrance fee does not include the \$2 cost of purchasing a park map		X										
<b>2</b>	<b>Revise fee collection system</b>												
2.1	Identify tour operators and guides with which to establish fee-sharing agreements	X											
2.2	Establish revenue/fee sharing as incentive for guides and tour operators to comply with the fee-sharing agreement		X										
2.3	Implement patrols by park rangers or supplemental staff resources to randomly check visitors on trails for proof of paid entrance fee			X									

## Action Plan 4: Visitor Information Management System

<b>Action Plan 4: Visitor Information Management System</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposition by:	George Washington University Panama Consulting Team	
Consultant	Fatima Akhtar George Washington University 600 21 <sup>st</sup> Street Washington, DC	Phone: 703-827-9833 Email: Fatima2@gwu.edu Phone: Email:

Description of Recommended Action
<p>A visitor data collection system is important to better understand why visitors visit SNP and the surrounding attractions and to increase the numbers by developing a marketing plan that targets these segments. Without a visitor data collection system, the park administration has no idea how many visitors actually visit the park and why they come to the park or what they would like to see improved.</p>

Objectives	Tasks to be Performed	Responsibility
1. Identify the attractions that need a visitor information management system	1.1 Inventory of attractions around SNP  1.2 Evaluate the current data collection system for these attractions  1.3 Finalize list of attractions that would be part of this system	1.1 ANAM  1.2 ANAM, Universities, NGO  1.3 ANAM, Universities, NGO
2. Identify a private sector firm, university or NGO that would be willing to create this system and monitor it	2.1 Interview several management consulting firms, universities and NGO's interested in creating and monitoring visitor information management system  2.2 Create visitor information management system  2.3 Monitor and report data collected on regular basis (quarterly, bi-yearly)	2.1 ANAM, AED  2.2 Private sector/university/NGO  2.3 Private sector/university/NGO
<b>Estimated Cost</b>	\$5,000 - \$7,000 Initial Cost	\$4,000 - \$6,000 Annual Maintenance Fee

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: Attractions have been identified	All initial research has been completed and a list created for the attractions that need a visitor information system
Obj. 2: A private sector firm, university or NGO has been identified that will create and monitor this system on a regular basis	Requirements for the visitor information system have been provided and the system is being created. The information collected is provided as a report to ANAM and SNP administration

### Work Plan Timing

Task		Timing by Month, beginning August, 2005											
No.	Description/Specific Tasks	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>1</b>	<b>Identify the attractions that need a visitor information system</b>												
1.1	Inventory of attractions around SNP	X											
1.2	Evaluate the current data collection system for these attractions		X	X									
1.3	Finalize list of attractions that would be part of this system				X								
<b>2</b>	<b>Identify a private sector firm, university or NGO that would be willing to create this system and monitor it</b>												
2.1	Interview several management consulting firms, universities and NGO's interested in creating and monitoring visitor information system				X	X							
2.2	Create visitor information management system						X	X	X	X			
2.3	Monitor and report data collected on regular basis (quarterly, bi-yearly)										X		

## Action Plan 5: SNP Website

<b>Action Plan 5: SNP Website</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposition by:	George Washington University Panama Consulting Team	
Consultant	Robert Cosentino George Washington University 600 21 <sup>st</sup> Street Washington, DC	Phone: 202-641-4208 Email: robertcosentino@yahoo.com Phone: Email:

<b>Description of Recommended Action</b>
<p>As a nonprofit national park, web site promotion is one of the most important aspects of SNP's marketing plan. Every effort made to market and raise awareness of SNP should always direct the audience back to the website. Web site promotion is critical for tourists from North America who are Panama's single largest source of visitors and whom rely heavily on the Internet for their travel research.</p>

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Identify an organization that would fund the SNP website	1.1 Speak with several NGOs who would be willing to support a small, but powerful online presence for SNP	1.1 USAID, ANAM, IPAT
2. Identify a private sector business that would be responsible for building, maintaining, and promoting SNP's website	2.1 Interview several web design firms. Firms would have to be capable of delivering website hosting and promotional strategies as outlined in this project 2.2 Work with firm to design content and layout 2.3 Work with firm to design promotional and marketing strategies 2.4 Launch SNP website 2.5 Re-evaluate website strategy every year	2.1, 2.2, 2.3, 2.4 Private sector web design and hosting and marketing/promotion company 2.5 SNP/ANAM
<b>Estimated Cost</b>	\$4,000 - \$8,000 Initial Cost	\$2,000 - \$5,000 Annual Maintenance Fee

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: Identify an organization that would fund SNP's website	Find a donor organization who recognizes the importance of a web presence (particularly for the large North American tourist market)
Obj. 2: Identify a private sector business that would be responsible for building, maintaining, and promoting SNP's website	Website promotion is as important as website design. Make sure the private sector business can clearly articulate specific website promotional and marketing strategies

### Work Plan Timing

Task		Timing by Month, beginning August, 2005											
No.	Description/Specific Tasks	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
1	<b>Identify an organization that would fund the SNP website</b>	X	X										
2	<b>Identify a private sector business that would be responsible for building, maintaining, and promoting the SNP website</b>		X	X									
2.1	Interview several web design firms		X	X									
2.2	Work with firm to design website content and layout			X	X	X	X						
2.3	Work with firm to design specific promotional and marketing strategies							X	X				
2.4	Launch SNP website									X			
2.5	Maintain and update website. Review strategies after one year										X	X	X

## Action Plan 6: Agua Buena Café

<b>Action Plan 6: Agua Buena Café</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposition by:	George Washington University Panama Consulting Team	
Consultant	Sue Kennedy George Washington University 600 21 <sup>st</sup> Street Washington, DC	Phone: 202-547-0246 Email: <a href="mailto:skennedy@gwu.edu">skennedy@gwu.edu</a>
Other	Boris Dominguez Agua Buena	Phone: 507-216-6038 Email:

<b>Description of Recommended Action</b>
There is a need for a small café in Agua Buena adjacent to the sports stadium. Currently, the owner of the property sells tamales during sporting events out of her home or by walking around. With the increase in spectators to the revamped stadium, a café is necessary to handle the food and beverage needs of the regional tourists.

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Identify source of funding to build a café in an existing vacant lot area	1.1 Speak with executing agency responsible for distributing MIF grant funding for small businesses	Boris Dominguez: property owner and small business entrepreneur  USAID/AED, Executing Agency, IADB
2. Build café and provide food and beverages to spectators at sporting and cultural events while earning revenues and creating jobs for the community	2.1 Purchase materials and pay for manual labor to build a small outdoor café  2.2 Teach proper food preparation, storage and sanitation methods  2.3 Create a menu with entrees and drinks at competitive prices  2.4 Train new employees.	MIF Grant Executing Agency  Voluntourists from SAVE Center through Tourism Development Corps or university program
<b>Estimated Cost</b>	\$8,000 - \$10,000 Initial Cost	MIF Grant Funds and Boris Dominguez

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: Identify source of funding to build a café in an existing vacant lot area	MIF Grant Executing Agency has recognized the importance of building a café near the stadium to foster sales of food and beverages, reduce poverty in the area through generation of revenue and create jobs
Obj. 2: Build café and provide food and beverages to spectators at sporting and cultural events while	Grant funds have been secured, the café has been built and is successful due to

earning revenues and creating jobs for the community	<p>good food, a variety of beverages to choose from, and a pleasant atmosphere</p> <p>The café is busy even when the stadium is empty due to good word-of-mouth advertising and reputation</p>
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<b>Resource Requirements:</b>		
<i>Item</i>	<i>Description</i>	<i>Estimated Costs (if any)</i>
Staff	1 owner, 1 cook, 1 server	\$1,000/month
Consultants	Voluntourists	\$0
Other persons	Initial Labor	\$2,000
Equipment	Kitchen oven, utensils, etc. Tables, chairs, etc.	\$1,500
Raw Building Materials	Cement, walls, paint, bathroom installation and plumbing, electricity	\$5,000 (funding through MIF small business grant)

<b>Describe Linkages:</b>	
Strategic Alliances	IADB, MIF-grant Executing Agency USAID/AED Local government SAVE Voluntourists
Institutional arrangements	SAVE Center volunteer network
Other	

### Work Plan Timing

Task		Timing by Month, beginning August, 2005											
No.	Description/Specific Tasks	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>1</b>	<b>Identify source of funding to build a café in an existing vacant lot area.</b>	X	X	X									
1.1	Speak with executing agency responsible for distributing MIF grant funding for small businesses.		X	X									
<b>2</b>	<b>Build café and provide food and beverages to spectators at sporting and cultural events while earning revenues and creating jobs for the community.</b>						X	X	X	X	X	X	X
2.1	Secure materials and workforce for building the cafe			X	X	X							
2.2	Teach proper food preparation, storage and sanitation methods						X	X					
2.3	Create a menu with tasty entrees and drinks at competitive prices						X	X					
2.4	Train new employees						X	X					

## Action Plan 7: Agua Buena Spanish/English School

<b>Action Plan 7: Agua Buena Spanish/English School</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposition by:	George Washington University Panama Consulting Team	Phone: Email:
Consultant	Sue Kennedy George Washington University 600 21 <sup>st</sup> Street Washington, DC	Phone: 202-547-0246 Email: skennedy@gwu.edu

<b>Description of Recommended Action</b>
<p>There is a need for the community of Agua Buena to engage itself in the tourism industry. Mainstream tourism is not a likely source of revenue due to limited natural resources in the area. However, Agua Buena is an excellent location for a Spanish/English school due to its rural atmosphere and authentic mestizo community culture. The initial tourist market would be teachers in the US and Europe with summers off who would come and train the teachers at JFK School in Agua Buena. They would instruct how to teach Spanish as a foreign language to student tourists. These international teachers would stay in the community in a homestay arrangement for at least 1-2 weeks and immerse themselves in the Spanish language and culture of the area.</p>

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Design Spanish/English School program at JFK School in Agua Buena	1.1 School officials to identify good teachers to be trained in teaching Spanish to international tourists.  1.2 Contact SAVE Center for initial guidance and to develop Scopes of Work for volunteer teachers  1.3 Design curriculum, textbooks, methodology, etc.	School Director Octavio – Vice-Rector/ Principal  SAVE Center volunteer network (possibly located within the City of Knowledge)
2. Secure volunteer teachers from abroad who wish to train local teachers (and practice their Spanish)	2.1 Work with the SAVE Center’s Volunteer Coordinator to determine which volunteer teachers to choose  2.2 Volunteer teachers arrive and train local teachers	SAVE Center volunteer network (possibly located within the City of Knowledge)
3. Expand program to include year-round student tourists and build separate school	3.1 Market program to wider audience once local teachers build the capacity for teaching Spanish as a foreign language and program becomes more	SAVE Center Voluntourists to help with marketing of the school to broader audience

	popular 3.2 Create brochure, include the program on appropriate websites, in student study abroad programs and elsewhere	MIF-grant Executing Agency to fund the building of the new school
<b>Estimated Cost</b>	\$8,000 - \$10,000 including the building of the new school	MIF Grant Funds and Octavio: Vice-Rector of JFK School

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: Design Spanish/English School program at JFK School in Agua Buena	<p>Local stakeholders have met and discussed the logistics of housing a Spanish/English language school in the town.</p> <p>Curriculum has been designed and textbooks and teaching materials decided upon</p> <p>School director has contacted SAVE Center to request volunteers and a site inspection has been completed</p> <p>Volunteer “Scopes of Work” have been approved by the SAVE Center Volunteer Coordinator</p>
Obj. 2: Secure volunteer teachers from abroad who wish to train local teachers (and practice their Spanish)	<p>SAVE Center Volunteers have been guiding the process, working with local stakeholders and training teachers to teach Spanish as a foreign language</p> <p>Volunteer teachers are satisfied with the program because they are able to practice and/or learn Spanish and live in an authentic rural mestizo community away from tourist centers</p>
Obj. 3: Expand program to include year-round student tourists and build separate school	<p>SAVE Center Volunteers are frequenting the area and the program has received global recognition</p> <p>MIF small business grant has been approved and the school is built</p> <p>SAVE Center Volunteers help with marketing the new school through the Internet, tour operators and creation of a brochure</p>

<b>Resource Requirements:</b>		
<i>Item</i>	<i>Description</i>	<i>Estimated Costs (if any)</i>
Staff	1 Administrator, 3 teachers (initially summer only)	\$1,800/month
Consultants	Voluntourists from SAVE	\$0
Other persons		
Equipment	Textbooks, notebooks, writing materials, etc.	\$300
Other	Eventual building of separate school	\$5,000-8,000

<b>Describe Linkages:</b>	
Strategic Alliances	Local school Local government SAVE Voluntourists
Institutional arrangements	SAVE Center volunteer network USAID/AED, IADB
Other	

### Work Plan Timing

Task		Timing by Month, beginning August, 2005											
No.	Description/Specific Tasks	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>1</b>	<b>Design Spanish/English Summer School program at JFK School in Agua Buena</b>	X	X	X	X	X							
1.1	School officials to identify prospective teachers to be trained in teaching Spanish to international tourists.		X	X									
1.2	Contact SAVE Center for initial guidance and to develop Scopes of Work for volunteer teachers		X	X	X	X							
1.3	Design curriculum, textbooks, methodology, etc.				X	X	X						
<b>2</b>	<b>Secure volunteer teachers from abroad who wish to train local teachers</b>						X	X	X				
2.1	Work with the SAVE Center's Volunteer Coordinator to determine which volunteer teachers to choose							X	X	X			
2.2	Volunteer teachers arrive and train local teachers (until August 2006)	X 06										X	X
<b>3</b>	<b>Expand program to include year-round student tourists and build separate school</b>		X 06	X	X	X	X	X	X	X	X	X	X
3.1	Market program to wider audience once local teachers build capacity for teaching Spanish as a foreign language and the program becomes more popular.					X 06	X	X	X	X	X	X	X
3.2	Create brochure, include the program on appropriate websites, in student study abroad programs and elsewhere							X 06	X	X	X		

## Action Plan 8: Agua Buena Homestay

<b>Action Plan 8: Agua Buena Homestay</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposition by:	George Washington University Panama Consulting Team	Phone: Email:
Consultant	Sue Kennedy George Washington University 600 21 <sup>st</sup> Street Washington, DC	Phone: 202-547-0246 Email: skennedy@gwu.edu

<b>Description of Recommended Action</b>
<p>With the utilization of volunteers to create curricula for the Spanish/English school and teach the teachers, there is a need for accommodations in Agua Buena. Youth With A Mission (YWAM) representatives suggested that a homestay with a recently widowed woman who owns a 5-acre farm would be ideal. Her house is large enough to accommodate up to four voluntourists; however, there is a need for renovations to the property. Other homestay options would need further investigation as the number of voluntourists increases and an evaluation of possible sites would need to be completed.</p>

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Build housing accommodations for voluntour teachers and student tourists	1.1 Assess current living situation and needs 1.2 Secure grant funding through MIF executing agency 1.3 Contact SAVE to request voluntourists to renovate home and small farm 1.4 Build, renovate, and clean bedrooms for guests, install extra bathroom if necessary	Local labor and materials paid for through MIF grant  SAVE Center to assess situation and provide appropriate number of volunteers
2. Create employment opportunities and revenue for local residents including homestay owner, additional hired help, and other stakeholders	2.1 Manicure overgrown lawn, plant garden to grow food for guests, attend to livestock for fresh dairy, meat, eggs, etc. 2.2 Voluntour teachers, student tourists and everyday tourists will pay modest weekly fees (varying depending on work) for food and accommodations and Spanish language training 2.3 Voluntourists will spend money	MIF grant executing agency to pay for local labor and materials  SAVE Center to provide volunteers

	at the café, sports stadium, store, on handicrafts, transportation, etc.	
<b>Estimated Cost</b>	\$7,000-9,000	MIF Grant Funding Owner of homestay/farm

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: Housing accommodations are built for voluntour teachers and student tourists	SAVE Center approved Scopes of Work for voluntourists to come and help renovate the home and maintain the small farm.  Funding through the MIF executing agency was granted, materials were purchased and accommodations were built and renovated
Obj. 2: Create employment opportunities and revenue for local residents including homestay owner, additional hired help, and other stakeholders	Overgrown lawn is manicured, garden grows plenty of food for guests and local residents, livestock is attended to for fresh dairy, meat, eggs, etc.  Voluntour teachers, student tourists and everyday tourists are paying modest weekly fees (varying depending on work) for food and accommodations and Spanish language training  Voluntourists are spending money at the café, sports stadium, store, on handicrafts, transportation, etc.

<b>Resource Requirements:</b>		
<i>Item</i>	<i>Description</i>	<i>Estimated Costs (if any)</i>
Staff	1 Administrator	\$600/month
Consultants	Voluntourists	\$0
Other persons	Labor	\$2,000
Equipment	Building materials for setting up homestay, gardening utensils, food for livestock	\$4,000
Other	Miscellaneous	\$1,000

<b>Describe Linkages:</b>	
Strategic Alliances	USAID/AED, IADB, MIF Executing Agency
Institutional arrangements	SAVE Center Volunteer Network
Other	

### Work Plan Timing

Task		Timing by Month, beginning August, 2005											
No.	Description/Specific Tasks	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>1</b>	<b>Build housing accommodations for voluntour teachers and student tourists</b>				X	X	X						
1.1	Assess current living situation and needs	X	X	X									
1.2	Secure grant funding through MIF executing agency		X	X									
1.3	Contact SAVE to request voluntourists to renovate home and small farm	X	X										
1.4	Build and renovate bedrooms for guests. Install extra amenities as necessary.				X	X	X						
<b>2</b>	<b>Create employment opportunities and revenue for local residents including homestay owner, additional hired help, and other stakeholders</b>				X	X	X	X	X	X	X	X	X
2.1	Manicure overgrown lawn, plant garden to grow food for guests, attend to livestock for fresh dairy, meat, eggs, etc.				X	X	X						
2.2	Voluntour teachers, student tourists and everyday tourists will pay modest weekly fees (varying depending on work) for food and accommodations and Spanish language training.									X	X	X	X
2.2	Voluntourists to spend money at the café, sports stadium, store, on handicrafts, transportation, etc.									X	X	X	X

## Action Plan 9: Agua Buena Sports Stadium

<b>Action Plan 9: Agua Buena Sports Stadium</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposition by:	George Washington University Panama Consulting Team	Phone: Email:
Consultant	Sue Kennedy George Washington University 600 21 <sup>st</sup> Street Washington, DC	Phone: 202-547-0246 Email: <a href="mailto:skennedy@gwu.edu">skennedy@gwu.edu</a>

<b>Description of Recommended Action</b>
There is a need for the communities of Chilibre and Agua Buena to work together to renovate the sports stadium and bleacher seats in Agua Buena in order to promote cultural activities, community pride in local residents, and stimulation of economic growth through the sale of tickets, food, etc. to tourists in regional markets.

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Identify sources of funding to renovate soccer/baseball playing field and repair/repaint bleacher seats	1.1 Contact executing agency for MIF grant funds to secure partial funding  1.2 Contact SAVE Center and arrange for voluntourists to help with the design and labor involved in renovating the stadium  1.3 Contact local government officials for assistance with the purchase of materials and garnering of workforce to complete the manual labor	MIF Executing Agency  SAVE Center  Local government “Junta Comunal” of Chilibre and Agua Buena
2. Attract more spectators	2.1 Entice local government to become involved in the purchase of equipment and uniforms, etc.  2.2 Market events in surrounding communities to reach a larger audience  2.3 Invite sports teams from surrounding areas to compete against one another and encourage the creation of new ones to stimulate competition	Local government  Participating businesses  SAVE Voluntourists

	2.4 Offer additional cultural activities such as “Controversy” to take place at the stadium before/after games	
3. Earn revenues for the community	3.1 Charge for tickets for admittance to the stadium 3.2 Develop additional offerings for food and drink	Local government Local businesses
<b>Estimated Cost</b>	\$10,000	MIF Grant Funding Local government

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: Identify sources of funding to renovate soccer/baseball playing field and repair/repaint bleacher seats.	Local government has recognized the importance of cultivating local culture and stimulating the economy; officials have agreed to work together to improve the surroundings and livelihoods of local residents.  The SAVE Center Volunteer Coordinator has assessed the situation and deployed three volunteers to assist with the design and labor involved with renovating the stadium.
Obj. 2: Attract more spectators	The government has distributed new uniforms and equipment, invited teams from surrounding communities to play, and fostered the creation of new teams to stimulate competition.  A local marketing campaign highlighting the renovated stadium has been successful  Added cultural attractions including “Controversy” take place before and after the games
Obj. 3: Earn revenues for the community	The word is out that this is something fun and worthwhile resulting in increased ticket sales.  Sales of food and beverages have increased - particularly at the new café.

<b>Resource Requirements:</b>		
<i>Item</i>	<i>Description</i>	<i>Estimated Costs (if any)</i>
Staff	1 Administrator (for 1 year)	\$500 monthly = \$6,000/yr.
Consultants	Voluntourists	\$0
Other persons	Labor	\$2,000
Equipment	Paint, yard tools, etc.	\$1,000
Other	Miscellaneous	\$1,000

<b>Describe Linkages:</b>	
Strategic Alliances	Local Government
Institutional arrangements	SAVE Center volunteer network MIF Executing Agency for small businesses
Other	

### Work Plan Timing

Task		Timing by Month, beginning August, 2005											
No.	Description/Specific Tasks	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>1</b>	<b>Identify sources of funding to renovate soccer/baseball playing field and repair/repaint bleacher seats.</b>	X	X	X									
1.1	Contact executing agency for MIF grant funds to secure partial funding.			X	X	X							
1.2	Contact SAVE Center and arrange for voluntourists to help with the design and labor involved in renovating the stadium.			X	X	X							
1.3	Contact local government officials for assistance with the purchase of materials and garnering of workforce to complete the manual labor.						X	X	X				
<b>2</b>	<i>Attract more spectators</i>								X	X	X		
2.1	Get local government involved in the purchase of equipment and uniforms, etc.								X	X	X		
2.2	Market events in surrounding communities to gain larger audience								X	X	X		
2.3	Invite sports teams from surrounding areas to compete against one another and foster the creation of new ones to stimulate competition								X	X	X	X	X
2.4	Offer additional cultural activities such as “Controversy” to take place at the stadium before/after games										X	X	X
<b>3</b>	<b>Earn revenues for the community</b>								X	X	X	X	X
3.1	Charge for tickets to get into the stadium								X	X	X	X	X
3.2	Create more offerings for food and drink							X	X	X	X	X	X

## Action Plan 10: SAVE Center

<b>Action Plan 10: SAVE Center</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposition by:	George Washington University Panama Consulting Team	Phone: Email:
Consultant	Sue Kennedy George Washington University 600 21 <sup>st</sup> Street Washington, DC	Phone: 202-547-0246 Email: skennedy@gwu.edu

<b>Description of Recommended Action</b>
<p>There is a need to develop a SAVE Center to coordinate, facilitate and deploy volunteer tourists or “voluntourists” to help SNP and surrounding communities with a vast array of needs. The City of Knowledge (CoK) will house the SAVE Center. Voluntourists arriving from abroad will attend orientation and begin the initial phase of their assignments at this central location. CoK has ample housing accommodations with amenities, catering abilities, classrooms, and a computer room with high-speed Internet. Depending on the nature of the assignment, some volunteers will spend their entire stay at CoK, returning from their site on a daily basis, while others will stay in accommodations at their sites. CoK will hire a volunteer coordinator who will handle all of the logistics of the program including site inspections and work with communities, development of Scopes of Work for volunteers, and determination of timeframes and levels of expertise required. The coordinator will be the key contact and liaison for local communities and volunteer institutions abroad, including Tourism Development Corps, VolunTours, the International Volunteer Program Association, and Smithsonian Journeys.</p>

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Open SAVE Center at City of Knowledge	1.1 Seek initial capital/funding for creation of a SAVE Center in Panama	GWU to work with NGOs such as UMPYME to foster the understanding and logistics involved in housing the Multi-Lateral Investment Fund (MIF) Grant funds
2. Coordinate the various components of the SAVE Center including financial structure, office space, logistics of bringing volunteers to Panama, etc.	2.1 CoK staff to hire a Volunteer Coordinator for the SAVE Center to handle all logistics  2.2 Develop Scopes of Work and timelines for each project  2.3 Work with volunteer organizations such as Tourism Development Corps (TDC), VolunTours, and local	City of Knowledge  SAVE Center Volunteer Coordinator  TDC, VolunTours, USMA

	Panamanian Universities (USMA) to match volunteers with specific tasks that need to be accomplished	
3. Begin branding, product development and the evolution of a marketing strategy.	<p>3.1 CoK Volunteer Coordinator will work with organizations such as TDC who will advertise and brand the Panama SAVE Center through their own marketing efforts</p> <p>3.2 In time, Panama's SAVE Center will be recognized by the National Geographic Society as an excellent example of demonstrating geotourism principles; a MapGuide and article in Traveler magazine will ensue</p>	<p>SAVE Center Volunteer Coordinator</p> <p>Organizations such as TDC, VolunTours, Intl. Volunteer Program Assoc., Smithsonian Journeys, The Nature Conservancy, etc.</p> <p>Jonathan Tourtellot of the National Geographic Society: Director of the Center for Sustainable Destinations (CSD)</p>
<b>Estimated Cost</b>	\$20,000	MIF Grant Funding

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: SAVE Center at CoK is opened	MIF grant funds have been approved and received by the executing agency. CoK has agreed to house the SAVE Center and a Volunteer Coordinator has been hired
Obj. 2: The various components of the SAVE Center including financial structure, office space, logistics of bringing volunteers to Panama, etc. have been coordinated	<p>Volunteer Coordinator has worked with local communities to develop Scopes of Work and timelines for completion of each project</p> <p>Coordinator has worked with TDC, VolunTours, local Panamanian Universities (USMA) and other organizations to match qualified volunteers with the tasks that need to be accomplished</p>
Obj. 3: Branding, product development and the evolution of a marketing strategy have begun	<p>Organizations including TDC, Voluntours and Smithsonian have begun advertising their volunteer positions on their websites, in their brochures, etc.</p> <p>National Geographic's Geotourism Department has recognized Panama's SAVE Center as a model for other centers and an article in Traveler magazine has been written</p>

	<p>A MapGuide accompanying the article is inserted into the magazine detailing Panama, particularly SNP and surrounding communities</p> <p>Brochures for Panama's SAVE Center have been developed and distributed and a website has been created</p> <p>Due to marketing efforts, tourist visitation to Panama's SNP area has increased and led to economic growth</p>
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<b>Resource Requirements:</b>		
<i>Item</i>	<i>Description</i>	<i>Estimated Costs (if any)</i>
Staff	1 Volunteer Coordinator	\$9,000 per year
Consultants	Voluntourists (funding comes through grant program)	\$0
Equipment	Renting of CoK facilities including villas, classrooms, computer room, meals for volunteers, etc.	\$9,000 per year
Other	Miscellaneous expenses	\$2,000 per year

<b>Describe Linkages:</b>	
Strategic Alliances/ Institutional arrangements	Tourism Development Corps, VolunTours, Intl. Volunteer Program Assoc., Smithsonian Journeys, The Nature Conservancy, The National Geographic Society

### Work Plan Timing

Task		Timing by Month, beginning August, 2005											
No.	Description/Specific Tasks	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>1</b>	<b>Open SAVE Center at City of Knowledge</b>				X								
1.1	Seek initial capital/funding for creation of a SAVE Center in Panama	X	X	X									
<b>2</b>	<b>Coordinate the various components of the SAVE Center including financial structure, office space, logistics of bringing volunteers to Panama, etc.</b>	X	X	X	X								
2.1	CoK staff to hire a Volunteer Coordinator for the SAVE Center to handle all logistics.		X	X									
2.2	Develop Scopes of Work and timelines for each project.				X	X	X	X	X	X	X	X	X
2.3	Work with volunteer organizations such as Tourism Development Corps (TDC), VolunTours, and local Panamanian Universities (USMA) to match volunteers with specific tasks that need to be accomplished.				X	X	X	X	X	X	X	X	X
<b>3</b>	<b>Begin branding, product development and the evolution of a marketing strategy.</b>										X	X	X
3.1	CoK Volunteer Coordinator to work with organizations such as TDC who will advertise and brand the Panama SAVE Center through their own marketing efforts.											X	X
3.2	Beyond the scope of this timeline, Panama's SAVE Center will be recognized by the National Geographic Society as an excellent example of demonstrating geotourism principles. A MapGuide and article in Traveler magazine will ensue.												X

## Action Plan 11: Multi-lateral Investment Fund (FOMIN/MIF)

<b>Action Plan 11: Multi-lateral Investment Fund (FOMIN/MIF)</b> <i>Detailed Work Plan for Priority Action(s)</i>		
Proposer: Name & Address	Inter-American Development Bank	Phone: Email:
BCEG Advisor: Name & Address	Jose Manuel Ruiz Financial Specialist Banco Interamericano de Desarrollo	Phone: (507) 263-6944 Email: josemr@iadb.org
GW Team: Name & Address	John Sherry, Katherine Janik, Sue Kennedy The George Washington University Department of Tourism and Hospitality Management 600 21 <sup>st</sup> Street, NW Washington, DC 20052 USA	Phone: 240-432-6454 Email: <a href="mailto:krjanik@gwu.edu">krjanik@gwu.edu</a> Phone: 301-588-6031 Email: <a href="mailto:jsherry@gwu.edu">jsherry@gwu.edu</a>

<b>Description of Recommended Action</b>
<p>The client should submit a proposal to the IADB for funding under a MIF grant. The MIF project will be a \$100,000 pilot for the start of 15-20 new businesses, with a 30% matching requirement from the executing agency. This grant is disbursed to a non-profit non-governmental organization that is considered the executing agency and will administer the funds for micro-financing of tourism-related small business clusters in the SNP region. The MIF strategy is to support small business development, including development of capacities and competitiveness of small and medium enterprises, and development of social and environmental and private sector strategies that promote competitiveness and reduce poverty.</p> <p>The MIF grant makes use of clusters or sets of projects with common features to ensure efficient allocation of resources to generate economies of scale. Grants are formulated in accordance with a specific strategy and having centralized technical support in order to improve implementation.</p> <p>Refer to the MIF pilot program appendix for further details.</p>

<b>Objectives</b>	<b>Tasks to be Performed</b>	<b>Responsibility</b>
1. Identify participants	1.1 Identify a non-profit agency that has an established capability to administer funds to small businesses and that can serve as the executing agency under the MIF grant  1.2 Identify small businesses within the SNP region that are eligible for the MIF grant.	AED, USAID, IADB  AED, Executing Agency, IADB
2. Submit MIF proposal to	2.1 Complete proposal in accordance	AED, USAID

IADB office in Panama City	to template and instructions 2.2 Proposal should include project rationale, information on requesting institution, project objectives, estimated costs/financing composition, and information on the executing agency	
3. Cooperate with IADB due diligence	3.1 Provide IADB with requested information 3.2 Arrange for counterpart financing through executing agency	AED, USAID

<b>Work Outputs by Objective</b>	<b>Critical Success Indicators</b>
Obj. 1: Identify Participants	A non-profit, non-governmental organization has agreed in writing to serve as the executing agency for the MIF grant  Small businesses within the SNP region have agreed in writing to participate in the MIF program and have provided the required counterpart matching funds
Obj. 2: Proposal completed	MIF proposal for grant has been completed and submitted to the IADB Panama City office
Obj. 3: IADB due diligence gathering	All participants cooperate with IADB in gathering information for due diligence
Obj. 4: MIF grant is approved by IADB	Funds are disbursed to executing agency and administered to small businesses within the SNP region
Obj. 5: Economic sustainability and tourism sustainability have increased.	Small businesses within the SNP region have been established and are operating

<b>Resource Requirements:</b>		
<i>Item</i>	<i>Description</i>	<i>Estimated Costs (if any)</i>
Staff	Identify and work with executing agency	\$ 0 (not including administrative costs)
Consultants	Consulting activity previously completed by GWU graduate students summer 2005	
Other persons	IADB, executing agency	\$100,000
Equipment		\$0
Other	Small businesses	30% counterpart funds

<b>Describe Linkages:</b>	
Strategic Alliances	AED/USAID and executing agency Executing agency and small businesses within SNP region
Institutional arrangements	AED/USAID and IADB
Other	Organizations within clusters

### Work Plan Timing

Task		Timing by Month, beginning January 2006											
No.	Description/Specific Tasks	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>1</b>	<b>Identify Participants</b>												
1.1	Identify a non-profit agency that has an established capability to administer funds to small businesses and that can serve as the executing agency under the MIF grant.	X	X										
1.2	Identify small businesses within the SNP region that are eligible for the MIF grant.			X	X								
<b>2</b>	<b>Submit MIF proposal to IADB office in Panama City</b>												
2.1	Complete proposal in accordance to template and instructions				X								
2.2	Proposal should include project rationale, information on requesting institution, project objectives, estimated costs/financing composition, and information on the executing agency.				X								
<b>3</b>	<b>Cooperate with IADB due diligence</b>												
3.1	Provide IADB with requested information					X	X						
3.2	Arrange for counterpart financing through executing agency					X	X						

## **BUSINESS & MARKETING PLANS**

- 1. Soberanía National Park Marketing Strategies**
- 2. Soberanía National Park Visitors' Center**
- 3. Eco-Lodge for Gamboa Cooperative**
- 4. Gamboa Cooperative Tour Company**
- 5. Voluntourism Coordinator for Capacity and Infrastructure Building Activities**
- 6. Certificate Program**

# Plan 1:

## Soberanía National Park Marketing Strategies

### Marketing to Domestic (Panamanian) Tourists

The domestic (Panamanian) tourists will be predominantly families who come to the zoological attractions at Summit Park for day trips. In addition to the zoological attractions, the families will also be encouraged to explore the surrounding SNP entrance trails, which will be accessible via Summit Park. Because of the limited resources of Summit Park and SNP, nontraditional strategies will be used to market the parks. Specifically, SNP and Summit Park will promote the entrance to SNP at Summit Park through the following distribution channels (networks):

- Target Children and Families through Workshops, Activity Books, and Joint Brochures
- Cultural and Folklife Events

#### *Target School Children*

SNP should target school children by networking with areas schools to highlight the educational benefit of visiting the Summit/SNP facilities. This strategy will create a greater demand for more educational field trips to the park. One method of achieving this is to host workshops at the park for school administrators and teachers, especially those that teach the biological sciences. These workshops would ideally stimulate more field trips by informing the schools of the educational benefits derived from the zoological gardens at Summit Park and the abundant natural offerings at SNP.

Another method of increasing foot traffic by students is to provide an activity book for elementary-level students that enter the park. These fun, children-oriented activity books highlight both the zoological attractions of Summit Park and the natural attractions of the Entrance region to SNP. These books would be distributed to children on weekday school field trips. The books would ideally foster active engagement from students and send them home with a fun experience. This strategy will also increase the amount of families that arrive to Summit Park and SNP on the weekends. Marketing directly to children has been proven as an effective method for influencing family decision-making, including where to spend their free time as a family on the weekends. This positive encounter would in turn lead children to demand repeat visits to the parks from their parents on weekends.

Finally, SNP and Summit Park should consider jointly creating a brochure about the parks, that could be handed out to visitors. This brochure would be accompanied by a calendar of events featuring relevant upcoming park information. Brochures would accompany the activity books provided to the children upon entering the park. This would provide a reasonably low-cost promotional vehicle that could be shared with parents and other adults to continue to generate visitor interest.

SNP should consider hiring a full-time individual to focus on marketing the park. This position, which would cost roughly \$10,000-\$25,000 annually to hire and train, would then be able to handle the majority of the recommendations provided in this annex, such as networking with schools, holding workshops, building alliances and affiliations with other organizations and websites, and updating SNP's own website.

The cost of creating a children's activity brochure and updated calendar of events would cost roughly \$2000-\$4000 annually.

### *Cultural and Folk life Events*

Another promotional strategy to raise awareness of Summit Park and SNP would be to host cultural and folk life events at the parks. These special events could be held on major holidays and other dates throughout the year. One recommended possibility is for the park to organize and host indigenous community exhibitions. These exhibitions would allow surrounding indigenous communities to share their culture and history with local Panamanians, while simultaneously creating a unique attraction at the park as a means to increase visitation. Additionally, the park could host cultural festivals, such as events that highlight the various regions of Panama, their respective peoples, traditional foods, and dances. Additionally, current expansion plans at Summit Park call for the construction of a small amphitheatre. A recommendation is to piggyback on the amphitheatre concept and make it available to local organizations as a place to hold their cultural events. Examples could include celebrations by indigenous groups, musical performances, and the traditional Panamanian *La Quince* celebration when a young girl turns fifteen.

Costs to implement these events would be very limited, especially if the park hires someone to focus exclusively on marketing. If the facilities are available, SNP could likely break even from holding these events by charging rental fees for the grounds/amphitheatre.

### **Marketing to Ecotourists**

Ecotourists will come from around the world to visit the attractions of Summit Park and SNP. Together the parks offer a wide variety of activities for the visitor, including flora, fauna, wild animals, and special attractions like the endangered Harpy Eagle. Generally, ecotourists tend to learn about and visit interesting sites through one of the following channels: tour operators; the Internet; affiliations with local organizations; and cross-promotion.

### *Tour Operators*

Although many will ideally arrive on their own, having heard about the parks via word-of-mouth or other promotional materials, it is likely that the majority will be steered there via tour operators. Tour operators currently tend to play the dominant role in shaping visitor itineraries in Panama. Most Panamanian Tour Operators operate directly out of Panama City, and the majority of their clientele arrive there. SNP is uniquely situated near Panama City for tour operators to offer several daytrip itineraries. The marketing strategy in this area is to work with and convince tour operators to include SNP especially the El Charco Trail as part of their tour offerings.

IPAT is involved in a campaign to create awareness about the benefit of Panama among travel wholesalers abroad. This promotional endeavor will help to situate Panama as a viable, safe ecotourist destination in the minds of travel wholesalers.

Additionally, IPAT should consider embarking on a similar knowledge campaign with Panamanian tour operators to diversify their product offerings in Panama. Currently, tour itineraries within Panama are fairly similar and limited. IPAT can educate tour operators on the advantages of

offering numerous and varied itineraries that target specific market segments, rather than a “one size fits all” model for tourists.

The costs for this would be very limited assuming SNP hires a full-time director of marketing to facilitate the educational component. Hosting workshops and creating, printing, and distributing sample itineraries would likely cost under \$2000.

#### *Website*

An interactive presence on the Internet is a must for any tourist destination. It serves as both a promotional vehicle and a way of branding a site. SNP would be well advised to build and promote a comprehensive website that can be easily accessed worldwide. Virtually all tourism market segments today rely on the World Wide Web to gather information about their destinations, and SNP is no exception. In addition to building an effective website, SNP should ensure that its site is linked to other Panamanian websites that offer general tourism information (i.e., [www.visitpanama.com](http://www.visitpanama.com), [www.panamainfo.com](http://www.panamainfo.com)).

The costs to build an interactive SNP website would range between \$4000-\$8000, which is a one-time upfront cost. Annual maintenance costs would be between \$2000-\$5000 per year, although these costs could be absorbed into the salary of the full-time director of marketing position.

#### *Affiliations and Cross-Promotion*

A recommended action plan for SNP is to promote its trails and diverse ecological offerings by creating affiliations with ecotourist and environmental organizations in other regions of the world, especially North America. SNP can partner with these organizations to promote its ecological diversity and friendliness to attract the ecotourist market. Examples of conservation organizations to target include the Sierra Club, EcoClub, Friends of the Earth, the Nature Conservancy, National Geographic, Audubon, and Leave No Trace.

Additionally, SNP should cross-promote its offerings by making its brochures and other print media available at other sites, likely to be visited by the target market. In the case of ecotourists, SNP ought to consider strategically placing its marketing materials, such as pamphlets and maps, at locations such as the Smithsonian Institute Marine Park, Miraflores Visitor Center, the Panama Viejo Museum, Gamboa Resort, and the proposed Biodiversity Museum. These would also be tied into the Discovery Route described in the Finding #2.

The costs to build SNP’s brand recognition via affiliations and cross-promotional strategies would be two-fold: the costs of contacting and networking with other organizations and websites, which would be absorbed in the salary of the full-time marketing position proposed above; and the costs of designing and printing the marketing materials would range from \$4000-\$6000 annually. (these marketing materials are SNP specific and are separate from the Discovery Route marketing materials)

#### **Marketing to Cultural/Heritage Tourists**

As a secondary segment, cultural/heritage tourists tend to discover their destinations through a combination of Internet research, tour operators, and affiliate programs. The same strategy,

highlighted above, for educating tour operators and wholesalers, developing the website, affiliations and cross-promotional strategies for the ecotourists can be used for the cultural/heritage tourists.

### **Marketing to Adventure Tourists**

As a secondary segment, adventure tourists tend to discover their destinations through a combination of Internet research, tour operators, and affiliate programs. The same strategy for educating tour operators and wholesalers for the ecotourists and cultural/heritage tourists can be used for the adventure tourists. For marketing channels and strategies for Adventure Tourists, please see the Tour Operator, Website, and Affiliations and Cross-Promotion Strategies above.

### **Marketing to Cruise Ship Passengers**

Cruise ship passengers arriving at the Colon port will be limited in the amount of time they have to visit a particular site. As a result, tour operators will need to design comprehensive yet time-sensitive itineraries that allow the visitor to disembark the ship, arrive at the destination, spend time at the site, and return to the ship. In this case, IPAT in conjunction with SNP/ANAM need to work with Colon2000 and Aventuras2000 to design an appealing itinerary that combines history, culture, and adventure. One example is a park-based itinerary that involved a boat ride down the Chagres River, run by an indigenous community, followed by a hike at one of SNP's trails, the northern end of the park would be ideal for such a trip. The itinerary, along with the trail signage, would detail an interesting historical story, such as the activities of Ulysses S. Grant and his expedition through Panama, or the band of pirates that robbed people bringing gold up the Camino de Cruces trail from Peru, through Panama, to the Caribbean and back to Spain.

The costs for this would be very limited assuming SNP hires a full-time director of marketing to facilitate the educational component. Hosting workshops and creating, printing, and distributing sample itineraries would likely cost under \$2000.

### **Marketing to Do-It-Yourself/Independent Tourists**

Do-It-Yourself Tourists tend to be extremely independent and take pride in eschewing organized forms of travel. They prefer to organize their own trips and itineraries and often prefer to minimize planning in order to maximize flexibility. This group is extremely web-savvy and tends to rely on the Internet for information. For this market segment, a strong web presence is the best form of marketing and promotion. In addition, the availability of marketing and promotional materials at their arrival destinations can help to influence this segment's travel plans.

For marketing channels and strategies for Do-It-Yourself/Independent Tourists, please see the Website Strategies above.

#### *Marketing via Airlines/Airport/Hotels*

Another method of capturing the independent tourist segment is by targeting them at common arrival points. Many independent tourists arrive at their destination without a specific agenda, preferring to determine their activities once they establish familiarity with their surroundings. For

this group, it would be helpful to place advertisements in selected airline magazines (such as Copa Airlines), and at kiosks at the airport and local hotels.

The costs to market SNP at arrival points would involve the designing and printing the marketing materials, which would range between \$4000-\$6000 annually. A full-time director of marketing would handle the coordination with the airlines, airports, and hotels. Building creative kiosks to display at these sites would involve one-time expenses of \$300-\$500 per kiosk. Placing ads in airline magazine would run approximately \$300-\$600 per month.

### **Marketing to Bird Watching Tourists**

#### *Creation of Affiliation Programs with Birding Societies*

A recommended action plan for SNP is to promote its numerous bird watching opportunities through the creation of affiliations and partnerships with birding organizations and ornithology societies in other regions of the world, especially North America. SNP can partner with these organizations to promote its birding varieties to attract this market segment. Examples of birding societies and organizations to target include the myriad of avian and aviary societies in North America, Europe and Australia, and the National Audubon Society. Also, Canopy Tower is a premier bird watching lodge in Panama; SNP should consider establishing a formal partnership with the Canopy Tower to create a destination vacation for avid bird watchers. Possibilities include cross-promotion of each other on their respective websites, availability of brochures, pamphlets, and promotional material at a SNP display kiosk at Canopy Tower, and the creation of a tourist itinerary to SNP and its trails that involves a visit to Canopy Towers' observation deck, even for guests that are not staying overnight.

Additionally, SNP should consider getting its bird watching message out to this group through the use of advertising in specialized birding publications and fortifying its Internet presence from a birding perspective. Magazines and periodicals worth targeting include *Birds and Blooms*, *Bird Watching Digest*, and *Birder's World*. Also, SNP should work to set up links with well-frequented bird watching websites, such as [www.ornithology.com](http://www.ornithology.com), and should create a birdwatching discussion group, message board and observation checklist on its own website.

Finally, SNP should promote specific events in its park that celebrate certain birds and their migratory patterns. This can be modeled after the state of North Carolina's "Wings over Water" annual festival in the United States. For example, SNP can work with birdwatching organizations to create an annual celebration that observes and celebrates one of the over 900 unique species of birds found in Panama – for example, a celebration of the rare "Pico Rojo" bird – this may be promoted as "Red Beak Week."

From a cost perspective, the full-time director of marketing would be able to handle the outreach to birdwatchers.

## **Plan 2: Soberanía National Park Visitors' Center**

A visitors' center is a valuable asset for any national park. A visitors' center will help attract visitors and provide a central location for funneling and controlling visitor usage as well as collecting fees. Several ideas have been discussed regarding where and how to locate a visitors' center at SNP. There are two main viable options – co-locate a visitors' center for SNP in Summit Park or construct a new building between the current SNP administrative building and Summit Park. These options have distinct benefits and concerns, which are discussed below.

### **Option 1: Co-locate a visitors' center at Summit Park**

#### *Pros*

This is beneficial because the expenses will be shared between both organizations. A shared building will save on overhead for SNP including utilities, staffing and administrative resources. Additionally, this alternative is beneficial for promotion purposes. Currently, Summit Park receives more annual visitors than SNP. Summit is generally better known by Panamanians and international visitors. If a visitors' center for SNP is located in Summit Park awareness of SNP and visitation will increase. Another benefit of a dual visitors' center is the opportunity for direct trail access into SNP from Summit. Once visitors pass through the center, they will have direct access to SNP without having to drive to another location. Finally, a co-located building will provide a more cohesive visitor experience. Visitors wishing to experience both parks will be able to do so without having to travel to two separate locations.

#### *Cons*

There are also several concerns to address when considering co-locating an SNP visitors' center at Summit Park. The first is how to manage multiple management structures. SNP is run by ANAM and Summit is run by the Panama City Municipality. These two organizations have distinct goals and objectives. Careful collaboration is important to ensure that the needs of both groups are met. Additionally there is concern about concession revenue sharing. If a concession, such as a store, cafeteria, or any type of equipment rental is set up, it is not clear how revenues would be shared.

### **Option 2: Build a new visitors' center building between the current SNP administration building and Summit Park.**

#### *Pros*

This option is beneficial because it will provide a sole forum to promote SNP's resources. More space will be available to present interpretive nature exhibits. Additionally, SNP will have full control over the content they provide in the visitors' center. If the building was co-located with Summit, SNP might have to forfeit some control over the content of the center.

*Cons*

The primary concern regarding building a new visitor's center is the tremendous expense involved. Without a significant increase in visitors or funding, constructing a new visitors' center is not a financially viable option for SNP. A second concern of building a new visitors' center rather than co-locating in Summit Park is that SNP will not benefit from potential cross over business and exposure from Summit Park.

## **Plan 3: Eco-Lodge for Gamboa Cooperative**

### **How can an eco-lodge benefit the Gamboa Cooperative?**

An eco-lodge would bring together different aspects of the Gamboa Cooperative. It would give guests at the Gamboa Resort an additional activity. It would provide research institutions in Gamboa an in field research environment. It would bring more tourists to the indigenous communities and provide the residents of those communities with educational opportunities and a location to practice supervised sustainable and environmentally compatible agriculture.

For the Gamboa Resort, a proximate eco-lodge would allow the resort to market itself to niche market tourists interested in eco-tourism, heritage tourism, and educational tourism. A partnership between the resort and eco-lodge could benefit both operations and the Gamboa Resort could be a potential partner if they are able to see the long term benefits of such an operation. The eco-lodge would offer a variety of activities that could be extended to the guests of the resort. Additionally, the resort could market overnight stays at the eco-lodge and incorporate them into guest packages. The partnership between the resort and eco-lodge would give Gamboa resort a distinguishable product that makes it a more desirable destination and a strong competitor for niche market tourists.

The town of Gamboa would also benefit from a proximate eco-lodge by further attracting research institutions to the area. Already host to STRI facilities, other institutions such as PRORENA concerned with reforestation, the Yale Tropical Resources Institute at the Yale School of Forestry and Environmental Studies concerned with forest ecology and forest dynamics, and the International Cooperative Biodiversity Groups for Panama concerned with the discovery of natural drugs in the tropical forest and the conservation of biodiversity would be drawn to the area. All of these institutions could be potential partners in an eco-lodge. As part of the eco-lodge concession education and research facilities could be housed and provided with an in field research environment.

In addition to research and education facilities, the eco-lodge could also host researchers, academics, and scientists working in field. Other educational institutions in Panama would also be potential partners in an eco-lodge. University of Panama, Florida State University, Panama, and USMA all have course offerings that are concerned with the environment, ecology, and tourism. These programs could incorporate the eco-lodge into their curriculum. They could also use the eco-lodge to market study abroad programs internationally to other educational institutions. Long term, the eco-lodge would have a positive effect on the perception of the quality of Panamanian educational institutions.

The remaining members of the Gamboa cooperative are the two indigenous communities. As part of the ANAM eco-lodge concession, a small portion of the grounds surrounding the eco-lodge could be devoted to the research of a sustainable, low impact community

garden. The indigenous communities would be able to learn how to practice agriculture in a way that does not threaten the ecology or biodiversity of SNP. Partner research institutions could supervise and train community residents as well as research the environmental impact of the garden. The food grown in the garden could be used to sustain the eco-lodge as well as the small indigenous communities in the cooperative.

The indigenous communities would also benefit from the eco-lodge by the additional tourists such a concession would attract. The communities would be provided with a market for their handicrafts and could also host guests from the lodge in each of their communities. Additionally, members of the community could use the eco-lodge as an educational facility for the community.

An eco-lodge would benefit all members of the Gamboa cooperative and bring more tourism and economic development. Guests at the eco-lodge would be able to visit each indigenous community, eat authentic indigenous food, and participate in indigenous cultural celebrations. Other offerings to guests would include educational opportunities. The partner research associations could provide an opportunity for guests to learn about the ecology, biodiversity, sustainable community garden, and other research being conducted in tropical forests. The lodge could host an array of researchers as well as provide a unique educational opportunity for national and international education institutions.

# **Plan 4:**

## **Gamboa Cooperative Tour Company**

June, 2005

Business Plan Copy Number 1

This document is confidential. It is not for re-distribution.

**This is a business plan. It does not imply an offering of Securities.**

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## **A. Executive Summary**

Gamboa Cooperative Tour Company (GCTC) is a cultural/heritage tourism company, that has evolved from two separate indigenous communities, the San Antonio Wonan and the Ellapuru Embera, of the Gamboa region into a consortium of two communities allied with outside tour operators, hotels, museums, academic institutions, and non-governmental agencies (NGOs). The purpose of the GCTC is to serve as a vehicle for the two communities to combine resources in order to maximize revenue and minimize costs, essentially creating economic, social, and environmental value. Despite a lack of financial resources and tourist-centered infrastructure within the community villages and Soberania National Park (SNP), the Gamboa Cooperative Tour Company has a limited but proven track record of sales for both informative tours and handicrafts. The expansion of these two components will enable the Company and its strategic allies to offer tourists a number of multifaceted cultural/heritage tour packages to choose from, pertaining to their individual interests.

There is tremendous demand in the tourism market for the country of Panama; it is estimated at approximately \$2.7 billion in terms of total demand, and it is expected to grow to about \$4.8 billion by 2015, according to a WTTC study. We define our market as the sale of cultural/heritage tours and handicrafts. This is a niche market within the greater tourism market. Globally, people traveling for specific cultural motivations accounts for about 5-8 per cent of the total tourism market (about 60 million trips) showing a significant demand for cultural/heritage tourism.

The Management Team, comprised of the chiefs of the two communities, in conjunction with a board of advisors established from the company's highly experienced strategic allies in the tourism sector, is dedicated to the success of the GCTC.

Revenues and profits will be initially generated through sales of tour packages of the two indigenous communities by which tourists will experience the culture of the Wonan and the Ellapuru. The company will package and sell these tours to tour operators as a component of larger tour circuits. Gamboa Cooperative Tour Company will generate additional income by sales of its existing product line, which includes jewelry, fruit and wood carvings, woven baskets, and masks – all made of natural materials. The profits from tour package sales have extremely significant potential due to the very strong margins and the growth in demand for eco-tourism and cultural/heritage tourism. In addition, the Company will cultivate referral customers through development of informational pamphlets/brochures for distribution to visiting tourists.

Gamboa Cooperative Tour Company will establish collaborations with the University of Panama, USMA, Florida State University-Panama, and international universities such as the George Washington University to develop educational tourism programs to educate and assist our communities in tourism and infrastructure development and protection of the SNP environment. We will establish strategic alliances with tour operators, museums and hotels to expand our reach into the tourism market and to spark sustainable business development throughout the SNP region.

## **B. Mission**

### **Mission Statement**

The Gamboa Cooperative Tour Company's (GCTC) mission is to be the premier provider of cultural/heritage tours in the Gamboa region of Soberanía National Park. We will accomplish this through a strategic partnership between the San Antonio Wonan and the Ellapuru Embera indigenous communities working as part of larger tour packages through business alliances with hotels, tour operators and museums that serve the Panama City-SNP region and surrounding communities. We will also work with local and international academic institutions to educate our communities in environmental programs and to educate visitors of our cultures.

We aspire to carry a reputation in the marketplace for delivering our services and products through business practices in line with ISO 14001, the Environmental Management System (EMS) International Standards. GCTC will effectively control the environmental impacts of its activities, products and services through ISO 14001 by preventing pollution and complying with pertinent environmental regulations and legislation.

## **C. Company Overview**

### **C.1. Business Description**

Gamboa Cooperative Tour Company was founded in [August 2005] through a partnership agreement between the San Antonio Wonan and the Ellapuru Embera communities. This partnership was established in order combine resources and unify efforts to offer cultural/heritage tour services. Our partnership will package our respective offerings through larger tour circuits, in collaboration with tour operators, museums, and academic institutions.

We provide tour services and canoe/boat transportation to and from our collaboration of indigenous communities to provide tourists with a unique Panamanian cultural experience.

Our partnership is in the start-up stage of business, having just consolidated our communities for the purpose of sharing resources to maximize revenues and minimize costs. However, the individual communities in the joint venture each have an existing track record of sales for tour services and souvenir products.

By year-end 2005, our company is on track to achieve approximate sales of \$76,544, and an approximate profit of \$42,670. With a conservative 5% per annum estimated growth rate, our company expects to achieve \$97,691 in gross sales and \$71,118 in pretax profits in 2010. We can achieve this because our surplus funds will allow us to market our services more efficiently through relationships with outside tour operators and hotels. We will expand facilities in our villages and improve trail/attraction infrastructure to meet increased demand. We can achieve such improvements in infrastructure at minimal cost through educational tourism and social work programs with local and international academic institutions.

### **C.2. Strategic Alliances**

GCTC has developed important and profitable strategic alliances with the following larger, more established business; The Gamboa Rainforest Resort is a luxury hotel/resort that provides customers with comfortable, up-scale lodging just five minutes from our communities by boat. Gamboa Resort has relationships with numerous tour operators and travel agencies in Panama which enables it to attract vacationers and business conference attendees. Currently, we have an agreement with the resort whereby the resort supplies the tourists and shares per visitor fees with us. At present, we rely on the resort's marketing and advertising capabilities to promote our tour services. We have identified numerous hotels in Panama City that seek to ally with in order to further expand our business potential.

Another type of strategic relationship that will benefit the company is a joint venture with tour operator companies. GCTC will use a fee sharing agreement with tour operators through development of larger tour packages or circuits in which GCTC's tours will be

the cultural/heritage tourism component of outside tour operators' packages. Tour operators have expertise in advertising and promotion, which can benefit us greatly. Alongside the tour companies, museums will be approached to be another component of the tour circuits, whereby museums can house cultural and historical information pertaining to our partnership's two respective indigenous communities; a form of education-based marketing.

Lastly, we plan to have strategic relationships with academic institutions through education and volunteer programs. In the aspect of education, we will develop programs with local and international universities, and other academic institutions in various fields such as ecology, archaeology, ornithology, etc. Students can experience practical application of the theories and methodologies of the classroom in our rich bio-diverse environment. In the aspect of volunteer programs, local university students can serve their 100-hour social service requirements supporting our communities through environmental and language education, as well as through infrastructure development projects to improve the sustainability of our natural surroundings.

## **D. Products**

### **D.1. Products and Services**

GCTC provides the following tour service components:

- Interpretive tour of an indigenous village noting cultural, economic, and historical values of the community
- Providing a meal typical of the community
- Providing a cultural performance: dance and music
- Providing tourists with the opportunity for overnight stay in a community guest house
- Trail hikes
- Trips to nearby waterfalls

Additionally, we create numerous handicrafts for sale, fashioned from natural materials in the environment such as:

- Fruit and wood carvings of park animals
- Bead jewelry – bracelets & necklaces
- Woven baskets
- Masks resembling park animals

Presently, our cultural tour package is in the introductory stage in terms of the cooperative of community offerings, and it is in the growth stage in terms of existing tourism components presently offered. We plan to expand on our cultural tours to include arts and crafts sessions, and to make overnight housing for tourists.

#### Unique features or proprietary aspects of Product

Our tours are unique because of the ability for us to present two different indigenous communities - the Wonan and the Ellapuru – to visitors.

Although others in the market are able to provide somewhat similar tours and products for sale, such as the Pararapuru Embera along the banks of the Chagres River, those other indigenous communities are located farther from Panama City. And so our greater accessibility to Panama City is one of our competitive advantages.

### **D.2. Development**

#### New and Follow-on Products

Responding to market needs, we plan to enhance the infrastructure of our villages by enhancing/building lodging facilities for overnight guests – of the same design and materials as our own hut-style homes. Additionally, potable water and restroom facilities will be developed for the convenience of our communities and for guests.

Through educational/academic links, we plan to enhance the infrastructure near and around the trails and other tour attractions that are part of our services.

### **D.3. Production**

Critical factors in the delivery of our tour services are: the price of gasoline, the health of our community, cultural and environmental education of our community, and relationships with tour operators. Our cultural tour package is unique because we own and operate the tour company, staffed with members of our communities and we have an advantage in the marketplace because of our relationships with other tour operators as resellers of our tours. We achieve economies of scope through the outside tour operators' distribution networks and through their marketing/advertising abilities.

## **E. The Market**

### **E.1. Market Definition**

We define our market as the sale of cultural/heritage tours and handicrafts. This is a niche market within the greater tourism market, which according to a World Travel & Tourism Council study is approximately a \$2.7 billion market in terms of total demand, and it is expected to grow to \$4.8 billion by the year 2015.

### **E.2. Market Segment**

We define our market segment as the cultural/heritage component of the tourism industry. This segment has continually grown around the world. Although statistics specific to Panama are not available, according to a conservative estimate by the Association for Tourism and Leisure Education (ATLAS) people traveling for specific cultural motivations accounts for about 5-8 per cent of the total tourism market, globally (about 60 million trips).

A typical customer for our cultural/heritage tour product is a person who is a long-haul traveler. According to the WTO<sup>1</sup> long haul travelers are much more culturally oriented - for 80 % of US visitors to Europe culture is the primary stated motive, 90 % of Latin Americans have cultural motives (for example, roots or study), and 93% of the Japanese traveling to Europe are interested in experiencing other cultures.

Cultural/heritage tourists tend to also be eco-tourists, although the reverse is not consistent. A profile of eco-tourists is used here due to the lack of information for cultural/heritage tourist-specific profile. Among the main characteristics, which are consistent throughout the entire series of studies are age above 35, higher levels of education and higher than average household income.

- Age - “concentration in mid to older age groups, particularly 40 to 65 years old”. (WTO, 2001, Canada)
- Education - high average levels of education across all countries. 37% of the Canadian ecotourists hold a college/university graduate degree and another 26% have been in college/university for 1 to 3 years.
- Income - the average income of ecotourists is higher than average for the country. The Canadian study revealed that between 19% and 37% of eco-travelers have an income that is higher than \$70,000, while the average income in 1995 was between \$48,137-40,914 according to the Canadian Statistics.

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<sup>1</sup> Tourism Market Trends 2003 - Europe (English version) (2003), World Tourism Organization, p.29

### **E.3. Marketing Strategy**

Our marketing plan will mainly employ the resources of our strategic allies, the large tour operators, hotels, academic institutions, and museums. In addition to utilizing the marketing and promotion capabilities of our allies, we will further develop brochures and pamphlets to promote and brand our communities. We will distribute these promotional materials to our strategic partners as well as government agencies such as ANAM, IPAT and AED.

### **E.4. Pricing**

Our pricing strategy is a combination of cost-based and market based pricing. Fixed and variable costs involved in transporting tourists and providing tour services result in a breakeven point of 2 to 3 tourists per visit, based on a price of \$25 per person. We arrive at our pricing based on market prices; other indigenous communities in the outer regions of SNP currently charge \$20 to \$30 per tourist to tour operators as part of a package sold to tour operators at a price of \$65 per tourist.

### **E.5. Distribution channels**

The distribution channels we use for our services are tour operators, hotels, museums, and academic institutions. These make sense for delivering our product to the end user because of their high level of accessibility to potential tourists/visitors to our communities.

## **F. Competition**

We compete directly with other indigenous communities located near the border of Soberanía National Park, along the Chagres River. These communities are the Tusipono Embera and the Pararapuru Embera villages along the banks of Chagres and only accessible by boat are much more familiar with capitalizing on tourism.

Tour operators from Panama City (including Turista International) frequently bring guests to these communities and pay the communities a fee on a per person basis. These communities currently see groups of tourists three to four times per week, and the communities are much larger than those of GCTC. The Chagres communities sell a much larger inventory of handicrafts than those of Gamboa.

Tusipono has 15 structures and about 50 residents. Pararapuru has more than 20 structures with 73 residents. Pararapuru currently hosts guests for home stays and offers visitor concessions like food and cold beverages (they also have a diesel generator for electricity). Additionally, the Pararapuru have working toilets and educational facilities up to sixth grade for the residents.

Although these communities are much further from Panama City and much less accessible than our Gamboa communities, they are more successful in capitalizing on tourism opportunities. They are larger in size and offer tourists greater comfort. The Chagres communities have been involved in tourism for the last seven years, having quickly incorporated tourism into their daily lives.

## **G. Risk/Opportunity**

### **Business Risks**

Some of the major risks facing our development include our limited operating history; our limited resources; the lack of park infrastructure; and our current dependence upon the Gamboa Resort for tourists, marketing and promotion.

### **Opportunities**

Although our business today has its share of risk, we feel we can overcome these risks because of the shared determination between our two communities to combine resources and work together. We will address marketing and promotional risk as well as sales risk by establishing relationships with tour companies, hotels, universities and academic institutions, and museums. Partnering with larger companies and organizations who know the market will increase our knowledge of the market to better tailor our products, services and facilities to meet customer demand. We feel we can also address the risk posed by lack of park infrastructure by focusing on relationships with academic institutions through educational programs.

If we are able to overcome these risks, our company has the opportunity to dominate a niche in the marketplace, easily accessible to Panama City, and become a major force in the tourism and more specifically cultural/heritage tourism industry. We feel our brand could become known as the place travelers, tourists, and students go to for a true Panamanian cultural experience.

## **H. Management Team**

Our management team will be comprised of the chiefs of the two communities who will work together to address the needs of each respective community, as well as the cooperative as a whole.

We will look to garner professional support through our relationships with the private sector. Additionally, we will establish a board of advisors comprised of business and tourism experts in the industry from the academic, private, and public sectors.

## **I. Financial Plan**

### **I.1. Assumptions**

The attached projections assume the following;

- Sales growth rate is 5% per annum
- Growth rate for costs is 6% per annum
- Tax rate is 30%
- Average weekly number of tourists visiting is 40 (2080 per annum)
- Canoe/Boat rentals cost \$18 per trip (fixed cost)
- Guides cost \$10 (fixed cost)

### **I.2. Income statements**

Total sales is estimated to reach approximately \$76,500 by the end of 2005, and grow to about \$97,700 by the end of 2010. These figures incorporate a conservative 5% growth rate per annum.

Cost of goods sold is expected to increase conservatively as well at about 6% per annum as the needs of the communities grow, and maintenance of newly developed infrastructure becomes necessary.

Gross profit will increase at a slower pace than gross sales, and is expected to reach approximately \$61,000 by the end of 2005. Gross profit is expected to reach \$71,100 by the end of 2010.

### **Cash Flow**

Cash flow looks positive as net cash income is expected to be just under \$43,000 at the end of 2005, and just under \$70,000 at the end of 2010.

## **J. Conclusion**

The purpose of this business plan is not to raise capital, but rather to establish a solid partnership between the San Antonio Wonan and the Ellapuru Embara communities of the Gamboa region. This plan will be used to garner strategic relationships and support from the private, public and academic sectors, to maximize the business and tourism potential of the two communities of the Gamboa Cooperative Tourism Company and the larger Soberania National Park region.

## K. Exhibit A

### Income Statement

	2005 Actual	2006 Projected	2007 Projected	2008 Projected	2009 Projected	2010 Projected
<b>Income Statement (\$US )</b>						
Total Sales	\$76,544.00	\$80,371.20	\$84,389.76	\$88,609.25	\$93,039.71	\$97,691.70
Cost of Goods Sold	\$15,586.40	\$17,316.50	\$19,273.26	\$21,451.14	\$23,875.12	\$26,573.01
Gross Margin	\$60,957.60	\$63,054.70	\$65,116.50	\$67,158.11	\$69,164.59	\$71,118.69
Selling, Gen & Adm Expenses						
Depreciation						
EBIT	\$60,957.60	\$63,054.70	\$65,116.50	\$67,158.11	\$69,164.59	\$71,118.69
Interest Expense						
Taxes	\$18,287.28	\$18,916.41	\$19,534.95	\$20,147.43	\$20,749.38	\$21,335.61
Net Income	\$42,670.32	\$44,138.29	\$45,581.55	\$47,010.67	\$48,415.21	\$49,783.08

**Exhibit B**

**Cash Flow Statement**

<b>Calendar Year</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
<b>Project Year</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>
<b>Cash Flow Statement (UCA Method)</b>						
Sales	76,544	80,371	84,390	88,609	93,040	97,692
Change in Receivables	0	0	0	0	0	0
Cash from Sales	76,544	80,371	84,390	88,609	93,040	97,692
Cost of Goods Sold	15,586	17,316	19,273	21,451	23,875	26,573
Change in Inventory	0	0	0	0	0	0
Change in Payables	0	0	0	0	0	0
Cash Production Costs	15,586	17,316	19,273	21,451	23,875	26,573
Gross Cash Profits	60,958	63,055	65,116	67,158	69,165	71,119
Cash Operating Expenses	0	0	0	0	0	0
Cash After Operations	60,958	63,055	65,116	67,158	69,165	71,119
Taxes Paid	18,287	18,916	19,535	20,147	20,749	21,336
Net Cash After Operations	42,670	44,138	45,582	47,011	48,415	49,783
Interest & Fee Expense	0	0	0	0	0	0
Dividends Paid	0.00	0.00	0.00	0.00	0.00	0.00
Financing Costs	0	0	0	0	0	0

Net Cash Income	42,670	44,138	45,582	47,011	48,415	49,783
Change in Cash	42,670	44,138	45,582	47,011	48,415	49,783
Beginning Cash	0	42,670	86,809	132,390	179,401	227,816
Change in Cash	42,670	44,138	45,582	47,011	48,415	49,783
Ending Cash	42,670	86,809	132,390	179,401	227,816	277,599

# **Plan 5: Voluntourism Coordinator for Capacity and Infrastructure Building Activities**

## **Scope of Work**

**Goal:** To develop necessary infrastructure and capacity within Chilibre and surrounding communities to help Chilibre engage in the tourism market and ultimately raise the quality of life.

**Need:** The lack of education, the lack of infrastructure and a lack of capacity within Chilibre and surrounding communities have led to no business development and no economic benefit from the tourism sector that is so prevalent around them. There is not one tourism agency/outfitter that arranges tours for tourists, nor one hotel to provide lodging for tourists, nor one restaurant to provide food for passing tourists. In addition to services geared towards tourism, some areas of Chilibre lack basic necessities such as water, adequate housing and roads.

**Job Description:** The “Voluntourism Coordinator” needs to be familiar with local community groups and associations. This individual will need to communicate in English and live in the Chilibre area. The potential “Voluntourism Coordinator” will be provided transportation and access to phone and internet to communicate with relevant institutions and interested parties.

### **Responsibilities:**

- Arrange lodging for the voluntourists at “homestays”, the Chilibre Eco-Resort or the Spanish School
- Identify projects within the community
- Identify necessary projects/infrastructure within the tourism circuit
- Identify necessary trainings/building capacity within the community
- Identify new and potential “homestays” within the community
- Match-up needs within the community with the expertise from international voluntourists
- Coordinate with local schools and universities to take advantage of their resources
- Coordinate projects; time, necessary materials, labor and trainings

# **Plan 6: Certificate Program**

## **Cost Structure**

Each course is 2 days with Blackboard support  
6 courses @ \$6,000--\$36000  
Travel and Per diem for 6 professors @ \$1000--\$6,000  
Translation for the workbooks 6 @ \$2000  
Misc—Venue, coffee breaks, AV equipment—6 @ \$1000--\$6000  
Total Cost- \$52,000  
Per person- \$52,000/ 35 students per session = \$1,485.71

## **Course List**

The following course list would be offered in the package for those participating in the program.

### **Sustainable Tourism, Parks and Protected Areas**

- Tourism, Sustainable Tourism and Ecotourism Concepts (Includes: LAC, Impacts, Carrying Capacity Concepts)
- The Ecotourism Industry, Structure and Market Trends
- Tourism's Role in Community Development
- Tourism's Role in Biodiversity Conservation
- Integration of Tourism with Park and Protected Area Management
- Overview of Policies and Strategies that Impact Tourism Development

### **Tourism Assessment topics to be covered**

- Introduction to the Assessment Process
- Assessment Team
- Preparing for an Assessment
- Conducting Assessments:
- Recommendations, Reporting and Next Steps

### **Tourism Product Development topics to be covered**

- Introduction to Ecotourism Product Development
- Target Markets and Product Development (factors and considerations in product development).
- Product Innovation (identification of resources, benchmarking, competitive advantage, etc)
- Nexus with Marketing and Management

### **Tourism Marketing topics to be covered**

- Consumer Motivations
- Destination Image and Consumer Behavior
- Segmentation and Targeting
- Positioning, Perceptual Mapping and Branding, and Partnerships

- Pricing, Promotion, and Place
- Monitoring and Evaluation
- Electronic Marketing and Database Management

Project Design and Management topics to be covered

- Principles of Project Management
- Project Planning
- Project Implementation
- Project Management Software and Tools (i.e. financial planning tool)
- Risk Management – Assumptions and the “notorious nine” – political/econ, institutional, personnel, tech. assistance, decentralization vs. participation, timing, info. systems, differing agendas, sustaining project results.
- Monitoring and Evaluation
- Adaptive Management

Fundraising topics to be covered

- Accessing funding for Tourism
- Proposal Development
- Donor Guidelines

Elective Courses (chosen from the Tourism Destination Management Certificate Program)

Ecotourism Training - Train the Trainers topics to be covered

- Human Learning Behavior
- Teaching Techniques
- Integrating Activities
- Administering a Training Program

*Actual Proposal still in progress signed by president of FSU environmental club and by Director of FSU (Panama) Dr. Langoni*

## **ADDENDUMS**

- 1. Benchmarking Analysis of Visitor Management**
- 2. SNP Existing Trail Analysis**
- 3. Application of Tourist Profiles in SNP**
- 4. Recommended Tourist Attractions by Tourist Profiles**
- 5. Sample Visitor Itineraries in 2010**
- 6. Visitor Survey Data and Results**
- 7. Feedback from Tour Operators**
- 8. Pilot Project for Sustainable Tourism**
- 9. Ten Potential Attractions in and around SNP**
- 10. Camino de Cruces Trail Festival and Press Release**
- 11. Inventory of Chilibre Community-made Products**
- 12. Sustainable Tourism Product Development Manual**
- 13. FSU Panama Environmental Club Agreement**
- 14. Natural Guide Training Program Description**
- 15. Media Coverage**

# **Addendum 1:**

## **Benchmarking Analysis of Visitor Management**

The benchmarking analysis focused on national parks in both developed and developing countries, as well as a national park in Panama, with the goal of using the analysis results in the assessment of SNP. The benchmarking analysis on visitor management in national park systems in developed countries derived a set of best practices and critical success factors that can serve as benchmarks for SNP in its effort to increase visitation. The analysis on national park systems in developing countries derived commonalities in practices and procedures of parks with resources similar to the resources available to SNP.

### **Visitor Management: Australian and United States National Parks**

#### ***AUSTRALIA***

The following is a distillation of information from a report, *A Natural Partnership: Making National Parks a Tourism Priority*, published in 2004 by the Australian Tourism & Transport Forum (TTF), which explores the importance of a partnership between Australian National Parks and the tourism community. This data has been extracted with the goal of benchmarking for analysis and assessment of Soberania National Park in Panama.

#### **Visitor Overview**

Conservation is the primary goal of Australian protected areas, with park recreation and tourism its second priority. In Australia today, state and territory governments under Commonwealth Government environmental and World Heritage legislation control protected areas. According to the 2004 report, the natural environment is essential to Australia's global tourism appeal and significantly contributes to its international image<sup>1</sup>. Furthermore, many of Australia's most important and globally recognized natural attractions are located within its protected areas<sup>2</sup>. Australia believes that for tourism to succeed, it must provide tourists with adequately funded protected areas that provide high quality visitor experiences.

As detailed in the report<sup>3</sup>:

- Domestic visitors account for 90 percent of total visitors to Australian national parks.
- In 2002, only 41% of international tourists visited a national park during their trip; greater proportions of international tourists visit iconic national parks.

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<sup>1</sup> (2004). *A Natural Partnership: Making National Parks a Tourism Priority*. *Australian Tourism & Transport Forum (TTF)* (hereinafter "2004 Report"): 4.

<sup>2</sup> 2004 Report: 4.

<sup>3</sup> 2004 Report: 7.

- National park visitors are typically well educated and have above average incomes.
- Facilities considered most important to visitors are signage, information about the park, and clean restrooms.

### **Psychographic Characteristic of Visitors to Australia's National Parks**

The 2004 report identifies the psychographic characteristics of Australian national park visitors relative to the general traveling public<sup>4</sup>:

- They are more environmentally aware with stronger environmental concerns.
- They are more open to challenges in life and able to take risks.
- They are more open to new technology and ready to accept changes.
- They are more assertive and independent in their decision-making processes.
- They are more regular users of the Internet as a source of information as well as a tool in making bookings and organizing vacations.

### **Critical Success Factors and Best Practices Provisions**

In response to the identified psychographic characteristics of visitors to its protected areas, Australia has identified critical success factors and best practices provisions of visitor facilities and services. These are essential to the long-term sustainability and success of its national parks, and include:

#### *1. Directional signage and park user information*

Information should be provided throughout parks to provide information on attractions. Signs and placards should explain the aesthetic, natural, and cultural values of the site and explain the need for their protection. They should also provide information on available facilities, locations of trails, tour schedules, park events, safety precautions, and minimal impact practices. The effective usage of signage, maps, and interpretation should be applied<sup>5</sup>.

#### *2. Interpretation*

Interpretation should convey an understanding of a site or environment and its associated values. This may be in the form of self-guided or face-to-face tours and should be organized around themes and built on an understanding of the visitors' needs<sup>6</sup>.

#### *3. Walking trails*

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<sup>4</sup> 2004 Report: 7.

<sup>5</sup> 2004 Report: 10.

<sup>6</sup> 2004 Report: 10.

The design and construction of visitor walking paths should be done according to visitor needs, wants, and expectations. They should also accommodate the ecological and aesthetic requirements specific to each protected area<sup>7</sup>.

4. *Visitor impact and behavior management*

Steps should be taken to minimize the physical impact of visitors in a protected area. Solutions to this problem include paving walkways and installing boardwalks to avoid environmental impacts associated with heavy foot traffic. Sometimes, visitors prefer sites to be unpaved and as natural as possible. In this case, minimizing the pedestrian impact can be accomplished by only allowing access to certain areas by escorted visitors<sup>8</sup>.

5. *Campground layout and facilities*

The amount of development of campground facilities desired by visitors varies greatly from one protected area to another. In all cases, enhancing the natural setting of campgrounds increases the satisfactions of visitors<sup>9</sup>.

### **Enhancing the Quality of Visitor Experiences**

As research in Australia suggests, and is highlighted throughout the 2004 report, enhancing the quality of visitor experiences in national parks should focus on a number of key areas. Specifically<sup>10</sup>:

- Parks should maintain and improve the quality of the environment, as well as natural and cultural attractions.
- Parks should improve the quantity and quality of visitor data and its management so that the planning decisions at all levels of park management are better informed.
- Parks should increase funding to allow for constant monitoring of visitor impact on protected areas, as well as changing needs, wants, and expectations of visitors.
- Parks should ensure that they meet visitors' expectations, such as clean restrooms, clean water, etc.
- Parks should provide information regarding attractions and provide directional information.
- Parks should improve the quantity and quality available to visitors prior to arrival.

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<sup>7</sup> 2004 Report: 10.

<sup>8</sup> 2004 Report: 10-11.

<sup>9</sup> 2004 Report: 11.

<sup>10</sup> 2004 Report: 11.

- Parks should provide appropriate interpretation of attractions to visitors.
- Parks should create and highlight attractions according to visitor characteristics and expectations.

### **Applied Critical Success Factors**

The following are short descriptions of national parks in Australia that have successfully applied the concepts outlined in the above-mentioned key success factors section:

- **Barrington Tops National Park<sup>11</sup>**  
This park was established in 1969 and is the second highest tableland in Australia. It is rich in Aboriginal history and is located approximately 320 kilometers from Sydney in New South Wales. In terms of attractions, it boasts a diverse terrain of rainforests, eucalypt forests, woodlands, grasslands, and swamps. The park offers bird watching, swimming, and hiking. Over 75 percent of the park is declared wilderness and it was declared a World Heritage Site in 1986.
- **Kondalilla National Park<sup>12</sup>**  
This park was designated a protected area for recreational use in 1906 and in 1945, was declared a national park. It is located in Queensland, approximately 50 kilometers from Brisbane. The park is home to the Skene Creek waterfall, which cascades 90 meters into a rainforest valley, and offers bird watching, picnicking, and nature photography. In addition, over 107 species of bird live in the park area. The park has developed an extensive hiking trail with scenic overlooks of the waterfall. Toilets are provided for visitors in the parking area.
- **Mungo National Park<sup>13</sup>**  
This park was established in 1945. It has a visitors' center, which is the recommended first stop for visitors to the area, and has displays featuring the natural and human history of the area. Displays explain how the landscape was formed, as well as a fossilized history of the mega fauna found around the park. In terms of attractions, the park has numerous historical sites, a network of nature trails, camping, hiking, and cycling. Because it is 100 kilometers from the nearest city, the park offers excellent views of the stars at night.

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<sup>11</sup> Department of Environment and Conservation (NSW). Retrieved June 1, 2005, from <http://www.nationalparks.nsw.gov.au/parks.nsf/ParkContent/N0002?Opendocument&ParkKey=N0002&Type=xo>

<sup>12</sup> Environmental Protection Agency/Queensland Parks and Wildlife Service. Retrieved June 1, 2005, from <http://www.epa.qld.gov.au/projects/park/index.cgi?parkid=104>

<sup>13</sup> Department of Environment and Conservation (NSW). Retrieved June 1, 2005, from <http://www.nationalparks.nsw.gov.au/parks.nsf/ParkContent/N0049?Opendocument&ParkKey=N0049&Type=xo>

## ***UNITED STATES***

The following is a distillation of information from various studies and papers published by the U.S. National Park Service (NPS) on visitor management, forecasting and motivations when visiting National Parks in the United States (U.S.), and to a small extent abroad. This data has been extracted with the goal of benchmarking for analysis and assessment of Soberania National Park (SNP) in Panama.

### **Carrying Capacity/Visitor Distribution**

National Parks have both positive and negative impacts on the surroundings where they are located. The goal is to maximize the benefits of a park while minimizing the negative impacts. One method to minimize impacts is through adjusting carrying capacities.

Carrying capacity is a prescribed number of people that an area will accommodate given the desired natural/cultural resources conditions.<sup>14</sup> Capacity serves as a trigger to alert managers that other attractions may be needed to sustain the areas resources that have high visitation. Carrying capacity must consider both recreational visitors to the area as well as those that use and value the area, such as educational groups, scientists, artists, concessionaires, local communities and park personnel.

The number of visitors to national parks is not fully under the control of the NPS; both long-term and short-term events and trends beyond the agencies' reach significantly affect visitation. Some of the factors influencing visitation are controllable, by managing ease of access to a location, using publicity and special events to reach targeted populations, cooperating with partners in offering programs, and employing promotional pricing.

Visitation frequency and distribution to a particular site can be influenced by marketing and visitor data collection. Marketing must be built on knowledge of the specific target market segments that parks want to reach. In one sense, the U.S. NPS serves the entire American public – even a global public – but many parks also have populations of visitors and potential visitors that are of special interest, including school children, special interest groups, or ethnic groups. Forecasting visitation depends on knowledge of these strategically important market segments, including changes in their size, geographic distribution, and share of the overall population. When forecasting visits to a specific location or facility, existing competitive sites are important to consider because they compete for visitors with new facilities.<sup>15</sup> The most important key to forecasting park visitation and use of visitor facilities is continuous research that tracks trends in visitor profiles and correlate this information with the factors known to affect visitation and facility use.

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<sup>14</sup> Haas, Glenn E. Ph.D. (2001). Visitor Carrying Capacity in the National Park System. *Social Science Research Review*, 4. Retrieved May 30, 2005, from <http://www.nature.nps.gov/publications/index.cfm>

<sup>15</sup> Gramann, James H. (2003). Visitation Forecasting and Predicting Use of NPS Parks and Visitor Centers: Focus Group Report. *NPS Social Science Program*. 10. Retrieved May 29, 2005, from <http://www.nature.nps.gov/publications/index.cfm>

## Visitor Motivations

Most frequently cited reasons for traveling to a U.S. national park<sup>16</sup>:

1. Sightseeing
2. Vacation
3. Education, hiking, proximity

Most frequently cited for not traveling to a U.S. national park:

1. Distance
2. Not enough time
3. Lack of information
4. Cost of visiting
5. Lack of interest

## Park Fee Systems

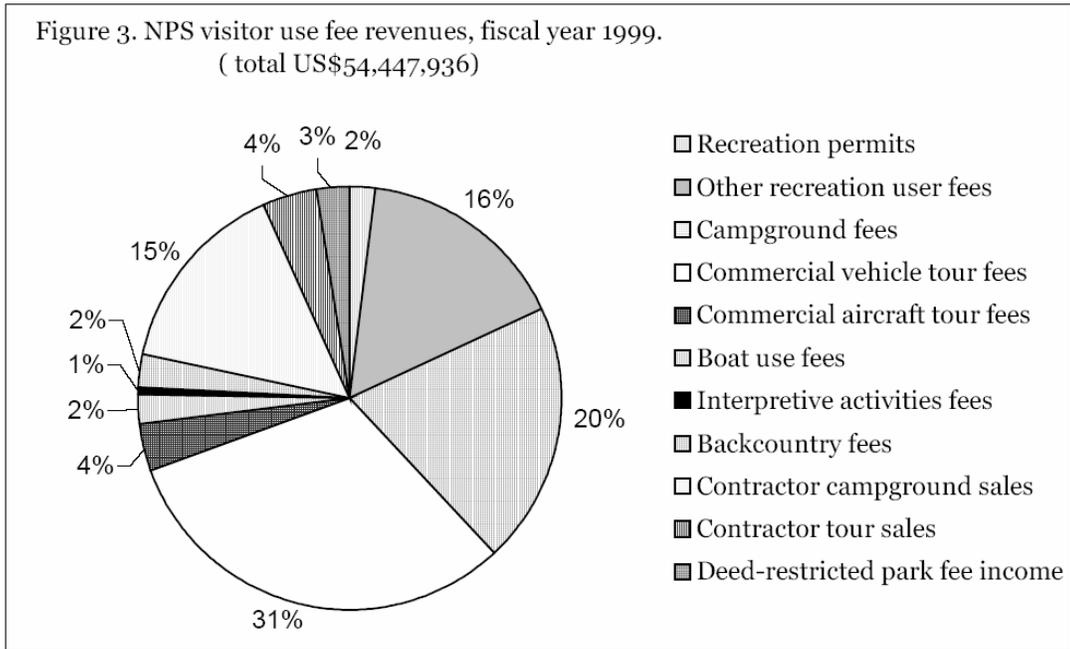
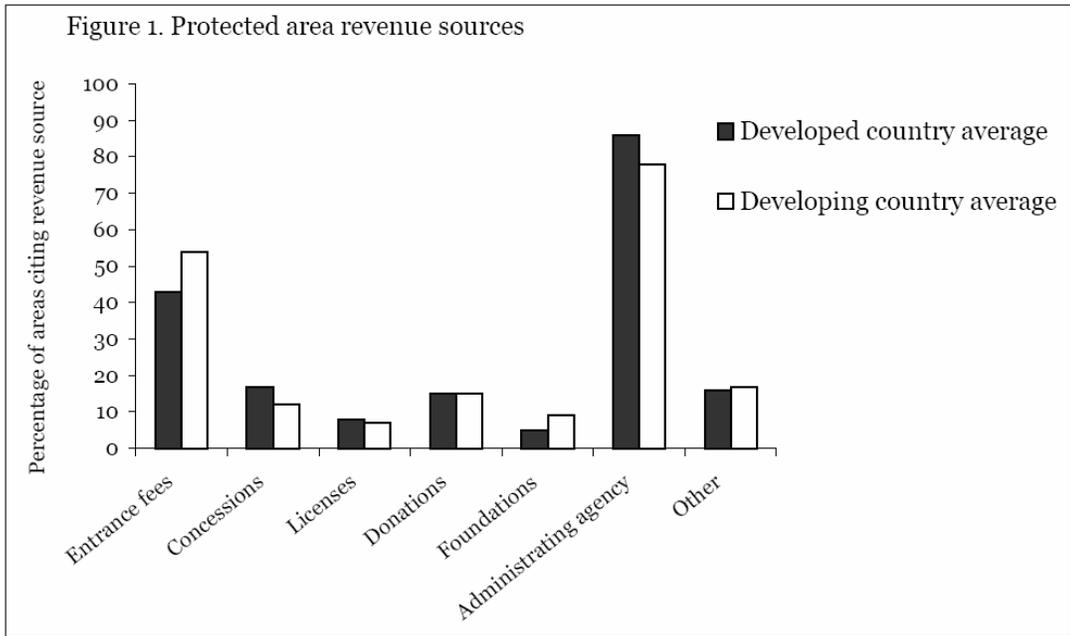
Visitors did not see an increase in fees to the U.S. NPS as a barrier to entry.<sup>17</sup> However, people prefer to pay lower entrance fees with separate fees for additional services rather than one comprehensive fee. Types of fees charged at National Parks include:

1. Entrance fees
2. User fees (fees for facilities within the protected area, such as parking, camping, visitor center, boat use, shelter use etc.)
3. Concession fees (charges or a percentage of sales paid by concessionaires providing services in the park)
4. Royalties and sales revenue (souvenirs etc.)
5. Licenses and Permits (for private firms to operate on park property, tour operators, guides, fishing, boat launch etc.)
6. Taxes (local hotel room taxes, airport or vehicle taxes)
7. Lease and rent fees (renting park property or equipment)
8. Voluntary donations (cash, in-kind gifts and labor. This is often through a 'friends of the park' group)

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<sup>16</sup> (2001). The National Park Service Comprehensive Survey of the American Public, Technical Report. *NPS Social Science Program*, 13 Retrieved May 29, 2005, from <http://www.nature.nps.gov/publications/index.cfm>

<sup>17</sup> Solop, Frederic I. Ph.D. et al (2003). The National Park Service Comprehensive Survey of the American Public, National Parks Service Fees: An Examination of Public Attitudes. *NPS Social Science Program*, 7 Retrieved May 29, 2005, from <http://www.nature.nps.gov/publications/index.cfm>



Source: (National Park Service 1999)

18

"Willingness to pay" refers to the amount users are willing to pay for benefits derived from a protected area visit in relation to other competing uses of their income.<sup>19</sup> This

<sup>18</sup> Brown, Cory R. (2001). Visitor Use Fees in Protected Areas: Synthesis of North American, Costa Rican and Belizean Experience. *The Nature Conservancy*. 5. Retrieved June 4, 2005, from <http://nature.org/aboutus/travel/ecotourism/resources/>

<sup>19</sup> Brown, Cory R. (2001). Visitor Use Fees in Protected Areas: Synthesis of North American, Costa Rican and Belizean Experience. *The Nature Conservancy*. 5. Retrieved June 4, 2005, from <http://nature.org/aboutus/travel/ecotourism/resources/>

varies with the visitor's income, education, occupation, the site's qualities, rarity or uniqueness, and the availability of ground transportation and accommodations.

### **Comparison - Fee Systems in Costa Rica**

A 1995 contingent valuation study of Costa Rica's national parks found that the current fee of US\$6 (foreigners) or US\$1 (residents) was not optimal in terms of revenue generation or as a scheme to balance visitation across all of the national parks.<sup>20</sup> The authors surveyed both Costa Rican nationals and foreigners about their willingness to pay for future visits to Volcán Poás and Manuel Antonio National Parks. Costa Rican residents expressed a mean willingness to pay US\$11 for Poás and US\$10 for Manuel Antonio. This willingness to pay is almost 900% more than the current fee for residents. Foreign visitors indicated they would pay more than double the current fees, with a mean willingness to pay US\$23 for Poás and US\$14 for Manuel Antonio.<sup>21</sup>

A study by Tobias and Mendelsohn in 1991 valued the economic value of the Monteverde Cloud Forest Biological Reserve, in Costa Rica.<sup>22</sup> Using the travel cost method they revealed that Costa Rican citizens place a value of US\$35 per visit, annually totaling US\$97,500-116,200. Since 1998 foreign visitors outnumbered nationals four to one, foreign visitation would represent an additional US\$400,000-500,000 annually. This is considered a minimum estimate by the authors, as foreign tourists presumably would place greater value on the site; this is corroborated through the Shultz study (Tobias and Mendelsohn 1991). The estimated value of an ecosystem and its services should also be considered when levying visitor use fees.

### **Visitor Management: Honduran and Costa Rican National Parks**

#### ***HONDURAS***

The Government does not run the national park system in Honduras. Each park is independently managed by non-governmental organizations (NGOs.) There are 20 national parks operating in Honduras.

#### **La Tigra National Park**

La Tigra National Park is important for the environmental sustainability of Honduras. It is similar to SNP in that it plays a central role in water production for the capital city of Tegucigalpa, as well as the surrounding communities. La Tigra is also very close to the capital city; it is only a forty-five minute drive away. La Tigra covers 23,821 hectares, also similar in size to SNP.

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<sup>20</sup> Shultz, S., J. Pinazzo and M. Cifuentes 1998. Opportunities and limitations of contingent valuation surveys to determine national park entrance fees: evidence from Costa Rica. *Environment and Development Economics* 3: 96.

<sup>21</sup> Brown, Cory R. (2001). Visitor Use Fees in Protected Areas: Synthesis of North American, Costa Rican and Belizean Experience. *The Nature Conservancy*. Retrieved June 4, 2005, from <http://nature.org/aboutus/travel/ecotourism/resources/>

<sup>22</sup> Tobias, D. and R. Mendelsohn 1991. Valuing ecotourism in a tropical rain-forest reserve. *Ambio* 29(2): 91-93.

La Tigra National Park is managed by the NGO, Fundación Amigos de la Tigra (Amitigra). The park manages visitor use through two visitor centers, Jutiapa Visitor Center and El Rosario Visitor Center. Through these two access points, the park management controls visitation to the park by providing guided tours, a public information area, a multiple use room, facilities for conducting workshops and seminars, restrooms and parking lots. While there are no food or beverage services available within the park, outdoor picnic areas are available for use. La Tigra National Park limits the maximum number of people on the trails per day to 70 people.

## ***COSTA RICA***

The government-run National Conservation Areas System (SINAC) manages national parks in Costa Rica. They administer 186 areas, including 32 national parks. The entrance fee for all national parks in Costa Rica is set at \$6.00 for foreigners. Most parks require visitors to review instructions before entering the parks, ensuring they use tour guides and adhere to the park operating hours.

### **Chirripo National Park**

Chirripo National Park covers 50,150 hectares, which is approximately twice the size of SNP. Chirripo is home to the indigenous people known as the Chirripo Indians, whose reservation is adjacent to the park. Chirripo is also similar to SNP in that it shelters one of Costa Rica’s most important watershed areas. The Pacific Chirripo River and Atlantic Chirripo River watershed areas are located inside the park.

Chirripo National Park is regulating visitor use by allowing only 60 visitors in the park at one time through certain entrance points. Hikers are not allowed to walk the trails without a guide. The park is also encouraging visitors to use the lesser known and under-utilized Herradura Trail. Park management hopes that through promotion and equal use of various trails, excessive wear will be reduced. Park headquarters have amenities such as restrooms and a conference center and also sells visitor guides and park maps.

	<b>Costa Rica</b>	<b>Honduras</b>
	Chirripo National Park	La Tigra National Park
Operating Hours	6:00 am – 5:00 pm	8:00 am– 2:00 pm Tues – Sun (may stay in park until 5:00 p.m.)
Entrance Fee	US \$6.00	US \$10.00
Multi-tiered pricing (different prices based on residency, age, location, etc.)	Yes	Yes
Annual Visitors	1,862	10,000

## **Visitor Management: Panama National Parks**

### **PANAMA**

#### **Metropolitan Natural Park**

Metropolitan Natural Park (MNP) is located within the city limits of Panama City. The park provides recreational activities for its visitors including trails and educational interpretation. The park includes a visitors' center with a store, meeting room, and public restrooms. Upon entering the park, you are greeted by a MNP employee who provides park orientation, collects entrance fees and supplies a park map. He or she advises on the best trails or activities based on the visitors' particular interests. The visitors' center is an ideal model for Soberanía National Park (SNP). Through this central location, fees are collected and visitor use is managed.

However, MNP lacks the vast array of natural resources, including bird species, flora and fauna that SNP offers. Upon entering MNP it is still obvious that the visitor is in the middle of the city. The noise from vehicle traffic diminishes the "jungle experience."

	<b>Metropolitan Natural Park</b>	<b>Soberanía National Park</b>
Size	265 hectares	22,104 hectares
Entrance Fee Nationals	\$1.00	\$1.00
Entrance Fee Visitors	\$2.00	\$3.00
Visitors Center	Yes	No
Management authority	Board of Trustees, led by Panama Mayor	ANAM

## **Addendum 2: SNP Existing Trail Analysis**

Renovation of the trails listed below could provide substantial increases in numbers of visitors and in revenue by tapping into the growing number of tourist and cruise ship passengers coming to Panama looking for historical, cultural, and nature activities.

### **Leisure Trails**

#### ***EL CHARCO TRAIL***

**Implementation Suggestions:** Activities include minor maintenance to infrastructure and signage. Additional interpretive resources could also be provided on this trail because visitors typically visit this trail without a guide. Educational institutions and a junior park ranger internship/work abroad program from Panama, US or other educational institutions could provide resources to improve the trail. Panamanian or other corporations could finance infrastructure improvements through an adopt-a-trail program.

#### ***PLANTATION ROAD***

**Implementation Suggestions:** Plantacion Road needs additional interpretive signage along the trail. Additionally, the end of the trail, further into the park needs some minor clearing. There are some fallen trees that cover the path. This could be cleared through a volunteer group.

### **Adventure/Special Interest Trails**

#### ***CAMINO DE CRUCES TRAIL***

**Implementation Suggestions:** Some sections of the trail need to be cleared, but more importantly signage should be added to better delineate the trail. A number of volunteer organizations can be utilized to clear the trail, as well as historical societies due to the trail's historical significance. Corporate sponsorship should also be explored for funding of the trail's maintenance.

A special event can also be planned on the trail once improvements are made to kick-off the trail opening. This could attract attention to the park and involve a fundraiser to collect funds for the trail and SNP. For further details on such an event see Addendum 10.

#### ***PIPELINE TRAIL***

**Implementation Suggestions:** Simple improvements are needed for Pipeline trail. Additional signage should be constructed at the entrance to the trail in Gamboa. A park guide should also be placed at the entrance of the trail during peak birding hours (4am – 7am) to collect entrance fees.

## **Addendum 3: Application of Tourist Profiles in SNP**

The background research and the field studies conducted by the consulting team confirmed that SNP has the great potential to offer diverse experiences and attractions appealing to different types of tourists. The differentiation and specific targeting of tourists based on their specific demographic characteristics and specialized needs and interests, i.e. their specific tourist profile is a great way to directly reach out to the potential visitors of SNP. Identifying applicable tourist profiles is increasingly being used by tourism destinations to identify high-potential target groups and create tailored tourism experiences.

Based on the previously identified attractions and the potential tourism experiences in the park and the surrounding areas, the consulting team identified five specialized tourism categories that could be target markets. Based on preliminary research, the team outlined profiles of the tourists that are most likely to be attracted by these specialized offerings.

In the future, SNP and its partners from the park's surrounding areas could incorporate tourist profiles into all marketing efforts. The tourism profiles recognized and described by the consulting team identify the main demographic characteristics, most appropriate marketing channels, and specific preferences and needs. The Park and its partners could use these profiles to both 1) target tourists and promote existing attractions; and 2) identify and develop new attractions based on the interests and needs of specific groups.

The five most relevant profiles described below are: adventure tourists, cultural tourists, ecotourists, SAVE tourists, and birding tourists. The characteristics of each are described below, followed by a discussion of how they relate to SNP.

### ***ADVENTURE TOURIST PROFILE***

<b>Demographic Profile</b>	40 years average age, higher than average income.
<b>Information Search Behavior &amp; Sources</b>	Specialized Internet websites, Outdoor/adventure magazines, Outdoor/adventure clubs, and Specialty tour operators.
<b>Accommodation and Food Preferences</b>	Comfortable 4-5 star accommodations, but also camping Good food
<b>Activities &amp; Behavior</b>	Camping, hiking, rock climbing, mountain biking, sky diving, wind surfing, jet skiing.
<b>Needs</b>	Rental equipment, guides, medical services & facilities, instructors, maps, certification programs, safety and security procedures.

According to the WTO, the adventure tourism segment is one the fastest growing (18% each year) in the last few years. A GWU/TDI research analysis reveals that up to 90%

of outdoor/adventure enthusiasts have engaged in such activities since their younger years. 63% of adventure tourists participate in more than one related activity each year. The more enthusiastic adventure travelers often belong to clubs and specialized organizations, and are interested in specialized websites and publications. Family and friends have strong influence on the travel choices and decisions of this segment. According to a tourism profile analysis completed by Dr. Donald Hawkins, during their stay at the destination of interest, adventure travelers often prefer to have comfortable 4 or 5 star accommodation, but often choose to camp. They are interested in having high-quality food. This tourist group often looks for the availability of more than one opportunity for rigorous activity. According to the GWU/TDI they look for experiences that bring them a feeling of achievement (declared by 88% of adventure tourists) and a feeling of being young (declared by 67% of adventure tourists).

WTO identifies the adventure traveler as having an average age of 40 years and having higher than average income. A GWU/TDI study indicates that the average income of US adventure travelers is \$57,800, which is higher than compared to the general US average of \$50,700. 63% of adventure travelers have higher education (compared to the US average of 55%).

The above-mentioned study conducted by Dr. Donald Hawkins identifies several key channels that adventure travelers use for information search. The main channel is the Internet and specifically specialized in outdoor/adventure topics websites (Great Outdoors, out-there.com). This group of tourists learns about new destinations of interest also through specialized magazines and publications like *Outdoor* and *National Geographic Adventure*. Specialized clubs are another potential promotional channel since many of the more avid adventure travelers belong to specialized outdoor clubs and organizations. Specialized tours operators and specialized trade shows and stores are another source of information on travel opportunities for this group.

### **Recommendations for SNP**

SNP offers assets to attract adventure tourists. Currently, the most suitable adventure tourists trail in the park is the Camino de Cruces trail, which is long and relatively intense. Another potential trail is the proposed Gold Mine trail, which could be appealing to adventure tourists because it offers an intense hike on an undeveloped trail and the “discovery” of the remnants of steam equipment used for the gold mine.

In order to reach this tourist segment, SNP should offer specialized information on its website allowing adventure-oriented tourists to identify specific attractions and create specialized itineraries. SNP could use affiliate programs to establish relations with specialized clubs that could promote it as a destination among members. Another opportunity for reaching out to the adventure travelers is informing potential tourists about SNP through specialized publications. SNP could organize familiarization trips for groups of authors for outdoor/adventure magazines.

## ***CULTURE TOURIST PROFILE***

<b>Demographic Profile</b>	45-60 years average age, higher than average income.
<b>Information Search Behavior &amp; Sources</b>	Internet websites, Trade magazines, Specialty tour operators.
<b>Accommodation and Food Preferences</b>	High-quality accommodation. Local cuisine.
<b>Activities &amp; Behavior</b>	Visit historic sites & monuments, interaction with local (indigenous) people, eating local cuisine.
<b>Needs</b>	Interpretative guides, guidebooks and maps, access to local communities.

According to the WTO cultural tourism is one of the fastest growing segments in the tourism industry. It currently accounts for above 10% of the world tourism market, although the varying definitions of cultural definitions make it very difficult to specify the exact contribution of this category. The earlier mentioned TDI/GWU study reveals that US cultural tourists spend on average much more (\$ 615 per trip) than the average tourist (\$425 per trip); European cultural tourists spend an average of 72 EURO per day. US cultural tourists usually stay more – 4.7 days compared to the average 3.3 days. Cultural tourists are also very likely to visit national parks. They are inclined to travel in groups. Often, they are ready to stay an extra day or two because of a cultural event – 61% are ready to add one day and 30% are ready to add an extra night. The attractions that are most often visited by cultural tourists include historical sites and buildings, significant battlefield sites, museums, galleries, theaters and events.

The TDI/GWU reveals that 91.2% of the cultural tourists are 35 or older. 73% of the culturally-oriented tourists are 50 years of age or more. Tourists with interest in cultural attractions and experiences are usually very well educated – 65% of the cultural tourists in the US hold a university degree. Their income is significantly higher than average - \$90,500. It is important to note, however, that 82% of the cultural tourists in the US travel for cultural experiences domestically.

### **Recommendations for SNP**

SNP has attractions that could draw cultural tourists visiting Panama City and the surrounding areas to the park. The sites most interesting to cultural heritage visitors include the beginning of the Camino de Cruces trail and the church ruins at Venta de Cruces and the indigenous communities in the Gamboa cooperative. Another area for consideration is for visitors interested in culture and history is the undeveloped Gold Mine trail.

In order to reach this tourist segment, SNP should offer specialized information on its website describing the attractions and possible itineraries that cultural tourists could be interested in. SNP should use affiliate programs with clubs, associations or educational institutions interested in specific cultures. The use of specialized publications and

websites is another excellent channel for promoting the cultural heritage attractions of SNP.

### ***ECOTOURIST PROFILE***

<b>Demographic Profile</b>	32-54 years average age, relatively higher than average income, well educated.
<b>Information Search Behavior &amp; Sources</b>	Specialized Internet websites, scientific magazines, specialized clubs, trade shows, specialized tour operators.
<b>Accommodation and Food Preferences</b>	Small ecolodges, well-developed campgrounds. High-quality food.
<b>Activities &amp; Behavior</b>	Wildlife viewing, nature hiking, bird watching, flora walks, scuba diving, and horseback riding.
<b>Needs</b>	Well-trained interpretative guides, energy-efficient transportation, information books.

Ecotourism is another fast growing segment in the past few years. According to the WTO in the last few years ecotourism has been growing at a 10-25% annual rate. Just like with cultural tourism, there are varying definitions of ecotourism, which set different scopes for the activities it involves. The above mentioned study conducted by Dr. Donald Hawkins, reveals that in general, ecotourists are interested in different forms of experiencing nature. They look for opportunities to visit natural areas and view flora, fauna and unique geographic formations. Ecotourists are specifically interested in endangered plant and animal species, and habitats of endemic species when visiting a certain destination. For ecotourists it is very important to have peace and to be able to experience nature in very small groups.

In 2002 WTO carried out a series of studies on the Ecotourism markets in seven of the biggest tourism spenders in the world – Canada, Germany, Great Britain, France, Italy, Spain and the U.S. According to the studies, eco-travelers are also very interested in learning and new experiences, and feel that it is important that tourism benefits the community. The main experiences sought by ecotourists are interpretation/learning experiences and discovering of local cultures and foods. An interesting observation is that ecotourists are usually very conscious about the impact that tourism activities have on the local nature and communities. It is important to note that ecotourists are inclined to pay a higher price for accommodation, food or other tourist service if they know that it is nature-friendly or benefits the local community.

According to the earlier mentioned Ecotourism Special Report Series published by WTO, most ecotourists are concentrated in mid to older age groups, particularly 40 to 65 years old. They are usually very well educated - 37% of Canadian ecotourists hold a college/university graduate degree and another 26% have been in college/university for 1 to 3 years. The average income of ecotourists is higher than average for each surveyed country. For example, the Canadian study revealed that between 19% and 37% of eco-travelers have an income that is higher than \$70,000 whereas the average income is between \$48,137-\$40,914 according to Canadian statistics.

## Recommendations for SNP

As a national park with the mission to preserve valuable natural resources, SNP is a natural attraction for nature-oriented tourists. Ecotourists could be drawn by any of the trails and attractions within the park, since all of them offer many opportunities to view interesting flora and fauna. In order to reach out to ecotourists, SNP should incorporate ecotourism-specific itineraries on its website and should promote them through other specialized websites, as well as specialized tour operators. As in previous examples, familiarization trips for authors writing in specialized nature-oriented publications could lead to an increased popularity of SNP as an ecotourism destination.

## SAVE TOURIST PROFILE

<b>Demographic Profile</b>	Average age is still undefined due to the recent creation of the concept, high education, higher than average income.
<b>Information Search Behavior &amp; Sources</b>	International volunteer organizations, scientific research organizations, university study abroad programs, GWU SAVE database.
<b>Accommodation and Food Preferences</b>	Basic amenities, camping, home stays. No specific food preferences.
<b>Activities &amp; Behavior</b>	Volunteer opportunities in local organizations, schools and language schools, study abroad programs.
<b>Needs</b>	Access to opportunities for volunteer work and research.

The SAVE concept was first developed by a student consulting team involved in the GW International Consulting Practicum Program in Honduras in 2003. The SAVE concepts stand for Scientific, Academic, Volunteer and Educational tourism. Due to the recent introduction of SAVE as a tourism market category, there is no data on the demographic profile of SAVE tourists. The following are descriptions of the interest and focuses of the four different groups of tourists that fall in the SAVE category as offered by GWU:

**Scientific tourists** are individuals or groups that travel for the purpose of conducting specific research or observation within fields such as biology, archaeology, or anthropology (i.e. Earth Watch Institute, Global Vision International, Greenforce Conservation). World Heritage Center Sites have been effectively utilized for scientific field studies in the past, but the economic impact that these expeditions provide to the local community has not been fully documented. Scientific expeditions hire local workers, live in the communities, eat local food, utilize local transportation and buy local goods—leading to positive economic impacts in surrounding communities.

**Academic tourists** are individuals or groups that travel with the intention of participating in experiential learning activities leading to credit for formal degree programs or courses offered by higher education institutions; for example, field studies in anthropology, archaeology, languages, conservation biology, etc. Although there has been some research on the economic and social impacts of formal study abroad programs, the focus has been

on the importance of incorporating field studies in academic disciplines using learning opportunities provided at World Heritage Sites. Academic groups have a tendency to visit more remote places in the interest of study, and are more willing to interact with local communities.

**Volunteer tourists (or voluntourists)** are individuals or groups that travel to participate in specific activities that will contribute to the betterment of society; for example, International Volunteer Program Association, Amizade, I to I Tour Operator. Los Ninos International has created VolunTours--the combination of volunteer service and travel/tourism. In recent times, travelers, particularly youth, have shifted from what was originally just traveling or studying abroad to incorporating service into the learning experience. There are many types of volunteer activities that can be directly related to the improvement of World Heritage Sites and local communities.

**Educational tourists** are individuals or groups that travel to obtain, for personal gratification rather than academic credit, knowledge or experience within a wide range of human activities; for example, Smithsonian Journeys, Natural Habitat Adventures, The Nature Conservancy Educational special interest activities that involve any value added experiential learning for the traveler would fall in this niche. One example would be a culinary trip where the visitor learns how to prepare local food in the traditional manner. Educational experiences leading to some credential or certificate of completion involve longer trips and higher expenditures for value added activities (e.g. guided interpretation) directly benefiting local people.

### **Recommendations for SNP**

There are many areas and sites within SNP and in the surrounding areas that could attract SAVE tourists. In order to benefit from the potential of the SAVE market, however, SNP and its partners from the surrounding communities should analyze the opportunities for SAVE tourism and should develop SAVE-oriented "itineraries" that could ensure benefits for the park and the local communities. The partnering of an organization willing to coordinate the SAVE tourism efforts of the park and other interested partners could help utilize the full potential of this new category of tourism. To reach out to potential SAVE travelers, SNP could utilize the interactive online SAVE database developed by GWU, to look up affiliations with scientific, academic, volunteer and/or educational institutions and organizations.

## ***BIRDWATCHER TOURIST PROFILE***

<b>Demographic Profile</b>	49-53 years average age, almost 2/3 – male, but the share of females is growing fast, higher than average income.
<b>Information Search Behavior &amp; Sources</b>	Specialized associations and clubs, local groups, word of mouth, specialized Internet websites and forums, specialized magazines.
<b>Accommodation and Food Preferences</b>	Non-conventional accommodation (guest houses, ecolodges, camping)
<b>Activities &amp; Behavior</b>	Re-visit old places and discover new places for bird watching.
<b>Needs</b>	Local guidebooks, information on rare and unusual species, maps.

Birdwatching is one of the most popular and fast growing segments in the past few years both in North America and Europe. Recent studies conducted by the US Department of Agriculture’s Forest Service and the US Fishing and Wildlife Service indicate that about 30% of the US population engages in birdwatching activities each year. This translates into 70 million people who visit places to observe birds either in their immediate surrounding areas, their region, and other regions of the country or to other countries. Over one third of birdwatchers in the US describe themselves as “enthusiasts” and engage in more than 50 birdwatching activities each year. A research analysis conducted by GWU/TDI reveals that tour operators specializing in birdwatching travel identify a group of the most avid enthusiasts, also referred to as “twitchers”, who represent between 5-10% of the entire market. This is the category that is most likely to travel internationally. GWU/TDI reveal that more than 20% of birdwatchers make 40 or more birding trips each year, and 16% travel more than 80 times each year. About 65% of all birdwatchers are able to identify at least 200 species and 33% identify over 400 bird species. Birdwatchers are equally interested in visiting places they have already visited in the past, and new places, the main decision criteria being the ornithological significance of the area.

All above-mentioned studies identify the average birdwatcher as between 49 and 53 years of age. It is important to note that the group of 65 plus represents up to 24% of birdwatchers in the US. About two thirds of birders are men, but in the past few years there has been a rapid increase of the number of women interested in this type of activities. According to the US Fishing and Wildlife Service birdwatchers in the US are more likely to live in smaller cities or town in the northern US. It is important to point out that most birdwatchers come from higher social brackets; according to the American Birding Association 27% are with incomes above \$100,000.

Birdwatchers learn about interesting sites and places to visit mainly through specialized associations and clubs (i.e. American Birding Association, The Nature Conservancy, etc.), as well as word of mouth. With the growing significance of Internet and online forums, those specialized in birding are finding another important information channel.

### **Recommendations for SNP**

With the significant number of bird species that could be observed in SNP, the development of specialized birdwatching opportunities has a great potential. Almost all trails and areas in the park offer opportunities to observe birds with the Canopy tower and the Pipeline trails being the “peak” attractions for birdwatchers. Considering that Panama is home to approximately 900 bird species and that birdwatchers report seeing up to 400 species in one day along the Pipeline trail in SNP, it could be assumed that the most avid birdwatchers are aware of the birding importance of the area. Therefore, it is important to target the broader segments of birdwatchers through the most popular information channels they use. SNP could target the broad birdwatcher segments by affiliations with birding associations and clubs in US (American Birding Association), Canada and Europe and by linking information about birding opportunities in SNP to specialized websites. Attracting authors and journalists from specialized publications or specializing in birdwatching for familiarization trips and securing publications in specialized magazines and newspaper sections. Since online discussions and forums are identified as a powerful channel impacting the decision making of birdwatchers, SNP could encourage local avid birdwatchers to participate in these and promote the richness and significance of the areas.

**Addendum 4:**  
**Recommended Tourist Attractions by Tourist Profiles**

# PARQUE NACIONAL SOBERANIA

## ZONAS DE MANEJO

Recommended tourist attractions by tourist profiles:



Bird watching



Ecotourism



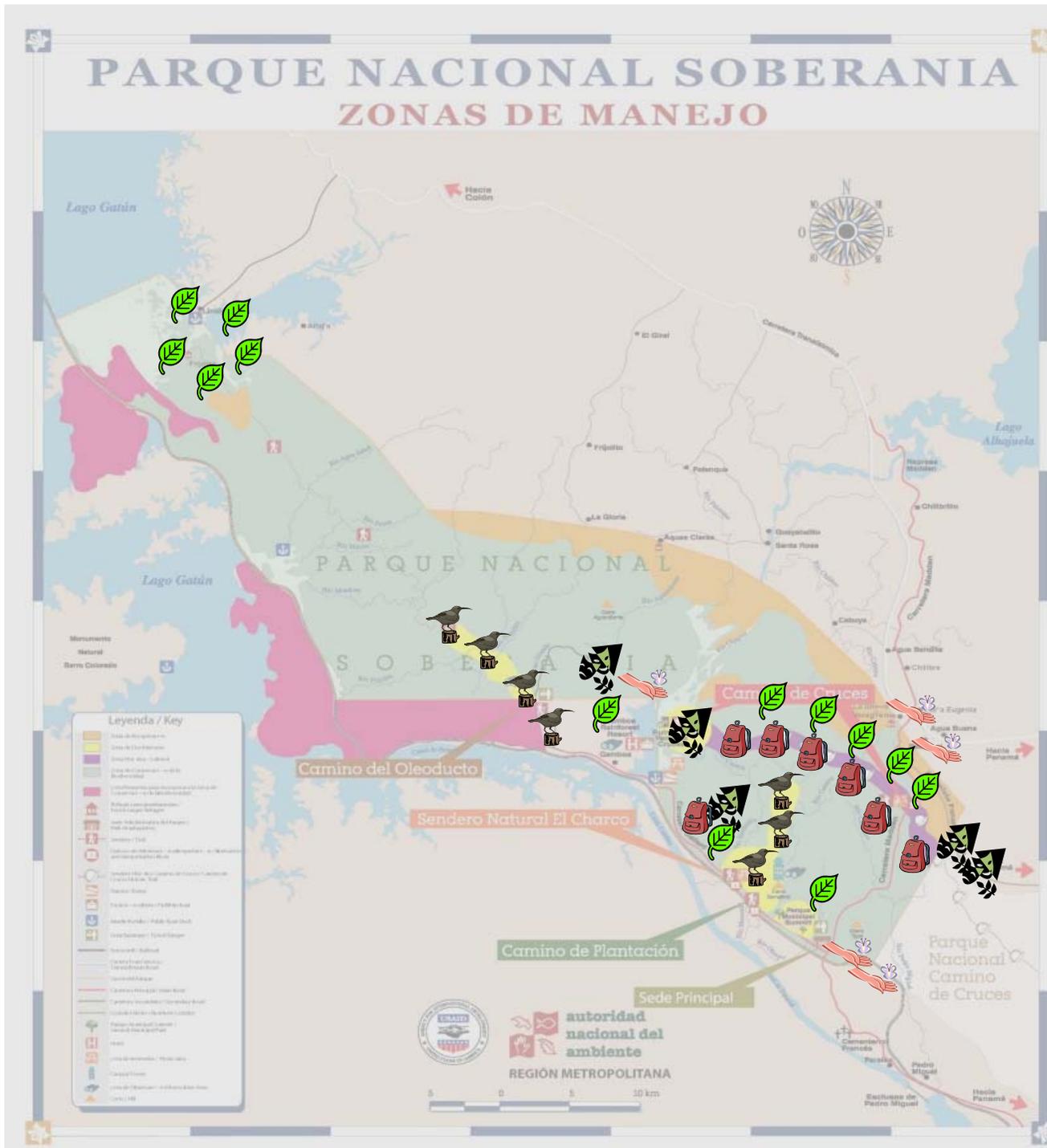
Cultural tourism



SAVE



Adventure tourism



## **Addendum 5: Sample Visitor Itineraries in 2010**

### **Sample Itinerary 1: Cruise Ship Passenger Arriving at Colon Port**

11:00 AM...Arrive at Colon2000 Port. Depart Ship and board bus for short ride to Limón

11:40 AM..Arrive at Limón

11:45 AM...Board boat run by local community and tour Lake Gatún. 1 hour eco-cruise

12:45 PM...Arrive Northern Entrance of Pipeline Trail in Soberanía National Park for hike

1:30 PM...Board boat for ride to local community

1:45 PM...Stop for lunch at local community in Limon

2:15 PM...Leisure time at community (shopping, observing local customs)

3:00 PM...Re-board boat for return trip

3:30 PM...Re-board bus for return to Colon2000 Port

4:15 PM...Arrive Colon 2000

This tour includes ground and water transportation, food & beverage, and an English-speaking guide. The cost is \$75.

### **Sample Itinerary 2: Multi-Day Tour of Panama City for International Ecotourist**

*"PANAMA BEST OF BOTH WORLDS TOUR: CITYLIFE AND NATURE"*

#### ***Day 1 ARRIVE PANAMA***

Upon arrival to Tocumen International Airport in Panama City, visitors are greeted by a representative of tour operator and transferred to local hotel.

#### ***Day 2 HISTORIC PANAMA CITY & PANAMA CANAL***

The day includes visits to several sites, including the ruins of Old Panama City (*Panama Viejo*) where the Camino Real starts. In addition, the tour includes stops at Mi Pueblito, the Smithsonian Marine Life Institute, the Miraflores Locks Visitor Center at the Panama Canal, and shopping at Avenida Central in Panama City. Visitors are then free to dine at any of Panama's excellent restaurants and experience its renowned nightlife.

#### ***Day 3 SOBERANIA NATIONAL PARK & CAMINO DE CRUCES TRAIL***

The tour starts with a short drive from the hotel located along the shores of the Pacific Ocean to Chagres River. The expedition starts with a canoe ride down the Chagres River on a boat operated by the San Antonio-Wounan indigenous community. The group is dropped off at the entry point of SNP. Soberanía is home to endangered

species such as jaguars, mantled howler monkeys and anteaters. It is also a bird sanctuary for more than 560 species, including the harpy eagle -- the largest eagle in the world and Panama's national bird. Most of the trajectory of this trek will take place through mature primary rainforest.

The group will then embark on a hike on the Camino de Cruces Trail. This well-marked trail is of historical significance – it was the route used by Captain Henry Morgan during his 17<sup>th</sup> Century attack on the Spaniards in Panama City, the route used by pirates smuggling gold from South America to ships in the Caribbean, as well as the road used by former U.S. President Ulysses S. Grant on his trek to California via the Panama isthmus.

The Camino de Cruces trail culminates with a visit to ancient church ruins on a well-maintained 5 km loop. The hike ends back at the top of the trail, and is followed by a boat ride operated by the Ella Peru Emberas, back to their local indigenous community to learn more about their history in the area and an opportunity to purchase handmade arts and crafts.

***Day 4 (Optional – for Adventure Tourists)***

***OVERNIGHT CAMPING, THEN RETURN TO SOBERANIA NATIONAL PARK FOR RUGGED CHARCO TRAIL & GOLD MINE HIKE***

For the truly intrepid traveler, day 3 of the tour culminates with overnight camping at the newly created campgrounds in SNP (equipment to be provided by the tour operator) or can also be a stay at a new ecolodge. At daybreak, visitors embark on an adventurous hike on the recently updated El Charco trail and then continue to the newly created Gold Mine Trail. This rugged trek leads the hiker to the restored ruins of an old gold mine used in the 1700's and 1800's. The tour is led by an experienced guide who is a member of a local indigenous community and also a font of knowledge about the history and cultural significance of the area. The tour ends with a return to the visitor's local hotel in Panama City, with an optional transfer to the airport.

**Sample Itinerary 3: Cultural Homestay**

***“A UNIQUE PERSPECTIVE ON INDIGENOUS COMMUNITY LIFE”***

***Day 1 ARRIVE LOCAL INDIGENOUS COMMUNITY***

Tour operator provides transportation from area hotels and airport to local community near Panama Canal Zone watershed.

Upon arrival at the community (eg. San Antonio-Wounan indigenous community), visitors are greeted by a traditional seafood lunch prepared by local community members. Following lunch, visitors are treated to a canoe ride up the Chagres River with San Antonio-Wounan bilingual guides. The guides explain the importance of the watershed region to the community's development, as well as pointing out interesting and scenic areas for the visitors.

The canoe ride culminates at the entry point of Soberania National Park. Once inside this rugged natural preserve, the group will embark on a hike on the Camino de Cruces Trail. Most of the trajectory of this trek will take place through mature primary rainforest. The Camino de Cruces trail culminates with a visit to ancient church ruins on a well-maintained 5 km loop. The hike ends back at the top of the trail, and is followed by a boat ride operated back to the local indigenous community to learn more about their history in the area.

The evening's activities include accommodations with a local family in the community in a thatched-roof hut. Dinner is served in a large group setting, and is followed by the evening's entertainment, which consists of traditional dances, as well as an explanation of local beliefs and customs.

### ***Day 2 TOUR OF LOCAL COMMUNITY***

After a traditional breakfast with their assigned local indigenous family, visitors are offered a tour of the community and explained the subsistence lifestyle, along with efforts to improve the quality of local life through sustainable economic developmental efforts. The tour includes a stop at a local school, where visitors are encouraged to meet and play with the schoolchildren.

The visit ends with a luncheon feast prepared by local chefs, followed by an opportunity to purchase local arts and handmade crafts from community members. Tour operators then provide return transportation for visitors to their points of origin.



9. HA VISITADO EL PARQUE NACIONAL SOBERANIA?

SI

NO

10. SI NO LO HA VISITADO, SABE DONDE QUEDA?

SI

NO

11. SI NO LO HA VISITADO, LE GUSTARIA VISITARLO Y PORQUE NO LO HA HECHO?

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**MUCHAS GRACIAS!!!**

## Results of Summit Park Surveys

Q1	<b>GENDER</b>			
	Male	8	Did Not Respond	4
	Female	8	Total	20

Q2	<b>AGE RANGE</b>			
	Less than 25	2	Between 45 and 55	1
	Between 26 and 35	5	Between 56 and 65	1
	Between 36 and 45	4	More than 65	2
	Did Not Respond	5	Total	20

Q3	<b>HOW DID YOU LEARN ABOUT SUMMIT PARK?</b>			
	Internet	0	Advertising	0
	Family / Friends	12	Tour Operators	0
	Other	8	Did Not Respond	0
			Total	20

Q4	<b>WHY DID YOU CHOOSE TO VISIT SUMMIT PARK TODAY?</b>			
	Father's Day	2	Fresh Environment	2
	Visits from Abroad	2	Animal Watching	5
	Nice Place	2	Plants	2
	Bird Watching	3	Other	6
	Nature	3	Tranquility	2

Q5	<b>WHAT DID YOU LIKE BEST ABOUT SUMMIT PARK?</b>			
	Animals	4	Environment	4
	Cleanliness	1	Tranquility	2
	Plants	2	Accessability	1
	Other	5	Nature	5

Q6	<b>WHAT DO YOU THINK NEEDS TO BE IMPROVED AT SUMMIT PARK?</b>			
	Accessability	1	Other	4
	Nothing to Improve	1	Animals	7
	Guides	1	Care of Animals	5
	Advertising	2	Bike Access	1
	Motivation	1	Infrastructure	6

Q7	<b>HOW MUCH TIME DID YOU SPEND IN SUMMIT PARK?</b>			
	Less than 2 Hours	10	Between 3 and 4 Hours	4
	Half Day	2	All Day	4
	Other	0	Total	20

Q8	<b>SCORE THE ACTIVITIES YOU DID IN THE PARK (1 = LOWEST, 5 = HIGHEST)</b>			
	Walk		Animal Watching	
	Score 5	5	Score 4	5
	Score 4	2	Score 3	5
	Score 3	4		
	Eat Food		Run	
	Score 5	1	Score 5	1
	Score 3	1		
	Did Not Respond	2	Bird Watching	
			Score 5	1
	Serve as Torist Guide		Score 4	1

Score 5	1		
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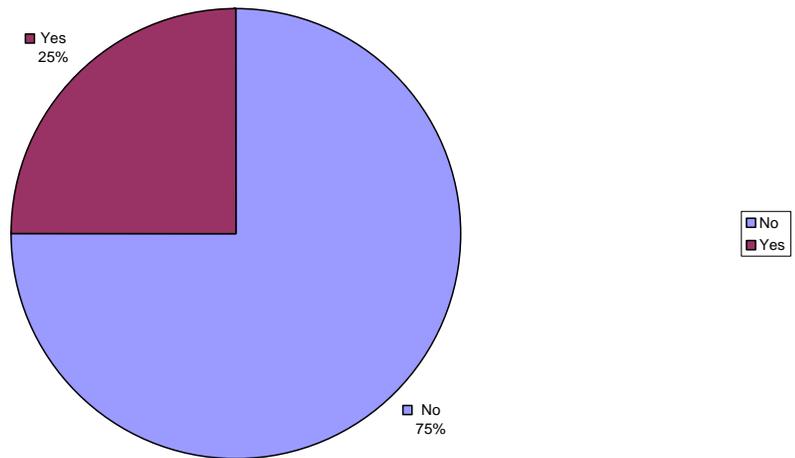
<b>Q9</b>	<b>HAVE YOU EVER VISITED SOBERANIA NATIONAL PARK?</b>		
No	15	Yes	5
Yes	5	Total	20

<b>Q10</b>	<b>IF NO TO Q:9, ARE YOU AWARE OF SNP?</b>		
No	4	Yes	5
Did not Respond	6	Total	15

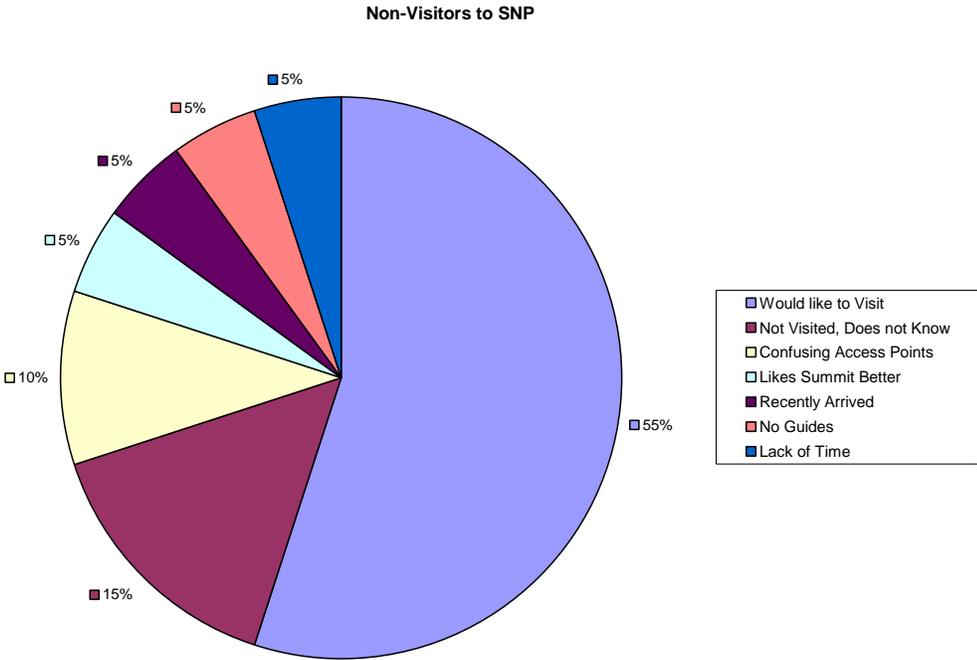
<b>Q11</b>	<b>IF NOT VISITED, WOULD YOU LIKE TO? WHY HAVE YOU NOT VISITED?</b>		
Would like to Visit	11	Did Not Respond	5
Not Visited, Does not Know	3		
Confusing Access Points	2		
Likes Summit Better	1		
Recently Arrived	1		
No Guides	1		
Lack of Time	1		

Graphical Representation of Question 9-

Have You Ever Visited SNP?



Graphical representation of Question 11 -



## **Addendum 7: Feedback from Tour Operators**

The GWU Consulting Group met and interviewed several prominent local tour operators during our rapid assessment campaign in Panama. The purpose of these visits was to understand the following characteristics of their operations:

1. The tour operators' business
2. Their channels of distribution
3. The various itineraries they offer
4. Their promotional methodologies
5. Their interactions with local and indigenous communities
6. Their concerns and suggestions regarding making SNP a viable, marketable tourism destination

The following tour operators were interviewed with regard to this project:

- Julia Franco – Vacaciones
- Angelo Paredes – Turista Internacional, SA
- Marco Gendasegui – Ancon Expeditions of Panama
- Ernesto Orillac – Margo Tours
- Ana Cecilia Young – EcoCircuitos
- Laura Ramirez – Gamboa Hotel Tours
- Aida Quijano Jiminez – Apavit (National Association of Travel Agents)

### ***SUMMARY OF TOUR OPERATORS COMMENTS***

<b>ISSUE:</b>	<b>THOUGHTS/RECOMMENDATIONS</b>
<b>Park Infrastructure</b>	<ul style="list-style-type: none"> <li>➤ Safety and infrastructure are most important to park's sustainability as a tourist attraction</li> <li>➤ Basic infrastructure needed for SNP – walking paths, handles, better signage, more rangers, bathrooms, garbage cans, rest areas, etc.</li> <li>➤ SNP lacking guides, park rangers, eco-lodges, and park security officers</li> <li>➤ Need more options than what's available; currently too much pressure on a few parks (i.e., other trails besides Pipeline)</li> <li>➤ Need to make real trails (many are currently buried and hard to find due to erosion)</li> <li>➤ Possibly creation of a separate trail for scientific purposes – maybe create several different trails</li> </ul>
<b>Guides</b>	<ul style="list-style-type: none"> <li>➤ Need more English speaking guides</li> <li>➤ Language at park is a problem – need bilingual speakers and signs</li> </ul>
<b>Coordination Improvement</b>	<ul style="list-style-type: none"> <li>➤ Need better coordination between tour operators in Panama to sell the same message</li> </ul>

	<ul style="list-style-type: none"> <li>➤ Need more uniformity among National Parks in Panama; currently too much variance</li> </ul>
<b>Government Support</b>	<ul style="list-style-type: none"> <li>➤ Need IPAT to spend money more wisely</li> <li>➤ Need more transparency and support at government level</li> <li>➤ Panama needs to maintain and sustain its promotional and marketing campaign</li> <li>➤ Tourism Authority cannot be controlled by politics – need mix between private enterprise and government on IPAT’s Board of Governors</li> <li>➤ ANAM needs to make the law better, real, and enforceable</li> </ul>
<b>Summit Park/Gardens and SNP Coordination</b>	<ul style="list-style-type: none"> <li>➤ Summit Park and Gardens should be part of SNP, or at least work better together</li> <li>➤ Visitor Center should be in Summit Gardens (infrastructure already exists, parking, way of managing visitor traffic)</li> </ul>
<b>Indigenous Communities</b>	<ul style="list-style-type: none"> <li>➤ Indigenous communities near SNP have been too commercialized by Gamboa resort</li> <li>➤ Indigenous communities overrun by cruise ship tourist would lose their allure for ecotourists and may lose their identity as well</li> <li>➤ People want to stay in nature-friendly environment, not on concrete hotels; need to focus on conservation and preservation</li> <li>➤ Develop housing around SNP – eco-tourists want housing that helps conservation locally and benefits the communities (perhaps lodges offering homestays and nature studies).</li> <li>➤ Currently no involvement with communities around SNP – they probably just haven’t promoted themselves well, could be a potential success</li> <li>➤ Clientele that wants to be in contact with nature would appreciate ecolodge/arts and crafts/educational traditions sessions at local communities</li> </ul>
<b>Park Rangers</b>	<ul style="list-style-type: none"> <li>➤ Currently no security at park – need to better train rangers, hire more, educated them re: nature</li> <li>➤ Rangers should have some form of enforcement authority in park</li> <li>➤ Rangers should have direct access to police, although don’t need to carry weapons</li> </ul>
<b>Laws and Regulations regarding SNP</b>	<ul style="list-style-type: none"> <li>➤ Need to have laws/regulations regarding number of visitors to SNP &amp; carrying capacity</li> <li>➤ Change the law to give rangers more authority – make it a real crime to hunt in the park</li> <li>➤ Need both park rangers (education, tourist friendly) and police (enforcement)</li> <li>➤ Need to allow camping for backpackers</li> </ul>

<b>Concessions</b>	➤ Okay to have a coffee shop or bookstore, but don't want to make it a Disney World
<b>Educational Outreach to Communities</b>	<ul style="list-style-type: none"> <li>➤ Indigenous community currently works for Gamboa resort – community could instead be working directly in tourism to benefit financially</li> <li>➤ Educational/Voluntourism/Social Work – U.S. university groups that come down to Panama to do eco-tourism plus social/volunteer work (NYU and Princeton) – do business plans or volunteer work as part of trip.</li> <li>➤ Suggestion to embark on educational program to Chilibre Community – teach them how to take care of park and how the park will take care of them economically</li> <li>➤ Need to end slash and burn, hunting, poaching, etc</li> </ul>

# **Addendum 8: Pilot Project for Sustainable Tourism**

**\*\*Draft for discussion only**

## ***INTRODUCTION***

UNPYME and the Panamanian National Environmental Authority, and its international partners, Tourism Development Corps (TDC), a division of Citizens Development Corps, and The George Washington University's Department of Tourism and Hospitality Management (GWU), are proposing a Pilot Sustainable Tourism Project in Panama, in order to increase the competitiveness of Panamanian SMMEs, strengthen Panama's natural tourism products and the conservation of the environment, and position the country as a premier destination for authentic Central American travel.

This project has divided into two distinct phases. The first phase of this program has completed a six-week rapid community-based tourism assessment performed by GWU Masters of Tourism Administration and Masters of Business Administration students and ascertained the needs of SMMEs centered around the Soberania National Park using methods developed and tested by GWU's Department of Tourism and Hospitality Management.

The second phase of the program will address the gaps identified in the assessment and will consist of technical assistance and training given to selected SMMEs by Volunteer Advisors (VAs) from TDC, in areas such as destination marketing, quality control, hospitality management, supply chain development, and environmental sustainability. The ultimate goal at the end of this phase is to build the capacity of a wide range of tourism businesses in the region to receive and capture the international tourism market in an environmentally sustainable manner.

### **Background:**

- MIF should focus its actions on a series of basic activities aimed at addressing the need to allocate its resources according to a strategic plan.
  - MIF should make use of clusters or sets of projects with common features, formulated in accordance with a specific strategy and having centralized technical support in order to improve implementation.
  - MIF project will be a \$100,000 pilot with a 30% matching component for the start of 15-20 new businesses.
  - Some MIF projects have used grant components to pass through the local match to the grantee.
  - It should be noted that the TDC volunteer component could also be used as part of the in kind match.
  
- Importance of MIF cluster strategy

- Projects with same common goal to work together
- Economies of scale are generated making it possible to efficiently allocate MIF resources.
- Projects supporting sustainable tourism development respond to the MIF Strategy
  - Development of capacities and competitiveness of small and medium enterprise
  - Development of social and environmental and private sector strategies that promote competitiveness and reduce poverty.

### **The role of MIF:**

- Projects will focus on those destinations with a critical mass of tourism
  - These require external assistance to organize themselves and carry out joint action with the goal of increasing income, employment, and economic development
  - Improve market functioning and the capacities and competitiveness of SMEs
  - Innovative replicable solutions.

### **Requirements:**

- Collaboration among companies for the development of strategic business
  - Improvement of the competitiveness of tourism products at the destination level aimed at specific segments/markets (heritage, eco, and educational)
  - Participation by different companies that offer each of the components of the product for a given market/segment
    - Leading institution must be a non-profit organization with ties to business communities
    - Market studies and benchmarking directly related to the product
    - Defining a competitive strategy for the set of companies that participate in the specific business
    - Conceptualizing the structure of the report
    - Creating product clubs (groups of entrepreneurs who, with or without public sector support work together to develop a product)
    - Preparing specific promotional plans
    - Creating market channels and negotiating capacity with intermediaries
    - Relevant training.
- Collaboration for product development based on destination branding.
  - MIF will finance assistance for:
    - Developing the brand (personality and graphic image) and the applications of the same, including the design of standards for tourism sign posting
    - Defining the standards for participating companies

- Preparing specific marketing plan
- Creating marketing channels and the capacity to negotiate with intermediaries
- Developing systems for using the brand name as a source of income (merchandising)
- Relevant training.

## Phase I Activities

With assistance from the Incentive Fund associated with the USAID-funded Integrated Watershed Management Program for the Panama Canal run by the Academy for Educational Development (AED), TDC and GWU have already completed the first phase of the Pilot Program. More specifically, given the overall goal of providing education and communication technical assistance to support sustainable management of the Panama Canal Watershed (PCW), thereby decreasing pressure on water resources and stimulating economic development, and the importance of the tourism industry in the achievement of this goal, TDC and GWU received a grant to conduct the rapid assessment of the Soberania National Park and the surrounding communities, facilities and attractions.

This rapid assessment a team of 23 student interns (17 from GWU and 6 from a Panamanian counterpart) has focused on three specific subjects:

1. **Tourism Market Analysis** of SNP and the surrounding areas. The tourism market analysis is an assessment and analysis of the potential for sustainable tourism development in SNP and the surrounding areas.
2. **Analysis of Visitor Uses** in SNP. The focus of this assessment is current and potential visitor use of the SNP, as well as the control systems for current and proposed uses.
3. **Business Plan and Strategy Development** for the SNP ecotourism cluster. The business plan development aims at offering an efficient plan for utilization of the economic potential of the cluster

In addition to the small grant received from AED which covers local transportation and accommodation expenses for the interns, each of the 17 GWU students has paid \$5,700 to participate in the program, of which approximately US\$5,000 went to academic credit and the other \$700 went to airfare and incidentals, to participate in the program. Moreover, GWU has paid for the salary and transportation for Dr. Donald Hawkins and Kristin Lamoureux, who have provided overall supervision of the student activities. Virtually no funds from MIF were provided for Phase I activities.

## Phase II Activities

Building upon the results of the assessment completed in Phase I of this project, Phase II will consist of the provision of training and technical assistance in a number of general business areas to companies along the tourism supply chain that are centered around Soberania National Park and related cultural and historic assets. The trainings and firm-level assistance will be tailored to the specific needs of targeted firms, and may include:

- Firm-level technical assistance and training on exporting, strategic planning, financial management and accounting, quality management, HR development, contract management, IT and other technology upgrades, marketing, and product development
- Training of City of Knowledge trainers in the above areas, so as to assure sustainability and a multiplier effect of the skills transfer
- Business networking, including fostering national and international linkages, and developing trade networks
- Obtaining and utilizing financing for business expansion and growth

Phase II of the program will also undertake interventions that support the expansion and deepening of linkages along the tourism supply chain. This supply chain includes not only the traditional tourism industry sectors—hotels, restaurants, travel and tour operators, and recreation and entertainment firms—but it also includes the sectors that directly and indirectly support tourism and that account for a large portion of the jobs that are created in the industry as a whole. These subsidiary industries include construction, transportation, agriculture and agribusiness, retail businesses, financial management, and other business service providers (IT support and lawyers, for example). Activities to support the supply chain of tourism include the following:

- Creating chains among clients
- Improving quality of goods and services for clients already in a supply chain
- Improving quality of goods and services for clients to qualify for a supply chain
- Improving capacities of supply chains to provide goods and services
- Developing procurement processes for chain end-users.

## ***CONCLUSION***

Through this approach of deepening connections throughout the tourism supply chain, while concurrently building capacity of all of the businesses that comprises it, the Team will be able to strengthen the tourism cluster located near the Soberania National Park in Panama as a whole. Several potential clusters have been identified by GWU in phase I of this project. These clusters are centered on bird watching groups, indigenous communities, tour operators, educational institutions, and eco-adventure activities.

Many natural and cultural tourist attractions are managed by the public sector. In line with the growing trend toward more professional, commercially-oriented management through alliances with the private sector, technical assistance will be financed to support the awarding of tourism concessions to the private sector for the provision of facilities and services related to the development of tourism products in natural areas of tourism interest, historic heritage sites and other public spaces. UNPYME and its international partners in conjunction with Soberania National Park, surrounding communities, and clusters associated with building capacity, provides an ideal environment for the application of a MIF proposal.

**\*\*SAMPLE PROPOSAL FOR UNPYME\*\***

**THE SOBERANÍA NATIONAL PARK (SNP) SUSTAINABLE TOURISM AND SMALL BUSINESS PROJECT**

**I. Basic Project Data**

**Country/Region:** Panama/SNP  
**Project Name/Number:** Sustainable Tourism Project for Small Business Development  
**Team Leader/Members:** List MIF/IAD people involved  
**Date of Request:** June 30, 2005  
**Beneficiary/Executing Agency:** Union Nacional de Pequeñas y Medianas Empresas (UNPYME)  
**Tentative Dates:** *Intentionally blank*

**II. Background and Problem Statement**

- 2.1 Panama's key attractions are beaches, nature-based tourism and indigenous communities offering cultural & ethnic tourism experiences. Panama has an abundance of natural resources that are attractive to tourists. Panama has 4 UNESCO-recognized World Heritage Sites, and leads the region with the amount of protected areas; approximately one-fifth of the nation's land is protected. In addition to Panama offering the greatest number of diverse bird species in the region, Panama also offers flora and fauna biodiversity, historical significance and a rich heritage.
- 2.2 Panama has continued experiencing growth in international arrivals, which translates into an increase in tourist visitors and growth in the tourism sector. According to the Panama Institute of Tourism (IPAT) the international arrivals in the country have been persistently increasing since 1994<sup>23</sup>. Panama's 10-year real growth rate for population employed in tourism is 2.3%, behind Mexico at 4.8% and Belize at 3.7%. A major factor in the tourism industry is business travel through the active trade associated with the Panama Canal. Another key factor explaining some of the growth in tourism in Panama is the ambition of the country to become a hub for the region – the country has been expanding its seaports and other transportation centers.
- 2.3 According to the WTTC, Panama's tourism industry contributes 13.5%, *both directly and indirectly*, to Gross Domestic Products (GDP) in 2005. By 2015 this number is supposed to decrease slightly to 13.4%. This ranks Panama fourth among Latin American countries, behind Belize, Mexico, and Costa Rica. The 10-year real growth rate in this category is 3.4% for Panama compared to leaders Mexico at 5.6% and Costa Rica at 5.1%. In 2005 13.8% of Panama's total capital investment was invested in tourism related projects. By 2015 this number is expected to increase slightly to 13.9%. This ranks Panama fourth behind Belize, Costa Rica, and Ecuador.

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<sup>23</sup> IPAT, <http://www.ipat.gob.pa/estadisticas/2003/tocumendomicilio.html> (retrieved 06.05.2005)

The 10-year real growth rate in this category is 3.6% for Panama, with leaders Mexico at 8.9% and Chile at 4.9%.

- 2.4 The main factors that constrain the ability of Panama's tourism sector to ensure its long-term competitiveness are: 1) low profitability for small tourism businesses; 2) lack of awareness of national parks and other ecologically significant attractions amongst Panamanians and foreign tourists; 3) low adoption of best management practices and certification; 4) limited ability to offer premier tourist products and/or services. This proposal will outline these constraints in relation to SNP, located outside Panama City, and how the development of small business surrounding SNP can establish the foundation for increasing Panama's overall sustainable competitiveness.
- 2.5 Low profitability for small tourism businesses: The majority of the tourism enterprises fall within the micro, small and medium sized businesses that are mostly owner or family operated and function on a very limited budget while continuing to be faced with high operating costs.
- 2.6 Lack of awareness about SNP amongst Panamanians and foreign tourists: The majority of Panamanians and foreign tourists that visit Panama do not know that SNP exists. Although Panamanians and foreign tourists visit particular sites within SNP, these sites are not linked with the overall park in which the sites are located. Locals are not aware of the abundance of and biodiversity and ecological attractions that SNP has to offer.
- 2.7 Low adoption of best management practices and certification: Businesses within the SNP region have not adopted and/or implemented best practices for the small business management. Furthermore, SNP also does not have best practices for park management and training certification for guides. The cost of implementing best management practices and certification are beyond the financial capabilities of the small business and SNP.
- 2.8 Limited ability to offer premier tourist attractions, products and/or services: Due to the limited financial condition of small businesses and SNP, there are restrictions in their ability to develop the existing attractions, and establish new attractions, that take advantage of the region's rich biodiversity, which has the potential to translate into increased economic activity in the SNP region.

### **III. Project Objective and Description**

- 3.1 The goal of UNPYME is to develop small and medium enterprise in Panama and improve the capacity and competitiveness of the tourism industry. Through the growth of the tourism sector, UNPYME will help make Panama a thriving and sustainable tourism destination. The purpose of this project is to integrate sustainable tourism practices and products on key tourism sectors.
- 3.2 **Component 1: Building Capacity in the Tourism Supply Chain.** The purpose is to develop the portfolio of services and attractions in the tourism industry. Specifically, SNP and surrounding communities will grow into a well-known tourist destination by developing tourist attractions through improved park management, concessions and introducing private enterprise to share in the management of the national park.

3.3 **Component 2: Growth in Tourism Sub-Sectors – Heritage, Educational, and Eco-Tourism.** The purpose of this component is to create new sustainable tourism products, business development opportunities, standards and guides in the area of heritage, educational, and eco-tourism with public and private sector collaboration. The focus is on the opportunities available for developing heritage and educational tourism and establishing standards for operating business concessions at heritage sites. An additional opportunity to focus on is the introduction of voluntourism, a program that will be coordinated through a SAVE center to assist in reducing pressures on the canal watershed and SNP.

3.4 **Component 3: Branding, Marketing and Business Development for Specific Product Clusters.** The purpose is to develop and enhance marketing, promotion, product development and destination branding capacities. The focus is on facilitating business development through strategic market planning and developing marketing tools to facilitate successful access for the sustainable tourism product market. By establishing product clusters, efficient development can be realized by creating economies of scale and sharing costs within the clusters.

3.5 **Overall Achievements:** At the end of this project, Panama will have successfully built capacity in the sustainable tourism industry associated with SNP and the surrounding communities. Significant improvement will be gained in the competitiveness of the tourism industry and employment opportunities will be realized that contribute to poverty reduction and SME growth.

**IV. Executing Agency and Execution Structure- UNPYME**  
TBD

**V. Issues for IADB analysis**  
TBD

**VI. Action Plan – Calendar dates for project preparation.**  
TBD

**VII. Environmental and Social Strategy**

No negative environmental or social impacts are expected from this operation. In fact, the project is expected to create some positive impacts by increasing awareness of the local population and firms about the value of the natural and cultural heritage, by improving their capacity to benefit from business opportunities provided by tourism, and by implementing sustainable tourism

## **Addendum 9: Ten Potential Attractions in and around SNP**

The following lists the potential for improving and building the following attractions in and around SNP. Each attraction lists the infrastructure and necessary training required to attract more tourists.

### **1) *LA CUEVA DE MURCIELAGOS (Bat Cave)***

- Interpretive signage
- Entrance fee
- Flash lights
- Provide information on cave ecology (bats and insects)
- Training on how to be a guide
- Safety and emergency training

### **2) *BIRD WATCHING TOWER AT BOCA DE LA BAHIA***

- Water transportation
- Deck/tower
- Training on how to be a guide
- Knowledge of ornithology
- Environmental education
- Safety and emergency training

### **3) *CHILIBRE ECO-RESORT (the old Country Club)***

#### *Restaurant*

- Food preparation and sanitation
- Basic hotel and restaurant management
- Chairs, tables, dinner and glass ware

#### *Lodging/Camping*

- Training on housekeeping services
- Sheets, blankets, pillows, towels
- Equipment rental (tents, sleeping bags, nets)
- Trash management system
- Maintenance of grounds
- Training on quality control

### **4) *INTERPRETED BOAT RIDE TO THE HISTORIC SAN JUAN PEQUENI***

- Training on how to be a guide
- Knowledge of the ecology, geology and watershed management
- Safety and emergency training
- Boat, motor, oars, life-jacket
- Boat Dock

### **5) *INTERPRETED HIKE TO THE NATURAL BRIDGE***

- Training on how to be a guide
- Railings and steps where hended
- Signage
- Safety and emergency training

#### **6) *BOAT RIDE TO THE WATERFALL***

- Safety and emergency training
- Boat, motor, oars, life-jacket
- Boat Dock

#### **7) *EL CAMINO DEL REY (Option of guided or self-guided)***

- Training on how to be a guide
- Signage and interpretation
- Knowledge of archaeology
- Maintenance and upkeep

#### **8) *INDIGENOUS COMMUNITIES***

- Food preparation and sanitation
- Training on tourism management
- Training on how to be a guide
- Handrails and benches
- Community Center
- Bathrooms

#### **9) *CHILIBRE SPANISH SCHOOL***

##### *Language School*

- School and lodging facility
- Training on how to be language teachers
- Knowledge of local culture and environment
- Tables and chairs

##### *Lodging*

- Basic hotel and restaurant management
- Training on housekeeping services
- Sheets, blankets, pillows, towels
- Maintenance of grounds
- Training on quality control

#### **10) *HOMESTAYS***

- Food preparation and sanitation
- Lodging (separate room) for tourist
- Bathrooms
- Running Water (showers and laundry)

## **Addendum 10: Camino de Cruces Trail Festival and Press Release (English and Spanish versions)**

### ***SAMPLE PRESS RELEASE***

#### **Camino de Cruces Historical Celebration**

On 10 December, 2005, Soberanía National Park (SNP), Panama, will hold an historical celebration of the Camino de Cruces trail. The event aims at promoting the significance of Camino de Cruces and celebrating the recent completion of the initial restoration of the trail. The Camino de Cruces historical celebration will include festivities at the Metropolitan Park and a hike on the trail. The event will begin at 9.00 a.m. and is open to all residents and visitors of Panama and the surrounding regions.

Camino de Cruces was built around 1550 by Spanish conquistadors who laid out the route from old Panama City to the town of Venta de Cruces, located on the Chagres River. This trail was heavily trodden by the Spanish Crown in Panama (Castilla de Oro) to haul the valuable cargos of gold, silver, jewelry, and works of art from the South Sea (Pacific Ocean) to the Kingdom of Spain. It was also used by thousands of men during the California Gold Rush of the 1850's. Today, the only remnants of the town, which is now underwater, are the ruins of a church. The historical significance of the trail comes from the fact that it was the first route to connect the Pacific and the Atlantic Ocean. In time, the trail was used by colonists and conquistadors until 1855 when the Panama Canal railroad opened.

Today, remnants of the cobblestone road, originally built five centuries ago, can still be seen. The historic trail begins at the Metropolitan Park and goes through the Camino de Cruces Park, ending at Venta de Cruces in Soberanía National Park. Although portions of the original path are yet to be uncovered, the existing almost 20-kilometer trail attracts international and local visitors interested in history and nature. The first phase of the clean-up and upgrade of the trail was completed in June and was initiated by the Autoridad Nacional del Ambiente, Soberania National Park, Las Cruces Trail National Park and the Metropolitan Park. Funding for the initiative came from ANAM, USAID and private sponsors. The future upgrade of the trail will include the installation of signage and visitor infrastructure.

With this Saturday's event, the organizers aim to promote the cultural and historical importance of Camino de Cruces and to popularize it among the residents and visitors of Panama. The trail has the potential to attract many local and international tourists not only with its historical significance, but also the rich nature and biodiversity that hikers can experience. The Camino de Cruces historical celebration is planned with the ambition to turn it into a regular annual celebration. Among the dignitaries expected to attend the event are the President of the country His Excellency Martín Torrijos, General Administrator of ANAM Ligia Castro de Doens, USAID Regional Director Kermit Moh and others.

For more information, contact ...

###

## ***EJEMPLO DE COMUNICADO PARA LA PRENSA***

### **Celebración histórica en el Camino de Cruces**

El 10 de diciembre de 2005 el Parque Nacional Soberanía (PNS) acogerá una celebración histórica en el Camino de Cruces. El objetivo del evento es promover la importancia del Camino de Cruces y celebrar la reciente finalización de la restauración inicial del camino. La celebración histórica del Camino de Cruces incluirá actos en el Parque Metropolitano y una caminata por el sendero. El evento comenzará a las 9.00 a.m. y está abierto a todos los residentes y visitantes de Panamá.

El Camino de Cruces fue construido alrededor de 1550 por los conquistadores españoles quienes decidieron conectar la Ciudad de Panamá y el pueblo de Venta de Cruces, situado junto al río Chagres. Este camino se usó intensamente por la Corona española en Panamá (Castilla de Oro) para transportar los valiosos cargamentos de oro, plata, joyería y obras de arte desde el océano Pacífico hasta España. Asimismo fue utilizado por miles de personas durante la época de la fiebre del oro en California. En la actualidad, los únicos restos que quedan del pueblo, que está ahora sumergido bajo el agua, son las ruinas de la iglesia. La relevancia histórica deriva de ser la primera ruta que conectaba los océanos Pacífico y Atlántico. Con el tiempo, el camino fue utilizado por colonos y conquistadores hasta el año 1855 cuando el ferrocarril del Canal de Panamá empezó a funcionar.

Hoy en día, los restos del camino empedrado que originalmente fue construido hace cinco siglos todavía pueden verse. Actualmente el Camino de Cruces es un sendero histórico que comienza en el Parque Metropolitano, atraviesa el Parque Camino de Cruces y termina en Venta de Cruces en el Parque Soberanía. Si bien partes de la vía original aún están por descubrir, los casi 20 kilómetros del camino existentes atraen visitantes locales e internacionales interesados en la historia y la naturaleza. Justo este mes se ha terminado la primera fase de la limpieza y mejora del camino, actividades iniciadas por la Autoridad Nacional del Ambiente, el Parque Nacional Soberanía, el Parque Nacional Camino de Cruces y el Parque Metropolitano. Los fondos necesarios para llevar a cabo la iniciativa han sido aportados por ANAM, USAID y patrocinadores privados. Las futuras mejoras en el parque incluirán la instalación de señalización y la infraestructura para el visitante.

Con los actos del sábado, los organizadores pretenden promocionar la importancia cultural e histórica del Camino de Cruces e incrementar su popularidad entre los residentes y visitantes de Panamá. El camino posee el potencial para atraer muchos turistas locales e internacionales, no solo debido a su relevancia histórica sino también por la rica naturaleza y biodiversidad que los visitantes encuentran. Por todo ello, se espera que la celebración histórica del Camino de Cruces se convierta en una celebración anual con carácter regular. Entre las personalidades que se espera que asistan a los actos se encuentra el Presidente de la República el Excmo. Sr. Martín Torrijos Espino, la Administradora General de ANAM Dra. Ligia Castro de Doens y el Director Regional de USAID Sr. Kermit Moh.

Para información adicional, contacte con...

###

### **Introduction**

The Camino de Cruces Trail Historical celebration has been identified as an opportunity to market and promote the Soberanía National Park (SNP) and surrounding communities and businesses. The first annual festival is scheduled to be held on December 10, 2005.



### **The Purpose of the Historical Celebration**

In order to celebrate the Camino de Cruces Trail in the SNP and its significance in the history of Panama, the creation of an annual historical celebration is being proposed. This celebration would specifically highlight the section of the trail that runs from the town of Venta Cruces to the Madden highway.

### **Cleanup, Restoration and Development of the Trail**

As part of the celebration preparation, the route need to be identified and cleaned up. An initial clean-up and restoration would take place between July and December 10,

2005, and ongoing restoration and maintenance continuing after the festivities. The expected first historical celebration could be used to attract non-governmental organizations, corporate sponsors and volunteer organizations, which can supplement the efforts of the main initiators of the restoration activities - Autoridad Nacional del Ambiente, Soberania National Park, Las Cruces Trail National Park and the Metropolitan Park.

### **History of the Trail**

The original Camino de Cruces Trail was completed around 1550 by Spanish conquistadors who laid out the route from old Panama City to the town of Venta Cruces, which was located on the Chagres River. A trading post was established in the town in 1536 and Indian slave labor was used to build a cobblestone road. Part of this road later became the Camino de Cruces Trail. Today the historic trail begins at the Metropolitan Park and goes through the Camino de Cruces Park, ending at Venta Cruces in SNP. Today, the only remnants of the town, which is now underwater, are the ruins of a church. The historical significance of the trail comes from the fact that it was the first route to connect the Pacific and the Atlantic Ocean.

A variety of types of travelers used the trail, including colonists and conquistadors, from the time of its opening until 1855 when traveling on the Panama Canal railroad replaced it. The trail was used in the rainy season to transport gold and silver from Spanish conqueror Francisco Pizarro's conquest of Peru. Pirates used it in the 18<sup>th</sup> and 19<sup>th</sup> centuries and Americans from the east coast used it to travel to California to participate in the California Gold Rush of the 1850's. Additionally, one of the first labor actions in the history of Panama occurred on the trail.

Following is a list of some of the major historical events that took place on the trail and would be highlighted during the festival:

- Sir Francis Drake unsuccessfully attempted to steal a treasure filled gold mule train traveling from Panama City to Venta Cruces in February 1573.
- Buccaneer Henry Morgan, the King of all Pirates, plundered old Panama City, Panama Viejo, while searching for gold in January 1671.
- Ulysses S. Grant crossed the Isthmus of Panama from Colon to Panama City in six weeks while traveling to California with the U.S. 4<sup>th</sup> Infantry in July of 1852.

### **Design of the Historical Celebration**

The Camino de Cruces Trail Festival will include various events and activities at SNP, Camino de Cruces National Park and the Metropolitan Park. The main festivities will be followed by an optional interpretive hike on the trail where attendees will have the opportunity to learn about the history of the trail and the SNP. The festival will begin at 9.00 a.m. and is open to all residents and visitors of Panama and the surrounding regions.

Suggested activities include the following:

- A handcrafts fair with vendors from indigenous communities selling their wares
- An interpretive hike on the trail where participants learn about the historical, cultural and geographical aspects of it through trained guides

- Traditional Panamanian food and dance
- Booths and/or displays explaining and celebrating the history and various historical events that occurred on the trail
- Storytellers and/or speakers relating the history of the trail

### **Planning the Festival**

In order to ensure the effective planning and coordination of the celebration, there is a need to develop a detailed event timeline, detailed production schedule and budget for the event. Preliminary drafts of these event management tools were developed by the consulting team and are attached at the end of this addendum. The consulting team also developed a potential evaluation form that could be used for the event, as well as a proposed design of the interpretative hike, which is proposed as part of the event.

### **Funding and Sponsorship**

Local businesses and organizations should be identified and contacted to request funding and/or sponsorship for the festival. USAID would then be approached to request matching funding. The following is a sample list of who could be initially contacted:

- Spanish Development Agency—this organization has already been contacted. Unfortunately they have already determined their budget for the next year and cannot change it.
- Soberania National Park (SNP)
- Canopy Tower Ecolodge and Nature Observatory
- Gamboa Rainforest Resort
- Local Panamanian businesses and associations

**Sample Timeline for Camino de Cruces Trail Historical Celebration**  
**December 10, 2005**

<b>Deadline</b>	<b>Date Completed</b>	<b>Activity</b>	<b>Responsibility (Individual or Committee)</b>	<b>Status</b>	<b>Comments</b>
July 2005		Hire Event Planner			
July 2005		Form Planning Team			
July 2005		Initial planning team meeting			
July 2005		Recruit volunteers for restoration and cleanup of the trail			
July 2005 -- 12/9/2005		Initial restoration and cleanup of trail			
July 2005		Prepare list of possible sponsors and funding organizations			
July 2005		Draft and revise letter/invitation to possible sponsors-include information sheet on festival.			
July 2005		Approach organizations for funding			
July 2005		Finalize sponsors and funding			
August 2005		Site visit to Metropolitan Park			
August 2005		Site visit to Gamboa Rainforest Resort			
August 2005		Site visit to Camino de Cruces Trail			
August 2005		Determine format of 2005 festival. Also determine size of event, potential number of attendees and time frame			
August 2005		Decide on logo			
September 2005		Design and implement website with contact information including email address			
Continuously		Update website with new information			
September 2005		Meet with indigenous communities regarding participation in handcrafts fair			
September 2005		Generate list of possible vendors			
September 2005		Generate list of possible speakers and storytellers to approach			
September 2005		Draft and revise letter/invitation to possible speaker and storytellers-include information sheet on festival. Send letters and invitations.			
September 2005		Finalize speakers and storytellers			
October 2005		Create production schedule (agenda) for the day of the event			
October 2005		Draft and implement marketing plan			
October 2005		Draft and implement advertising plan			
October 2005		Draft hike registration form and post to website			
Continuously		Receive and process hike registration forms			

<b>Deadline</b>	<b>Date Completed</b>	<b>Activity</b>	<b>Responsibility (Individual or Committee)</b>	<b>Status</b>	<b>Comments</b>
November 2005		Research possible caterers			
November 2005		Determine food and beverage needs and place order			
November 2005		Determine AV needs and place order for equipment			
November 2005		Determine signage needs. Design and arrange for production			
November 2005		Create and distribute map and directions to Metropolitan Park to all involved including speakers, sponsors, staff, faculty, vendors, volunteers, etc.			
November 2005		Create and distribute production schedule (agenda) for day of event			
12/10/05		Onsite management of festival-- includes set-up, coordinate speakers, caterers, vendors, sponsors, volunteers, AV, registration, etc			
12/10/05		Conduct festival and hike			
12/10/05		Conduct onsite evaluations and surveys while festival is ongoing			
12/10/05		Assist with tear-down of festival after the event has concluded			
December 2005		Send evaluation forms to everyone involved, including speakers, sponsors, staff, faculty			
December 2005		Send thank you letters after event has concluded. Send to speakers, sponsors, vendors and anyone involved in the festival			
December 2005		Process and interpret surveys and evaluation forms. Prepare final report(s)			
December 2005		Final committee wrap up meeting			

**Sample Production Schedule for  
The Camino de Cruces Trail Historical Celebration  
December 10, 2005  
Metropolitan Park, Camino de Cruces National Park and Soberanía  
National Park  
(Additional activities to be added as they are finalized during  
planning)**

<b>Time</b>	<b>Activity</b>	<b>Responsibility</b>	<b>Comments</b>
7:00 am	All staff and volunteers arrive at the beginning of the trail at Metropolitan Park	All event staff, park staff and volunteers	
7:15 am	All staff and volunteers briefed by organizers on last minute details	All organizers, event staff, volunteers, park staff	
7:30 am	Set-up	All organizers, event staff, volunteers, park staff and vendors	
9:00 am	Festival opens	All organizers, event staff, volunteers, park staff	
10:00 am	Hikers leave for Camino de Cruces Trail Interpretive Historical Hike	Organizers, guides	
Approximately 5:00 pm	Hikers return	Guides	
7:00 pm	Festival Ends	All organizers, event staff, volunteers, park staff	
8:00 pm	Tear down	All organizers, event staff, volunteers, park staff and vendors	

**SAMPLE BUDGET FOR CAMINO DE CRUCES TRAIL HISTORICAL  
CELEBRATION**

<b>Description</b>	<b>2005</b>	
<b>Income</b>	<b>Amount</b>	
Sponsorships	40,000.00	
USAID Matching Grant	40,000.00	
Other (Donations, Gifts, etc.)	20,000.00	
<b>Total Income</b>	<b>100,000.00</b>	
<b>Expenses</b>		
Food and Beverage	5,000.00	
Entertainment	5,000.00	
Event Planner Salary	20,000.00	
Marketing	10,000.00	
Graphic Design	2,000.00	
Postage and Delivery	500.00	
Printing and Reproduction	1,000.00	
Supplies	1,000.00	
Merchandise	1,000.00	
Promotion/Advertising	15,000.00	
Tour Restoration and Development	5,000.00	
Hike Development	5,000.00	
Guide Training	1,000.00	
Volunteer Expenses (T-shirts, Name Tags, etc.)	500.00	
Transportation	5,000.00	
Equipment Rental	5,000.00	
Security and Licensing Fees	5,000.00	
Insurance	10,000.00	
Website Development and Updates	2,000.00	
Miscellaneous	1,000.00	
<b>Total Expenses</b>	<b>100,000.00</b>	

## **Sample Attendee Evaluation Form for the Camino de Cruces Trail Historical Celebration and Interpretive Hike**

Thank you for attending the Camino de Cruces Interpretive Historical Hike. Please take a few minutes to answer the following questions. Your feedback will assist organizers in improving next year's festival. Thank you!

1. How did you hear about the festival and hike? (Please check one.)  
Newspaper ad\_\_\_ Radio ad\_\_\_ Press kit\_\_\_ Brochure\_\_\_ Flyer\_\_\_  
Hotel concierge (which hotel) \_\_\_\_\_  
Other\_\_\_\_\_

2. What activities did you participate in or attend during the celebration? (Please check all that apply.)  
\_\_\_ Hike  
\_\_\_ Watching traditional Panamanian dancing  
\_\_\_ Eating traditional Panamanian food  
\_\_\_ Handcrafts fair  
\_\_\_ Listening to speakers  
\_\_\_ Listening to storytellers  
\_\_\_ Other

4. Which activity did you enjoy the most and why?\_\_\_\_\_

5. Which activity did you enjoy the least and why?\_\_\_\_\_

3. If you participated in the hike, would you do so again? Yes\_\_\_ No\_\_\_ If no, why?\_\_\_\_\_

4. If you participated in the hike, would you consider hiking other trails in the park? Yes\_\_\_ No\_\_\_ If yes, which one?\_\_\_\_\_

3. Would you consider attending the festival again? Yes\_\_\_ No\_\_\_  
If no, why?\_\_\_\_\_

Additional comments:

## **Addendum 11: Inventory of Chilibre Community-made Products**

### **Familiarization trip for tour operators**

At least three familiarization trips with the participation of at least 7 selected national tour operators will be organized to visit the Bat Cave, El Camino del Rey, Chilibre's Eco-Resort amongst others, using community tourism services. This activity will help to increase tourism package sales to Chilibre's target sites.

### **Development of marketing materials and product support**

Based on The George Washington Consulting Teams analysis of Chilibre's current tourism products situation, a marketing campaign will be designed to promote target sites and community-based tourism services. In partnership with IPAT, AED and Chilibre's proposed Destination Management Company, Crusadors of Chilibre, CPI will produce articles for national and international newspapers, articles in specialized magazines and marketing materials, and promotion in TV programs. Contacts with tourism travel guides (Lonely Planet, Rough Guides, among others) will be strengthened to initiate the information of the sites published in latest editions.

As part of the destination campaign, high quality promotional materials will be designed and distributed. These materials will include: brochures, hand outs, posters and a promotional video. These will be distributed in selected feeder markets at the national and international level.

### **Tour design and marketing support for tour operators and groups**

A crucial element for successful marketing of community-based ecotourism products is the establishment of alliances with national tourism private sector, specifically with tour operators and hotel companies, which have a deep knowledge of the tourism market and control an important portion of the tourism flow in the country. Chilibre's Destination Management Company will link local communities with private partners, to enhance collaboration and improve sales.

### **Trainings for more competitive artisan products**

Training programs will be designed to produce high quality products, and link local producers with the national and international market.

## Handicrafts and Artisan Work of Panama



**Mola**, in Kuna Language is the blouse of the Kuna women's traditional dress, and is decorated with two very complex handcrafted panels (front & back). These panels are created with a technique called "reverse applique", like a colorful collage of textiles with designs extracted directly from ancestral body paintings, like ones still practiced by neighboring groups like The EMBERA-WOUNAAN.

**Tagua**, the nut of a family of plam trees, is dried for 5 to 10 years, in which it solidifies. The Tagua nut is processed into many articles



The Wounnan and Embera Indians are turning these "ivory nuts" into truly exceptional miniature sculptures. Panama's Tagua sculptures have won the UNESCO prize for handicrafts.



The **Wounaan & Embera baskets** are well known for their fine detail and craftsmanship, these baskets are delicately woven using natural fibers found in the forest. The women use their traditional methods and with a variety of plants and earth extracts the baskets fibers are dyed. Seldom if ever, are two baskets alike. The original designs portray life in their villages, forest animals and plants.



The original **Folk Pottery of Panama** was unearthed in Panama in the early 1960's, artifacts left from the Cocle population, dating back 500-1200 AD. The Cocle population rose 500 AD and survived until 1000, whose pottery is distinguished by their lively asymmetrical animal forms. Archeological finds suggest that present day Cocle region of Panama has about 600 years of pre-history and was also an important center during colonial times. In almost every major town of Cocle you will find it is characterized by a colonial architecture with Spanish influence.

**Carvings** made from the Cocobolo range in color from a reddish to deep, rosy brown, to a black (the latter coming from root segments). The wood itself is quite hard and has been exploited for years. Carving Cocobolo is a male-dominated profession. Traditionally, Embera & Wounaan Indians have carved Cocobolo and other hardwoods as Shamans's curing sticks and domestic items; it is only in the past 15 years that a market has developed for intricate carvings.





**Chunga Masks** are hand woven by the women of the Embera & Wounaan Indians; the women use the same fibers they use to weave their famous baskets. These masks are used in tribal ceremonies and resemble some of the animals they share the rainforest with, demonstrating the importance of their surrounding environment and how connected they are with the environment.



The **Chaquira Jewelry** represents the Ngobe-Bugle Indians, whose ancestors were the fighters encountered by the conquistadors, rated among the most skilled of all warriors in the Western Hemisphere. Their ornaments were quite different from today's version; the colors were dull and not so tightly beaded. The more historic jewelery was fashioned of pebbles, pieces of bone, seeds and seashells, which the Indians colored with homemade dyes.

The **Painted Feathers** have miniature hand painted decor by artisans in Panama with a variety of motifs like: The Panama Canal landmarks, Panamanian folk music instruments, Rainforest animals, and rural landscapes of Panama.



The **Wood/Seed Beaded Jewelry**, are handcarved beads or seeds from specific trees found in their surrounding environment. These Folk & Indigenous Jewelry pieces, some made of natural products like, wood beads, natural fibers, carved coconut shell & dyed water melon seeds hand crafted by various Folk & Indigenous Artisans.



The **Toucan Eyeglasses Pouch** is one of many handcrafts that have been altered from the more ethnic and traditional use to a product that can be utilized in everyday life, meanwhile representing the culture and showing resemblances to the Mola applique. The same fashion of design is used in jackets, shirts, dresses, smocks hot pads and oven-mitts.



The **Mini Cutarras/Folk Sandals** are among many small handcrafts such as miniature figurines, key chains, and accessories that demonstrate great detail and a strong sense of craftsmanship among the Panamanians.

**Addendum 12:**  
**Sustainable Tourism Product Development Manual**

# Desarrollo de Productos Turísticos Competitivos para Panamá

*Un Manual para Empresarios y Operadores  
de Pequeños Negocios*

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## Propósito de este manual

El turismo se está convirtiendo rápidamente en uno de los principales sectores de actividad económica del mundo. Los ingresos generados por actividades turísticas ya representan una parte significativa de la economía mundial y se espera que su relevancia económica continúe creciendo en los próximos años.

Al mismo tiempo, muchas áreas y destinos en todo el mundo están apreciando los beneficios que el turismo puede traer a un territorio. Mientras que los sistemas de transporte y telecomunicaciones expanden sus horizontes, lugares que en el pasado no hubieran sido considerados como destinos turísticos ahora están disfrutando de los beneficios de ingresos en esta rama de actividad.

Sin embargo, el turismo también puede acarrear efectos negativos. Así, el turismo de masas con frecuencia ha generado diversos problemas en los destinos turísticos, tales como el abuso de los recursos naturales, contaminación, tensión social e inestabilidad económica. Pero no todas las actividades turísticas han de producir estas consecuencias negativas.

Actualmente dentro del turismo se han abierto nuevas posibilidades. El turismo alternativo (ecoturismo y turismo de patrimonio histórico, ambiental y educativo), o el de eventos son algunas de las opciones que un destino puede incorporar en su plan de desarrollo turístico. Estos productos turísticos ofrecen una experiencia nueva al viajero, mientras que proporcionan una base económica sostenible y protegen los recursos naturales y culturales. Las tendencias indican que el turismo alternativo es cada vez más popular como opción turística, dado que los turistas exigen más de sus vacaciones y buscan la “experiencia” de sus vidas.

No obstante, para asegurar que el turismo sea sostenible se requiere una cuidadosa planificación y un control constante. Con la preparación apropiada, cualquier región está en disposición de convertirse en un destino turístico de éxito.

Este manual ha sido preparado para ayudar al sector turístico en Panamá en el ámbito del desarrollo de sus productos turísticos con el objetivo de que lleguen a ser sostenibles y competitivos. Ha sido diseñado como una guía de auto-ayuda con el propósito práctico de asistir a empresarios de negocios pequeños en el desarrollo de nuevos productos turísticos y mejorar los productos actuales.

Vamos a comenzar con explicaciones precisas de producto turístico y cómo desarrollarlo desde la perspectiva de un destino y del punto de vista de un empresario. Al identificar un producto específico, el proceso de planificación y marketing va a comenzar con un enfoque de innovación. Cada paso de la etapa de planificación ha sido explicado de manera fácil para que usted, empresario o líder de la comunidad, cree su propio producto turístico y disfrute de los beneficios que el turismo puede traer. Esperemos que sea de utilidad para usted y le deseamos mucho éxito.

## **1. Introducción al Desarrollo de un Producto Turístico**

El primer paso en el desarrollo con éxito de actividades turísticas es un análisis del “producto turístico”. Usted va a desarrollar y vender un producto nuevo o mejorado, y eso significa que, como todos los fabricantes de productos, usted necesita saber tanto (o más) sobre la creación de un producto de lo que saben sus competidores.

### ***1.1 Aquí Están los Puntos Claves que Necesita Saber:***

- La definición del producto turístico, en el nivel micro y macro
- Componentes de un producto turístico
- El papel de los sectores público y privado en el desarrollo del producto
- Puntos claves para el desarrollo con éxito de los productos turísticos
- Identificación de recursos turísticos

### ***1.2 ¿Qué es un Producto Turístico?***

Un producto turístico es un conjunto de elementos tangibles e intangibles que incluye:

recursos y atracciones  
+  
instalaciones e infraestructura  
+  
servicios  
+  
actividades  
+  
imágenes y valor simbólico

que ofrecen BENEFICIOS que sean atractivos para un grupo específico de clientes para satisfacer las motivaciones y expectativas relacionadas con su tiempo libre.

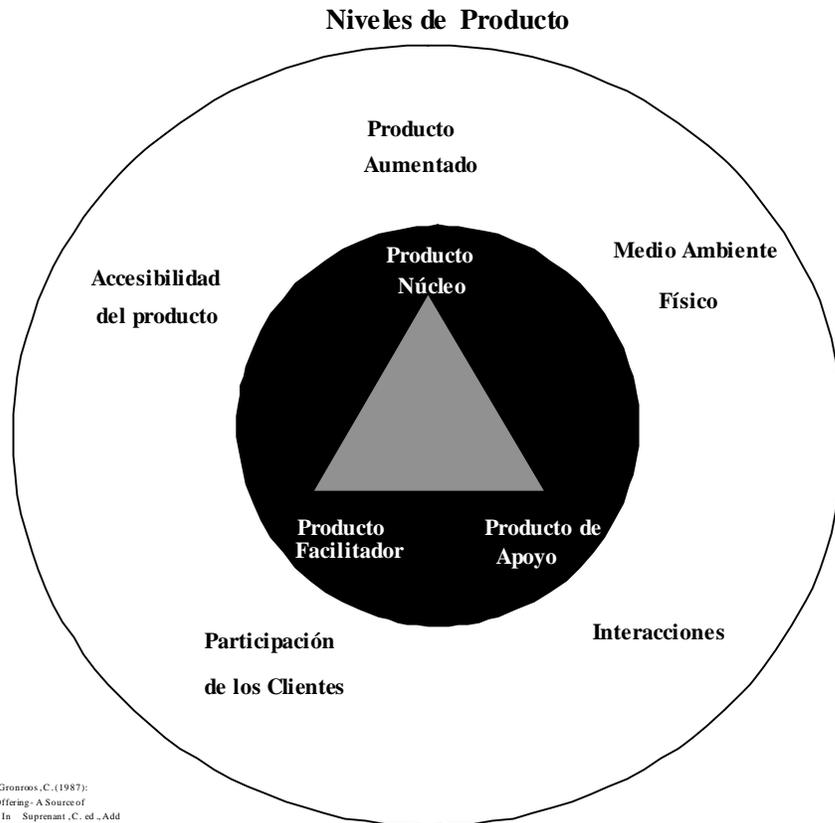
### 1.3 Componentes del Producto

En el sector turístico es importante que se consideren los cuatro niveles de productos. Estos niveles son el producto núcleo, el producto facilitador, el producto de apoyo y el producto aumentado.

1. **Producto Núcleo:** la esencia de lo que está siendo comprado o lo que el consumidor quiere. En turismo, el producto núcleo normalmente es la experiencia misma, como la puesta de sol en una playa aislada o el olor de flores frescas en la mañana.
2. **Producto Facilitador:** estos bienes o servicios son necesarios para que el consumidor pueda utilizar el producto núcleo. En un hotel, este puede incluir servicio a los huéspedes como teléfonos, lavandería o recepción.
3. **Producto de Apoyo:** se utiliza para hacer que el producto núcleo sea más atractivo y supere al de los competidores.
4. **Producto Aumentado:** incluye los servicios necesarios para que el consumidor utilice el producto núcleo. Gira en torno a la accesibilidad del producto, su imagen, la satisfacción del cliente y la interacción con el mismo.

La interacción de estos cuatro niveles es mostrada en la Figura 1:

**Figura 1: Niveles del Producto**



Source: Adapted from Gronroos, C. (1987):  
Developing the Service Offering - A Source of  
Competitive Advantage. In: Suprenant, C. ed., Add  
Value to Your Service, Chicago: American Marketing Association, p.83.

## **2. Innovación de Producto**

El turismo se caracteriza por ser un sector competitivo ya que los turistas pueden elegir entre miles de destinos y productos específicos. De este modo, los productos turísticos de Panamá compiten con los de otros países, y al mismo tiempo compiten con otros productos dentro del mismo país.

Para que el desarrollo del producto turístico sea eficiente, hay que considerar cuidadosamente el grado comparado de atracción de cada producto actual y propuesto. Con este propósito, la segunda sección de este manual trata los siguientes temas:

- Identificación de recursos turísticos y atracciones potenciales
- Guía de desarrollo de productos para los destinos
- Guía de desarrollo de productos para los empresarios
- Evaluación de los competidores
- Reconocimiento de marca
- Integración de los productos turísticos

### ***2.1 Identificación de Recursos Turísticos***

Los recursos turísticos son la base del desarrollo turístico y a menudo coinciden con el motivo principal para visitar el destino. Es por ello que la conservación y administración de estos recursos debe ser una prioridad. Si no se presta la adecuada atención al diseño y a la gestión, estos activos tan importantes pueden perder gran parte de su valor.

Por eso, es aconsejable elaborar un inventario y realizar una evaluación de los recursos actuales y potenciales. Esto ayudará a gestionar recursos bajo la presión de un gran número de visitantes, además de identificar oportunidades nuevas, como se ilustra en el siguiente gráfico:

### ***2.2 Pasos para Crear el Inventario de Recursos***

Identificación	Tipo Ubicación geográfica Descripción
Acceso y alrededores	Cómo llegar Características del área cercana Necesidades de acondicionamiento
Evaluación Cualitativa	Singularidad Grado de atracción Conservación
Evaluación Global	Evaluación comparativa Nivel de uso actual Potencial (sólo o combinado con otros) Prioridad

Los recursos no se convierten en atracciones por el mero hecho de destinarlos a actividades turísticas, sino que es necesario alcanzar cierto nivel de desarrollo en los accesos y en su capacidad de atracción desde el punto de vista de los turistas. El objetivo de desarrollar atracciones es intentar satisfacer las necesidades recreativas de los visitantes. Estas atracciones tienen la capacidad de atraer personas y pueden estimular el crecimiento, por lo que el trabajo de los promotores de desarrollo es crear un contexto con atracciones que sirvan para que el turista disfrute de su visita.

### **2.3 Recursos con Potencial Para Atraer Turistas**

#### **CLASES DE RECURSOS:**

- Recursos naturales: Parques, lagos, playas, paisajes pintorescos . . .
- Patrimonio histórico: Monumentos, museos, sitios históricos . . .
- Manifestaciones de cultura tradicional y moderna: Arte, gastronomía, música, arquitectura, bailes folclóricos...
- Atracciones hechas por el hombre: Parques, resorts o complejos vacacionales, campo de golf, centro de convenciones
- Actividades: Caminatas, escaladas, ciclismo, pesca, observación de pájaros

Las atracciones pueden ser clasificadas de la siguiente forma:

*Propiedad:* Pública, privada (comercial o de organizaciones sin fines de lucro)

*Permanencia:* Las atracciones referidas a sitios tienen una ubicación fija mientras que las atracciones relacionadas con eventos son más cortas en duración pero la ubicación puede cambiar.

*Poder de atracción:* Mercados locales, para el fin de semana o destinos nacionales/internacionales

El Anexo 1 contiene una serie de listas que puede ser utilizada para evaluar cada atracción en una región. Esas listas contienen un sistema de evaluación que permite identificar las atracciones más competitivas, así como clasificarlas en atracciones locales (L), de fin de semana (F), o como destinos nacionales/internacionales (D).

Usted debe evitar ser demasiado analítico o descriptivo. Solamente tiene que recoger datos útiles que le puedan ayudar a tomar decisiones para ofrecer una visión general de la situación. En algunos casos, su oferta estará basada en recursos únicos con mucho poder de atracción, pero también puede identificar varios recursos secundarios que pueden ser combinados con actividades interesantes para formar la base de un producto competitivo.

## **2.4 Guía para el Desarrollo de Productos**

Tras crear un inventario de todas las atracciones de una región, el proceso de desarrollo de producto continúa adentrándose en una nueva fase. Como ya se ha mencionado anteriormente, las atracciones son la razón principal para visitar al destino. Es por esta razón que el desarrollo de los productos debe centrarse principalmente en atracciones, seguido de los servicios complementarios. El Centro de Turismo de la Universidad de Minnesota identifica cinco elementos para evaluar atracciones después de completar el inventario. Estos elementos son los siguientes:

**Calidad:** Los turistas quieren más valor por su dinero y un factor importante es la calidad del producto. Es necesario examinar los servicios ofrecidos, además de la protección de los recursos naturales y socio-culturales. La comunidad involucrada debe evaluar la calidad de las atracciones en todos los niveles.

**Autenticidad:** Los turistas viajan a ciertas zonas por un periodo de tiempo limitado, y muestran mayores niveles de satisfacción cuando sienten que su experiencia es genuina.

**Singularidad:** Dado que cada vez más áreas incorporan actividades turísticas en su desarrollo económico, es necesario crear más productos turísticos. Al completar el inventario, surgirá una gran variedad de posibilidades que pueden servir como atracciones potenciales.

**Expansión de las Actividades:** El hecho de tener una atracción única no es suficiente. Los turistas deben tener varias opciones para que participen en más actividades y para que se queden más tiempo en el destino. Es importante que las actividades adicionales sean compatibles con la atracción principal y los recursos naturales y culturales de la comunidad.

**Poder de Atracción:** Este concepto es una combinación de la distancia que los turistas están dispuestos a viajar, del lugar de dónde vienen y de la forma en que llegan a la atracción. Las atracciones deben ser agrupadas en primarias y secundarias: las atracciones primarias deben ser utilizadas para desarrollar una estrategia de marketing para el destino, mientras que las atracciones secundarias proporcionan a los turistas opciones de actividades después de visitar las atracciones primarias. Ambos tipos son igualmente importantes para el desarrollo de un destino.

El siguiente paso en el desarrollo del producto turístico es crear la combinación apropiada de atracciones. Esto puede hacerse con la información obtenida en los dos pasos previos, el inventario y la evaluación. Según Gartner<sup>i</sup> hay dos maneras de agrupar atracciones para llegar a la combinación ideal: agrupación orgánica y atracción temática.

**Agrupación Orgánica** es la agrupación de atracciones similares, lo que se usa para aumentar el valor total de cada atracción. Como Gartner explica, “Un edificio antiguo es un edificio antiguo, pero diez edificios antiguos es un distrito histórico”<sup>ii</sup>. Atracciones

que no son atracciones por sí mismas pueden ser agrupadas con atracciones similares para crear una atracción primaria. Esto no solamente aumenta el poder de las atracciones, pero también disminuye los gastos de marketing y crea más opciones para realizar actividades turísticas.

**Atracción Temática** es crear una imagen que puede ser utilizada toda la atracción. Los parques temáticos han seguido el modelo de Disney al crear destinos de fantasía por todo el mundo. Pero un área temática no tiene por qué aplicarse únicamente en los parques temáticos. Una comunidad entera puede asumir una identidad, como un pueblo restaurado o una región indígena. Según Gartner, “la idea del tema es crear singularidad”<sup>iii</sup>. La clave del proceso es crear una imagen que sea única al área y que se pueda mantener en toda la atracción.

## 2.5 Guía de Desarrollo de Productos para Operadores de Pequeñas Empresas

El ingrediente clave en este apartado es investigar ciertos aspectos: las tendencias de los índices de ocupación, los cambios en los mercados, y el crecimiento y la disminución de áreas específicas son factores esenciales en el proceso de tomar decisiones. ¿Necesita Panamá productos nuevos? ¿Quiere Panamá diversificar su base de mercado de turistas? ¿Quiere Panamá utilizar todos sus recursos para mejorar sus productos actuales o dedicar sus recursos a productos nuevos que pueden diversificar el mercado de turistas?

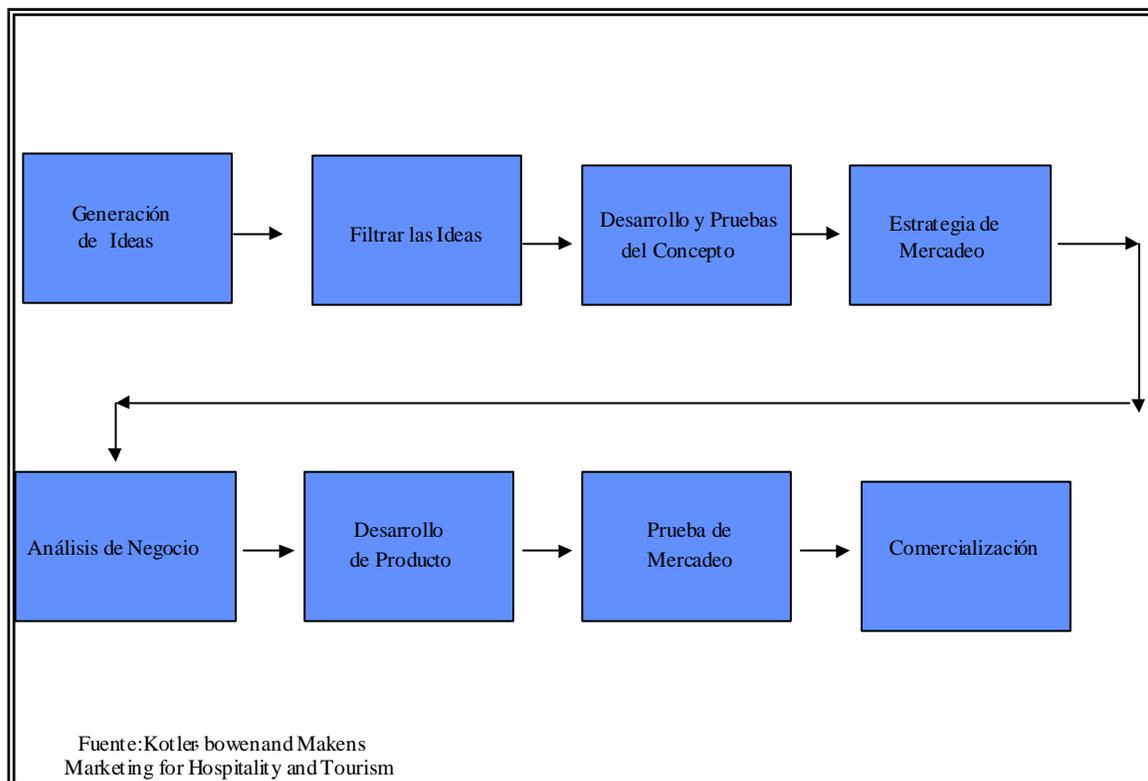


Figura 2: Etapas Principales en el Desarrollo de Productos Nuevos

## **2.6 Evaluando la Competencia**

Antes de iniciar un proyecto, es aconsejable identificar proyectos modelos, compararlos, y después utilizar las mejores prácticas para aprender de ellos y evitar sus errores.

## **2.7 Proyectos Modelos**

No es siempre posible encontrar proyectos idénticos. Sin embargo, encontrar proyectos que son similares ayudará a identificar las necesidades para sus propios proyectos. Le evitará algunos de los esfuerzos iniciales y también errores potenciales.

## **2.8 Mejores Prácticas**

La idea de “Turismo Verde”, turismo que no desgasta los recursos del medio ambiente, originalmente vino de la política de “Best Practices”, o Mejores Prácticas. Esta idea de las Mejores Prácticas incorpora una nueva manera de pensar, combinando prácticas eficaces de negocios con políticas responsables con respecto al entorno y a cuestiones sociales. El resultado normalmente es una alternativa económica que es rentable y sostenible.

Cuando usted evalúa a los competidores, es importante determinar si están utilizando estas Mejores Prácticas. Sin esta política, el entorno y la cultura van a deteriorarse y el destino turístico no va a funcionar. Si los competidores no están siguiendo estas Mejores Prácticas, cualquier proyecto nuevo se puede encontrar en ventaja frente a ellos. En cambio, si los competidores están utilizando estas Mejores Prácticas, investigarlos permitirá saber lo que les ha funcionado y lo que no, y qué cambios deben hacerse en este planteamiento de Mejores Prácticas.

## **2.9 Ejercicio de Ventaja Competitiva<sup>iv</sup>**

El siguiente ejercicio ayuda a localizar los proyectos modelos y a evaluar cómo funcionan, sus fortalezas y qué puede cambiarse. Esto le ayudará a evaluar a sus competidores y lo que puede pasar en el futuro.

¿Cuáles son los dos o tres destinos que usted cree que son sus competidores principales, en términos de atraer a su mercado principal?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Seleccione a un competidor de la lista y escriba el nombre abajo.

Nombre: \_\_\_\_\_

Piense en los recursos, atracciones y otros elementos del competidor. Para cada categoría de turismo de abajo, liste solamente dos ventajas importantes que este competidor tiene y que contribuyen a su éxito.

Atracciones

1. \_\_\_\_\_
2. \_\_\_\_\_

Eventos (ej. festivales)

1. \_\_\_\_\_
2. \_\_\_\_\_

Transporte

1. \_\_\_\_\_
2. \_\_\_\_\_

Servicios al Turista

1. \_\_\_\_\_
2. \_\_\_\_\_

¿Cuáles son las cosas que su competidor hace especialmente bien con respecto a comunicar información sobre su área y las oportunidades vacacionales que ofrece? (Por ejemplo, señales, panfletos, y anuncios, etc.).

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

¿Puede identificar algunas ventajas que su área tiene sobre los competidores? Además, tal vez debería comparar lo que usted tiene en común con el competidor o intentar encontrar maneras de ofrecer un servicio mejor, precios más bajos, o publicidad más interesante o eficaz. Sin embargo, dirigir sus esfuerzos a mejorar y desarrollar sus fortalezas también puede ser una estrategia buena.

Piense en los recursos, atracciones y otros rasgos de su área. Para cada categoría listada abajo, escriba dos o tres ventajas importantes que su área tiene sobre los competidores. Busque los rasgos únicos y específicos que su área tiene o puede desarrollar y promover para dar una ventaja a su destino en atraer visitantes.

### **Atracciones Culturales e Históricas:**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

### **Atracciones Naturales**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

### **Actividades Recreativas**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

### **Eventos Especiales**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

### **Servicios y Facilidades Turísticas**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

### **Accesibilidad**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

### **Información Demográfica y Características de los Visitantes**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

### **Comunicaciones**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

### **Apoyo de Organizaciones Públicas y Privadas**

Ventajas:

1. \_\_\_\_\_
2. \_\_\_\_\_

Limitaciones:

1. \_\_\_\_\_
2. \_\_\_\_\_

## ***2.10 Identificación de Competidores***

En la actualidad, es posible investigar las compañías turísticas que ofrecen tours de intereses especiales en la página de internet de Specialty Travel Index, [www.spectrav.com](http://www.spectrav.com). Si se compara la lista de intereses especiales/posibilidades de aventuras ligeras urbanas con la lista de los tours ya existentes, encontrará que muchos están usando lugares rurales en vez de urbanos, concentrándose en actividades de aventura con riesgo o en temas educativos y culturales. Además, la elaboración y promoción de la mayoría de los paquetes de intereses especiales o de aventura están siendo realizados por los pequeños turoperadores y promotores turísticos locales, no por los operadores turísticos mayoristas.

## ***2.11 Reconocimiento de la Marca***

Cada producto necesita desarrollar su propia identidad y nombre para que sea identificable por los consumidores. En algunos casos, el mercado ha identificado un tipo de producto por el nombre de una marca (un ejemplo de ello es Xerox). Para desarrollar lealtad a la marca, el nombre y también el logotipo de la marca deben atraer la atención y ser fácil de recordar. En el sector turístico, la lealtad a la marca es especialmente importante. En el proceso de establecer la marca es aconsejable identificar y aprovechar su ventaja competitiva.

## ***2.12 Entrar en los Catálogos de Paquetes Turísticos***

¿Por qué una empresa que principalmente vende paquetes de buceo en Australia también ofrecería viajes a Panamá en el mismo catálogo? Porque sus clientes de aventura/intereses especiales son fieles a actividades, ¡no a los destinos! Aproximadamente la mitad de los clientes de los paquetes turísticos ya son clientes o llegan a través de referencias. Si la empresa que crea los paquetes no puede diversificar su línea de productos, se arriesga a perder su cliente, favoreciendo a otra empresa.

Para todo destino ser incluido en los catálogos proporciona una exposición muy valiosa. Aún si el viajero no compra un paquete de este catálogo, la semilla ha sido sembrada en su cerebro: la actividad que le interesa está disponible en tal destino y existe de forma accesible.

## ***2.13 Atraer a Viajeros Independientes***

Los viajeros independientes representan un mercado importante. Para aprovecharse de este mercado de viajeros independientes hay que conocer sus intereses y fuentes de información. ¿Qué es lo que les atrae? ¿Están buscando una actividad o experiencia específica? ¿Conocen todas las opciones y actividades que existen en Panamá? ¿Qué

clase de medios de comunicación llega a ellos e influyen en sus decisiones de viajar?  
¿Cuál es la percepción que tienen de Panamá?

### ***2.14 Identificar el Potencial para Rutas, Itinerarios, Eventos e Intereses Especiales***

Los propietarios de hoteles y otras empresas turísticas que quieran aumentar sus ingresos ofreciendo sus productos a través de ventas directas, contribuyen a alcanzar un desarrollo del destino turístico. Desarrollando productos nuevos para ser vendidos a través de operadores de turismo de aventura o de intereses especiales también contribuye a alcanzar este desarrollo turístico. Lamentablemente, muy pocos de estos operadores turísticos tienen el tiempo o los recursos económicos para explorar áreas geográficas que no conocen. Si estos operadores no son contactados por empresas turísticas panameñas que tienen rutas, itinerarios, instalaciones, eventos ya identificados y elaborados, los operadores continuarán sin incluir a Panamá en sus catálogos.

Sin embargo, el hecho de simplemente colocar folletos de su hotel en un sobre y mandarlos a un operador es malgastar su tiempo. Al contrario de los paquetes para operadores de sol y playa, el hotel con frecuencia es la parte menos importante del paquete.

Por ejemplo, para estimular el interés de un operador de viajes de ciclismo, los siguientes materiales serían esenciales:

- Mapas de las rutas mostrando itinerarios diarios (de 10 a 50 kilómetros) que podrían ser cubiertos por participantes del viaje
- Descripciones del paisaje a ser visto en las rutas
- Condiciones del tiempo
- Instalaciones en el camino (ej. restaurantes, baños, talleres de reparación de bicicletas, etc.)
- Vehículos locales que puede ser usados como coches escoba (“sag wagons”, en el caso que un ciclista tenga problemas y no pueda continuar), traslados de personas y equipaje
- Eventos locales, festivales, ferias y entretenimiento que puede ser incorporado en los paquetes
- Clubes de ciclismo locales interesados en conocer grupos de turistas

¿Qué pasaría si un área quiere cierta clase de desarrollo de productos turísticos, pero no hay una empresa local que ofrezca el servicio de conexiones con aeropuertos, puertos, etc (transfers)? En vez de ser considerado un obstáculo, esta situación puede verse como una oportunidad para empresarios nuevos en el área.

### ***2.15 Crear Itinerarios Específicos***

Por ejemplo, al crear un inventario de viajes de aventura e intereses especiales para cada área geográfica de Panamá, llega a ser relativamente fácil preparar propuestas de itinerarios. Como mencionamos anteriormente, las sugerencias de aficionados es la manera más rápida de crear propuestas de itinerarios. Si aficionados a la observación de flores y mariposas ya han identificado los mejores senderos, la mejores paradas, la distancia que puede cubrir en un día, los tipos de flores que pueden verse en las diferentes temporadas, los tipos de vehículos que necesitan para llegar a estos lugares, etc., crear los itinerarios (2 noches, 5 noches, una semana) debería ser fácil.

Las propuestas de itinerarios tienen que ser en formato de “módulo” compuestas por diferentes partes distintivas que pueden ser combinadas de diferentes maneras, en vez de ser un solo itinerario rígido y sin posibilidad de combinar sus diferentes componentes. Algunos operadores van a querer organizar un viaje por varias áreas geográficas, mientras que otros van a querer quedarse en la misma área. Una propuesta de itinerario incluiría alojamiento (hotel, casa privada, posada, etc.), transporte desde el aeropuerto (si es necesario), y actividades diarias.

Ofrecer un itinerario modular que incluya precios a los operadores facilita que ellos coloquen el tour en sus catálogos, ya sea como extensión opcional o como parte integrada en su tour en varias áreas. El itinerario puede ser desarrollado por un hotel, una empresa local de turismo, o una organización de desarrollo del destino. De cualquier forma, el operador va a querer hablar solamente con una sola persona en cada destino.

Los dueños de hoteles, operadores de atracciones y de otros servicios tienen una visión más centrada en los productos que ellos ofrecen. Como empresarios, solamente se concentran en sus propios servicios. En Panamá el sector privado tiene que confiar en los operadores turísticos, organizadores de eventos, y agencias de representación, especialmente en otros países, así como en sus sistemas de distribución y ventas. Si estos intereses comerciales no están convencidos de que los nuevos productos turísticos creados son de interés para sus sistemas de distribución y ventas, es muy probable que no estén interesados en el desarrollo de productos turísticos nuevos, mejorados o modificados.

En el pasado los costes de marketing directo eran prohibitivos. Además, el sector turístico asumía que los canales de distribución y ventas establecidos (agentes de viajes y operadores turísticos locales) controlaban el proceso de decisión de los compradores de turismo.

### **3. Innovación de Marketing**

A medida que los mercados turísticos se están volviendo más complejos y sofisticados, evolucionando a un mercado global internacional con diferentes motivaciones y comportamientos por parte de los consumidores, estos mercados no pueden ser tratados

como uno solo. Hace 50 años los viajes de placer eran comunes solo para los más ricos y millonarios. Con el desarrollo de la industria aeronáutica comercial y la consecuente reducción de las tarifas de los pasajes aéreos, la creación de paquetes turísticos dirigidos a la mayoría del mercado, y la aparición de lugares de hospedaje económicos para esta mayoría con pequeño presupuesto para viajar, el perfil de viaje internacional por placer ha cambiado completamente.

En esta sección nos centraremos en los siguientes elementos de innovación de marketing:

- ¿Qué es lo que los turistas compran?
- La necesidad de un planteamiento de enfoque de mercado
- Descubrir las tendencias de viaje de placer
- Evaluar la actual imagen de Panamá
- Relacionar las tendencias de mercado con el desarrollo del producto potencial
- Investigación de mercado, una herramienta para decisiones de marketing

### ***3.1 ¿Qué es lo que los Turistas Compran?***

Los turistas PAGAN por los SERVICIOS que necesitan para disfrutar de su tiempo de placer en un ambiente diferente y a veces desconocido,

Pero ellos buscan EXPERIENCIAS y UTILIDADES,

Y eso es lo que los turistas COMPRAN.

Desde el punto de vista del visitante:

recursos/atracciones =  
oportunidades de descubrir. COSAS PARA VER

actividades =  
oportunidades para disfrutar. COSAS PARA HACER

servicios, instalaciones e infraestructura =  
oportunidades que son accesibles. FACILITADORES

Estas experiencias, si son nuevas o diferentes, son parte importante de las vacaciones, añadiendo valor al viaje. Por ejemplo podemos mencionar viajes en botes con suelo de vidrio a manera de ventana, lecciones de buceo, excursiones montando caballos, senderos naturales, grupo folclórico, etc.

El turismo vende SUEÑOS, el sueño de disfrutar una placentera experiencia.

Los turistas compran DIVERSIÓN y AVENTURA, con la expectativa de que no tendrán esas mismas experiencias en el lugar donde residen.

Los turistas compran IMÁGENES y PROMESAS, la promesa de que el destino turístico cumplirá con sus expectativas y que los servicios requeridos serán proporcionados en un lugar específico y a determinada hora.

El hecho de no alcanzar lo que se espera y de no obtener los servicios planeados provoca FRUSTRACIÓN.

Los clientes frustrados se enfadan y se QUEJAN. No regresarán al destino turístico y contarán a otros sobre su mala experiencia.

Debemos recordar que el tiempo de placer tiene:

- Gran implicación emocional, es tiempo para diversión y desarrollo personal, es tiempo de hacer realidad los sueños
- Alto valor económico, porque es costoso.

### ***3.2 La Necesidad de un Planteamiento de Enfoque de Mercado***

**Pregunta: ¿Qué es lo que la gente quiere cuando adquiere sus vacaciones en Panamá?**

- **¿Quiénes son sus clientes?**

¿Qué es lo que ya conoce de los turistas que visitan Panamá? ¿Por qué seleccionaron este destino? ¿Asume usted que la decisión de venir a Panamá fue tomada solamente por ellos? ¿Qué fantasías, sueños y expectativas hicieron que ellos eligieran Panamá en lugar de otro destino?

Es necesario tener en cuenta que personas distintas a los turistas que usted ve en el destino podrían estar tomando la decisión de comprar. Por ejemplo, el cliente en el mercado de incentivos no es el cliente final, pero sí lo es la empresa que ofrece el viaje como parte del programa de incentivo entre sus empleados o proveedores. Otro ejemplo es el operador turístico en otro país que selecciona un destino en Panamá para añadirlo en su línea de producto. Vender el destino al operador turístico podría ser en algunos casos más importante que venderlo a un viajero individual. ¿A quién se está dirigiendo con su mensaje en este momento?

- **¿Cuál es la principal razón (motivo) para que sus clientes compren su producto?**

¿Alguna vez les ha preguntado a sus clientes al respecto? ¿Ha comprobado si su opinión es la misma que la de sus clientes?

- **¿Cuáles son los beneficios que ellos están buscando?**

¿Cómo sabe qué imágenes asociadas a beneficios promocionar? ¿Es solo su opinión o usted tiene información de investigaciones fiables?

- **¿Qué componentes del producto turístico están ya operando en su mejor capacidad y cuáles no están operando al máximo de su capacidad o cuáles faltan?**

Los componentes del producto turístico pueden ser considerados en tres niveles:

- Destino turístico: un concepto global
- Operadores privados: un concepto individual
- Turistas: un concepto personal

Por ejemplo, el presupuesto para un viaje en un complejo turístico (resort) en la playa es radicalmente diferente con el presupuesto de un turista que compra un viaje en bicicleta por las montañas de Panamá.

### ***3.3 Evaluando la Imagen Actual de Panamá***

Al diversificar los esfuerzos de promoción para incluir oportunidades de viaje a Panamá basadas en actividades y/o experiencias, la base del mercado se amplía y se vuelve más rentable.

### ***3.4 Fundamentos de Segmentación de Mercado***

La forma de dividir el mercado en segmentos dependerá de las características específicas de cada destino o negocio. No hay un único grupo de variables para segmentar el mercado, sino varios. Y pueden utilizarse diferentes categorías tales como criterios demográficos, de comportamiento o psicográficos.

Criterios geográficos y demográficos como el sexo, la edad, el lugar de residencia, normalmente no proporcionan información suficiente sobre hábitos de compra y los gustos y preferencias de los segmentos de mercado definidos. Sin embargo, los aspectos relacionados con el comportamiento de compra sí son criterios relevantes que pueden ser

usados para identificar los diferentes segmentos en el mercado turístico. Ejemplos de esas variables relacionadas con la conducta al adquirir servicios turísticos son:

- Principal motivación de viaje
- Viaje independiente o con un paquete turístico
- Reserva directa o a través de un agente de viajes
- Grupo de viaje: parejas, familias, grupos de amigos
- Tipo de transporte y hospedaje
- Temporada de viaje
- Patrones de consumo: servicios consumidos/requeridos, elección de actividades, consumidores débiles o fuertes
- Imagen, valor percibido
- Lealtad: clientes frecuentes, porcentaje de repetición

Con independencia de las variables que se utilicen para segmentar, los segmentos reconocidos deben ser:

**Medibles:** Un segmento de mercado es útil si es posible medir el tamaño y el poder de compra del grupo de consumidores.

**Accesibles:** Debe ser posible acceder al grupo a través de acciones de comunicación y promoción.

**Sustanciales:** Debe ser lo suficientemente grande y potencialmente rentable para justificar una estrategia de marketing dirigida a éste. Por supuesto, el volumen crítico puede variar de negocio a negocio, y también es posible identificar los nichos de mercado que no son muy grandes en comparación a los anteriores pero que ofrecen oportunidades para especializarse. De hecho, algunos de éstos pueden ser muy rentables.

Los destinos y las empresas turísticas deben desarrollar productos compatibles dirigidos a segmentos compatibles. Los turistas prefieren ir a lugares en donde esperan encontrar turistas como ellos, que se comportarán de la misma manera que ellos y que tendrán el mismo estilo de vida que ellos.

El hecho de juntar gente con diferentes intereses muchas veces produce como resultado un bajo grado de satisfacción para ambos grupos, provocando esta situación numerosas quejas.

El siguiente cuadro puede utilizarse para ayudar a identificar las necesidades específicas de la base de clientes:

Segmento: \_\_\_\_\_

NECESIDADES	¿Hasta qué punto los satisfacemos actualmente? Bueno/justo/malo	¿Cuáles son nuestras oportunidades para mejorar?
Necesidades de información -		
Producto/servicio Atributos buscados -		
Expectativas relacionadas con la venta/sistema de reservas -		
Fórmulas de pagos preferidas -		
Demanda de garantías -		

## **4. Innovación Administrativa**

Esta sección trata sobre la complejidad de administrar el producto turístico. Se necesita una constante colaboración entre el sector público y el sector privado y también entre los intereses de los diferentes negocios turísticos que pueden ser competidores en busca de una porción del mercado. En esta sección se abordarán los siguientes temas:

- Desarrollo y mantenimiento de una ventaja competitiva
- Desarrollo de productos comerciales
- Presupuesto y análisis de punto de equilibrio

### ***4.1 Desarrollo y Mantenimiento de una Ventaja Competitiva***

Lo que hasta ahora ningún país ha hecho efectivamente es crear un catálogo de intereses específicos y muestras de itinerario de diferentes tours para una distribución mundial entre los operadores turísticos. Obviamente, si Panamá da el primer paso en este sentido, obtendría una sólida ventaja competitiva.

Si Panamá desea entrar en la escena del turismo de intereses especiales, la elaboración de un catálogo en donde se detalle cada área geográfica es la manera de crear una ventaja competitiva importante. Esto se relaciona con lo abordado en la sección 2: añadir mercados turísticos de especial interés a las áreas de resorts ya existentes, adaptando los actuales productos turísticos. La realización de listas de actividades de interés especial con muestras de módulos para distribuir a los operadores turísticos mayoristas que actualmente vienen ofertando los resorts en Panamá les proporcionarían a aquellos productos adicionales a ofrecer.

El actual objetivo de desarrollo turístico de Panamá debe ser crear y mantener una ventaja competitiva en los nichos de mercado del turista de clase alta así como del ubícuo aventurero que paga menos. Además, los nichos de mercado a nivel mundial tienden a estar formados por personas con más acceso a recursos, mayor educación y más viajeros. Ignorar estos mercados sería desastroso a largo plazo.

### ***4.2 Agenda 21 y Producto Turístico Sostenible***

De acuerdo con la reunión de la Cumbre de Río del 14 de junio de 1992, sostenibilidad implica una nueva relación de compatibilidad a largo plazo entre los factores medioambientales, sociales y económicos. Algunos de los temas más interesantes de la Agenda 21 que tienen implicaciones para el sector turístico son:

- La necesidad de incorporar todos los costes, incluyendo el coste medioambiental, en el precio de los bienes y servicios ofertados.
- La necesidad de cambiar los modelos de consumo a través de programas de educación pública y de elecciones del consumidor.

- La necesidad de desarrollar estrategias y programas para eliminar los residuos y mejorar la eficiencia en el uso de los recursos, entre otros.
- La necesidad de planificar el uso de tierras y de un abastecimiento integrado de infraestructura, energía sostenible y sistemas de transporte.

En muchos casos, en el sector turístico uno de los factores más importantes de ventaja es la calidad de los recursos naturales y culturales disponibles a nivel de destino. Sostenibilidad también tiene que ver con el mantenimiento, e incluso mejora, de la calidad.

### ***4.3 Comercialización de Productos***

El desarrollo comercial de productos está basado en la oferta existente de atracciones, instalaciones y servicios que:

- están agrupadas y presentadas de manera que pueden ser percibidas como algo nuevo o atractivo por segmentos específicos de mercado.
- se complementan con nuevas atracciones, instalaciones, actividades, eventos y servicios dirigidos a segmentos de mercado específicos o nuevos, adaptando el producto existente a las nuevas condiciones de la demanda.
- están diseñadas para mejorar la imagen del destino.
- pueden atraer nuevos segmentos de mercado.

La razón de tener un gran número de atracciones diversas es incrementar la demanda de servicios (alojamiento, comida, tiendas, transporte). Estos servicios son los generadores económicos de turismo pero requieren volumen de visitantes para ser factibles. En situaciones en donde hay pocas atracciones dirigidas solamente a un número pequeño del mercado turístico la economía turística está supeditada a grandes fluctuaciones.

El desarrollo de productos comerciales está basado en investigaciones de mercados, técnicas de marketing y acciones de comunicación

En esta sección, tratamos con el concepto básico de cómo el sector turístico opera con el sistema de distribución de ventas. El concepto es simple: si el destino no puede ser ofertado en un paquete y programado, no puede ser vendido.

### ***4.4 Presupuesto y Análisis de Punto de Equilibrio***

Es vital para toda operación turística de cualquier atracción que la administración tenga la habilidad de preparar y mantener un presupuesto. Hay dos tipos de presupuesto: el

presupuesto de operaciones, usado para controlar el intercambio de servicios por ingresos; y el presupuesto de tesorería, usado para medir el flujo de efectivo dentro y fuera del negocio.

El presupuesto de operaciones permite a la administración establecer el coste del producto, el precio de los servicios proporcionados y el ingreso necesario para cubrir los gastos y generar beneficios. Este presupuesto establece objetivos mensuales que mantienen a la organización dentro de lo esperado. Este presupuesto evalúa a la organización mensualmente para determinar elementos tales como: cuándo contratar más empleados, cuándo comprar menos y cómo identificar temporadas altas y temporadas bajas.

El presupuesto de tesorería se concentra en cuándo y de dónde viene el efectivo, cuándo los gastos deben pagarse, y en general cuándo un ingreso entra al negocio. Este presupuesto es necesario para reconocer cuándo una organización necesitará fondos adicionales o cuándo dispondrá de efectivo adicional en tiempos específicos. Ejemplo:

#### **Ejemplo de un tour presupuestado comparado con el tour finalmente obtenido**

<b>Tour X: Presupuestado</b>	Basado en 18 pasajeros
Costos variables por persona	\$163
Costo fijo	\$111
Costo total	\$274
Margen de ganancia presupuestado (Esta cantidad está basada en cuánto está dispuesto a pagar el mercado)	\$25
Precio de venta por persona	\$299

<b>Tour X: Obtenido (Solo 14 personas)</b>	
Costo variable por persona	\$163
Costo fijo	\$143
Costo total	\$306
Precio de venta	\$299
Pérdida en contribución al margen de ganancia por cada miembro del tour	\$(7)
<b>Pérdida total</b>	<b>\$126</b>

El análisis de punto de equilibrio es usado para establecer el punto en el cual la organización iguala sus gastos con sus ingresos, es decir, el punto a partir del cual se generan beneficios. El análisis de punto de equilibrio debe ser una proyección realista de la situación financiera de la organización.

Para determinar el punto de equilibrio, primero se tiene que diferenciar entre el coste fijo (coste que no varía con el nivel de rendimiento o producción, como por ejemplo el alquiler y los gastos administrativos) y costes variables (costes que varían directamente con el número de pasajeros, como por ejemplo guías turísticos, refrescos, etc.).

Una fórmula básica de análisis de punto de equilibrio es el total de costes fijos dividido entre el resultado de sustraer los costos variables del precio final, como se detalla a continuación:

Costos fijos: \$2000  
Costos variables: \$163 por pasajero  
Precio de venta: \$299 por pasajero  
 $= 2000 / (299-163) = 15$

Resultados del análisis de punto de equilibrio: Se necesitarán 15 pasajeros para alcanzar el punto de equilibrio con el precio definido. Como vemos en el segundo cuadro presentado anteriormente, este operador turístico opera a pérdida pues tiene solamente 14 pasajeros. Es esencial realizar el análisis de punto de equilibrio antes de realizar actividades de marketing y operar el tour. De esta manera el precio será definido de manera apropiada para generar ganancias.

#### ***4.5 Recursos Utiles en Internet***

Muchos recursos valiosos pueden ser encontrados en el internet para complementar la información contenida en este manual. **Steps to Competitiveness** ([http://strategis.ic.gc.ca/sc\\_indps/service/engdoc/steps.html](http://strategis.ic.gc.ca/sc_indps/service/engdoc/steps.html)) es una completa y práctica página web producida por el gobierno canadiense para ayudar a pequeñas y medianas empresas. Contiene secciones que abordan la planificación estratégica, finanzas, tecnología, recursos humanos, marketing, alianzas, calidad y nuevos servicios. **Bplans** ([www.bplans.com](http://www.bplans.com)) guía a los usuarios durante todo el proceso de creación del plan de negocios. También contiene secciones que tratan otras áreas del negocio tales como la publicidad, la investigación de mercados, la financiación, los temas legales, etc.

#### ***4.6 Plan de Negocios Preliminar***

Antes de crear un completo plan de negocios, será útil completar una versión más corta del mismo, denominado plan de negocios preliminar. Este contendrá los elementos mencionados anteriormente tales como objetivos, misión, claves de éxito, análisis de mercado, y análisis de punto de equilibrio. El formulario es presentado en el Anexo 2.

### **5. Conclusión**

Mientras el proceso de globalización continúe haciendo más corta las distancias entre los destinos, el turismo puede ser usado como una importante herramienta en el desarrollo de éstos. Al ser una de los sectores de actividad más grandes del mundo, el turismo posee un fuerte potencial de desarrollo. Los ingresos generados a través de la actividad turística

pueden servir como una fuerte base para la economía de toda comunidad. En esa línea, Panamá tiene un gran potencial para el desarrollo de turismo. Productos sostenibles como ecoturismo, turismo cultural/histórico, de salud, o de eventos, pueden proporcionar alternativas económicas que son escasas en los sectores de fabricación y agrícolas. Así, las regiones que tienen pocos recursos pueden obtener grandes beneficios con un conveniente desarrollo turístico. Siguiendo este manual los líderes turísticos pueden desarrollar productos que son sostenibles y competitivos a la vez. La base de este manual es considerar que cualquier región puede desarrollar actividades turísticas eficaces con la cantidad adecuada de investigación y planificación. Al seguir estos pasos, es posible crear un producto que proporcionará beneficios para el operador, la comunidad y la región de modo sostenible.

Como hemos explicado, con independencia del rol que uno desempeñe dentro de su comunidad (líder público dentro de ésta u operador privado), el primer paso en el desarrollo de cualquier producto turístico es seguir un proceso de planificación turística. Estableciendo firmemente cuáles son los objetivos que uno espera alcanzar y continuamente re-evaluándolos ayudará a mantener el proyecto en marcha y con éxito.

El desarrollo de un producto innovador es el siguiente paso. Tras establecer los objetivos, es crucial identificar qué productos ayudarán a alcanzarlos. Tomar ideas de empresas que funcionan muy bien o las mejores prácticas ayudará a eliminar cualquier duda durante el proceso. Es necesario poner mucho esfuerzo a la hora de identificar el producto turístico más adecuado.

Cuando el producto ha sido creado, es necesario iniciar las actividades estratégicas de marketing del mismo. En este sentido, un destino o atracción que nadie conoce no sirve para cumplir los objetivos fijados. La clave para el desarrollo turístico es la realización de las actividades adecuadas de marketing del producto en los lugares donde se identifique quién está interesado por este tipo de producto, y la captación de este mercado objetivo. El establecimiento de los mercados clave en los que aplicaremos las estrategias de marketing para nuestro producto será más efectivo en términos de coste que realizar esas actividades en todos los mercados en general.

El turismo es un fenómeno dinámico, que siempre se encuentra en un cambio constante. Para mantener un producto en el mercado después de que ha sido creado, es necesario que se incorpore una dirección innovadora. No es suficiente la mera creación de un producto maravilloso, sino que cada etapa del proyecto debe ser continuamente evaluada y renovada. Los directivos y administradores turísticos deben buscar nuevos productos para seguir siendo competitivos.

Después de que un producto turístico se ha creado y mantenido en el mercado de una manera sostenible, los beneficios que proporcionará serán múltiples. El desarrollo turístico en Panamá tiene un enorme potencial para atraer turistas de todo el mundo pero especialmente de América del Norte. La proximidad de Panamá a este mercado, así como su relativa estabilidad política, le otorga una ventaja competitiva sobre el resto de destinos en América Latina.

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Finalmente, no hay razón alguna para que un desarrollo sostenible turístico no lleve a Panamá a liderar el desarrollo de la región en el siglo XXI. Esperamos que este manual contribuya a que esta situación ocurra.

## **Anexo 1: Inventario**

Califique cada atracción de acuerdo a su poder de convocatoria, ya sea como atracción local (L), como atracción de fin de semana (F) o como destino nacional o internacional (D).

Calificación: L= local F= fin de semana D= destino

<b>Número</b>	<b>Atracciones culturales e históricas</b>	<b>Calificación</b>	<b>Comentario</b>
	Lugares arqueológicos	L F D	
	Fuertes y campos de batalla	L F D	
	Lugares de nacimiento/casas de gente famosa	L F D	
	Edificios de interés arquitectónico	L F D	
	Cementerios	L F D	
	Bailes ceremoniales	L F D	
	Iglesias, sinagogas, templos	L F D	
	Conservatorio	L F D	
	Pueblos antiguos	L F D	
	Celebraciones étnicas	L F D	
	Programas de folklore	L F D	
	Pueblos abandonados	L F D	
	Distritos históricos	L F D	
	Teatros históricos y óperas	L F D	
	Tours históricos	L F D	
	Monumentos	L F D	
	Lugar histórico	L F D	
	Bibliotecas	L F D	
	Bases militares	L F D	
	Museos	L F D	
	Eventos	L F D	
	Ruinas	L F D	
	Otros	L F D	
	Otros	L F D	

<b>Número</b>	<b>Atracciones naturales</b>	<b>Calificación</b>	<b>Comentario</b>
	Jardines botánicos	L F D	
	Playas	L F D	
	Áreas de estudio de pájaros	L F D	
	Desiertos	L F D	
	Cambio de estaciones	L F D	
	Bosques	L F D	

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	Programas de medioambiente	L	F	D	
	Formaciones geológicas	L	F	D	
	Islas	L	F	D	
	Lagos	L	F	D	
	Montañas	L	F	D	
	Parques nacionales	L	F	D	
	Senderos naturales	L	F	D	
	Océanos	L	F	D	
	Areas protegidas	L	F	D	
	Ríos	L	F	D	
	Dunas	L	F	D	
	Volcanes	L	F	D	
	Cataratas	L	F	D	
	Santuarios de animales salvajes	L	F	D	
	Otros	L	F	D	
	Otros	L	F	D	

<b>Número</b>	<b>Recreaciones</b>	<b>Calificación</b>			<b>Comentario</b>
	Parques de entretenimiento	L	F	D	
	Coliseos	L	F	D	
	Playas	L	F	D	
	Ciclismo	L	F	D	
	Observación de pájaros	L	F	D	
	Paseo en botes	L	F	D	
	Campamentos	L	F	D	
	Canotaje	L	F	D	
	Ranchos	L	F	D	
	Concurso de pesca	L	F	D	
	Cacería	L	F	D	
	Golf	L	F	D	
	Resorts de salud, centros de belleza	L	F	D	
	Caminatas, excursiones	L	F	D	
	Paseo en caballos	L	F	D	
	Paseo en globos	L	F	D	
	Marina	L	F	D	
	Parques locales	L	F	D	
	Maratones, triatlones	L	F	D	
	Escalar montañas	L	F	D	
	Paracaidismo	L	F	D	
	Areas de picnic	L	F	D	
	Campos de juegos	L	F	D	

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	Veleros	L	F	D	
	Esquiar	L	F	D	
	Bucear	L	F	D	
	Natación	L	F	D	
	Tenis	L	F	D	
	Esquiar sobre agua	L	F	D	
	Zoológicos	L	F	D	
	Otros	L	F	D	
	Otros	L	F	D	

<b>Número</b>	<b>Eventos especiales</b>	<b>Calificación</b>			<b>Comentario</b>
	Espectáculos aéreos	L	F	D	
	Espectáculos de autos antiguos	L	F	D	
	Espectáculos de colecciones y antigüedades	L	F	D	
	Ferias de arte	L	F	D	
	Carreras de autos	L	F	D	
	Parrilladas y eventos de comidas	L	F	D	
	Espectáculos de botes	L	F	D	
	Campamentos de niños/adolescentes	L	F	D	
	Espectáculos de gatos y perros	L	F	D	
	Producciones de baile u óperas	L	F	D	
	Celebraciones étnicas/culturales	L	F	D	
	Festivales medioambientales	L	F	D	
	Ferias (agrarias/culturales/otras)	L	F	D	
	Tours a granjas	L	F	D	
	Mercado de granjeros	L	F	D	
	Otras actividades agrarias	L	F	D	
	Espectáculos de flores	L	F	D	
	Festivales de comida	L	F	D	
	Celebraciones de feriados	L	F	D	
	Carreras de caballos	L	F	D	
	Espectáculos de caballos	L	F	D	
	Torneos de golf	L	F	D	
	Vacaciones educativos	L	F	D	
	Celebraciones de aniversario/centenarias	L	F	D	
	Teatros locales	L	F	D	
	Carreras de motos	L	F	D	

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	Conciertos/ festivales musicales	L	F	D	
	Celebraciones religiosas	L	F	D	
	Eventos deportivos	L	F	D	
	Sinfonías/ orquestas	L	F	D	
	Seminarios, congresos, conferencias	L	F	D	
	Otros	L	F	D	
	Otros	L	F	D	

<b>Número</b>	<b>Otras atracciones</b>	<b>Calificación</b>			<b>Comentario</b>
	Moteles, casas de hospedaje	L	F	D	
	Puentes	L	F	D	
	Hospedaje rural	L	F	D	
	Plantas de generación de energía	L	F	D	
	Tiendas étnicas	L	F	D	
	Factorías	L	F	D	
	Instalaciones geotermales	L	F	D	
	Edificios públicos	L	F	D	
	Plantas industriales	L	F	D	
	Bibliotecas	L	F	D	
	Torres de observación, observatorios	L	F	D	
	Tiendas de artesanías locales	L	F	D	
	Restaurantes, bares locales	L	F	D	
	Carreteras con paisajes atractivos	L	F	D	
	Edificios singulares	L	F	D	
	Universidades, colegios, institutos	L	F	D	
	Viñedos	L	F	D	
	Lugares remotos	L	F	D	
	Lugares con características particulares (ubicación, historia, cultura)	L	F	D	
	Otros	L	F	D	
	Otros	L	F	D	

## Anexo 2: Plan de Negocios Preliminar

<b>Plan SAVE de Negocios Preliminar en Panama</b>		
Negocio: Nombre, Dirección, Teléfono, Correo electrónico		
Equipo de GWU:		
<b>4.6.1.1.1.1 Resumen Ejecutivo</b>		

<b>Objetivos de Negocios</b>		
<b>Objetivos</b>	<b>4.6.1.1.1.2 Tareas a realizar</b>	<b>Responsabilidad</b>

<b>4.6.1.1.1.3 Misión</b>

<b>4.6.1.1.1.4 Claves de Éxito</b>

<b>4.6.1.1.1.5 Análisis de Mercado</b>			
<b>4.6.1.1.1.5.1 Segmentos de Mercado</b>	<b>Clientes potenciales Primer año</b>	<b>Clientes potenciales Segundo año</b>	<b>Clientes potenciales Tercer año</b>
Total			

<b>Análisis de Punto de Equilibrio</b>
<b>Total de costo estimado fijo:</b> <b>Costo estimado variable por cliente:</b> <b>Precio de venta estimado por cliente:</b> <b>Punto de Equilibrio=Costofijo total/costo de venta menos costo variable</b>

### Cronograma del Plan de Negocios

<i>Tarea</i>		<b>Cronograma por mes, empezando en enero 2005</b>											
No.	Descripción/Tarea específica	1	2	3	4	5	6	7	8	9	10	11	12
<b>1</b>													
1.1													
1.2													
1.3													
<b>2</b>													
2.1													
2.2													
2.3													
<b>3</b>													
3.1													
3.2													
3.3													

i Gartner, William C. Tourism Development, Principles, Processes and Policies.

Van Nostrand Reinhold, USA: 1996

<sup>2</sup> *ibid*

<sup>iii</sup> *ibid*

iv Nolan, Timothy M., Goldstein, Leonard, Wiliam, J. Applied

Strategic Planning: the Consultant Kit, Pfeiffer & C., San Diego, CA:1992

**Addendum 13:**  
**FSU Panama Environmental Club Agreement**

## Environmental Club



June 17, 2005

Dear Dr. Langoni:

A few days ago, some students from the George Washington University Tourism and Business graduate programs approached us with a concern about the SNP (Soberania National Park) and made a proposal to us. This consisted on taking on their own project and turn it into a monthly clean-up program for the Environmental Club. For this matter, we need support from the University as we are a student organization.

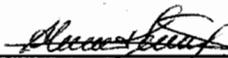
We were told that garbage is accumulating on the entrances of this park, and a lot of help is needed to take care of this problem. Hence, the Environmental Club at FSU- Panama would like to set up a permanent program which would consist on a monthly "garbage pick-up day." Our goal is to clean up the entrances of the park and keep them in good condition for the safety of the fauna and flora of the park as well as enhancing its image.

As stated before, we address you asking for help. To full fill this task we need support from the university in the form of transportation and materials such as the university van, plastic bags, rubber gloves, etc. It is a great opportunity for the EC to grow as an organization, and it will surely be an activity that will leave the name of Florida State University - Panama as an institution that has real concerns and supports the community.

The students of George Washington University suggested that a time window could be created, so that every FSU student has the opportunity to go help and earn social service hours. Hence, the Environmental Club proposes FSU-Panama to adopt an official FSU environmental activity day.

In a nutshell, the Environmental Club, based on the proposal of GWU students, requests the support through transportation, materials, and a method to open this activity to all students by means of the creation of a monthly time window; that is, a period officially dedicated uniquely towards this purpose.

Sincerely,

X   
Alessandra Treuherz  
(Environmental Club President)

Received: JUN 17, 05  
L. J.

**Addendum 14:**  
**Natural Guide Training Program Description**

# *1. Nature Guide Training Program Description*



**SELECTIONS FROM:  
INTERPRETING FOR CONSERVATION  
A MANUAL FOR TRAINING  
LOCAL NATURE GUIDES**

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## **RARE NATURE GUIDE TRAINING PROGRAM**

In 1994, RARE Center implemented the first Nature Guide Training Program (NGTP) in Costa Rica as a way to help rural adults participate in, and benefit from, ecotourism. NGTP provides students with little formal education the basic skills needed to work as nature guides, community-based tour operators, and other related jobs - offering them sustainable local economic alternatives.



The conservation and community development benefits that result directly from the NGTP include:

- The value of conservation within nearby rural communities is increased by the creation of local jobs dependent upon the existence of protected areas. Guiding also represents tourism-related employment beyond the lower-level service-oriented jobs that have historically been offered to local populations.
- NGTP guides are encouraged to become conservation activists, and often return to their communities to begin environmental education programs, develop interpretive nature trails, and initiate their own local guide training programs.
- NGTP graduates are encouraged to not only guide visitors, but to educate them as well by incorporating conservation messages into their tours - messages that are heard by thousands of international visitors each year.
- The existence of local guides increases protected areas' ability to monitor threats to park resources and enforce site visitation regulations.

The Nature Guide Training Program was developed through a unique collaboration with Latin American protected area managers, local tour operators, and WorldTeach – a Harvard University-based volunteer organization. Since the first course, RARE Center has collaborated with dozens of tour operators, NGOs, and government agencies to provide courses in Mexico's Southern Baja Peninsula and Yucatan Peninsula, the Mexican state of Chiapas, Guatemala, and the North Coast of Honduras. RARE Center recently initiated the first NGTP in South Africa, and future courses are anticipated in Indonesia and throughout Central America.

### **Methodology**

The NGTP curriculum is based on a state-of-the-art training methodology in which students live and study with their teachers in an isolated, English-only environment. During the three-month course and one-month follow-up period, students receive more than 1,000 hours of practical experience, equal to more than a year at a U.S. university. The curriculum covers conversational English, local natural and cultural history, interpretation, and guiding skills - as well as basic tour planning and marketing. Curriculum and teaching materials are adapted to the specific needs of each country or region.

The program utilizes proven experiential learning techniques so that students acquire skills by actually using and developing them, rather than by studying about them. Throughout the course, students create and lead tours, give oral presentations, design signs, collaborate to solve problems, and carry out role-plays.

### **The NGTP is an intensive twelve-month program organized in three phases:**

- **Pre-course:** Pre-course activities last approximately four months and includes selecting local partner organizations, selecting 16 students, training a supervisor for each local organization who will provide follow-up to the guides, and preparing the team of course staff and volunteer teachers. Three course coordinators (a local program manager, a local naturalist, and a native English-speaking training coordinator) are trained to run the course, along with a group of six volunteer English teachers. One of the most important activities during this period is the creation of a vision for ecotourism and the role of the guides in each protected area. All partners and supervisors participate in a three-day vision workshop led by a RARE Center facilitator.
- **Course:** Staff, teachers, and students then begin the ten-week intensive course that takes place in isolated training sites located in the protected areas where the guides will work. Both the English and natural history classes are shifted outside

into the surrounding natural environment as much as possible. Each week, students develop and lead "practice" tours that incorporate the interpretive techniques and natural/cultural history information taught during the previous week's lessons. RARE Center's approach to training the guides includes illustrating to the students that the visitors to their parks and protected areas value their natural history stories. The language skills and basic natural and cultural history knowledge necessary to convey those stories are then provided. Unfortunately, this is where most guide training courses end. RARE Center's training takes an additional step of teaching and encouraging the guides to incorporate messages of conservation into those stories, and educate park visitors on the importance of biodiversity protection.

- **Post-Course:** Post-course activities begin with an initial intensive one-month follow-up phase. Guides return to their protected areas and communities accompanied by one of the course instructors and together with their supervisors, they begin to design tours in the area and develop workplans that include conservation activities such as creating environmental education programs in local schools and interpretive trails development. Evaluations are made of each guide's progress and a final report distributed to all partner organizations. The program manager also remains in a support position for an additional five months to help the guides promote their tours, work with collaborators, continue student assessment, and assist the guides where needed.

### Results to date

As its programs in Costa Rica, Mexico, Guatemala and Honduras have shown, this hands-on approach encourages students, who might otherwise be hindered by self-consciousness, to become enthusiastic and active learners. Such that:

- Nearly 300 rural adults have been trained through eighteen courses.
- Graduates' monthly salaries have increased by an average of 92%.
- Program graduates from the first 11 courses (half of these graduated within the last five years) have already generated *additional* revenue of more than \$1 million (not including revenue from related, non-guiding services).
- In Baja California Sur, 65% of graduates have found employment as nature guides and another 18% are working or studying in conservation or ecotourism-related fields. Seventy percent have initiated or participated in community environmental education programs, and many others have started other local conservation projects.
- In the Yucatan, 76% of graduates are guiding, and more than a dozen have launched ecotourism cooperatives or businesses in their communities. The graduates have also taught environmental education to more than 500 local adults and children in the past year alone.
- In Honduras, the majority of graduates have joined the staffs of the NGOs that manage protected areas, where they are working as nature guides, educators, or public use coordinators.

### Local Partners

In order for the program to be successful, it is essential to form strong collaborations with local reserve staff, NGOs, and tour operators. Local partner organizations that sponsor one or more guides during the training are asked to commit to employing or formally collaborating with each guide for a minimum of one year, to ensure that he or she receives sufficient post-course support. The guides' supervisors attend three to six training sessions with NGTP program staff to learn about the program and create work plans with the guides. Local partner organizations may also be asked to pay an inscription fee (10% of the total cost per participant) for each participant in the course.



# *5. Overview of Nature Guide Training Program Course Curriculum*



SELECTIONS FROM:  
INTERPRETING FOR CONSERVATION  
A MANUAL FOR TRAINING  
LOCAL NATURE GUIDES

**COURSE CURRICULUM, SITE ONE  
NATURE GUIDE TRAINING PROGRAM**

Unit / Days	Grammar and Communication	Natural History And Conservation	Interpretation and Guiding Skills
<p><i>I. Greetings:1</i></p> <p><i>Days 1-3</i></p> <p><i>Introduce yourself and others</i></p> <p><i>Ask for and give personal information</i></p>	<p><b>1. What is your name?</b> My name is Jose. What is your name? Nice to meet you.</p> <p><b>2. Where are you from?</b></p> <p><b>3. Subject Pronouns</b></p> <p><b>4. Verb “To Be”</b> I am a student. You are a teacher. He is a guide.</p> <p><b>5. Possessive Adjectives</b> What is his/her name? Where are they from? My name, Your name, Her name...</p> <p><b>6. Polite phrases/mealtime phrases (before first meal)</b> Please pass..., thank-you, your welcome</p> <p><b>7. How are you? And 8 basic emotions</b> I am happy. I am sad. He is angry.</p> <p><b>8. Contractions with To Be and 8 more emotions</b> Are you excited? Yes, I’m excited. She’s embarrassed. He’s jealous. No, I’m not excited. No, she’s not embarrassed.</p> <p><b>9. Yes/No questions with short answers “To Be”</b> Are you happy? Yes, I am.</p>	<p><b>1. Identify 15 body parts of birds</b> BC Lesson 4 &amp;5</p>	

	<p>No, I'm not.</p> <p><b>10. What do you do?</b> I am a guide. I am a tourist.</p>		
<p><i>II. Greetings 2 and Basic Birds</i></p> <p><i>Days 4-5</i></p>	<p><b>11. What day is today?</b> Days of the week</p> <p><b>12. What is this/that?</b> With classroom objects</p> <p><b>13. Describing birds with verb To Be and 15 body parts (Bird of the Day)</b> Is the tail long? Yes, the tail is long. No, the tail is not long.</p> <p><b>14. When is your birthday?</b> Months</p> <p><b>15. How old are you?</b> #'s 1-100</p> <p><b>16. What time is it?</b></p>	<p><b>2. Bird of the Day, Introduction</b> ONLY with the Verb To Be</p> <p><b>3. Identify Bird Adaptations</b> 5 foot/leg and 5 bills</p> <p><b>4. How to use Binocs 1</b> BC Lesson 2</p>	<p><b>Model Tour (in Spanish) Day 5</b></p> <p><b>1. A Good Guide Speaks Loudly and Clearly – Day 5</b></p>
<p><i>III. What bird is it?</i></p> <p><i>Days 6-7</i></p>	<p><b>17. Where is + prepositions</b> to locate birds and objects</p> <p><b>18. Human Body parts</b> This is my leg. That is your head. That is her foot.</p> <p><b>19. Review Lesson of Grammar Learned</b></p> <p><b>ASSESSMENT STATION REVIEW – Day 7</b></p>	<p><b>5. How to use Binocs 2</b> BC Lesson 3</p> <p><b>6. Why Birds are Important to my Community?</b></p> <p><b>7. Identify 10 most common birds at site using binocs</b></p>	<p><b>2. A Good Guide Uses Non-Verbal Communication Day 7</b></p>
<p><i>IV. Does the bird have a long tail?</i></p> <p><i>Days 8-9</i></p>	<p><b>20. What do you have?</b> With fruits and vegetables. I have a banana and an onion.</p> <p><b>21. Do you have? + Family</b> How many sisters do you have? Do you have children?</p>	<p><b>8. Identify and name 15 common animals in site ecosystem(s). Day 8</b></p> <p><b>9. Why Birding? In English Day 9</b></p>	<p><b>TOURS 1</b> In English using first two characteristics of a good guide, simple 5 minute tours</p>

	<p><b>22. Plurals</b> Using families, fruits and veggies, classroom objects</p> <p><b>23. Possessive Adjectives + Clothing</b> Jose has a blue shirt. His shirt is blue.</p> <p><b>24. How much does it cost? How many do you want?</b> Buying things at a store.</p> <p><b>25. How much + demonstratives</b> this, that, these, those, that one, this one</p>	<p>BC Lesson 1</p> <p><b>10. Bird of the Day with the verb To Have. Day 9</b> Does the bird have a black throat? Yes, it has a black throat. No, it doesn't have a black throat.</p>	
<p><i>V. What do you do every day?</i></p> <p><i>Days 10-11</i></p>	<p><b>26. Simple Present Tense</b></p> <p><b>27. Why...Because (reinforce in NH lesson)</b> Why are you in the course? Because I want to work with tourists. Why do Pelicans have webbed feet?</p> <p><b>28. Adverbs of Frequency</b> How often do you...? Always, usually, often, sometimes, rarely, never</p> <p><b>29. Adjectives</b> old/young, tall/short, wide/narrow, etc.</p> <p><b>30. Verbs of Daily Habit</b> What do you do every day?</p>	<p><b>11. Natural Resources, Organic and Inorganic Day 10</b> Why are leaves organic?</p> <p><b>12. Characteristics of Living Beings – Day 11</b></p>	<p><b>3. A Good Guide Acts Professionally – Day 11</b> Lessons I-III</p>
<p><i>VI. Is the bird flying?</i></p> <p><i>Days 12-14</i></p>	<p><b>31. Animal Daily Habits</b> Review of present tense and daily habits. Journal entry from point of view of animal or bird.</p> <p><b>32. Present Progressive I</b> What are you doing? I am studying. The bird is flying. They are listening to music.</p>	<p><b>13. Diversity of Living Beings – Day 12</b> How are organisms organized? Scientific names</p> <p><b>14. Ecosystems: Populations, Communities, Ecosystems, Biosphere – Day 13</b></p>	<p><b>4. A Good Guide</b></p>

	<p><b>33. What is the bird doing?</b> BC Lesson 13</p> <p><b>34. Present Progressive II</b> Are you studying English right now? Yes, I am studying English right now. No, I'm not studying English right now.</p> <p><b>35. Time Expressions with To Be</b> at, in, on, around, until, before, after, early, late</p> <p><b>36. To Want vs. To Need</b> I need something to drink. I want to drink a Coca Cola.</p>	<p>Differentiate and identify in the region.</p> <p><b>15 Using a Bird Book–Day 14</b> BC Lesson 8</p> <p><b>16. Adaptations of Bird Bills and Feet – Day 14</b> BC Lessons 6&amp;7</p> <p><b>NH ASSESSMENT</b></p>	<p><b>Prepares in Advance – Day 13</b></p>
<p><i>VII. There are many different habitats in an ecosystem.</i></p> <p><i>Days 15-16</i></p>	<p><b>37. Determiners</b> all, nearly all, most, many, a lot of, a few, some, not many</p> <p><b>38. There is/There are</b> Using habitats, ecosystems, etc.</p> <p><b>ASSESSMENT STATION REVIEW – Day 16</b></p>	<p><b>17. How do organisms adapt? Day 15</b> Natural selection Speciation</p> <p><b>18. How do organisms adapt? Day 16</b> Adaptation Evolution</p>	<p><b>TOURS 2</b> Using 4 characteristics of a good guide And NH topics to date (birding, ecosystems, life)</p>
<p><i>VIII. What are we going to see on the tour?</i></p> <p><i>Days 17-18</i></p>	<p><b>39. Future with Going To I</b> What are we going to see on the tour? We are going to see flamingos and many other birds.</p> <p><b>40. Future with Going To II</b> Are we going to see monkeys on the tour? Yes, we are. No we aren't.</p> <p><b>CHECKPOINT ONE</b> Living Beings and Ecosystems</p>	<p><b>19 and 20. Common Interactive Patterns –Days 17 and 18</b> niche habitat (create a habitat) food web</p>	<p><b>5. A Good Guide Provides necessary information to visitors-Day 17</b> We are going to walk on a trail. We are going to see many medicinal plants. Tour rules</p>
<p><i>IX. What does it smell</i></p>	<p><b>41. Sensory Tour</b></p>	<p><b>22. Food Chains</b></p>	<p><b>6. A Good Guide</b></p>

like? Day 19	What does it taste/smell/feel/sound like?  <b>42. What does it look like?</b> How big, how small, how tall, how long... What color is her hair? What color is its fur?		<b>Involves the Audience</b> Using the senses to experience the tour
Day 20	<b>Field Trip</b>	<b>Field Trip</b>	<b>TOURS 3</b>
X. Can we take pictures during the tour? Day 21	<b>43. Modal Verbs</b> can, could, should, would providing necessary information to tourists You can take pictures during the tour. You should stay on the path while we walk.  <b>44. Tour Rules</b> providing necessary information to tourists	<b>23. Species Interactions</b>   <b>NH ASSESSMENT</b>	
XI. For the birds Days 22-23	<b>45. What is the weather like?</b>  <b>46. Review: Present Tense, Present Progressive, Future Indicative</b>   <b>ASSESSMENT STATION REVIEW – DAY 23</b>	<b>24. Distribution and Abundance – Day 22</b>  <b>25. Recognizing Common Families of Birds – Day 23</b> BC Lesson 9  <b>26. Begin Common Birds at Course Site List - Day 23</b> BC Lesson 12  <b>27. Using Bird Checklists, Names and Classifications</b> <b>Day 23 Night Class</b> BC Lessons 10 & 14	<b>7. A Good Guide Uses Objects on every tour</b>
XI. Teaching children about food chains Day 24	<b>CHECKPOINT TWO</b> Food Chains and Species Interactions	<b>28. Endangered Species</b>	<b>8. A Good Guide Knows the Audience</b> Researches audience before the tour Asks tourists questions about the tour and about themselves
Day 25	<b>OPEN</b>	<b>OPEN</b>	<b>OPEN</b>
XII. What birds did you	<b>47. What did you do yesterday?</b>	<b>29. Bird Adaptations to</b>	

<p><i>see on the tour yesterday?</i></p> <p><i>Days 26-29</i></p>	<p>Regular –Ed and Irregular Verbs</p> <p><b>48. Did you give a tour last week?</b> Yes, I did. No, I didn't</p> <p><b>49. Irregular Verbs in the Past Tense</b></p> <p><b>50. Verb To Be in the Past</b></p> <p><b>51. How was the Tour?</b></p> <p><b>52. Past Tense Practice and Production</b></p>	<p><b>Flight-Day 26</b></p> <p><b>30. Bird Migration–Day 27</b> BC Lesson 19 (night session)</p> <p><b>31. Bird Reproduction–Day 28</b> BC Lesson 20</p> <p><b>32. Bird Communication – Day 28</b> BC Lessons 21-24</p> <p><b>33. Decomposers: Fungi and Microbes-Day 29</b></p>	<p><b>9. A Good Guide Has a Message for Every Presentation -Day 27</b></p>
<p><i>XIII.</i></p> <p><i>Day 30</i></p>	<p><b>53. Count and Non-Count Nouns</b></p> <p><b>54. Possessive Pronouns</b> mine, yours, his, hers</p>	<p><b>NH ASSESSMENT</b></p> <p><b>34. NH Review of Month</b></p>	<p><b>TOURS 4</b></p>
<p><i>XIV.</i></p> <p><i>Day 31</i></p>	<p><b>55. BIG REVIEW - Jeopardy</b></p> <p><b>ASSESSMENT STATION REVIEW</b></p>		

**COURSE CURRICULUM, MONTH TWO  
NATURE GUIDE TRAINING PROGRAM**

<b>Unit / Days</b>	<b>Grammar and Communication</b>	<b>Natural History And Conservation</b>	<b>Interpretation and Guiding Skills</b>
<i>Day 32</i>	<p><b>56. Review: What did you do during the break?</b></p> <p><b>57. What are you wearing?</b> Fashion show/striptease</p>	<p><b>35. Introduce the Birding Contest</b> BC Lesson 15</p> <p><b>CHECKPOINT THREE</b> Birds – migration and reproduction</p>	<p><b>Review Characteristics of a Good Guide 1-9</b></p> <p><b>10. A Good Guide Prepares Structure for a Presentation</b></p>
<p><i>XV. What were you doing when it began to rain?</i></p> <p><i>Days 33-34</i></p>	<p><b>58. Past Progressive</b> Where were you when it started to rain?</p> <p><b>59. Past Progressive II</b> Yesterday I was walking in the jungle when suddenly I heard a noise...</p> <p><b>60. Clauses with Before, While, During, After</b></p> <p><b>61. Key Guiding Phrases</b> Did you ever wonder?</p>		<p>Continue working on Characteristics #9 &amp; #10</p>
<p><i>XVI.</i></p> <p><i>Days 35-36</i></p>	<p><b>62. Creating a Relevant Conservation Message</b></p> <p><b>63. Ordinal Numbers</b> Dates, ordering events</p> <p><b>64. Modals</b> Can I help you? Can, might, may</p>		<p><b>11. A Good Guide Suggests a Relevant Conservation Action – Days 35-37</b> at least 3 different lessons/practice</p>
<p><i>XVII. Have you ever seen a mangrove before?</i></p>	<p><b>65. Present Perfect</b> Have you ever visited Mexico before?</p>		<p><b>12. A Good Guide Uses</b></p>

Days 37-39	<p><b>66. Present Perfect vs. Past Tense</b> Present Perfect for indefinite time in past Past Tense for specific event in past</p> <p><b>67. Describing Location of Birds in Trees</b> BC Lesson 16 Describing the locations of plants and animals</p> <p><b>ASSESSMENT STATION REVIEW</b></p>	NH ASSESSMENT	<p><b>Interesting Language – Day 38</b></p> <p><b>TOURS 5</b> Day 39</p>
<p>XVIII. <i>What will you do when the course is over?</i></p> <p>Days 40-42</p>	<p><b>Revisit Classes as Needed According to Assessment Results</b></p> <p><b>68. Future Tense with Will</b> How will you help your community after the course? I'll teach people in my community.</p> <p><b>69. Future Tense – Won't</b> I won't throw trash on the ground</p> <p><b>70. Going To vs. Will</b></p>		<p><b>13. A Good Guide is a Good Birder – Day 40</b></p> <p><b>14. A Good Guide Manages the Group – Days 41-42</b></p>
Day 43	<b>RED CROSS FIRST AID WORKSHOP</b>	<b>RED CROSS FIRST AID WORKSHOP</b>	<b>15. A Good Guide Uses Basic First Aid</b>
Day 44	<b>OPEN</b>	<b>OPEN</b>	<b>OPEN</b>
<p>XIX. <i>This is the best, most exciting tour in the region.</i></p> <p>Days 45-47</p>	<p><b>CHECKPOINT FOUR</b> Design according to recent NH topics</p> <p><b>71. If...Then Statements</b> If we continue to develop the beach, then the turtles will have no place to test.</p> <p><b>72. Comparisons with Adjectives</b> A Jaguar is bigger than a Pecari. Maria is shorter than Jose.</p> <p><b>73. Superlatives</b> Describe yourself – I am the craziest person in my</p>	NH ASSESSMENT	<b>16. A Good Guide Handles Difficult Questions</b>

	<p>family.</p> <p><b>74. Superlatives and Comparisons</b> Create a chart of 20 common adjectives: Big – Bigger - Biggest</p>		<b>TOURS 6</b>
<p><i>XX. How can I improve the tour?</i></p> <p><i>Days 48-50</i></p>	<p><b>75. Asking for Direct Feedback</b> <b>Asking and answering questions in past tense</b> What did you learn on the tour? What would you recommend for future tours?</p> <p><b>CHECKPOINT FIVE</b> Succession</p> <p><b>76. To Be – Present and Past Tense with Personality Traits</b></p> <p><b>77. Revisit Count vs. Non-Count Nouns</b> How much water? How many tourists?</p> <p><b>78. Using Adverbs of Quantity</b></p>		<b>17. A Good Guide Carries Appropriate Equipment</b>
<p><i>Day 51</i></p>	<b>FIELD TRIP</b>	<b>FIELD TRIP</b>	<b>TOURS 7</b>
<p><i>XXI.</i></p> <p><i>Days 52-55</i></p>	<p><b>ASSESSMENT STATION REVIEW</b></p> <p><b>79. So, Too, Either, Neither</b> I like spicy food. So do I. Me too. I don't like fish. Neither do I. I don't either.</p> <p><b>80. Adverbs</b> Sloths move slowly. Jose talks loudly.</p> <p><b>81. Messages with Tell vs. Ask</b></p>	<p>BC Lesson 29 – NIGHT SESSION</p>	<b>18. A Good Guide Evaluates The Presentation</b>
<p><i>XXII.</i></p> <p><i>Days 56-57</i></p>	<p><b>82. “Used To” past tense</b></p> <p><b>83. Conjunctions</b></p> <p><b>84. Past Perfect I</b> <b>85. Past Perfect II</b></p>	<b>NH ASSESSMENT</b>	<b>19. A Good Guide Uses Basic Design Principles</b>
<p><i>Day 58</i></p>	<b>ASSESSMENT STATION REVIEW</b>		

Day 59	<b>Giant Review for Each English Level Based on Results of Assessment</b>		<b>TOURS 8</b>
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**COURSE CURRICULUM, SITE THREE  
NATURE GUIDE TRAINING PROGRAM**

<b>Unit / Days</b>	<b>Grammar and Communication</b>	<b>Natural History And Conservation</b>	<b>Interpretation and Guiding Skills</b>
<i>Day 60</i>	<b>Review: What did you do during the break?</b>  <b>BEGIN TO PREPARE TOURS</b>		<b>Model Tour at Site</b>  <b>Brainstorm ideas for Tours</b>
<i>Day 61</i>	<b>86. Designing Visitor Surveys</b>  <b>Continue preparing and practicing tours</b>		<b>20. A Good Guide Follows up with the Visitors</b>  <b>Review MOST IMPORTANT PARTS OF A TOUR:</b> <ol style="list-style-type: none"> <li><b>1. Relevant Conservation Message</b></li> <li><b>2. Tourists Involved in the Tour</b></li> <li><b>3. Structure</b></li> </ol> <b>TOURS BEING LED BY STUDENTS FOR REAL TOURISTS</b>
<i>Day 62</i>	<b>87. Conditional</b> What would you do if you found \$1000 dollars? I would...I might.... I could....  <b>88. I wish...</b>		<b>Students continue to lead real tours for tourists</b>
<i>Days 63-69</i>	<b>Revisit and Review Topics as Needed by Individuals</b>	<b>NH ASSESSMENT</b>	<b>Students Continue to Lead Tours</b>
<i>Day 70</i>	<b>Final English Rating - OPI</b>	<b>NH POST TEST</b>	<b>Final Interpretation Rating – Tour Guide Checklist</b>

## **Addendum 15: Media Coverage**

During this project, the GW-Panama team received media coverage from written and oral sources; most notably La Prensa (Newspaper) and Canal Once (TV Station).

The La Prensa coverage of the project was done in two articles, both by Sofia K. de Kosmas. The first article titled “An Unknown Heritage”<sup>24</sup> (Un Patrimonio Desconocido), gives a general description of the SNP Gold Mine Trail, with the things that can be seen during the journey. It also makes explicit reference to the Research Project of GWU on the Soberanía National Park. The second article, titled “Highlight on Soberanía’s Potential”<sup>25</sup> (Resaltan Potencial del Soberanía) is a summary of the Consulting Team Presentation at the Miramar Hotel on June 23, and basically lists the Key Findings.

The coverage made by Canal Once, is footage of the Research part of the project and the presentation, followed up by a Live Interview on the Program “La Revista” (The Magazine) on June 27, 2005. Ms. Janireth Butte did the footage, and on it she described the project, the goals and asked questions to some of the consultants.

During the day of the presentation, some radio stations give coverage to the event and also asked questions to some members of the team.

All this leads us to conclude that the average Panamanian Citizen is aware of the SNP Sustainable Tourism Research Project.

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<sup>24</sup> Diario La Prensa, *Sofía K de Kosmas*. “**Un Patrimonio Desconocido**” Published on June 18, 2005 (<http://mensual.prensa.com/mensual/contenido/2005/06/18/hoy/panorama/253323.html>)  
Last accessed on July 7,2005

<sup>25</sup> Diario La Prensa, *Sofía K de Kosmas*. “**Resaltan Potencial del Soberanía**” Published on June 28, 2005 (<http://mensual.prensa.com/mensual/contenido/2005/06/28/hoy/panorama/262520.html>)  
Last accessed on July 7,2005